DDI Alliance Executive Board Meeting
21 May 2026

Present: Alina Danciu, Jon Johnson, Maggie Levenstein, Jared Lyle, Steve McEachern, Katja Moilanen

Annual Meeting of Members Preparation

The Board reviewed the proposed agenda for the May 28 Annual Meeting of Members.

FY26 Financial Summary

The Board reviewed the FY26 (July 2025-June 2026) financial summary. See Appendix A for FY26 Outcomes Reports from funded projects outlining outcomes, challenges, sustainability, and future plans.

FY26 expenses and revenues closely match what was budgeted. Several budget areas remained within approved allocations, though a small number have exceeded their original budgets. The Alliance's combined fund balance remains strong -- projected to be ~$317,000 USD at final year-end close.

FY27 Financial Summary

The Board reviewed FY27 funding requests

FY27 Summary	
Total Community Requests	$52,730 USD
Core Operations (Salaries, Supplies)	$49,500 USD
Total Projected Expenses	$102,230 USD
Expected Revenue (5% increase)	$82,425 USD
Projected Draw on Reserves if all community requests are funded	$19,805 USD

The Board requested clarification from the following funding requests before deciding on the final budget in June:

- Technical Committee: It is a good idea to meet to coordinate but we ask that they coordinate with the DDI-CDI working group and submit a single proposal for one meeting

with a clear purpose. Also, please clarify their plans for semi-regular meetings and how those align with the development roadmap.

- DDI-CDI Working Group: It is a good idea to meet to coordinate but we ask that they coordinate with the Technical Committee and submit a single proposal for one meeting with a clear purpose. Also, please provide sufficient details about how the requested funding will be spent.
- Marketing - Did not submit a request. Need to submit an explanation of how funds will be used in order for funds to be approved.
- “Beyond Descriptive Metadata: Improving Dataset Discoverability through Computationally Derived Metadata“ proposal: Request clarification about the computationally derived metadata. Also, request input from the Technical Committee on the viability of the proposal.

Next Meeting: Jun 11, 2026

- Review and approve funding requests, including requests requiring follow-ups.
- Approve the FY27 budget.
- Follow-up on March 2026 action items:
  - Johan, Alina, and Jon will:
    - Develop options to simplify the current membership tier structure.
    - Clarify whether participation in working groups and access to funds should be tied to membership status.
    - More clearly articulate and balance decision-making rights with tangible membership benefits to strengthen recruitment and retention.
    - Identify organizations that currently benefit from DDI but are not members, and to better understand what would motivate them to join.
  - Jon will follow up with the DDI members involved in the project to better understand how DDI is engaging with CDIF and to clarify the expected benefits and opportunities for the Alliance.
- Discuss Executive Board priorities for the upcoming year (including topics for meetings)
- Schedule FY27 meetings.

Appendix A. FY26 Outcomes Reports from Funded Projects

2026 Report to DDI on Use of Funds: Dagstuhl Workshops

Please complete each section (200 word maximum per section).

1. Objectives and Activities:

Did you do what you set out to do? List the primary results, including any metrics, of the project.

The funding was requested to assist participation of key experts in two workshops held at Schloss Dagstuhl in Wadern, Germany in 2025. Both topics featured DDI-CDI as a major component, and some of those whose travel to Dagstuhl was funded through this request attended both weeks.

The first workshop, titled 'Metadata Models and Services Typologies in Digital Resource-Sharing Frameworks ' achieved the following:

- A collaboration with the W3C based on the Variable Cascade
- Tools and implementation, including an integration framework for Dataverse to support DDI-CDI
- Implementer documentation for DDI-CDI model.
- Mapping of DDI specifications to SDMX
- Modelling efforts to incorporate qualitative data into DDI-CDI
- A reference repository architecture incorporating CDI knowledge graphs

The second workshop, titled 'The Provenance Chain: Connecting and Reusing Data, Models, and Experiments' achieved the following:

- Describing provenance and quality using W3C PROV and Schema.org in conjunction with DDI
- Further work on the EOSC CDIF-4-XAS project (X-Ray Absorption Spectroscopy data with DDI-CDI)
- Finalized description of Data Access based on W3C's Open Digital Rights Language (ODRL).
- Metadata mapping and integration, documenting transformations, using the SSSOM and RDF Mapping Language (RML), with DDI-CDI as a primary data format.
- Resolution of DDI-CDI bugs and addition of binary data description.

2. What Did You Do With the Money:

How did you end up spending the money? Explain any significant variances between the budgeted and actual expenditures.

The funding was used to enable the participation of Flavio Rizzolo (Stats Can), Luis Gonzalez (UN Stats), Doug Fils, and Steve Richard. All four are longstanding contributors to

the Dagstuhl series and to CDIF. Flavio is a key contributor to DDI-CDI and Luis has prepared key DDI-CDI implementations on SDG data. Both Doug Fils and Steve Richard are consultants who work for CODATA. The use of DDI funds for these US and Canada-based participants was determined to minimise transaction costs. CODATA largely supported Europe-based participants.

The reimbursements included travel costs and accommodation at Dagstul. The estimated costs are indicated below:
Luis Gonzalez: $1,139.90
Flavio Rizzolo: $2500.00
Doug Fils: $2750.00
Steve Richard: $1598.58
Estimated total: $7,988.48

3. Challenges and Lessons Learned:

Identify any significant challenges encountered during the activity. Describe the lessons learned and any changes made to the activity as a result.

DDI-CDI is attracting a lot of attention and plays a central role in CDIF. The strategy of implementing DDI-CDI in conjunction with other standards as part of a suite for data description and FAIRification has been vindicated.

The attraction many potential users have to the use of AI and lightweight standards such as Croissant ML is a potential problem - our solutions are much more resource-intensive and front-loaded even though they are better in the long run. Some mitigation is being offered now that CDI is being integrated into a number of large-scale funded infrastructure projects, such as CDIF4EOSC, AI4SOCIAL+ and SSHOC2.

The involvement of external experts was very important in making progress in the areas we are focusing on. Especially with the work on W3C, where an experience in a different organization is significant, we found that - although we were lucky to have some good contacts through specific individuals - this is not a given. Significant time was spent making sure that we had the involvement of the right people to ensure that the requisite vote in W3C to move forward with the work could be assured. We may want to consider if DDI funds can be spent to help bring such expertise into the mix as we go forward, as under current rules this does not seem to be the case.

4. Sustainability and Future Plans:

If relevant, describe how the outcomes will be sustained beyond the funding period. Outline any plans for future activities or next steps.

The strategy of organising a long term series of workshops, one focusing on technical development of DDI-CDI and the other on implementation issues, with specific case studies, has also been vindicated. The case for this has been presented in detail to Dagstuhl in a requested 'Impact Report', which has been extremely well received. Future plans, therefore are to continue and reinforce this series, with work on DDI-CDI and work on CDIF.

This work will continue to be supported by CODATA, in partnership with the DDI Alliance, and a suite of projects looking at CDIF implementation. The most significant of these is the CDIF4EOSC project, which places CDIF (and therefore DDI-CDI) at the heart of interoperability solutions for the European Open Science Cloud.

While CDIF is only one of many DDI-CDI implementations, it does promise to be one which enjoys wide uptake within the European research community broadly. The importance of DDI to such initiatives also guarantees continued and increased interest in the development of DDI standards. This goes beyond DDI-CDI, as other products of the Alliance (XKOS, the DDI Controlled Vocabularies, DDI Codebook, and DDI Lifecycle, etc.) are also relevant and attracting attention.

5. Supporting Documentation:

Include any relevant documents such as data sets, reports, photographs, or testimonials.

Article for the newsletter. (DDI Community Newsletter, Winter 2026)

The work on CDIF-4-XAS led directly to the CDIF-4-XAS Implementation Plan https://doi.org/10.5281/zenodo.19651219).

The Dagstuhl Workshops organising team produced the attached impact report for Dagstuhl 'Statistical and Scientific Metadata Research Meeting Series: Impacts, Organization, and Future Directions' which lays out the impressive impacts of the long-running series and, in particular, of the collaboration with CODATA on DDI-CDI and CDIF.

Signature:

Project Leader: Simon Hodson, CODATA

Date: 1 May 2026

On behalf of the Dagstuhl Organising Team (Darren Bell, UKDS; Michelle Edwards, University of Guelph; Arofan Gregory, CODATA; Steve McEachern, UKDS; Hilde Orten, Sikt).

Statistical and Scientific Metadata Research Meeting Series

Impacts, Organization, and Future Directions

March 2026

Executive Summary

The Statistical and Scientific Metadata Research Meeting Series held at Schloss Dagstuhl – Leibniz Center for Informatics plays a central role in shaping the global approach to metadata standards, driving interoperability, FAIR[4] data practices for research data management, and AI readiness across scientific and policy domains. Since 2007, these research meetings have united experts from computer science, social science, official statistics, metadata standardization, and diverse research fields to tackle the challenges of distributed systems, big data, and generative AI. The focus of this report is on the years 2018-2025, with the achievements described below reflecting both the direct outcomes of the research meetings and the impact of initiatives that were launched and shaped by them.

Key Achievements

- **Standards Development:** Helped to deliver major specifications – **DDI Lifecycle**[2] for longitudinal research and **DDI-CDI** for cross-domain FAIR data use – culminating in the **Cross-Domain Interoperability Framework (CDIF)**[22].
- **Global Impact:** Influenced European and North American research infrastructures, UN statistical initiatives, and projects in Asia and the Global South. Adoption spans institutions and infrastructures like German Socio-Economic Panel (SOEP) at DIW Berlin[5], Consortium of European Social Science Data Archives (CESSDA) European Research Infrastructure Consortium[6], GESIS – Leibniz Institute for the Social Sciences[7], German National Research Data Infrastructure (NFDI)[29], European Open Science Cloud (EOSC)[39], UK Data Archive[8], Statistics Canada[19], and INSEE (statistics France)[14].
- **Collaboration:** Spawned high-profile projects such as **WorldFAIR**[25] (EU-funded, international case studies, 19 partners around the world); the **INSPIRE Network**[26] in

southern and eastern Africa (co-founded by the London School of Hygiene & Tropical Medicine [LSHTM]), which secured multi-million Euro funding for public health research, creation of data infrastructure, and training of PhD students in Africa; and the soon to start **CDIF4EOSC** project, receiving 8 million Euros for implementation across 20 European partners, which will place CDIF (and the cumulative work of the research meetings) at the centre of EOSC solutions for interoperable research data.

- **Innovation in Practice:** Advanced "metadata-driven design," enabling enhanced code generation from rich metadata, emphasized at the 2024 COSMOS conference on smart metadata[21]; promoted the concept of a "data engineering" approach in the management of scientific data; designed techniques for realizing the vision of "AI-ready" data, leveraging rich, structured metadata.
- **Strategic Partnerships:** Established alliances with World Wide Web Consortium (W3C)[57] and global infrastructures (EOSC[39], GBIF – Global Biodiversity Information Facility[31], UNEP[36]), embedding CDIF and DDI standards[1] into environmental and AI data strategies.

Why Dagstuhl Matters

The institute's unique setting fosters uninterrupted and intense collaboration among technologists, scientists, and data policy experts, accelerating the pace of technology and standards adoption while helping to shape global data governance. The institute's reputation is key in convincing high-level experts to invest their time and energy, to ensure that agreements and innovations are realized in research infrastructures, and in the national and international official statistical systems. For these research meetings, Dagstuhl serves as a central forum for convening leading experts in metadata standards to advance new initiatives and engage in state-of-the-art discussions.

Next Steps

In the short term, we aim to expand CDIF and DDI-CDI implementation, strengthen investment in FAIR and AI-ready data systems and deepen partnerships with W3C and UN bodies to ensure inclusive, interoperable, and future-proof data infrastructures. The underlying goal is to facilitate a shift from a research-paper-focused style of data management to one which is more data-centric, recognizing that data is a critical resource for scientific research.

Impacts

The research meeting series on metadata has impacted a number of different communities, from European and North American research domains to international official statistical and scientific organizations, and institutes in Asia and the Global South.

The research meetings have helped to set the agenda for work in this field, by actively shaping it rather than solely a reflection of ongoing work. The research meeting series influenced what problems were considered important, how they were framed, and which solutions were taken forward by major projects and organizations, making them a strategic driver rather than a passive forum.

Communities in Europe and North America led the development of the metadata standards which have been the original focus of our research meetings, those from the Data Documentation Initiative (DDI)[1]. The meetings at Dagstuhl contributed to two major specification developments and resulting metadata standards: DDI Lifecycle[2], designed to support the ongoing production of research data in the social and demographic domain, and DDI Cross-Domain Integration (DDI-CDI)[3], a model for the FAIR[4] use of data across disciplinary and infrastructural boundaries (these specifications have now been recognised in the ISO standards framework). DDI Lifecycle has been heavily adopted by many long-running research initiatives, including the German Socio-Economic Panel (SOEP)[5] from DIW Berlin, many of the data archives involved with Consortium of European Social Science Data Archives (CESSDA), ERIC (European Research Infrastructure Consortium)[6], GESIS – Leibniz Institute for the Social Sciences[7], the UK Data Archive[8], the European Social Survey (ESS) ERIC[9], the Inter-university Consortium for Social and Policy Research (ICPSR)[10] at the University of Michigan, MIDUS[11], the multidisciplinary study on aging at the University of Wisconsin, Vietnam Era Twin Study of Aging (VETSA)[12], longitudinal projects on genetic and environmental influences on cognitive and brain aging, and CLOSER,[13] a group of long-running longitudinal interdisciplinary social and health studies in the UK. It has also been adopted by many of the national statistical institutes, including INSEE (National Institute of Statistics and Economic Studies) in France[14], the U.S. Bureau of Labor Statistics[15], Statistics Denmark[16], the Australian Bureau of Statistics[17], Statistics New Zealand[18], and Statistics Canada[19]. The work on DDI Lifecycle resulted in many publications of different types, including the DDI Alliance Working Paper Series.[20]

A key development from the research meetings was the focus on “metadata-driven design,” a subject which has grown into a full conference hosted on smart metadata in Paris in 2024 (COSMOS).[21] This idea is one where customized application code can be programmatically generated to operate on data based on the creation of rich metadata as a starting point, leading to increases in efficiency. The conference was attended by members of both the official

statistics community and experts from several different scientific domains, fostering an unusual degree of cross-fertilization among these groups.

The work on DDI-CDI is more recent and has been used as a model for combining a range of different metadata models and standards in support of broad, cross-domain FAIR use of data. The major result in this area, which was a direct product of the work at Dagstuhl, was the Cross-Domain Interoperability Framework (CDIF)[22]. Published by the WorldFAIR Project[23], an international effort funded by the EU but involving partners from the USA, Europe, Asia, Africa, and South America, the coordination of CDIF is led by CODATA[24]. The results of this work are many, coming from a broad range of case studies in eleven different domains, comprising not only the social sciences but also many natural sciences, chemistry, and nanotechnology. The project outputs included not only the first draft of the CDIF specification but several dozen substantive papers.[25]

Notable among the results of meetings at Dagstuhl was the formation of the Kenya-based INSPIRE Network[26], which has attracted multi-million-Euro funding from several different agencies interested in Public Health research in Africa, providing support for PhD students in eastern and southern Africa and giving rise to follow-on projects such as Data Science Without Borders.[27] Central to this work is the creation of an African-owned "clearinghouse" infrastructure for high-value research data in Public Health and related domains.

The work on CDIF is ongoing, bringing together participants representing many different research infrastructures. Among these are the European Open Science Cloud, members of the Helmholtz Association[28], the Nationale Forschungsdateninfrastruktur (NFDI)[29], the Physical Sciences Data Infrastructure (PSDI) in the UK[30], the Global Biodiversity Information Facility (GBIF),[31] the Australian Research Data Commons[32], UNESCO's Oceans Decade through IOC,[33] Deep-time Digital Earth,[34] and the United Nation's Statistics Division for the Sustainable Development Goals Indicators.[35] The United Nations Environmental Programme (UNEP)[36] recently included CDIF and DDI metadata standards in its Global Environmental Data Strategy (GEDS) recommendations for use internationally in environmental data,[37] having participated in one of the research meetings in 2024.

Under the latest round of Horizon Europe funding[38], CDIF will benefit from several million Euros in funding for projects supporting interoperability in the European Open Science Cloud (EOSC)[39] and the use of AI in science. This ongoing investment indicates the need for and importance of standards for research data and metadata. Most notably, the CDIF4EOSC[40] project has explicitly been funded to place CDIF (which could not have been developed without the Dagstuhl meetings) at the centre of interoperability solutions for EOSC. In turn, the adoption of CDIF by the EOSC Federation and EOSC Nodes will have a significant influence on the practice of Research Infrastructures globally.

The research meetings prompt alignment and harmonisation among different technology standards by bringing their developers and maintainers together to collaborate. Among the groups involved in standardization we have had experts and representatives from the Statistical Data and Metadata Exchange (SDMX)[41], the W3C Data Catalog Vocabulary (DCAT)[42], the W3C RDF Data Cube Vocabulary[43], the W3C Simple Knowledge Organization System (SKOS)[44], Schema.org[45], many health-related standards (CDISC[46], HL7 FHIR[47], OMOP[48]), the Open Geospatial Consortium (OGC)[49], W3C Open Digital Rights Language (ODRL)[50], W3C JSON-LD[51], W3C SOSA/SSN[52], GBIF, Darwin Core[53], NetCDF[54], RO-Crate[55], the statistical models developed by the UN/ECE HLG-MOS[56], and many others. The results of this work have been alignment around a core of metadata specifications for FAIR use which form the heart of the CDIF guidelines.

In broader terms, this represents a practical approach to leveraging graph-based data models optimized for use within distributed systems. These are typically RDF-based approaches advocated for use on the Web by W3C[57], now becoming ubiquitous, but translating into a graph-based paradigm. As a specific example, a partnership between the DDI Alliance and the W3C is now being established, to carry forward a collaboration which has materialized at the research meetings from 2023-2025. The goal is to create an RDF vocabulary for the detailed description of data variables based on DDI-CDI. Further, work with members of the Croissant ML working group[58] of the MLCommons initiative is taking place, helping to produce standard knowledge graphs for training generative AI systems with rich metadata based on CDIF and DDI-CDI.

The research meetings foster the emergence of a community of technologists and interested policy makers which has sustained itself and grown over the years. While not a concrete output as such, this has led to the sharing of expertise and approaches in the design and implementation of systems in many different settings.

Complementary Events

The research meetings have comprised two distinct streams, each having organized an annual meeting. These streams are designed to serve as complementary events, one being a more focused meeting, looking specifically at the core metadata models, leading into a meeting with a broader scope which works on the combination of the core models with other significant elements of metadata standardisation.

The two largely share an organisingteam, and sometimes a small number of key participants. Each year, a first meeting is held focusing specifically on the standards and models being used in the social, behavioural, and economic sciences, public health, and official statistics. This

meeting is partly sponsored by the DDI Alliance[59], which is a thought leader for metadata practice in that domain. The outcomes from that meeting are then carried forward into a broader context in the second week's meeting, additionally involving environmental, geophysical, and material sciences as well as chemistry and other areas. This meeting is partly sponsored by CODATA[59]. The second week concerns itself with the cross-pollination of ideas between the social sciences focused on people, and the natural sciences. It is common for ideas emerging in the first week to be carried forward into the second week, where different perspectives help to both refine them and add depth. The focus of these meetings is the promotion of widespread interoperability through rich, standard metadata, fostering a "data engineering" paradigm with the international research community. This involves such topics as AI readiness, which has become a critical consideration for data producers, managers, and analysts, as well as the developers of AI models.

Efforts have always been made to invite experts who represent organizations with different geographical and domain backgrounds. Further, efforts have been made to include a mix of people in terms of gender and age. While it is necessary for the sake of continuity to invite some participants on a repeat basis, an effort is always made to balance this against the inclusion of new participants who will bring fresh ideas to the table.

The second thread draws on a broader set of metadata specifications and domain expertise, and often uses CDIF as a focus. The work around WorldFAIR mentioned above has been a key part of this development, and is now being continued in the WordFAIR+ programme[60] overseen by CODATA and through further work under the Horizon Europe programme.

It would be difficult or impossible to cover the range of topics and shift of focus in a single research meeting — the deeper technical work of the DDI meetings is a major factor in driving the success of the second, cross-standards meetings.

Future Directions

The work which has taken place at the Dagstuhl research meeting series is far from complete. Although the publication of DDI-CDI and the CDIF guidelines are both major accomplishments, both require further development and support. This is especially true as the technology landscape is increasingly impacted by the advent of generative AI. Responses to changes in the technology sphere as it intersects with data increasingly must be guided by inclusive dialog among experts from many different backgrounds. Dagstuhl is an ideal place for this to happen.

When it comes to data in scientific and policy research, change is facilitated through the actions of significant institutional players. Such institutions often lack sufficient understanding in terms of technology. Dagstuhl provides a place where the important players from technology,

scientific and science policy spheres can focus for an uninterrupted week, building the necessary awareness for the creation of fully informed policy. There are few such opportunities for this to happen: Dagstuhl's reputation helps convince the needed participants that attendance is meaningful, and it provides a dynamic which keeps them focused on the work without distractions. In our experience, Dagstuhl is unique in combining these elements.

Specifically, our efforts further the development and use of rich metadata standards, including their promotion and adoption. Immediate activities will include further work within international and supra-national groups such as EOSC, the UNEP's GEDS[37], efforts around the UN Sustainable Development Goals, and similar high-profile initiatives. AI technologies form an increasingly important part of the work, but the promotion of implementations based on the FAIR Data Principles is also important. From a standards perspective, the emergent collaboration with the W3C around their Data Exchange Working Group[61] – a formal collaboration between the W3C and the DDI Alliance – is an important future effort.

Over the past 18 years, the meetings at Dagstuhl have allowed for significant progress in the development and implementation of systems based on rich, standard metadata. The impact of these meetings has been international in scope, with the scientific and policy research communities both benefiting. The combination of the two different threads of the work has been highly efficient, leading to the realisation of ideas with substantial impact in practice. It is hoped that these efforts can be carried forward into the future.

Appendix

Organizing Team

The organising team has been regularly reconstituted over time to reflect specific research meetings and new developments in this field. Arofan Gregory and Joachim Wackerow, who had been involved from the outset, ensured continuity. The table shows the organisational team since 2018, which has been operating with a stable line-up for several years. Each cell shows the number of research meetings in which an organiser participated per year.

		2018	2019	2021	2022	2023	2024	2025
Simon Cox	Commonwealth Scientific and Industrial Research Organisation (CSIRO), Melbourne, Australia / OGC – Open Geospatial Consortium	1	1		1	1		
Michelle Edwards	University of Guelph, Canada						2	2
Arofan Gregory	Independent expert / CODATA – Committee on Data of the International Science Council (ISC)	2	2	2	2	2	2	2
Simon Hodson	CODATA – Committee on Data of the International Science Council (ISC)	1	1	2	2	2	2	2
Jon Johnson	CLOSER, London, United Kingdom	1						
Steven McEachern	Australian National University, Canberra, Australia / UK Data Service, University of Essex, United Kingdom	1	1		2	2	2	2
Hilde Orten	NSD – Norwegian Centre for Research Data / Sikt – Norwegian Agency for Shared Services in Education and Research		1	2	2	2	2	2
Dan Smith	Colectica – Algenta Technologies LLC, Minneapolis, USA	1						
Wendy Thomas	Minnesota Population Center, University of Minnesota, USA	1						
Joachim Wackerow	GESIS – Leibniz Institute for the Social Sciences / Independent expert	2	2	2	2	2	2	2

Research Meetings

The research meeting series started in 2007 and comprehends up to 2025, a total of 35 events. Here are listed only the research meetings since 2018.

Research Meeting 25473: The Provenance Chain: Connecting and Reusing Data, Models, and Experiments (2025-11-16 - 2025-11-21) (Details)

Research Meeting 25463: Metadata Models and Services Typologies in Digital Resource-Sharing Frameworks (2025-11-09 - 2025-11-14) (Details)

Research Meeting 24423: Evaluating and Refining Cross-Domain Metadata Exchange Frameworks (2024-10-13 - 2024-10-18) (Details)

Research Meeting 24413: Aligning Technology Architectures with Cross-Domain Metadata Models (2024-10-06 - 2024-10-11) (Details)

Research Meeting 23403: Defining a core metadata framework for cross-domain data sharing and reuse (2023-10-01 - 2023-10-06) (Details)

Research Meeting 23393: DDI-CDI: Realising interoperable data services in the metadata ecosystem (2023-09-24 - 2023-09-29) (Details)

Research Meeting 22353: Interoperability for Cross-Domain Research: Machine-Actionability & Scalability (2022-08-28 - 2022-09-02) (Details)

Research Meeting 21393: Interoperability for Cross-Domain Research: Use Cases for Metadata Standards (2021-09-26 - 2021-10-01) (Details)

Research Meeting 21383: DDI Cross Domain Integration for FAIR Data Sharing across Discipline Boundaries (2021-09-19 - 2021-09-24) (Details)

Research Meeting 19413: Interoperability of Metadata Standards in Cross-Domain Science, Health, and Social Science Applications II (2019-10-06 - 2019-10-11) (Details)

Research Meeting 19403: DDI 4 Core - Development of a Robust and Sustainable Model (2019-09-29 - 2019-10-04) (Details)

Research Meeting 18403: Interoperability of Metadata Standards in Cross-Domain Science, Health, and Social Science Applications (2018-09-30 - 2018-10-05) (Details)

Research Meeting 18393: Data Documentation Initiative (DDI) - Train the Trainers (2018-09-23 - 2018-09-28) (Details)

Participants Statistics

The participants statistics comprehend the 13 research meetings in the years 2018 to 2025. Despite the difficult year with COVID-19, the average number of participants per research meeting is around 22.

Geographic Regions

The majority from the participants come from Europe with large groups coming from North America and Australasia.

	Count	Percentage
Africa	2	0,7%
Asia	1	0,4%
Europe (w/o Germany)	137	48,4%
Germany	43	15,2%
International Organisations	7	2,5%
North America	71	25,1%
South America	4	1,4%
Australasia	18	6,4%
Grand Total	283	100,0%

Countries

Participants come from a wide range of countries (28), with the majority (around 63%) coming from the United States, the United Kingdom, Germany, and France.

Country	**Percentage**
Australia	6,0%
Austria	1,1%
Brasilia	1,4%
Canada	5,3%
Denmark	1,1%
Estonia	0,7%
Finland	0,4%
France	12,4%
Germany	15,2%
India	0,4%
Internat. Organisations	2,5%
Irland	0,7%
Italy	0,4%
Kenia	0,4%

Country	**Percentage**
Liechtenstein	0,4%
Luxembourg	0,4%
Malawi	0,4%
Netherlands	1,1%
New Zealand	0,4%
Norway	7,1%
Portugal	0,7%
Romania	0,4%
Slovenia	0,7%
Spain	3,2%
Sweden	1,4%
Switzerland	1,1%
United Kingdom	15,5%
United States	19,8%

Gender

The gender ratio, showing a women's participation of 27%, has shown a slight, consistent improvement over the last few years.

	Count	Percentage
Women	77	27,2%
Men	206	72,8%
Grand Total	283	100,0%

Seniority

The organizing group has consistently attracted a significant number of people who are influential and respective in this field (senior); nevertheless, we have made efforts to involve and encourage people who are talented and earlier in their careers.

	Count	Percentage
Junior	34	12,0%
Senior	249	88,0%
Grand Total	283	100,0%

Organisation Type

The type of organization from which the participants come shows that all types relevant to the topic – metadata standards – are represented.

	Count	Percentage
Academic	189	66,8%
Business	28	9,9%
Official statistics	33	11,7%
Standards	33	11,7%
Grand Total	283	100,0%

Multiple Attendances

More than two-thirds of participants are new to the research meetings, while roughly one-third have already participated in previous events. This represents a balanced ratio between new contributions and continuous participation, which is very fruitful for the theme of the series.

Number of attendances	Count	Percentage
1	93	68,9%
2	11	8,1%
3	9	6,7%
4	8	5,9%
>4	14	10,4%
Grand Total	135	100,0%

Standards and Specifications

The following list includes standards and specifications which are relevant to the research meetings either because their developers and maintainers have been in attendance, and contributed to the work, or because the specifications and standards have been impacted by work at the research meetings.

CDIF – Cross-Domain Interoperability Framework is a set of practical guidelines and profiles for domain-agnostic standards like DDI-CDI that enable FAIR data interoperability and reuse across disciplinary and institutional boundaries. https://cross-domain-interoperability-framework.github.io/cdifbook/

CDISC – Clinical Data Interchange Standards Consortium, https://www.cdisc.org/

Croissant – a standardized metadata format designed for machine learning (ML) datasets, developed by the MLCommons Association, https://mlcommons.org/working-groups/data/croissant/

Darwin Core (DwC), https://dwc.tdwg.org/

DDI-CDI (DDI Cross-Domain Integration) is a model-driven, domain- and technology-neutral metadata standard from the DDI Alliance designed to describe data and processes so that heterogeneous research data can be integrated and reused across domains. https://ddialliance.org/ddi-cdi

DDI-L (DDI Lifecycle) is the DDI Alliance's metadata specification for describing, managing, and reusing social science research data across the entire research data lifecycle – from study design and data collection to processing, dissemination, and long-term preservation. https://ddialliance.org/ddi-lifecycle

FAIR data is data which meets the FAIR principles of findability, accessibility, interoperability, and reusability. Mark D. Wilkinson; Michel Dumontier; IJsbrand Jan Aalbersberg; et al. (15 March 2016). "The FAIR Guiding Principles for scientific data management and stewardship". https://doi.org/10.1038%2FSDATA.2016.18

FHIR – Fast Healthcare Interoperability Resources created by the Health Level Seven International (HL7), https://www.fhir.org/

HLG-MOS – High-Level Group for the Modernisation of Official Statistics of the United Nations Economic Commission for Europe (UNECE), https://unece.org/statistics/networks-of-experts/high-level-group-modernisation-statistical-production-and-services

NetCDF – Network Common Data Format, https://www.unidata.ucar.edu/software/netcdf

RO-Crate – Research Object Crate, https://www.researchobject.org/ro-crate/

SDMX – Statistical Data and Metadata eXchange, https://sdmx.org/

Schema.org is a collaborative initiative founded by major search engines to create a standardized vocabulary for structured data, https://schema.org/

W3C Data Catalog Vocabulary (DCAT), https://www.w3.org/TR/vocab-dcat/

W3C JSON-LD – a JSON-based Serialization for Linked Data, https://www.w3.org/TR/json-ld11/

W3C ODRL – Open Digital Rights Language, https://www.w3.org/TR/odrl/

W3C RDF Data Cube Vocabulary, https://www.w3.org/TR/vocab-data-cube/

W3C SKOS – Simple Knowledge Organization System, https://www.w3.org/2004/02/skos/

W3C SOSA (Sensor, Observation, Sample, and Actuator) / Semantic Sensor Network Ontology (SSN), https://www.w3.org/TR/vocab-ssn

Publications

It should be noted that the major intent of these research meetings is to improve practice, and this can be most directly achieved by influencing the metadata standards used as the basis of implementation. For this reason, the focus has been on the development and refinement of standards and specifications rather than on scholarly publications. The listing of publications here is not comprehensive.

Cross Domain Interoperability Framework (CDIF) Guidelines

Cross-Domain Interoperability Framework Working Group. 2024. *Cross-Domain Interoperability Framework (CDIF) Book*. https://cross-domain-interoperability-framework.github.io/cdifbook/introduction.html.

Gregory, A., D. Bell, D. Brickley, P. L. Buttigieg, S. Cox, M. Edwards, F. Doug, L. G. Gonzalez Morales, P. Heus, S. Hodson, C. Kanjala, Y. Le Franc, L. Maxwell, L. Molloy, S. Richard, F. Rizzolo, P. Winstanley, L. Wyborn, and A. Burton. 2024. *WorldFAIR (D2.3) Cross-Domain Interoperability Framework (CDIF) (Report Synthesising Recommendations for Disciplines and Cross-Disciplinary Research Areas)*. Zenodo. https://doi.org/10.5281/zenodo.11236871.

Cross Domain Interoperability Framework (CDIF) Applications

The publications listed below were developed by the WorldFAIR project and describe FAIR implementation and the development of CDIF in that project. A significant number of the authors attended the workshop series.

Buttigieg, Pier Luigi. 2023. *WorldFAIR Project (D11.1) An Assessment of the Ocean Data Priority Areas for Development and Implementation Roadmap*. Zenodo. https://doi.org/10.5281/zenodo.7682399.

Buttigieg, Pier Luigi. 2023. *WorldFAIR (D11.2) New Interoperability Specifications and Policy Recommendations*. Zenodo. https://doi.org/10.5281/zenodo.10219933.

Chalk, S., S. Munday, K. Kroenlein, L. McEwen, and F. Mustafa. 2024. *WorldFAIR (D3.2) Training Package: FAIR Chemistry Cookbook*. Zenodo. https://doi.org/10.5281/zenodo.10711950.

Drucker, D. P., J. A. Salim, J. Poelen, F. M. Soares, R. A. Gonzalez-Vaquero, M. Devoto, J. Ollerton, M. Kasina, L. G. Carvalheiro, P. J. Bergamo, D. A. Alves, I. Varassin, F. C. Tinoco, M. Rünzel, D. Robinson, J. Cardona-Duque, M. Idárraga, M. C. Agudelo-Zapata, E. Marentes Herrera, and A. Saraiva. 2024. *WorldFAIR (D10.3) Agricultural Biodiversity FAIR Data Assessment Rubrics*. Zenodo. https://doi.org/10.5281/zenodo.10719265.

Gonzalez-Vaquero, R. A., D. Drucker, J. A. Salim, F. M. Soares, P. F. Zermoglio, and M. Devoto. 2024. *WorldFAIR (D10.2) Agricultural Biodiversity Standards, Best Practices and Guidelines Recommendations: Tutorial*. Zenodo. https://doi.org/10.5281/zenodo.10688865.

Gregory, A., and S. Hodson. 2024. *WorldFAIR (D2.4) Recommendations and Framework for FAIR Assessment within (and across) Disciplines*. Zenodo. https://doi.org/10.5281/zenodo.11242737.

Gregory, A., J. Todd, D. Amadi, J. Greenfield, S. Muyingo, and K. Tomlin. 2023. *WorldFAIR Project (D7.1) Population Health Data Implementation Guide*. Zenodo. https://doi.org/10.5281/zenodo.7887385.

Hodson, S. 2024. *WorldFAIR (D2.2) WorldFAIR's Experience with FIPs (Second Set of FAIR Implementation Profiles for Each Case Study)*. Zenodo. https://doi.org/10.5281/zenodo.11236094.

Hodson, S., and A. Gregory. 2024. *WorldFAIR Final Policy Brief: Enabling Global FAIR Data - Recommendations for Research Infrastructures* (Version 2). Zenodo. https://doi.org/10.5281/zenodo.14236140.

Knazook, B., and J. Murphy. 2023. *WorldFAIR Project (D13.1) Cultural Heritage Mapping Report: Practices and Policies Supporting Cultural Heritage Image Sharing Platforms*. Zenodo. https://doi.org/10.5281/zenodo.7659002.

Knazook, B., J. Murphy, K. Barner, K. Cassidy, S. Claeyssens, C. Cortese, E. J. Manchester, T. Padilla, D. Reijerkerk, G. Robson, A. Schmidt, T. Sherratt, and M. Warren. 2023. *WorldFAIR Project (D13.2) Cultural Heritage Image Sharing Recommendations Report*. Zenodo. https://doi.org/10.5281/zenodo.7897244.

Lynch, I., and A. Afantitis. 2024. *WorldFAIR (D4.2) FAIRification of Nanoinformatics Tools and Models Recommendations*. Zenodo. https://doi.org/10.5281/zenodo.10629631.

Lynch, I., T. Exner, and A. Afantitis. 2024. *WorldFAIR (D4.3) Nanomaterials Human / Machine-Readable Provenance and Persistence Policies*. Zenodo. https://doi.org/10.5281/zenodo.11127188.

McEachern, S., H. Orten, H. Thome Petersen, and R. Perry. 2023. *WorldFAIR Project (D6.1) Cross-National Social Sciences Survey FAIR Implementation Case Studies* (1.1). Zenodo. https://doi.org/10.5281/zenodo.7599652.

McEwen, L., and I. Bruno. 2023. *WorldFAIR Project (D3.1) Digital Recommendations for Chemistry FAIR Data Policy and Practice*. Zenodo. https://doi.org/10.5281/zenodo.7887283.

Miller, J., T. Robertson, and J. Wieczorek. 2023. *WorldFAIR Project (D9.1) Data Standard for Sharing Ecological and Environmental Monitoring Data Documented for Community Review*. Zenodo. https://doi.org/10.5281/zenodo.7849241.

Miller, J., T. Robertson, and J. Wieczorek. 2023. *WorldFAIR (D9.2) Community Consultation and Finalisation of Biodiversity FAIR Data Impact: Final Data Model and Training Materials Completed and Shared*. Zenodo. https://doi.org/10.5281/zenodo.10058058.

Murphy, J., B. Knazook, A. O'Carroll, K. Cassidy, K. Long, and S. Kenny. 2024. *WorldFAIR (D13.3) Implementation and Testing of Cultural Heritage Image Sharing Recommendations: DRI Case Study Report*. Zenodo. https://doi.org/10.5281/zenodo.10850009.

Prent, A., R. Farrington, L. Wyborn, A. Nixon, K. Elger, M. Klöcking, D. Hezel, and K. Lehnert. 2024. *WorldFAIR (D5.3) Guidelines for Implementing Geochemistry FIPs*. Zenodo. https://doi.org/10.5281/zenodo.10712808.

Prent, A., L. Wyborn, and R. Farrington. 2024. *WorldFAIR (D5.2) Geochemistry Methodology and Outreach*. Zenodo. https://doi.org/10.5281/zenodo.10406332.

Thiessen, P., E. Bolton, and L. R. McEwen. 2023. *WorldFAIR (D3.3) Utility Services for Chemistry Standards* (1.1). Zenodo. https://doi.org/10.5281/zenodo.10514901.

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Tomlin, K., J. Greenfield, and J. Todd. 2024. *WorldFAIR (D7.3) Population Health Data Policy and Practice Recommendations*. Zenodo. https://doi.org/10.5281/zenodo.11242767.

DDI Specification

ISO/PAS 25955:2026. *Information and Documentation — Technical Interoperability — Data Documentation Initiative (DDI)*. Geneva: International Organization for Standardization, 2026. https://www.iso.org/standard/92127.html.

Cross Domain Integration (DDI-CDI) Applications

Gillman, Dan. 2025. *DDI-CDI and Other Standards*. DDI Working Paper Series No. 35. DDI Alliance. https://doi.org/10.5281/zenodo.11223221.

Gregory, Arofan, Simon Hodson, and Joachim Wackerow. 2021. *The Role of DDI-CDI in EOSC: Possible Uses and Applications*. CODATA and DDI Alliance. https://doi.org/10.5281/zenodo.4707263.

Gregory, Arofan. 2022. *DDI Cross-Domain Integration (DDI-CDI): An Introduction*. Conference presentation, Meeting of the Wiesbaden Group on Information Stewards. United Nations Economic Commission for Europe. https://unece.org/sites/default/files/2022-07/MWW2022_Presentation_CODATA_Gregory.pdf.

DDI Lifecycle Applications

Akdeniz, Esra, and Wolfgang Zenk-Möltgen. 2017. *DDI-Lifecycle at the Data Archive: The Metadata System of the GESIS Data Archive for the Social Sciences.* GESIS Report / SSOAR. https://www.ssoar.info/ssoar/handle/document/52487.

Bhattacharjee, Tathagata, Samuel Kiwuwa-Muyingo, Chifundo Kanjala, et al. 2024. *INSPIRE datahub: A Pan-African Integrated Suite of Services for Harmonising Longitudinal Population Health Data Using OHDSI Tools.* Frontiers in Digital Health 6: 1329630. https://doi.org/10.3389/fdgth.2024.1329630.

Iverson, Jeremy. 2024. *Colectica in Action: Real-World Applications of DDI in Europe across the Data Lifecycle*. EDDI 2024 presentation. Zenodo. https://zenodo.org/records/14697287.

Moller, Mads, Samuel Kiwuwa-Muyingo, Tathagata Bhattacharjee, et al. 2024. *Integrating Longitudinal Mental Health Data into a Staging Database: Harnessing DDI-Lifecycle and OMOP Vocabularies within the INSPIRE Network Datahub.* Frontiers in Big Data 7: 1435510. https://doi.org/10.3389/fdata.2024.1435510.

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Other Publications

Cox, Simon J. D., Alejandra N. Gonzalez-Beltran, Barbara Magagna, and Maria-Cristina Marinescu. 2021. *Ten Simple Rules for Making a Vocabulary FAIR*. PLoS Computational Biology 17 (6): e1009041. https://doi.org/10.1371/journal.pcbi.1009041.

United Nations Environment Programme. 2025. *Global Environmental Data Strategy*. UNEP/EA.7/INF/5. https://docs.un.org/en/UNEP/EA.7/INF/5.

Endnotes

[1] The Data Documentation Initiative (DDI) is an international standard for describing surveys, questionnaires, statistical data files, and social sciences study-level information.
[2] The DDI Lifecycle (DDI-L) is the DDI Alliance's metadata specification for describing, managing, and reusing social science research data across the entire research data lifecycle—from study design and data collection to processing, dissemination, and long-term preservation. https://ddialliance.org/ddi-lifecycle
[3] DDI-CDI (DDI Cross-Domain Integration) is a model-driven, domain- and technology-neutral metadata standard from the DDI Alliance designed to describe data and processes so that heterogeneous research data can be integrated and reused across domains. https://ddialliance.org/ddi-cdi
[4] FAIR data is data which meets the FAIR principles of findability, accessibility, interoperability, and reusability. Mark D. Wilkinson; Michel Dumontier; IJsbrand Jan Aalbersberg; et al. (15 March 2016). "The FAIR Guiding Principles for scientific data management and stewardship". https://doi.org/10.1038%2FSDATA.2016.18
[5] Socio-Economic Panel (SOEP), long-running multidisciplinary household survey located at DIW Berlin. https://www.diw.de/en/soep
[6] Consortium of European Social Science Data Archives (CESSDA) European Research Infrastructure Consortium (ERIC). https://www.cessda.eu/
[77] GESIS – Leibniz Institute for the Social Sciences, https://www.gesis.org/en/home
[8] UK Data Archive, https://www.data-archive.ac.uk/
[9] European Social Survey (ESS) ERIC, https://www.europeansocialsurvey.org/
[10] Inter-university Consortium for Social and Policy Research (ICPSR), https://www.icpsr.umich.edu/
[11] MIDUS – Midlife in the United States, https://midus.wisc.edu/
[12] Vietnam Era Twin Study of Aging (VETSA), https://psychiatry.ucsd.edu/research/programs-centers/vetsa/
[13] CLOSER is the interdisciplinary partnership of leading social and biomedical longitudinal population studies, https://closer.ac.uk/
[14] INSEE French National Institute of Statistics and Economic Studies, https://www.insee.fr/en/
[15] U.S. Bureau of Labor Statistics, https://www.bls.gov
[16] Statistics Denmark, https://www.dst.dk/en
[17] Australian Bureau of Statistics, https://www.abs.gov.au/
[18] Stats NZ, https://www.stats.govt.nz/
[19] Statistics Canada, https://www.statcan.gc.ca/en/
[20] DDI Alliance Working Paper Series, https://ddialliance.org/working-paper-series
[21] COSMOS – Conference on Smart Metadata for Official Statistics, http://cosmos-conference.org/2024/
[22] Cross-Domain Interoperability Framework (CDIF) is a set of practical guidelines and profiles for domain-agnostic standards like DDI-CDI that enable FAIR data interoperability and reuse across disciplinary and institutional boundaries. https://cross-domain-interoperability-framework.github.io/cdifbook/
[23] WorldFAIR project, https://worldfair-project.eu/
[24] CODATA is the Committee on Data of the International Science Council (ISC), https://codata.org/
[25] WorldFAIR Project Outputs and Deliverables, https://zenodo.org/communities/worldfair-project/records?q=&l=list&p=1&s=10
[26] INSPIRE Network for sharing, harmonizing, and visualizing longitudinal population health data across Africa, https://inspiredata.africa/
[27] Data Science Without Borders (DSWB), https://dswb.africa/
[28] Helmholtz Association, https://www.helmholtz.de/en/
[29] NFDI – German National Research Data Infrastructure, https://www.nfdi.de/?lang=en
[30] Physical Sciences Data Infrastructure (PSDI), https://www.psdi.ac.uk/
[31] Global Biodiversity Information Facility (GBIF), https://www.gbif.org/
[32] Australian Research Data Commons, https://ardc.edu.au/resource/uplifting-fair-and-care-across-earth-and-environmental-science-data-a-discussion-paper/

[33] UNESCO's Intergovernmental Oceanographic Commission (IOC) leads the UN Decade of Ocean Science for Sustainable Development, https://www.unesco.org/en/decades/ocean-decade
[34] DDE – Deep-time Digital Earth, https://ddeworld.org/news/detail/314
[35] United Nation's Statistics Division for the Sustainable Development Goals Indicators, https://unstats.un.org/sdgs/indicators/indicators-list/
[36] UNEP – UN Environment Programme, https://www.unep.org/
[37] Global Environmental Data Strategy (GEDS), https://www.unep.org/topics/digital-transformations/global-environmental-data-strategy-geds
[38] Horizon Europe (HORIZON), https://ec.europa.eu/info/funding-tenders/opportunities/portal/screen/programmes/horizon
[39] European Open Science Cloud (EOSC), https://eosc.eu/
[40] CDIF4EOSC announcement, https://codata.org/cdif4eosc-watch-this-space/
[41] SDMX – Statistical Data and Metadata eXchange, https://sdmx.org/
[42] W3C Data Catalog Vocabulary (DCAT), https://www.w3.org/TR/vocab-dcat/
[43] W3C RDF Data Cube Vocabulary, https://www.w3.org/TR/vocab-data-cube/
[44] SKOS Simple Knowledge Organization System, https://www.w3.org/2004/02/skos/
[45] Schema.org is a collaborative initiative founded by major search engines to create a standardized vocabulary for structured data, https://schema.org/
[46] Clinical Data Interchange Standards Consortium (CDISC), https://www.cdisc.org/
[47] Fast Healthcare Interoperability Resources (FHIR) created by the Health Level Seven International (HL7), https://www.fhir.org/
[48] Observational Medical Outcomes Partnership (OMOP), https://www.ohdsi.org/data-standardization/
[49] Open Geospatial Consortium (OGC), https://www.ogc.org/
[50] Open Digital Rights Language (ODRL), https://www.w3.org/TR/odrl/
[51] JSON-LD, a JSON-based Serialization for Linked Data, https://www.w3.org/TR/json-ld11/
[52] W3C SOSA (Sensor, Observation, Sample, and Actuator) / Semantic Sensor Network Ontology (SSN), https://www.w3.org/TR/vocab-ssn/
[53] Darwin Core (DwC), https://dwc.tdwg.org/
[54] Network Common Data Format (netCDF), https://www.unidata.ucar.edu/software/netcdf
[55] Research Object Crate (RO-Crate), https://www.researchobject.org/ro-crate/
[56] HLG-MOS, High-Level Group for the Modernisation of Official Statistics of the United Nations Economic Commission for Europe (UNECE), https://unece.org/statistics/networks-of-experts/high-level-group-modernisation-statistical-production-and-services
[57] World Wide Web Consortium (W3C), https://www.w3.org/
[58] Croissant – a standardized metadata format designed for machine learning (ML) datasets, developed by the MLCommons Association, https://mlcommons.org/working-groups/data/croissant/
[59] The research meeting series were previously partly sponsored by GESIS Leibniz Institute for the Social Sciences
[60] WorldFAIR+ – making data work for cross-domain grand challenges, https://council.science/our-work/worldfair-data-driven-interdisciplinarity/
[61] DRAFT Dataset Exchange Working Group Charter, https://w3c.github.io/dx-wg-charter/

Please complete each section (200 word maximum per section).

1. Objectives and Activities:

The Scientific Board held a full day meeting in Budapest on December 1st 2025 in conjunction with EDDI. The funding request covered travel and accommodation for some Scientific Board members plus lunch and snacks for the meeting. However, it turned out in the end that travels would be covered by other sources and that lunch for everyone was included, which opened up the possibility of arranging a dinner for SB members.

2. What Did You Do With the Money:

We therefore organised a dinner for Scientific Board members who took part in the SB meeting. Five people attended and the cost of the dinner was 247,61 USD.

3. Challenges and Lessons Learned:

It is often difficult to estimate travel costs to be covered by the DDI Alliance, as some SB members' costs are covered by their own institution, but as this is not consistent from year to year, we can rarely be specific before the funding request deadline. Others may or may not ultimately be able to attend, while others may be covered by other DDI Alliance funding requests. We did not include a dinner in the FY26 funding request because we estimated that the available funding would mostly be needed for travels. We will include an estimate for dinner in our FY27 funding request.

4. Sustainability and Future Plans:

Topics discussed at the full day meeting are followed up on regular Scientific Board calls. We plan to organise another full day Scientific Board meeting in the margins of EDDI 2026.

5. Supporting Documentation:

Below is a selection of the topics that were addressed:

- Working group reporting: Agreed to continue half-yearly reporting
- Start work on a common template for use cases and best practices, markup examples, based on existing templates used by TC and working groups.
- Agreement to prioritise work on DDI Alliance StakeholderMap, AI strategy and Information Architecture Status: In the works. Measure feedback on Annual Meeting of the Scientific Community on May21
- Follow-up on the formation of the W3C Dataset Exchange WG, which is a collaboration with the DDI Alliance. Status: A charter has been formed.
- Advisory members for the Scientific Board: It was agreed to invite external experts as needed, but not to appoint fixed advisory members for the Scientific Board.

- Product development strategy: Agreement to ask CDI to move GitHub repo to the DDI GitHub repo used by TC (needs planning).
- Synchronisation of publication timing and periodicity between the EB Strategic Plan and the SB Scientific Work Plan. Needs further EB/SB discussion.

Signatures:

- **Project Leader: Hilde Orten and Darren Bell**
- **Date:2026.04.29**

Technical Committee Funding Report 2025/26

1. Objectives and Activities:

Funding was requested for a Face-to-Face meeting in the margins of EDDI. Specific goals of Face-to-Face meeting:

- *Initiate expanded coordination with Developers Group to initiate and develop a section on the DDI Website focused on Implementation Best Practices*
- *Identify and develop plan for expanding technical support for users*
- *Configuring git repositories (review and modify as needed)*
- *Expand and improve access to various DDI Tools (reporting, access, git based)*
    - *External management of Tools list (possibly others)*
        - *GitHub for collection and management*
        - *CSV or other output from GitHub to populate updates to HubSpot DB*
    - *Searchable/filterable listing on HubSpot*
- *Implementation exercise*
- *Invite additional members from Developers*

Unfortunately, the demand for meeting space and times at EDDI resulted in an overlap with the Hack-a-thon. This meeting consisted of the Chair, partial attendance by 2 members and conflicts with the remaining members. Due to this situation the goals of the meeting were altered.

The focus of the meeting was the enumeration of TC activities following the creation of DDI-Codebook and DDI-Lifecycle Working Groups and an enumeration of the activities of the Chair. This list will be used to determine which activities should be continued and whether they need to be done by the next chair or can be moved to another member.

2. What Did You Do With the Money:

The money was spent on the purposes requested. Airfare and 2 hotel nights were provided to Wendy Thomas to attend the Scientific Board Meeting and Technical Committee meeting. No funds for food were required. [Airfare: $1,083.51 Lodging: $203.44]

3. Challenges and Lessons Learned:

Following this meeting the Technical Committee determined that meeting effectively in the margins of EDDI was no longer effective. TC members are involved in the Scientific Board, the Hack-a-thon, and other working groups. Alternative meeting options will be explored in the coming year.

4. Sustainability and Future Plans:

The Chair and Vice-chair both attended the second day of the Hack-a-thon and were able to address that group regarding the development of databases describing tools, examples, and profiles that would support easy form-based submissions and a searchable front-end for the web site. We also discussed development of the best practices and how to present them. These discussions are on-going and TC has continued increased contact with the Developers Group post-EDDI.

The list of activities has been review and is being used as a basis for future activity distribution within TC and role of the Chair/Vice-Chair as leadership changes in 2026.

5. Supporting Documentation:

Activity list generated during the TC meeting at EDDI

Signatures:

- **Project Leader:**
  Wendy Thomas
- **Date: 2026-04-30**

Please complete each section (200 word maximum per section).

1. Objectives and Activities:

Please refer to *DDI Training Working Group - Annual Report 2025/2026*. In short, our DDI Training Working Group made progress in our ongoing outreach efforts and efforts to create and refine training materials. Presence at new conferences was explored, with mixed results. We were successful in posters being approved at IDCC and AAPOR, but were unable to send a presenter to AAPOR. We were not successful in our submission at ISI World Statistics.

2. What Did You Do With the Money:

Funds for the DDI TG were mainly used to support DDI TG member presence for conference workshops and presentations. Please refer to the link above for details. The quick figures are that we spent less than what we budgeted to spend in 2025-2026 because we were unable to send a delegate to the AAPOR conference. These activities are necessary for continued engagement with the DDI community and also help our group to better understand the needs for training so we can adjust content accordingly.

3. Challenges and Lessons Learned:

Continued engagement from volunteers in training group activities and deliverables is a challenge, including getting new co-chairs. One co-chair has been replaced, but there is no replacement yet for the one whose term ends in summer 2026. In addition, two members of the working group are no longer employed at the partner institutions, though one has remained involved. The Scientific Board helped recruit previous co-chairs and it would be helpful to get their help again.

Another challenge has been in getting presences of the working group at conferences to expand our outreach; tightened budgets for members resulted in a lost opportunity to present a poster at AAPOR, a conference at which the working group never had a presence. Lesson learned is to ask for additional funding in such a case, as the gap was relatively small.

4. Sustainability and Future Plans:

The DDI TG will continue to create, update, and organize content, and act as a training resource upon request. Partnerships with new groups, such as with MEIRU, will help expand our presence and potentially result in new membership. Translation of materials also opens up possibilities for new members as the content becomes available to a wider audience.

5. Supporting Documentation:

Please refer to the link provided above. If more details are needed please contact chantal.vaillancourt@statcan.gc.ca

Signatures:

- **Project Leaders:** Chantal Vaillancourt, Kathryn Lavendar (to March 2026), Philippe Bisson (from March 2026)
- **Date:** April 30, 2025

DDI Training Working Group
Annual Report (May 2025-April 2026)

Submitted by: Chantal Vaillancourt (co-chair)
Submitted on: April 30, 2026

Confluence: https://ddi-alliance.atlassian.net/wiki/spaces/DDI4/pages/7864375/Training+Group

- Approx 15 active members across TG and sub-groups (including chairs and Scientific Board contact)
- In the last year, gained 3 members (including one new co-chair). In addition, one member returned from leave; and 2 remained though they are no longer affiliated with their institution.
- Meets the first Tuesday of every other month
- One TG co-chair completed the second year of their mandate and was replaced; the second co-chair's mandate is ending summer 2026, with no replacement yet named
- Chairs for the sub-groups have been in their roles for 2 or 3 years; one of the groups now has a co-chair.
- Two active sub-groups: Slide Deck Review and Training Opportunities, which meet monthly
- The co-chairs and sub-group chairs meet monthly to collaborate and inform one other

In this 2025-26FY, the priority of the co-chairs remained fulfilling the objectives of the mandate of the group in line with the latest plans and DDI Alliance Scientific Work Plan and the DDI Alliance Strategic Plan.

Completed group summary report info (Summary of available plans)

Events

- EDDI 2025 presentation: "Supporting Users of DDI by Chloé Hertrich (Sciences Po), Catherine Yuen (University of Essex) of the DDI Alliance Training Group," as part of "An introduction to DDI for small organisations" workshop (December 2025)
- IDCC 2026 poster: "Building Resilient (Meta)Data Futures Using DDI, FAIR and Collaboration" by Catherine Yuen (February 2026)
- IDCC 2026 poster: "Call for Proposals DDI For Beginners: Free, Bilingual Training Resources To Start Making Your Data FAIR With DDI" by Alina Danciu, Jon Johnson, Lucie Marie, Becky Oldroyd (February 2026)
- IASSIST 2025 presentation: "Data Documentation Initiative (DDI) and Training Working Group: Who, What, and How" by Kathryn Lavendar, Chantal Vaillancourt and Catherine Yuen (June 2025)

Pending Events

- IASSIST 2026 presentation: "DDI Products for a Variety of Data Needs," by Julie Lenoir and Jennifer Zeiger (upcoming, June 2026)

Trainings completed

- DDI introductory training for SciencePo, from Julie Lenoir, Philippe Bisson (October 2025)
- Workshop Introduction to DDI Metadata for the Africa chapter of IASSIST, from Chifundo Kanjala and Jared Lyle (March 2026)

Training materials developed from new partners

- Exercise_Where to start with metadata_FAIRwDDI
- DDI_Metadata_Made_Simple
- MEIRU microlearning

Published new slide decks

- DDI and Controlled Vocabularies (September 2025)
- Les variables et la cascade de variables (April 2026)

Pending slide deck publications

- Questions and Survey Instruments in DDI: Maximizing the Value of Your Metadata

Other

- Created a proposal for the organization of published decks
- Provided feedback on the organization of the website
- Provided feedback on microlearning video from MEIRU
- Provided feedback on CLOSER Introduction to Metadata training
- Submitted a short course proposal for ISI 2025, but the proposal was not selected
- Submitted a poster for AAPOR that was accepted, but it had to be withdrawn as presenter could not attend the conference
- Still looking into the Japanese translations for intro DDI decks
- Latest Zenodo Usage
    - Total Downloads since 2021: 8,681 (increase of 2,246 from last year)
    - Total Views since 2021: 16,083 (increase of 4,601 from last year)
    - April 2025-Mar 2026 Downloads: 2,246
    - April 2025-Mar 2026 Views: 4,601
- YouTube Views - DDI Alliance YouTube Video List and Views

Total Views all time through April 2026 - Top five videos	**Views**
Introduction to DDI Metadata	4,115
EDDI2020: Tutorial: What can DDI do for you? An introduction to DDI	806
Structured Data Transformation Language (SDTL) Webinar, November 2020	211
EDDI2020: Session 1: Questionnaires	210
Real life examples using the DDI metadata standard to document variable comparability across studies	202

Total Views April 9 2025-April 8 2026 - Top five over the last year	**Views**
Introduction to DDI Metadata	703
DDI Alliance Annual Meeting of the Scientific Community (May 2025)	109
EDDI2020: Tutorial: What can DDI do for you? An introduction to DDI	100
Real life examples using the DDI metadata standard to document variable comparability across studies	46
Overview of the DDI Standards: The Statistical Agency Perspective	43

DDI TG Funds Summary 2025-2026

- **Approved total funds $5,000 USD**
    - Funding for workshops $4,000 USD
    - Translations $1,000 USD
- Funds used in this fiscal year
    - Support for DDI TG travel/workshops/conferences (IDCC and EDDI)
    - No funds used yet for translations - this effort is still in progress
    - **Total planned funds used for DDI TG activities 2025-2026 = $2,087.05**

Report on the fourth DDI Developers Hackathon in Budapest, 04.12. - 05.12.2025

Like the previous three Hackathons also the current iteration has been a full success exceeding expectations. The record from the previous year was broken again with a total number of 27 participants.

The following work packages from the challenges have been selected and processed:

- Nectar Publisher
    - Work on stabilized WebR integration
    - Output in Markdown and rendered HTML
    - Fixes on various outputs
    - Adding unit tests for parsers
    - Merge questionnaire branch

- Continue Slava's integration of the Nectar Publisher tool with Dataverse
    - Nectar interface to allow the selection of correct variable representation from AI generated options
    - Allow allow selection of correct unit of measure, also from AI generated options

- Unofficial example.csv for implementation examples
    - Minimal csv with different types of variables
    - First usage example in DDI Codebook, other products under development
    - Useful to give examples to developers and reference for tool implementations

- DDI 4.0 beta
    - Improvement on Json Schema generation
    - Testing of C# generation

- REDCap ODM-XML to DDI Codebook converter
    - Setup of in browser converter for question & variables in ODM-XML to DDI Codebook XML

- Work on moving the DDI registry to DDI Alliance AWS space

The output shows again the Hackathon might be one of the most profitable and valuable workshops the DDI Alliance organizes. We therefore strongly encourage financing a fifth round for EDDI 2026 in Brussels.

Please complete each section (200 word maximum per section).

1. Objectives and Activities:

Did you do what you set out to do? List the primary results, including any metrics, of the project.

My participation in the DDI-CDI Dagstuhl workshop was intended to fix/extend the DDI-CDI and to ensure the alignment of other standards with DDI-CDI, most notably other DDI products, SKOS, Croissant ML and SDMX.

Outcomes:

- Review and cleanup of the DDI-CDI format description dealing with the physical representation of a dataset, including the addition of an access method for binary files. This is going to be part of the upcoming DDI-CDI Beta.
- Added new variable statistics classes to capture key statistics for a given variable
- Finalize high-level mapping approach for integrating data from SDMX and DDI sources using DDI-CDI as a lingua franca for data exchange
- Participated in the discussions for the qualitative data model (which will be incorporated into the DDI-CDI version post-Beta)

2. What Did You Do With the Money:

Money was used for travel expenses, including flights, trains, taxis and Dagstuhl stay.

3. Challenges and Lessons Learned:

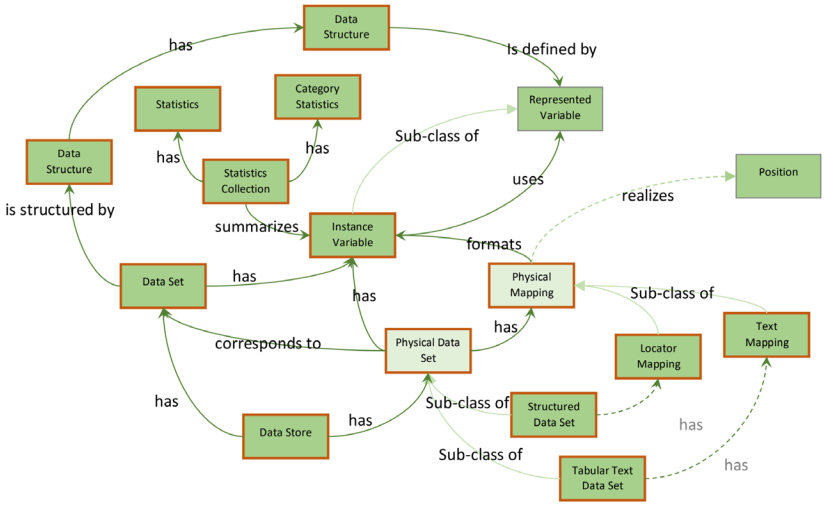
Nothing other than the usual small challenges of working in a fast-paced environment like Dagstuhl with a heterogeneous group of people.

4. Sustainability and Future Plans:

Three of the items above were extensions and modification to the DDI-CDI model, which are being added to the product this year. The mapping to SDMX is part of an ongoing activity under the UNECE Supporting Standards Group.

5. Supporting Documentation:

- DDI-SDMX mapping for data integration (discussion)
- DDI-CDI and other standards



Format description redesign

Signatures: **Flavio Rizzolo, May 1 2026**

Please complete each section (200 word maximum per section).

1. Objectives and Activities:

Did you do what you set out to do? List the primary results, including any metrics, of the project.

*The metadata microlearning project was designed to develop concise and targeted instructional content to support researchers and data professionals working in health and social sciences in low- and middle-income countries (LMICs) in applying the DDI Codebook metadata standard for data documentation. Through the needs assessment exercise done in four major health sciences research organizations in Malawi (Malawi Liverpool Wellcome Project, Malawi Epidemiology and Intervention Research Unit, Malaria Alert Centre, and John Hopkins Project), we were able to identify the gap in practical knowledge and use of the DDI Codebook metadata standard and tools. Therefore, we developed focused and relatable microlearning content as a 30–60-minute self-paced course titled "**Improving Health Research Visibility through Metadata: A Microlearning Approach Using the DDI Codebook Standard**". At the time of preparing this report, out of 90 registered users, 60% enrolled in the course, but only 16.7% of those enrolled completed it, resulting in an overall completion rate of 10%. We also embedded a voluntary and anonymous post-learning e-survey. Of 13 survey respondents, 53.8% reported improved knowledge of the DDI Codebook standard, and 76.9% indicated intent to adopt it.*

2. What Did You Do With the Money:

How did you end up spending the money? Explain any significant variances between the budgeted and actual expenditures.

The funds were spent on supporting the implementation of the project, including workforce costs for documentation experts, VPS, Moodle and DDI tools configuration experts, and public engagement activities. Additional expenditure included transport, materials and consumables used during needs assessment sessions, VPS subscription and domain for the platform, communications, ethics application fees, and project management costs. A significant variance from the original budget relates to the ethics approval process. The project incurred a non-refundable ethics application fee of USD 140.62, which was not initially budgeted for. This was necessary to enable data collection and the use of real study datasets for practical learning. However, due to delays in obtaining ethics approval, the project ultimately used a synthetic dataset for training purposes, despite the ethics fee having already been paid.

3. Challenges and Lessons Learned:

Identify any significant challenges encountered during the activity. Describe the lessons learned and any changes made to the activity as a result.

Several challenges were encountered during the implementation of this project. These included delays in the ethics approval process which forced the project to proceed using a synthetic dataset instead of real study datasets for training purposes and the cost of some required services was higher than initially anticipated, which created budget pressure in certain areas. The implementation period was also relatively short, requiring a large amount of work to be completed within a limited timeframe. From these experiences, several lessons were learned. Ethics application fees should be explicitly included in future budgets to avoid unexpected costs. Project planning should also account for potential delays in ethics approval processes, especially when real data use is dependent on approval. Furthermore, future implementations should allow more time for execution to ensure smoother delivery and better-quality outcomes.

4. Sustainability and Future Plans:

If relevant, describe how the outcomes will be sustained beyond the funding period. Outline any plans for future activities or next steps.

The microlearning course is deployed on a cloud virtual private server (VPS) paid for a year and accessible here: https://ddimetadatamicrolearning.online . Practice platforms are also hosted on the same VPS and accessible through subdomains: https://nada.ddimetadatamicrolearning.online for NADA and https://editor.ddimetadatamicrolearning.online for Metadata Editor. Beyond this period, all content will be archived on DDI's Zenodo permanent repository. Findings from the needs assessment exercise and low engagement with the digital microlearning content indicated the need to establish a regional DDI users mentorship cohorts program; preferably led and implemented by key regional DDI users that are also part of the DDI training working group. The mentorship cohorts program will ensure continued growth of practical knowledge and use of DDI products in all domains where they are applicable.

5. Supporting Documentation:

Include any relevant documents such as data sets, reports, photographs, or testimonials.

1. *Attached:*
    a. *Needs assessment report*
    b. *Post learning outcomes*
    c. *Financial report*

Signatures:

- **Project Leader: Dominic Nzundah**
- **Date:** 28/04/2026

Needs Assessment Report v1.0

Digital Metadata Microlearning Program for Equipping Researchers and Data Professionals with DDI Metadata Skills in Low- and Middle-Income Countries (LMICs)

Contributors: Dominic Nzundah, Paul Kambiya

1. Executive Summary

Standards-based data documentation is essential for effective research data management throughout the research lifecycle. In LMICs, particularly within health and social science research, datasets are rarely documented, inconsistently described, or stored without adherence to international metadata standards. This limits data reuse, weakens research transparency, and reduces the potential impact of locally generated evidence on policy and practice.

This needs assessment identifies critical gaps in knowledge, skills, and institutional capacity related to the use of the **Data Documentation Initiative (DDI) Codebook metadata standard**. The assessment supports the development of a **Digital Metadata Microlearning Program** tailored to researchers and data professionals in LMICs. This aims to strengthen responsible data sharing through standard based data documentation using DDI codebook metadata standard.

2. Background and Context

LMIC research institutions increasingly generate large volumes of quantitative data from surveys, surveillance systems, clinical trials, and administrative sources. Despite this growth, metadata practices often remain informal or dependent on individual experience rather than standardized frameworks.

The DDI Codebook standard provides a globally recognized structure for documenting quantitative data, supporting FAIR (Findable, Accessible, Interoperable, Reusable) data principles. However, adoption in LMIC contexts remains limited due to capacity constraints, lack of targeted training, and minimal institutional mandates. Digital microlearning presents an opportunity to address these challenges.

3. Purpose of the Needs Assessment

The purpose of this needs assessment is to : - Identify current levels of awareness and use of metadata standards, particularly DDI Codebook - Assess knowledge gaps among researchers and data professionals - Understand barriers to adoption of metadata standards - Identify preferred learning formats and realistic time commitments - Inform the design, scope, and delivery approach of the Digital Metadata Microlearning Program.

4. Target

The needs assessment focuses on: Researchers and Data professionals in health and social sciences in LMICs with focus on Malawi.

5. Method

The assessment is informed by a Needs assessment survey conducted in 4 health sciences research institutions namely, the Malawi Liverpool Wellcome Programme, Malaria Alert Centre, Johns Hopkins, and Malawi Epidemiology and Intervention Research Unit (MEIRU). The survey collected data on a **short professional background** of the participants, **familiarity** with metadata concepts, knowledge **gaps** and **barriers** to adoption, current **practices**, learning **preferences**, **time commitment** and **challenges**. For most participants, data was transferred from paper forms physically filled during the face-to-face presentation and needs assessment sessions into a kobo form, labelled and visualized using R.

6. Key Findings

6.1 Participant professional background

The majority of participants were data professionals (*see Fig 6.1.1*). In addition, most participants had over ten years of professional experience (*see Fig 6.1.2*).

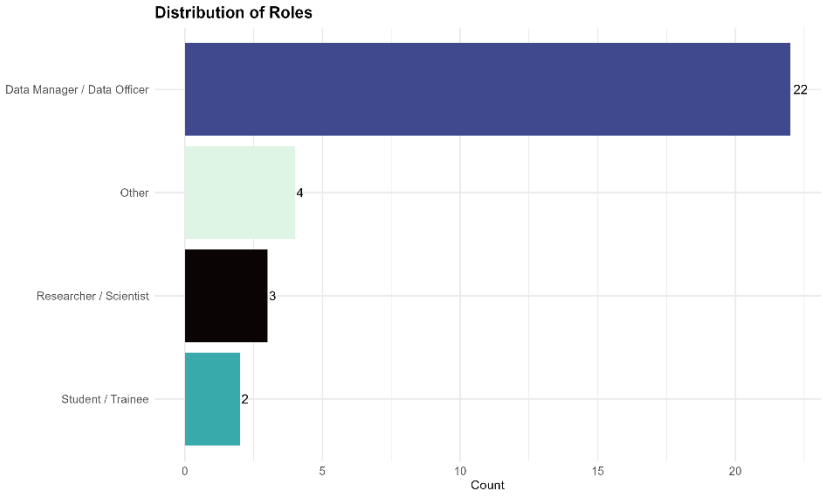


Fig 6.1.1
(visualization on roles)

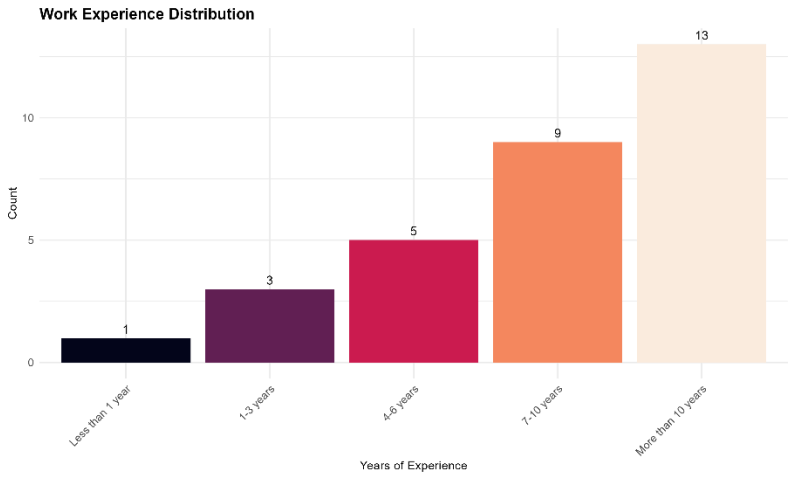


Fig 6.1.2
(visualization on experience)

6.2 Familiarity with metadata concepts

Comparisons on familiarity with metadata vs DDI codebook show that more participants were familiar **with metadata** and **less familiar with DDI codebook standard**. This means the majority of participants know more about metadata in general but less about the DDI codebook metadata standard (*see Fig 6.2.1*).

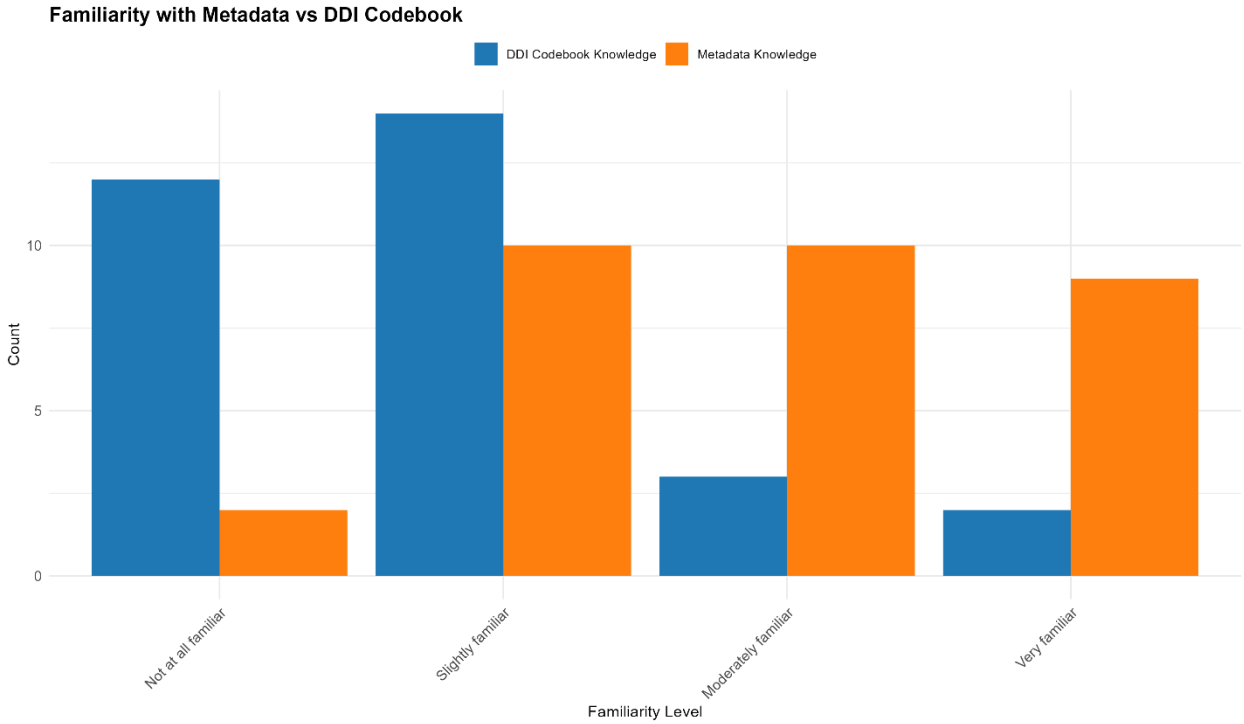


Fig 6.2.1 *(visualization on metadata concepts)*

6.3 Knowledge gaps and Barriers to Adoption

Most participants indicated they need more training in Understanding DDI codebook metadata standard, tools and application (*see Fig 6.3.1*). Lack of **training opportunities** and **institutional policy** are leading barriers to adoption (*see Fig 6.3.2*).

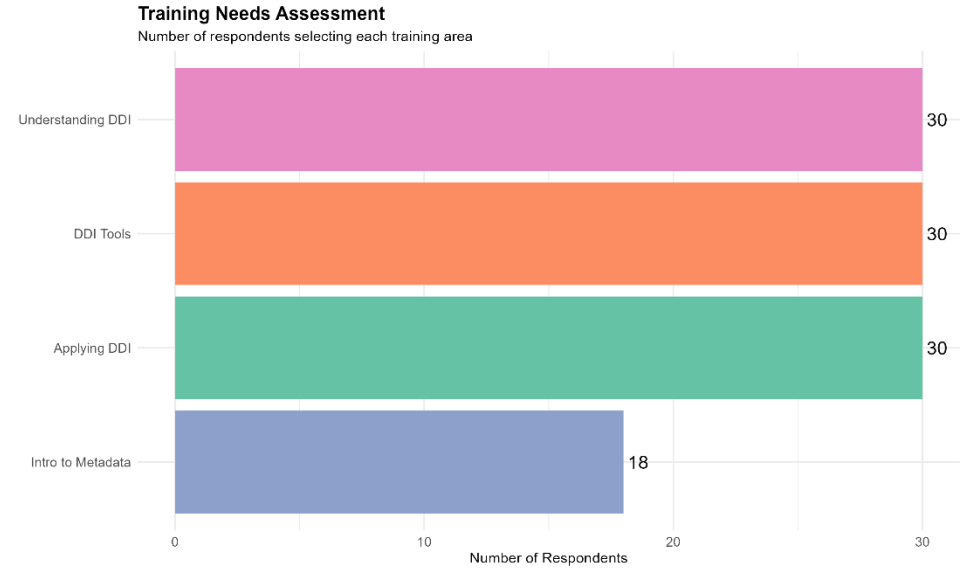


Fig 6.3.1*(visualization on training needs)*

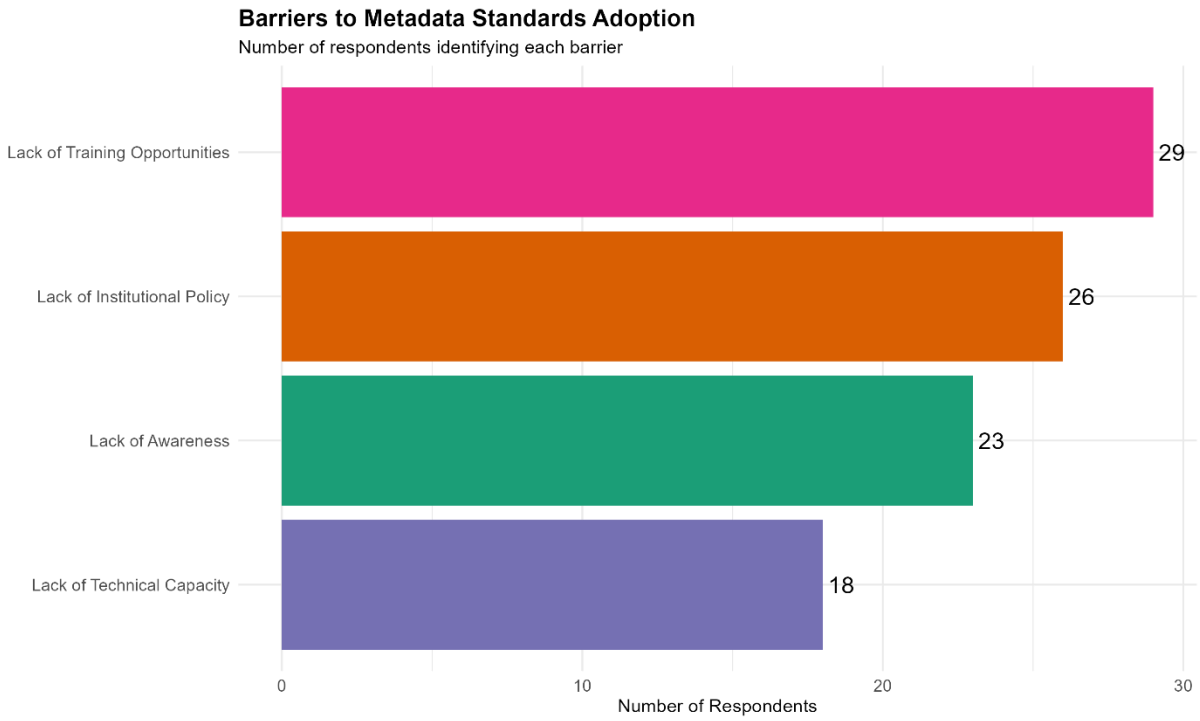


Fig 6.3.2 *visualization on barriers to adoption)*

6.4 Current Practices

While most participants indicated that their organizations often share data externally (*see Fig 6.4.1*), few always documented their data using a metadata standard (*see Fig 6.4.2*).

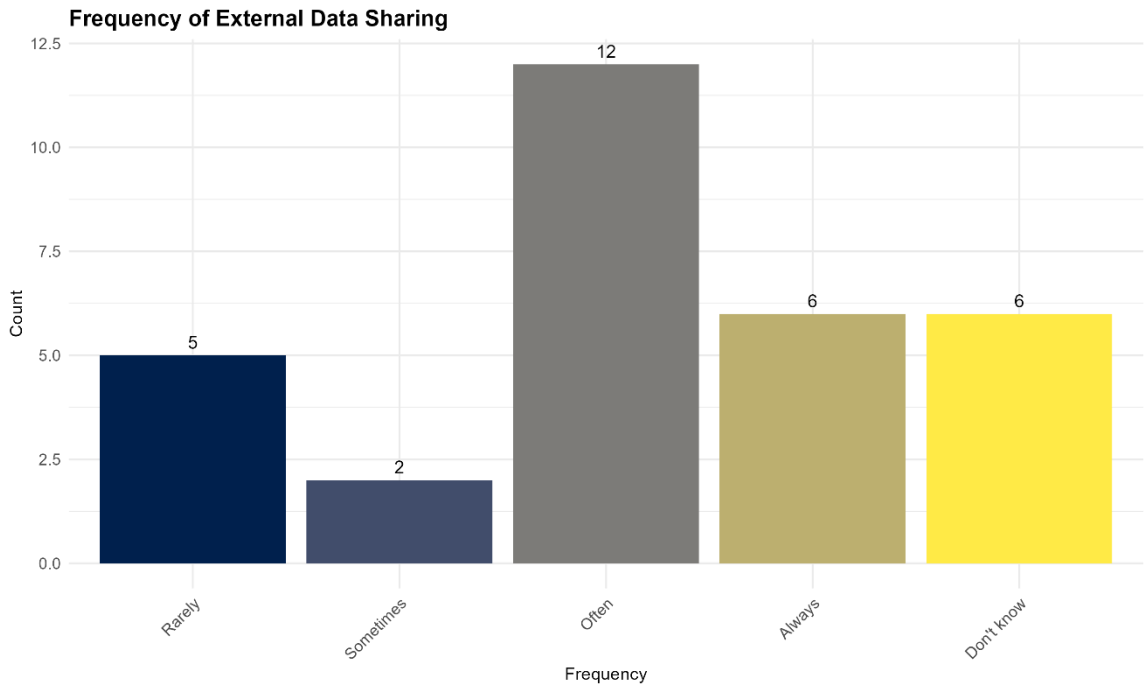


Fig 6.4.1 *(visualization on frequency of data-sharing in organizations)*

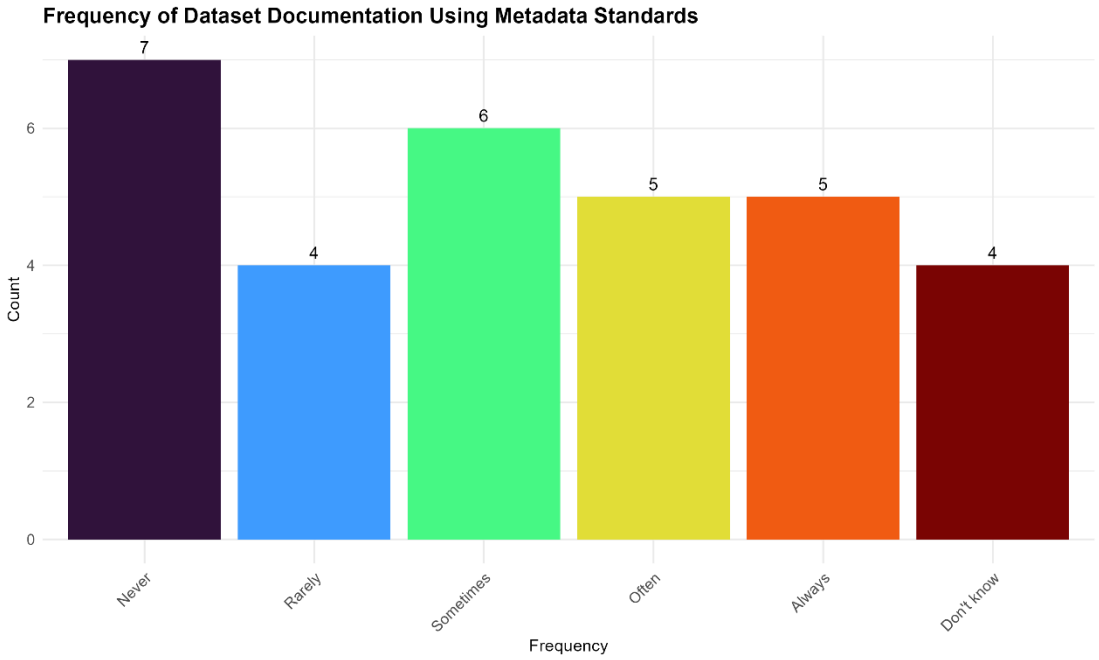


Fig 6.4.2 *(visualization on frequency of standard-based documentation in organizations)*

6.5 Learning Preferences and time commitment

Participants expressed strong preference in all learning preferences with more observations on peer- mentoring and interactive modules (*see Fig 6.5.1*) and a weekly time commitment of 30-60 minutes (*see Fig 6.5.2*).

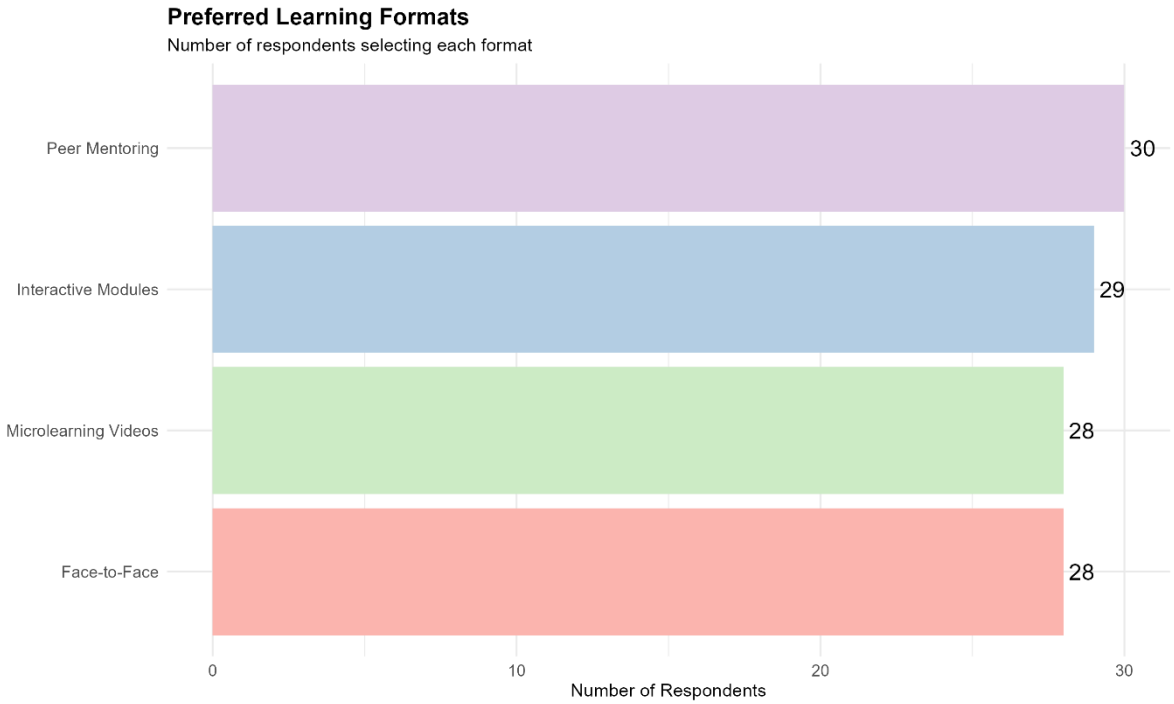
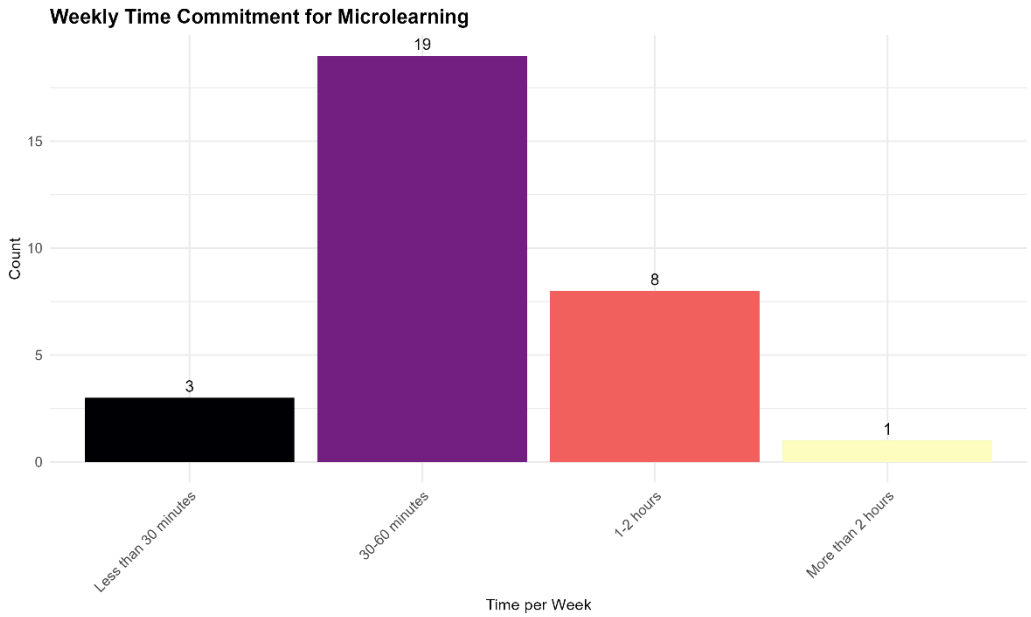


Fig 6.5.1 *(visualization on learning preferences)*

Fig 6.5.2
(visualization on weekly time commitment)



7. Identified Needs

Based on the findings, the following needs are identified:

7.1 DDI Codebook knowledge

- Understanding DDI codebook
- Applying DDI codebook in practice
- Tools for DDI codebook-based metadata creation

7.2 Program Design Needs

- Lightweight interactive modules
    - 2-5 minutes videos on each module
    - Interactive texts/cards with check your knowledge quiz at the end
    - Contextualized examples from LMIC health and social science research
- Recommendations for institutions
    - Adding standard based documentation in SOPs /DMPs
- Additional resources
    - Links for further reading
    - PDFs

8. Conclusion

This assessment showed that there are gaps in understanding and using DDI Codebook in practice, indicating the need to create learning resources that provide researchers and data professionals with hands-on experience in DDI codebook implementation within a weekly time limit of 30–60 minutes.

9. Next Steps

- Designing the curriculum and modules
- Organize all and submit it to DDI's TWG for review

Digital Metadata Microlearning Program for Equipping Researchers and Data Professionals with DDI Metadata Skills in Low- and Middle-Income Countries (LMICs)- Post-learning Outcomes

Contributor(s): Dominic Nzundah

Introduction

The metadata microlearning project was designed to develop concise and targeted instructional content to support researchers and data professionals working in health and social sciences in low- and middle-income countries (LMICs) in applying the DDI Codebook metadata standard for data documentation.

The course content was informed by findings from a needs assessment exercise (attached), which identified: (a) gaps in practical knowledge and use of the DDI Codebook standard and associated tools; (b) key barriers to adoption; and (c) constraints in the amount of time that target participants can realistically allocate to learning on a weekly basis.

In response to these findings, a 30–60-minute self-paced course titled "Improving Health Research Visibility through Metadata: A Microlearning Approach Using the DDI Codebook Standard" was developed. This report presents key post-learning outcomes derived from a voluntary and anonymous post-course survey.

Summarized post-learning outcomes

Key post-learning outcome indicators included: (a) participants' knowledge of the DDI Codebook standard following the course; (b) the extent to which the course addressed identified barriers to adoption; and (c) participants' intention to adopt the DDI Codebook standard in their work. A total of 13 participants responded to the post-course survey. Of these, 53.8% reported an improvement in their knowledge of the DDI Codebook standard. In terms of addressing adoption barriers, 61.5% indicated that the course adequately addressed these barriers, while 23.1% reported that the barriers were only partially addressed, and 15.4% indicated that the course did not sufficiently address them. Regarding adoption, 76.9% of respondents expressed an intention to adopt the DDI Codebook standard in their health research work. Additionally, 15.4% reported that they had already adopted the standard, while 7.7% indicated that they had begun initial implementation.

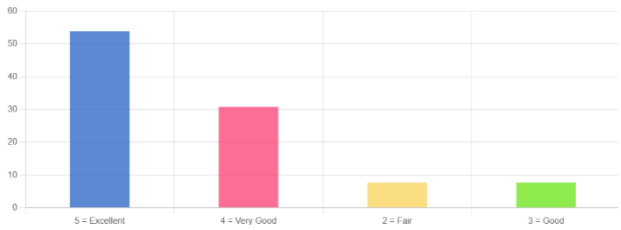


Fig 1.1 DDI codebook knowledge on a scale 1-5

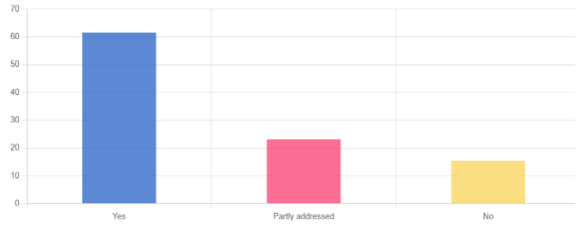


Fig 1.2 Adoption barriers addressed

Digital Metadata Microlearning Program for Equipping Researchers and Data Professionals with DDI Metadata Skills in Low- and Middle-Income Countries (LMICs)- Post-learning Outcomes

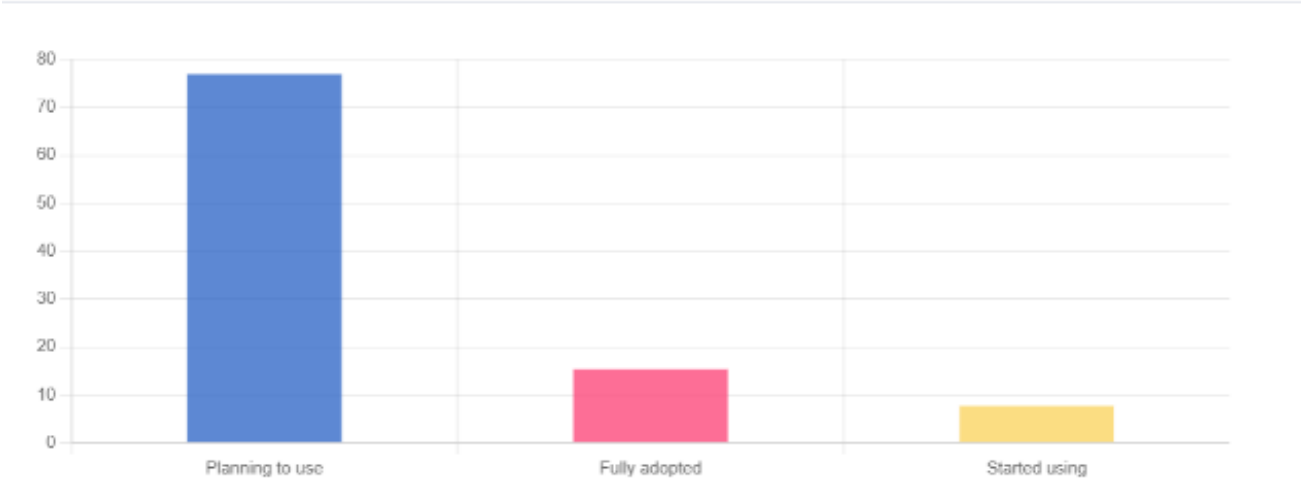


Fig 1.3 DDI codebook Adoption

Recommendation

Based on findings from both the needs assessment and the post-learning outcomes, it is recommended that regional DDI user mentorship cohorts be established to support sustained adoption and practical application of DDI standards.

This approach would leverage the experience of existing users of DDI products who are members of the DDI training working group, to provide peer-to-peer guidance and hands-on support.

The proposed mentorship program should extend beyond the DDI Codebook standard to encompass a broader range of DDI products and tools, as well as practical challenges encountered during implementation, which may hinder adoption.

Additionally , the program should be structured in a way that aligns with the needs and contexts of researchers engaging in Open Science practices, ensuring relevance, accessibility, and sustained engagement.

SECTION 1: REPORT NUMBER (to be completed by **sub-grantee**)

Report number	2	Reporting Period	1st February 2026 - 30th April 2026

SECTION 2: PROJECT DETAILS (to be completed by **PA**)

Sub-Grantee	MEIRU
Sub-Grantee PI	Dominc Nzunda
Project Title	Digital Microlearning Programme
MEIRU Project Ref	545
Main Funder	DDI Alliance
Main Funder Ref	

SECTION 3: INCOME (**sub-grantee** to complete highlighted cells only)

Total Budget (USD)	8,800.00	
Transfers from UofG	**Amount $**	**Date Received (dd/mm/yy)***
University of Michigan	8,800.00	08/10/2025
Total Transferred (GB	**8,800.00**	
Balance To Be Transfe	0.00	

*as stated on bank remittance advice

SECTION 4: EXPENDITURE (**sub-grantee** to complete purple cells/**PA** to complete blue cells)

Budget	**A Budget Total (incl. indexation) USD**	**C Expenditure previous periods USD**	**D Expenditure this period USD**	**E (=B+C+D) Expenditure Total USD**	**F (=A minus E) Budget Balance USD**	**G Expenditure Forecast USD**
Period from	**01/11/2025**	**01/11/2025**	**01/11/2025**	**01/11/2025**		
Period to	**30/04/2026**	**31/01/2026**	**30/04/2026**	**30/04/2026**		
Staff costs	4,238.00	2,550.00	2,392.16	**4,942.16**	-704.16	
Transport and Travel	1,333.00	1,551.48	0.00	**1,551.48**	-218.48	
Materials and Consumables	384.00	350.14	0.00	**350.14**	33.86	
Equipment	135.00	0.00	0.00	**0.00**	135.00	
Communications & Ethics Fees	950.00	0.00	140.62	**140.62**	809.38	
Project Management Costs	1,760.00	880.00	935.60	**1,815.60**	-55.60	
Total	**8,800.00**	**5,331.62**	**3,468.38**	**8,800.00**	**0.00**	**0.00**
Total	**8,800.00**	**5,331.62**	**3,468.38**	**8,800.00**	**0.00**	**0.00**

Balance (Income received minus Expenditure) (USD) **0.00**

SECTION 5: AUTHORISATION (**sub-grantee** to complete)

I certify that the above expenditure has been incurred according to the Terms and Conditions of the sub-grant with University of Michigan

Signed 

Institution Stamp

Telephone no +265 (0) 888 348 705

Email laurence.tembo@meiru.mw

Position

Programme Manager

Date **04 May 2026**