

DDI Alliance Executive Board Meeting Agenda

11 June 2026

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

Agenda

1. **FY27 Funding Requests** -- The Board approved all FY27 funding requests (see Appendix 1), with the exception of:
 - a. 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.
 - b. 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.
 - c. Marketing - Did not submit a request. Need to submit an explanation of how funds will be used in order for funds to be approved.
 - d. "Beyond Descriptive Metadata: Improving Dataset Discoverability through Computationally Derived Metadata" proposal: Request clarification about the computationally derived metadata. Also, input requested from the Technical Committee on the viability of the proposal.

FY27 Funding Requests	Request	Allocation	Request
Scientific Board	Request	\$4,000 USD	\$4,230 USD
Technical Committee	Request	\$4,000 USD	\$9,000 USD
Training Working Group	Request	\$5,000 USD	\$5,000 USD
Marketing Working Group	None	\$5,000 USD	\$5,000 USD
DDI-CDI Working Group	Request	\$2,000 USD	\$7,500 USD
Official Statistics Working Group	Request	\$2,000 USD	\$2,000 USD
Qualitative Data Working Group	Request	\$2,000 USD	\$2,000 USD
Dagstuhl	Request	\$8,000 USD	\$8,000 USD

Priority Fund - Mani	Request	\$10,000 USD	\$10,000 USD
<i>Missing: Developers Group</i>			
TOTAL Community Requests		\$42,000 USD	\$52,730 USD
Fixed Salaries, Supplies & Services			\$49,500 USD
TOTAL Expenses			\$102,230 USD
Expected Revenue			\$82,425 USD

FY27 Core Operational Expenses			Total
Salaries			\$45,000 USD
Supplies & Services			\$4,500 USD
TOTAL Core Operations			\$49,500 USD

FY27 Summary			
Total Community Requests			\$52,730 USD
Core Operations			\$49,500 USD
Total Projected Expenses			\$102,230 USD
Expected Revenue (5% increase)			\$82,425 USD
Projected Draw on Reserves (projected reserves at start of FY27: \$317,201 USD)			\$19,805 USD

ACTION: ITEMS: Jared will notify the groups with approved requests. For the remaining requests, the Board will make decisions via email once the requested clarifications have been received, and the groups will then be notified.

2. **DDI Alliance Organizational Evolution Task Group Charge** - The Board reviewed and approved the Task Force Charge (see Appendix 2). It discussed potential Task Force membership and leadership, with the goal of ensuring broad representation from across the Alliance and the wider community. The Board also recommended that the Task Force consult with other standards organizations as part of its evaluation of future operational models.

ACTION ITEM: Jared will contact the prospective Task Force members -- beginning with the proposed Chair -- to invite their participation. Jared and Jon will convene the Task Force and participate in its inaugural meeting to review the charge, discuss expectations, and launch its work.

3. **Recommended updates to Membership Rights and Benefits** (see Appendix 3), which were action items from the [March discussion](#). Jon summarized proposed updates to membership benefits, including: 1) simplifying the membership fee structure by removing the highest tiers for the For-Profit category, which are superfluous, and introducing a lower membership rate for very small Educational and Non-profit organizations; 2) requiring working group members to be affiliated with member organizations, while continuing to allow participation by non-members as invited experts; and 3) establishing a general principle that DDI Alliance funds should primarily benefit member organisations. Requests for funding to support individuals from non-member organizations would require a separate justification and Executive Board approval, either on a case-by-case basis or through the annual funding request process.

ACTION ITEMS: The Board requested clarification about the following proposed updates:

- Is the proposed new membership tier for Education and Non-Profit organizations employing <10 staff too high (\$2,100 USD)? What is the appropriate fee to charge?
 - What is the financial impact if the membership categories and associated fees are changed?
4. **Board Priorities for FY27.** The Board discussed potential priorities for the upcoming year of meetings. Suggested areas of focus included the Strategic Assessment of DDI Alliance Operational Support Model Task Force, follow-up on membership benefits revisions, exploration of additional funding opportunities, and revitalization of the Marketing Group.
 5. **Scheduling FY27 Board meetings.** The Board decided to meet every other month (September, November, February, March, May, June). Jared will email the Board proposed dates and times.

Appendix 1.

FY27 Funding Requests

Budget request from the DDI Alliance Scientific Board for FY2027

The request covers:

1. Funding to cover expenses related to a physical meeting in Brussels in the margins of EDDI 2026.
2. Funder to cover hotel expenses for Ingo Barkov in connection with his travel to the DCMI 2026

Submitted by the Scientific Board.

Allocated funds for the FY27: 4000 USD.

Allocated funds for the FY26:4000 USD, spent 247 USD

1. The Scientific Board plans a physical full day meeting in Brussels in the margins of the EDDI conference 2026.

The goal of the meeting is to review activities performed in the period of the current Scientific Work Plan, define open issues, and set goals for 2027 activities.

The request below covers travel funding and accommodation for one person travelling overseas and for one person travelling in Europe, as well as for a dinner for the participating Scientific Board members.

Flight trans Atlantic: 1 - 1600 USD x 1 = 1600 USD

Flight Europe: 1 - 550 USD x 1 = 550 USD

Local transport: 2 - 100 USD x 2 = 200 USD

Hotel nights: 4 - 160 USD x 6 = 640 USD

Dinner: 9 - 60 USD x 9 = 540 USD

Total: 3530 USD

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Note that there is some uncertainty in this budget request, as there will be a new ex-officio Scientific Board member representing the TC, and we don't know whether the new person will be located in Europe or trans Atlantic, or whether funding to take part in this meeting will be needed. This request covers trans Atlantic travel for the new person.

We will get back to you with updates as soon as we have more information related to this.

2. Ingo Barkow will represent the DDI Alliance at the DCMI 2026 in Seoul, and will present DDI and the ISO/PAS 25955. Ingo has asked the marketing WG to cover his conference fee for DCMI 2026.

The request below covers hotel expenses for 5 hotel nights

Hotel nights 5 - 140 USD x 5 = 700 USD

Total: 700 USD

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Requested sum in total (both requests): 4230 USD

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Hilde Orten and Darren Bell

for the DDI Alliance Scientific Board

Technical Committee Funding use 2026/2027

submitted by Oliver Hopt and Wendy Thomas for the Technical Committee

Intended use of the base fund of \$4000 and additional funding of \$5000

In 2025 the TC meeting in conjunction with EDDI collided with other group activities. Therefore, TC was thinking about setting up a meeting track with no alignment to a given event.

Main subjects of the TC meeting

The core TC meeting will focus on a new internal organization to focus on infrastructure and processes steering in the future. This should be accompanied with meeting other working groups, especially the new groups for Codebook and Lifecycle to coordinate and exchange about TCs support for the groups.

Costs

- Air fare (4 overseas) \$4000
- Hotel (4 nights, 4 person, \$150/night) \$2400
- Ground transportation (4 persons, each \$200) \$800
- Food & Snacks (3 Days, 10 persons, each \$30/day) \$900

Alignment possibilities

- First F2F Meeting Lifecycle WG (Colectica, GESIS, Ipums, Make Sense ...)
- First F2F Meeting Codebook WG (SND, Worldbank, CESSDA, Dataverse ...)
- Additional CDI meeting
- Qualitative WG

Preliminary schedule

Tuesday

- TC
- Additional working groups

Wednesday

- TC
- Additional working groups

Thursday

- Support meeting between TC and Lifecycle WG
- Support meeting between TC and Codebook WG
- Additional working groups

Note

TC wants to evaluate if a coordinated F2F meeting slot for different working groups with a central organization is working to attract people and groups.

While TC will arrange meeting space and a time slot, other working groups would have the possibility to align their F2F meetings to minimize their effort. In 2026 TC will try this approach to see if this is a setup for the following years.

The budget could be distributed between WGs with an overlap of people, as the groups might not meet in parallel. This results only in additional accommodation but no extra transportation costs.

Due to some overlap between the two new working groups, that probably don't have their own budget yet, we would also be able to share costs here, that would not reoccur within following years within the TC budget.

As not all groups might be able to meet F2F entirely, possible hosting organizations should be able to provide support for a hybrid meeting, GESIS as the host for this year can offer at least 5 meeting rooms with such support.

The past two years have shown that trying to have the Technical Committee meet in the margins of EDDI is complicated. Conflicts with topic working groups, the Scientific Board, and Hack-a-thon mean that we are unable to meet with even half of our membership. This proposal anticipates that the Face-to-Face would take place in October or March/April depending on participant availability.

DDI Alliance Training Working Group

DDI Budget Request

Fiscal year 2026/2027

Submitted by: Philippe Bisson and Chantal Vaillancourt (co-chairs)

Submitted on: May 8, 2026

The Training Working Group requests \$5,000. The activities in this request directly align with the Alliance's strategic mission to engage and expand the DDI community through outreach, training events and resources, and audience-specific materials.

Webinars

Webinars continue to be on a temporary hold for the next year as there is no one to lead them. If the need for a webinar arises, we will utilize resources and DDI members which fall within the budget request or are no added cost.

Conference attendance

Our training group's main activities involve helping to create content used for sharing knowledge about DDI and then participating in events where we can actually share knowledge about DDI. We would like to support DDI TG member attendance at one to two in-person conferences. Attendance will depend on the availability of trainers and whether proposals are accepted. Topics/proposals will be tailored to each conference's audience and familiarity with DDI products. In addition to reaching new audiences or providing advanced training, this will also provide the opportunity for trainers who would otherwise might not be able to attend and contribute because of organizational funding barriers, which in turn offers more equitable distribution of work throughout the TG.

The aim is to provide support for DDI TG members to attend and help with DDI presentations at conferences such as IASSIST and EDDI, particularly when their institutions are not already offering support. We will also endeavour to look at attending new conferences where possible. Costs include either all or partial coverage of conference attendance fees, accommodation, and sustenance. We would like to dedicate \$4,000 based on support for past DDI TG member conference registration and travel requests.

Translations

In the last fiscal year, the variable cascade deck was translated in French and published on Zenodo. The translation was carried out by in-kind contributions. Due to the success of the translations and the growing international audience of DDI training, we want to translate more slide decks into other languages. Last year, we proposed to translate up to three introductory training materials slide decks from English to Japanese and preliminary research has indicated this would be estimated to be \$1,000. We were unable to secure this help, but are looking into new avenues to move this forward. For this reason, we are asking to keep the \$1,000 in the budget this year.

Active Members of the DDI Training Working Group

1. Kathryn Lavender (ICPSR), co-chair Slides group
2. Chantal Vaillancourt (Statistics Canada), co-chair until June 2026
3. Philippe Bisson (Statistics Canada), co-chair, Training group
4. Jennifer Zeiger (ICPSR), chair Training opportunities
5. Catherine Yuen (University of Essex), co-chair Slides group
6. Adrian Dusa (RODA)
7. Alina Danciu (Sciences Po, CDSP)
8. Irene Koraki Folli (City St George's, University of London),
9. Dan Gillman (US)
10. Chloé Hertrich (SciencesPo)
11. Kaia Kulla (left Stats Estonia in Fall 2025)
12. Julie Lenoir (Ined)
13. Jon Johnson (CLOSER)
14. Dominic Nzunda (MEIRU)
15. Amber Leahey (University of Toronto) - Scientific Board
16. Hayley Mills (CLOSER)

FY 2026-2027 (July 1, 2026 - June 30, 2027)

Training Group Activity	Purpose / Goal	Strategic Mission Alignment	Audience	Cost (USD \$)
Funding for 1-2 workshops/training in-person conferences	DDI will be promoted by submitting workshops/training, to be held at conferences. Travel costs and conference fees are covered for the instructors.	engagement	Variety of users/audiences	\$4,000
Web page update	Members of the Training Group continue to update and make changes to training-related content on the DDI website.	alignment	New users	In-kind contributions
Translation of materials to Japanese	Intro training materials translated from English to Japanese; est for three slide decks based on internet search	2.5	New users, DDI Trainers	\$1,000
Training Material creation	Members of the Training Group continue to produce and organize Training Material (including exercises) on Zenodo and the DDI website (with the help of the DDI assistant).	1.1, 3.8	New and advanced users, DDI Trainers	In-kind contributions
Training requests	Members of the Training Group continue to reply to questions and provide training when relevant.	engagement	Intermediate and advanced users	In-kind contributions
FY27 TOTAL				\$5,000

DDI-CDI WG Budget Request for Fiscal Year 2026/2027

Summary

The DDI-CDI Working Group is now in the process of supporting a growing set of implementers, now that the 1.0 version of the DDI-CDI specification is available. This requires not only being responsive to developers, but also collaboration and alignment with other DDI groups and also non-DDI groups, to ensure that DDI-CDI is aligned with other standards as appropriate to meet real-world use cases.

To support this work, it is seen as very desirable to have a face-to-face meeting in the coming fiscal year, ideally with other DDI Alliance working groups, especially TC, DDI Codebook, DDI Lifecycle, and the Qualitative group. These are the DDI products (or concerned groups) which arise most often in combination with DDI-CDI in actual projects over the past year. While there are also many external groups, these are generally present at the Dagstuhl events, notably the CDIF community, so the focus of a separate face-to-face meeting is placed elsewhere, in support of different projects.

The budget needed for a face-to-face event is more than the \$2000.00 allotted to the group in planning estimates, so it is assumed that additional funds from the general pool would be requested as meeting planning proceeds. This document is to request the planned \$2000.00, and to set expectations for later requests during the course of the fiscal year.

Alignment with Strategic Goals

DDI-CDI represents a significant new area of implementation for the DDI Alliance's products. In part, this stems from the popularity of the Cross-Domain Interoperability Framework (CDIF), which uses DDI-CDI as its core data description standard. The success of CDIF, notably within European projects such as CDIOF4EOSC, but including many others, promises to establish DDI-CDI as a ubiquitous standard within the European research infrastructure. There are, however, other significant developments, including implementation within Dataverse, including implementation of the Qualitative extensions to DDI-CDI, and renewed efforts within the official statistical community involving DDI-CDI, SDMX, DDI Lifecycle, and Croissant ML, looking at how better to support AI implementations.

In terms of the DDI Alliance Strategic Plan, these different initiatives are in line with the objectives regarding the expansion and engagement of the DDI Community, as well as the alignment of both DDI Alliance specifications and with external specs. Through CDIF, much of the tools development has been collaborative, and this phenomenon is expected to grow as more money becomes available through European and other projects.

A face-to-face meeting will help the DDI-CDI group align with other DDI working groups, and to help all of the specs benefit from exposure to projects which are using a set of different specifications and technologies. This is especially important in terms of how RDF-based tools are being used in these projects, since this syntax is a more recent development for the non-DDI-CDI specifications, while it has become the main syntax for DDI-CDI implementation.

Request for Funds

It is understood that \$2000.00 has been planned for the DDI-CDI Working Group budget. It is estimated that a budget of \$7500.00 would be required to support a meeting, including travel expenses for three trans-Atlantic participants or a larger number of non-trans-Atlantic ones (probably costing half as much). This figure is based on past requests, given that the costs of fuel are making airline ticket prices very unpredictable.

It is expected that DDI-CDI will request an additional \$5500.00 from the general pool of funds when a face-to-face is planned. This number is approximate.

Please note that while Dagstuhl is an important event for the DDI-CDI group, there is only one guaranteed week this coming year, with a second meeting hoped-for but still not decided. In discussions with TC and the Qualitative groups, it is clear that a face-to-face including the DDI-CDI WG as well as these others, co-located, would be of benefit to all. This is a model which has worked well in the past. GESIS at Koln has been suggested as a possible venue, but other potential host institutions exist as well in France, the UK, etc. Our intention would be to plan a second face-to-face meeting to coincide with such an event, making it easy for participants to switch between groups as necessary given the topics under discussion.

Since many of the current projects involving DDI-CDI also involve other DDI work products, notably through tools such as Dataverse and Nectar, or in collaboration with initiatives such as the Supporting Standards group out of UN/ECE, this approach is seen as ideal.

Total amount requested: \$2000.00, with expected additional request of \$5500.00.

----- Forwarded message -----

From: **Steen, M. van der (Marcel)**
Date: Tue, Apr 28, 2026 at 7:40 AM
Subject: RE: OSWG News and Budget
To: Jared Lyle
Cc: Jug, M. (Matjaz)

Hi Jared,

Perfect, happy to do that of course. Please find a piece of newsletter text below.

With respect to the OSWG budget claim, I would suggest:

- **\$ 500 – Support for an external side meeting at EDDI 2026 in Brussels**
 - We are considering organizing an industry gathering focused on interoperability, bringing together providers of official statistics tools.
- **\$ 1,000 – Dissemination of questionnaire results at non-DDI Alliance statistical events**
 - It is important to provide feedback to statistical organizations on the findings of the global questionnaire, including insights that help validate internal consensus within their institutions.
- **\$ 500 – Reserve allocation for the remaining OSWG mini working groups**
 - The tasks of the four additional mini working groups are currently being defined, so their specific needs are not yet known. This amount is set aside as a provisional budget.

I hope you can work with this information. Let me know if you have any questions.

Best.
-Marcel

Dear DDI Secretariat,

The Qualitative Data Working Group (QDWG) would like to apply for funding for the activity described below.

The purpose of the request

The primary purpose of this request is to engage qualitative data metadata managers with DDI products. This initiative will enable the QDWG to better understand their needs and address areas that are currently underserved.

Given that the QDWG's mission is to support and promote the use of DDI products and standards among organizations and communities involved with qualitative data—enabling ways of documenting this kind of data and formulating recommendations on extending DDI products and standards to describe qualitative data—it is essential to gather feedback on how these products, in their current versions, are being used or could be used to meet these needs.

The proposal seeks funding to cover accommodation and travel expenses for 2–3 participants (with a total **maximum limit of \$2,000**) to attend the Hackathon associated with EDDI 2026 in Brussels.

Funded participants will explore using DDI Codebook (DDI-C) to describe selected qualitative research studies, thereby encouraging engagement with this DDI product and allowing the QDWG to collect actionable feedback to advance its goals.

How the activity aligns with the DDI Strategic Plan

This activity directly supports the DDI Strategic Plan priorities of **Engaging and Expanding** (Strategic Priorities 1 and 2) the use of DDI to underrepresented communities, specifically qualitative data producers, researchers, and managers involved in metadata management.

Participation in the Hackathon will foster community building by demonstrating the DDI Alliance's commitment to understanding the needs and use cases of these groups. This will positively impact membership growth from qualitative-data-holding institutions, which is currently limited.

Furthermore, this initiative will help the Alliance better understand this user segment: why they are not actively using DDI products, what gaps exist, and what improvements are needed to achieve broader adoption. The insights gained from this testing exercise will serve as a foundation for driving innovation in DDI product development.

An itemized budget for the proposed activities

The budget will cover accommodation and travel expenses for the selected candidates, with a total limit of **\$2,000** for all 2–3 participants.

Implementation Process:

1. **Call for Funding Requests:** Following the announcement of registration opening for the European DDI Conference 2026 in Brussels, a call for funding requests will be issued to recruit 2–3 participants for active involvement in a qualitative-metadata challenge associated with the EDDI Hackathon.
 - **Target audience:** Qualitative data producers, researchers, or managers involved in metadata management.
 - **Dissemination channel:** Primarily the DDI-users and IASSIST mailing lists, though not exclusively, allowing the QDWG to adapt outreach strategies to effectively reach underrepresented qualitative data communities.
 - **Task:** Engage in a specific challenge exploring the use of DDI-C for qualitative study description (including file-level description and "participant" metadata), as proposed on the dedicated project page at <https://github.com/ddi-developers/>
 - **Application Requirements:** Brief biography of the candidate, motivation of the application, and description of a representative qualitative study from their institution/project.
2. **Selection Criteria:** The QDWG will establish specific selection criteria for candidates:
 - **Mandatory:** Knowledge of qualitative data and metadata management. Strong proficiency in XML (to ensure the technical capability to construct and validate DDI-C instances).
 - **Desired:** A broad range of use cases, including participants with varying levels of DDI product experience and diverse areas/kind of data of the studies being described.

While familiarity with DDI-C is advantageous, it should not be a mandatory prerequisite. Including participants with limited background in the standard provides a unique opportunity to evaluate its intuitiveness and identify potential barriers to entry for new users, which is central to our goal of expanding adoption.
3. **Hackathon Challenge Goals:** The QDWG will propose the Hackathon challenge at <https://github.com/ddi-developers/> with the following objectives:
 - Obtain a description of a qualitative research study from the awardee's institution using DDI-C, including "participant" metadata (corresponding to a DDI-C XML instance).
 - Upload the XML study description to the dedicated challenge page at the GitHub repository.
 - Identify gaps in the descriptive capabilities of DDI-C with respect to qualitative research studies.

Important Note on Eligibility: *We respectfully recommend that the general criteria limiting funding support to participants from DDI Alliance member organizations be waived for this*

specific initiative. Many qualitative data archives are not yet using DDI products and, consequently, are not affiliated with the Alliance because current DDI products primarily focus on quantitative survey data. Restricting eligibility to existing members would exclude the very target audience this initiative aims to engage. We propose that funded participants be permitted to come from non-member organizations, with the expectation that successful engagement may lead to future Alliance membership.

Thank you for your continued support of the QDWG and for reviewing this proposal. We look forward to hearing from you.

Best regards,

Noemi Betancort, Chair of the DDI Qualitative Data Working Group
Dan Gillman, Vice-Chair of the DDI Qualitative Data Working Group

DDI Dagstuhl Workshops - Funding Request for the Financial Year 2026/2027

Dagstuhl organizers: Darren Bell, Michelle Edwards, Arofan Gregory, Simon Hodson, Steve McEachern, Hilde Orten, Joachim Wackerow

Overview

Budget is requested to fund DDI Alliance member organisations' participation in the workshop(s) at Schloss Dagstuhl for Fiscal year 2026/2027.

The funding is requested to help support travel to a workshop on application and further development of the DDI-CDI specification, and a cross-domain workshop which addresses DDI Codebook, DDI Lifecycle, DDI-CDI, and XKOS and how they fit into a broader set of specifications for FAIR implementation.

These events are co-sponsored by CODATA, which matches the DDI Alliance's funding in order to ensure the success of the workshop. Since the collaboration started in 2018, CODATA has more than matched the Alliance's funding for participants as well as providing funding for its own staff. Additionally, for the last two years a significant number of participants for the cross-domain workshop have been funded by the CODATA-coordinated WorldFAIR project.

The request for funding from the DDI Alliance to assist with the 2026 workshops is **\$8,000.00**.

Schloss Dagstuhl Cross-Domain Workshops: Goals and Focus

At the time of writing, due to a continuing backlog for Dagstuhl Seminars, there will be one workshop held at Schloss Dagstuhl in Wadern, Germany in 2026. However, the organisers are exploring with Dagstuhl the possibility of a second week while also looking at alternatives for Dagstuhl-style meeting in the week of 9 November.

The confirmed Dagstuhl Workshop will take place on 1-6 November with the topic ['Optimising Metadata Structures for Alignments with Standard Models at the Point of Use'](#).

The current working description is provided below:

While it is possible to describe data after it has been collected, based on what is known, there are ways in which data can be characterised to be more easily useful in broader terms, employing standards such as the Data Documentation Initiative Cross-Domain Integration (DDI-CDI). Standard models for data description provide us with a foundation for understanding how data can be viewed not just as the resulting artefact of an experiment or process, but as the critical resource which they have become in the modern computational landscape. When data, metadata, and the models used to structure these are consumed, this is often done using standards specific to the type of use: for the purposes of FAIR sharing, we need to provide a broad-based model which can be used across these applications.

We are currently witnessing a rapid shift in the way that data is consumed by end users. Primarily driven by AI, this shift is occurring not only because many of our

users are now AI-driven agents, but also because many of the presentations of our data will be mediated by AI-driven applications for the eventual end user. At the same time, more traditional users have not disappeared. This shift impacts not only how we present our data at the point of use, to accommodate standards such as Croissant ML to meet the needs of AI agents, but also how we manage our data and metadata upstream. Issues of transparency and the permissible use of data are placing greater emphasis on provenance and audit trail, as well as having standard mechanisms in place to help with data access. Many different standards exist for all of these aspects of data dissemination, but they are typically developed in isolation, and may present the implementer with conflicting models.

This workshop will explore how these standards fit together for our modern set of data users, and how we can optimize the models we use for data management to be able to meet demand at the point of consumption. As the centrality of data to all of our computation has increased, so has the need for accurate and complete information about that data. Metadata standards are a critical aspect of how we present and consume our data.

The second week, possibly at Dagstuhl on 7-11 December, possibly hosted elsewhere on 9-13 November, will focus on the use of AI tools for generating DDI-CDI metadata, organising production streams to make sure it is accurate, and communicating the reliability of the information at the point of dissemination.

Specific sub-themes and the participant list for the workshops are currently being finalised, and a number of essential participants have been invited.

These workshops continue a series of workshops on cross-domain approaches and collaboration with other standards which has been instrumental in recent developments and for DDI-CDI. Further information about [this series is available on the DDI website](#).

Alignment with DDI Strategic Plan

The activities within the two proposed workshops align closely with the DDI Strategic Plan. From the three core areas of the strategic plan, the workshop will contribute, in the following areas:

Aligning DDI Development:

The workshops will support all three areas of this strategic goal - *Alignment of product lines, Improve Documentation, and Support Tools Development*. All three of these areas are planned topics within the DDI-CDI workshop, including further development of the community based [Nectar](#) tool for new production of DDI-CDI metadata using AI-supported curation tools. Expected outcomes of the workshop will set an agenda for future engagement with both the standards maintainers (including W3C and SDMX) and the DDI developer community.

Engaging the DDI community

The workshops will contribute to the ongoing engagement with the DDI community through participation of community members in the workshop and the resultant use of outputs from

the workshop. Proposed participants from the workshop include contributors from three key DDI community groups

- DDI Alliance members: e.g. UKDS, GESIS, CODATA, CESSDA, SOEP, Sikt
- Official Statistics: Statistics Canada, United National Statistical Division, INSEE
- Standards communities: W3C, SDMX

Expanding the DDI community

The workshops will also enable the further engagement of new communities interested in the use and development of DDI. Both workshops will enable the DDI community to *Build partnerships with other standards*, by focussing on the engagement with other standards providers, and alignment and integration of the use of standards. Through participation of related standards and data communities, we will further enable the adoption of DDI-CDI in non-social science communities. These workshops will include implementers of DDI products and representatives from other standards, with specific user communities likely to include:

- Environmental sciences (e.g. British Oceanographic Data Centre and other ocean sciences institutes, INRAE, ENVRI, GBIF, GEO etc.)
- Materials sciences and crystallography (building on the CDIF-4-XAS project; RAL, GZB, CCDC, IUCr)
- Chemistry (IUPAC)
- Geochemistry (OneGeochemistry)

Funding Request

We are requesting funding for the workshop of \$8000 for the following:

- travel funding for **two** Europe-based participants (total US\$3,000.00)
- travel funding for **two** participants who would have to travel further (from North America, etc.) (total US\$5000.00)

European travel is estimated at **US\$1500.00** per participant, and non-European travel is estimated at **US\$2500.00**. These estimates include the cost of room and board at Schloss Dagstuhl for one week. These workshops are subsidized by Schloss Dagstuhl – Leibniz Center for Informatics (free seminar rooms, **c.US\$600.00** per participant per workshop/five days including full board).

Travel funding will support colleagues at DDI Member Organisations, and participants in DDI Alliance Working Groups, where these colleagues are unable to obtain funding from their own institutions.

Budget Details

The total budget request is for **\$8,000.00**. This will support travel and accommodation costs for two participants based in Europe, and for two participants coming from North America. (The cost of flights is significant, so these categories are estimated separately.)

Our travel funding request is based on the following estimates:

Expense	Cost per item	European participant	North American participant
Accommodation with full board in Dagstuhl	US\$580.00	US\$580.00	US\$580.00
Hotel at Frankfurt airport	US\$200.00	US\$200.00	US\$200.00
Local transport at origin and destination	US\$220.00	US\$220.00	US\$220.00
Flight - within Europe	US\$500.00	US\$500.00	
Flight - transatlantic	US\$1500.00		US\$1500.00
Total cost per person from Europe for Dagstuhl meeting		US\$1,500.00	
Total cost per person from North America for Dagstuhl meeting			€2,500.00

Beyond Descriptive Metadata: Improving Dataset Discoverability through Computationally Derived Metadata

PI: Murali Mani, Professor of Computer Science, University of Michigan-Flint

Senior Consultant: Jared Lyle, ICPSR, University of Michigan-Ann Arbor

Dates: July 01, 2026 - June 30, 2027

Purpose of the Request

Overview

The Data Documentation Initiative (DDI) has long supported the discovery, understanding, and reuse of research data through rich, structured metadata. The DDI-Codebook specification, for instance, documents the overall study (e.g., title, principal investigators, abstract, keywords, weighting), the files associated with the study, and the variables within the datasets. Together, these metadata elements help researchers identify relevant data, understand how the data were collected and structured, evaluate their suitability for particular research questions, and reuse them effectively.

DDI metadata standards have been highly successful in supporting data discovery and reuse. However, they primarily rely on expert-authored descriptive metadata explicitly documented by depositors or curators. As a result, certain empirical characteristics of datasets, such as demographic categories, response distributions, or the presence of specific subgroups, may not be consistently recorded in the metadata, even though they may provide powerful signals for computational systems that support dataset discovery, filtering, and ranking. This means relevant datasets may not be retrieved or effectively prioritized during typical repository searches.

Motivating Example

A researcher searching for datasets on “young adult smoking (under age 30)” may retrieve multiple datasets labeled broadly as “adult smoking” based on existing study and variable metadata. However, study metadata often does not explicitly specify the observed age distribution of respondents. By examining the data directly, it is possible to identify whether a dataset actually includes respondents within the target age range.

If incorporated into metadata, such computationally derived information could improve:

- the identification of relevant data (filtering), and
- the prioritization of search results (ranking).

This example illustrates how metadata derived directly from data can complement traditional descriptive metadata to support more effective data discovery.

Goals

This proposal seeks to investigate how computationally derived metadata can complement traditional expert-authored DDI metadata to improve dataset discoverability. The project will investigate which forms of computationally derived metadata provide the greatest improvements to dataset retrieval and ranking in realistic discovery scenarios. Examples include observed value ranges, category distributions, missingness patterns, and indicators of subgroup coverage that may not be consistently represented in traditional metadata but can be derived directly from the data.

Many of these features can already be documented in DDI-Codebook through existing variable-level metadata structures. Repositories such as ICPSR already generate substantial amounts of variable-level metadata during the curation process, including frequencies, ranges, and summary statistics. However, these forms of computationally derived metadata may be incomplete, inconsistently documented, not normalized across studies, or not systematically incorporated into dataset discovery and ranking workflows.

This project will explore how computational methods can enrich DDI-Codebook metadata at scale to improve:

- the identification of relevant data (filtering), and
- the prioritization of search results (ranking).

The project focuses specifically on DDI-Codebook metadata because it remains the primary operational metadata standard used by many social science data repositories, including ICPSR, for dataset discovery and dissemination. The work emphasizes practical enhancements to discovery-oriented metadata workflows within existing repository environments, rather than broader lifecycle management or cross-domain interoperability modeling.

The project will leverage ICPSR datasets as a primary testbed and will develop lightweight prototype tools and evaluation methods to demonstrate how enriched metadata representations can improve discovery. All analyses will operate on publicly available or appropriately authorized datasets and will focus exclusively on aggregate, non-sensitive metadata consistent with ICPSR data access and usage policies.

This work builds on prior efforts by the project team on metadata augmentation using generative AI, where automated approaches were used to enhance subject metadata for ICPSR datasets. These efforts demonstrated the feasibility and value of computational approaches for enhancing descriptive metadata derived from textual documentation. The proposed project extends this work by investigating how metadata derived directly from the data can provide complementary signals for improving dataset discovery and reuse.

Alignment with the DDI Strategic Plan

This project is closely aligned with the DDI Alliance Strategic Plan (2024–2027), particularly its priorities of engaging the DDI community, expanding the DDI community, and aligning DDI development with emerging computational practices.

Engaging the DDI Community

The project will produce prototype tools and evaluation results demonstrating how DDI-based metadata can support improved data discovery through computational enrichment. By working with ICPSR datasets and focusing on realistic discovery scenarios, the project will generate concrete outputs directly useful to DDI practitioners, data repositories, and metadata professionals.

Expanding the DDI Community

The project introduces computational, information retrieval, and AI-oriented perspectives into DDI metadata workflows. While DDI has traditionally been used by data curators and social scientists, this project demonstrates its relevance to computer scientists and developers working on data discovery, information retrieval, and AI-driven analysis. This broader applicability may help attract new technical communities to DDI.

Aligning DDI Development

The project explores how computationally derived metadata can complement existing DDI metadata structures. The work does not replace current DDI practices, but instead investigates how additional metadata derived directly from data can enhance interoperability, discovery, and reuse. Findings may inform future development of DDI standards and tools, particularly in the context of increasing automation and AI-assisted metadata creation.

More broadly, the project advances DDI's commitment to high-quality, interoperable metadata that supports FAIR data principles. In particular, by improving both the identification of relevant datasets and the prioritization of search results, this project advances the “findable” dimension of FAIR principles within DDI-based repositories.

Expected Outcomes and Deliverables

This project will produce a set of practical outputs, prototype tools, and evaluation results demonstrating how computationally derived metadata can enhance dataset discoverability in DDI-based repositories.

1. Prototype Tools for Computational Metadata Extraction

Develop lightweight proof-of-concept tools that will automatically extract selected metadata features from datasets, such as value ranges, distributions, and basic indicators of subgroup presence (e.g., age ranges or demographic response categories). These tools will demonstrate

how computationally derived metadata can be more systematically incorporated into DDI-based workflows to support improved data discovery.

2. Enriched Metadata Examples Using ICPSR Datasets

Create a curated set of ICPSR dataset examples augmented with computationally derived metadata. These examples will illustrate how computationally derived metadata can complement traditional DDI-Codebook documentation and improve data discoverability.

3. Evaluation of Improvements in Dataset Discoverability

Conduct an empirical evaluation comparing discovery performance using:

- existing metadata alone,
- and enriched metadata incorporating computationally derived features.

The evaluation will examine:

- improved identification of relevant datasets (filtering),
- improved prioritization of search results (ranking), and
- the relative usefulness of different forms of computationally derived metadata in discovery workflows.

Evaluation results will be summarized using interpretable retrieval metrics and representative discovery scenarios.

4. Community Report and Recommendations

Produce a concise report documenting:

- types of computationally derived metadata most useful for discovery,
- approaches for integrating such metadata into DDI workflows,
- considerations for normalization across heterogeneous datasets,
- implementation considerations, and
- limitations related to privacy, interpretability, and data access.

The report will be written for a broad audience, including data curators, repository developers, metadata practitioners, and researchers.

5. Community Presentation and Engagement

Present project findings to the DDI community through a webinar or similar forum to encourage discussion around computational metadata enrichment and future directions for DDI-based discovery systems.

Itemized Budget

Beyond Descriptive Metadata: Improving Dataset Discoverability through Computationally Derived Metadata				
Murali Mani				
DDI				
			Year 1	
			7/1/2026	
			6/30/2027	
Personnel:	Name	Effort		Cumulative
PI	Murali Mani	0%	\$ -	\$ -
Senior Consultant	Jared Lyle	0%	\$ -	\$ -
Undergraduate Student	TBD		\$ 1,792	\$ 1,792
Research Associate	TBD		\$ 7,497	\$ 7,497
Total Personnel:			\$ 9,289	\$ 9,289
Fringe Benefits:			\$ 711	\$ 711
Total Personnel and Fringe Benefits:			\$ 10,000	\$ 10,000
Other Direct Costs:	<i>Detailed description of expenses:</i>			
Travel - Domestic			\$ -	\$ -
Travel - Foreign			\$ -	\$ -
Materials and supplies			\$ -	\$ -
Publications			\$ -	\$ -
Consultants			\$ -	\$ -
Computer Services			\$ -	\$ -
Hosting (UG)			\$ -	\$ -
Computers (UG)			\$ -	\$ -
Other			\$ -	\$ -
Total Direct Cost:			\$ 10,000	\$ 10,000
Modified Total Direct Cost (MTDC) base:			\$ 10,000	\$ 10,000
Indirect Cost:		0.0%	\$ -	\$ -
Total Project Cost:			\$ 10,000	\$ 10,000

Appendix 2.

DDI Alliance Organizational Evolution Task Group Charge

DDI Alliance Organizational Evolution Task Group Charge

June 2026

Purpose

The DDI Alliance Organizational Evolution Task Group is established by the DDI Executive Board to evaluate and recommend new structures for the Secretariat and Executive Director functions to support the Alliance's continued growth, international scope, and long-term success over the next 20 years.

The Task Group is advisory in nature. It is not charged with implementing organizational changes, but rather with conducting a thoughtful, community-informed evaluation and providing strategic recommendations for consideration by the Executive Board.

Background

The DDI Alliance has evolved significantly over more than 20 years into a mature, internationally recognized standards organization with expanding governance, communications, technical, and community coordination needs. The current operational model, including the Secretariat and Executive Director functions hosted by ICPSR, has served the Alliance well and has been instrumental in the growth, stability, and success of DDI.

ICPSR remains strongly committed to DDI and proud of its longstanding leadership role as the Alliance's host institution. At the same time, ICPSR recognizes that the continued growth and increasing complexity of the Alliance require evolution of the operational model beyond continued reliance on concentrated institutional knowledge and limited staff and institutional support capacity.

At the request of ICPSR, the Executive Board is establishing this Task Group from a position of organizational health and stability, with the goal of proactively assessing updates to the Secretariat and Executive Director support models needed to meet the Alliance's future needs over the next 20 years.

Scope of Work

1. Secretariat

The current Secretariat structure (outlined in [Section IX](#) of the DDI Alliance Bylaws) has functioned effectively for many years and has provided the Alliance with important continuity,

stability, and operational support. At the same time, the scale, diversity, and international scope of Alliance activities have increased significantly, along with expectations related to governance coordination, communications, community engagement, and technical collaboration.

The Task Group will evaluate Secretariat operational models that would best support the Alliance's continued growth over the next 20 years, including evaluation of and recommendations regarding:

- the need for additional staffing, operational support, or coordination structures;
- approaches for strengthening operational continuity and organizational resilience;
- opportunities to distribute responsibilities more broadly across member institutions or governance bodies;
- whether greater operational redundancy or institutionalization would improve long-term sustainability; and
- operational functions that would benefit from clearer role definition or shared responsibility.

2. Executive Director

The Executive Director role (outlined in [Section IX](#) of the DDI Alliance Bylaws) has evolved considerably over time and encompasses strategic leadership, governance coordination, communications, membership support, operational management, and external representation.

The Task Group will evaluate the Executive Director role and related operational support structures needed to best support the Alliance's continued growth over the next 20 years, including evaluation of and recommendations regarding:

- whether the current single-role structure remains optimal;
- the need for additional operational or administrative support roles;
- approaches for strengthening succession planning and leadership continuity over time;
- responsibilities that could be more broadly shared across the Alliance; and
- whether a more distributed operational support structure would improve long-term sustainability and resilience.

Guiding Principles

The Task Group should conduct its work consistent with the following principles:

- recognition of the significant contributions and longstanding support provided by ICPSR and other Alliance contributors;
- commitment to organizational stability, continuity, and community trust;
- emphasis on long-term sustainability and resilience rather than immediate structural change;
- broad community consultation and transparency;

- respect for the international and collaborative nature of the Alliance; and
- consideration of realistic operational and resource constraints.

Reporting

The Task Group will submit final recommendations to the Executive Board by January 2027 for discussion and possible future action, with periodic progress updates beforehand.

The recommendations should identify recommended short-, medium-, and long-term changes to the Secretariat and Executive Director functions. The recommendations should also identify advantages, challenges, risks, resource implications, and transition considerations associated with potential approaches.

Recommendations may include multiple operational models or phased approaches for consideration by the Executive Board. Where feasible, the Task Group should identify recommended priorities, sequencing, or relative levels of effort associated with potential approaches. Proposed approaches may include changes to operational practices, governance structures, organizational responsibilities, or governing documents where necessary to support the Alliance's long-term needs.

Membership

The Task Group will include the following members from across the DDI Alliance community:

- Mari Kleemola, Chair
- Frédéric Minodier
- Hayley Mills
- James Doiron
- Pascal Heus

The Executive Board may appoint additional participants or advisors as appropriate.

Reference Materials

- [Section IX](#) of the DDI Alliance Bylaws defines the role of the Executive Director and the tasks of the Secretariat
- DDI Alliance [Charter](#) outlines the host institution and Executive Director governance roles.
- [Breckenhill Report](#): The DDI Alliance - An Independent Review of Governance, Intellectual Property Rights and Related Matters. Relevant sections include Section 9 regarding establishing separate legal existence and Section 13 regarding succession planning and selection of the Executive Director.

Appendix 3.

Recommended Updates to Membership Rights and Benefits

Membership Rights and Benefits

The DDI Alliance mission statement states that it is “An international collaboration of member organizations that develops open metadata standards” and “Membership is open to organizations worldwide, ... and is maintained through annual dues, in-kind contributions, and adoption of DDI standards and products”

The DDI Alliance is committed to continuing to provide open and free use of its standards, however, unlike many organisations it has no model to monetise these standards through the provision of additional services and as such acts as a public good to its primary user base in the social, demographic, economic, and health sciences. The primary benefit the DDI Alliance provides is its continued existence, in providing evolving standards that significant parts of the research and statistical eco-system depend upon to meet their organisational missions.

This is expressed in the rights of full members to have oversight and accountability for the direction of the standards through voting on changes to the standards, and its governance structures the Executive Board and the Scientific Board.

In the 15 years since the Beckenhill Report, the activities of the Alliance have evolved to meet the changing needs of its members, new standards and the ease of communication have meant that both a more diverse and larger number of people and organisations now participate in an increased number of activities.

However, participation has not converted into growth in fee paying membership, with tighter budgets in publicly funded organisations and perhaps a lack of recognition that open source is not free in the sense of beer, we have to recognise that we should be more cognisant that the benefits of participation as an organisation have to be proven rather than assumed.

The recent accreditation of DDI as an ISO/PAS standard is an important flag in the ground for organisation adoption where this is seen as being a stumbling block to the adoption of DDI which inevitably requires a level of investment and commitment.

From one perspective, the benefits of participation could be viewed as being intangible, but this undersells the value that the DDI community provides in advice and support within existing and future adopters of DDI standards to ease implementation. The working groups are forums which train and support the use of DDI and the development of wider skills of staff within a community of practice.

The proposed changes to membership benefits emphasizes the role of individuals as representatives of their organisations in the development of products and other activities.

They also more clearly acknowledge that organisations provide different forms of contributions, releasing staff for time to participate, membership dues, provision of skills, tools and infrastructure which enable the different activities the Alliance undertakes.

Recommendation 1 - Membership Fees

63% of members are from Educational and non-profit organisations.

The introduction of a lower rate for very small organisations is intended to encourage membership within this area, smaller organisations are especially prevalent with the LMICs and research projects more generally.

We propose removing the top tiers from the For Profit section as they are superfluous. We currently have no fee paying members in this section, those who are associate members are < 10 and whilst we would encourage fee paying membership, we recognise that many provide significant in-kind contributions.

Tracked changes below includes 5% increase in membership fees

Membership			
	Contributor		
	Premium	OECD* Country	Non-OECD* Country
Educational and non-profit organizations			
Employing 10+	4,725	3,150	1,575
Employing < 10	3,150	2,100	1,050
Government organizations			
Employing > 500	7,875	5,250	2,625
Employing 100-500	6,300	4,200	2,100

Employing 1-99	4,725	3,150	1,575
For-profit companies including vendors			
Employing 10,000+	30,000	20,000	10,000
Employing 5,000-9,999	22,500	15,000	7,500
Employing 500-4999	15,000	10,000	5,000
Employing 499	Please contact the DDI Alliance		
Employing 100-499	10,500	7,350	3,675
Employing 10-99	7,875	5,250	2,625
Employing < 10	4,725	3,150	1,575

Recommendation 2 - Working group membership

This recommendation emphasises our ambition to ensure that the working groups are closely tied to the organisations and their current and future needs. This does not preclude participation as invited experts to working groups.

Working Group Membership

- *From a member organisation*

Recommendation 3 - Access to funds

This recommendation is intended to clarify that as a general rule member organisations should be those that benefit from the DDI Alliance funds.

If funds are sought for an individual that is not from a member organisation, a separate case for support should be submitted to the Executive Board either on a case by case basis or as part of the annual call for funds.

Travel and subsistence & priority fund

- *From a member organisation*