

**DDI Alliance Meeting**  
**Monday, May 28, 2018, 08:30-17:00**  
**Webster Library, Concordia University**  
**Room [LB-362](#) -- [Map](#)**

<b>Agenda -- Meeting of Members</b>				
<b>Time</b>	<b>Subject</b>	<b>Detail</b>	<b>Lead</b>	<b>Purpose</b>
08:30-09:00	Light Breakfast	Available in LB-361		
09:00-09:05	Welcome		Steve	Introductions
09:05-09:20	<a href="#">State of the Alliance 2018</a>		Steve	Update on last year's work
09:20-09:30	Alliance Budget	<a href="#">Financial Report</a>	Jared	
09:30-10:00	Working Group Reports	-Marketing & Partnerships -Training - <a href="#">Technical Committee</a>	Barry Amber Wendy	
10:00-10:15	Coffee break	Available in LB-361		
10:15-12:25	<a href="#">DDI Strategic Plan</a>	Detailed discussion with the membership -What are the immediate needs? What are long-term needs? -Details of the plan  <a href="#">Online feedback</a> from membership	Steve	Get input and feedback
12:25-12:30	Proposed Date for Next Meeting		Steve	Agree on best day to meet
12:30-13:30	Lunch	Available in LB-361		

Agenda -- Meeting of Scientific Board				
Time	Subject	Detail	Lead	Purpose
13:30-14:30	<a href="#">DDI Strategic Plan</a>	-Continuation of discussion, with focus on the longer-term sections of the plan -Prioritizing and resourcing the plan	Steve	
14:30-15:15	<a href="#">Scientific Board direction and goals</a> for the year	- Improving infrastructure around all DDI specifications -Specific activities for the Alliance (e.g. URN resolution, query / exchange protocol, validation tools, use cases,and best practices)	Chair	Set goals for what to accomplish
15:15-15:30	Coffee break	Available in <a href="#">LB-361</a>		
15:30-16:15	Moving Forward program	-Overview of the DDI 4 timeline -Update on past reviews -Future direction on DDI 4, and additional views like codebook	Steve Wendy Achim	In-depth discussion of DDI4 development
16:15-16:20	Administrative matters	-Nominations for the Vice-chair position	Achim	
16:20-16:45	Global Research Digital Infrastructure	-Report on related initiatives (SDMX and GSIM) -Dagstuhl workshop on interdisciplinary metadata usage	Achim	Update group on progress

18:30 - Informal DDI group dinner at 3 Brasseurs ([1356 Saint-Catherine St W, Montreal, QC H3G 1P6](#))

# DDI Alliance - State of the Alliance 2018

# Strategic plan 2014-17

<http://www.ddialliance.org/system/files/DDIAllianceStrategicPlan2014-2017.pdf>

Three core work areas:

- Standards maintenance and development
- Expanding the DDI Community – Marketing and partnerships
- Restructuring to achieve our priorities

# Standards maintenance and development

- Manage and maintain the two existing product lines (Codebook and Lifecycle)
- Review and vote on RDF Vocabularies
- Develop a next generation model-based DDI specification (2017)
- Continue to publish new Controlled Vocabularies
- Gain ISO certification (2017)

# Expanding the DDI Community – Marketing and partnerships

- Build partnerships and strategic alliances (2017)
- Assess the current state of DDI usage, community needs, and resources (2017)
- Improve the DDI website
- Create new materials explaining the value of DDI to people who are not DDI specialists (2017)
- Build a community around DDI training and increase access through innovative mechanisms (2017)

# Restructuring to achieve our priorities

- Review governance arrangements, including **structure** and Bylaws (2016)
- **Review revenue and funding request models** (2016)

# Strategy development 2017-20

# Strategic plan 2018-2022

The strategic plan is developed to focus on three broad priorities:

1. **Community and outreach:** how do we engage with the DDI community and understand the community's needs?
2. **Organisational needs:** what structures and systems does the Alliance need in order to meet those needs, and how will it maintain those structures and systems in the long term?
3. **Standards:** What products does the Alliance provide and maintain, and how do those products meet the needs of the Alliance and the broader community

# Community and outreach

## 1. Engagement with Global Digital Research Infrastructure

- a. Develop best practices to map and translate DDI for DataCite, schema.org and other key metadata repository services.
- b. Engage with RDA IG's and WG's, CODATA, and Force 11 to advance DDI's integration into the larger digital research infrastructure framework.
- c. Increase communications with other metadata standards setting organisations for discipline-specific research data types.
- d. Fostering usage of DDI with other metadata specifications. Promoting cross-domain usage of DDI (therefore identifying suitable parts of DDI for this purpose)

## 2. Solving Common Problems with Current DDI Users.

- a. Prepare guidelines to assist end users in their choice of DDI specification
- b. Create validation tools and profiles to support interoperable DDI metadata across tools and organisations
- c. Assist software developers of DDI tools through a gap analysis on needed tools, guidelines for software usability, training, and support letters to funders

## 3. User group development program

- a. Create an NSO advisory committee
- b. Promote successful DDI uses by NSOs
- c. Use NSO outreach model to establish similar groups within other user communities

# The DDI Alliance as an organisation

## 1. **Generational Renewal**

- a. Recruit the next generation of knowledgeable and skilled core technical development team
- b. Expand skilled marketing team that is connected to relevant communities (archives, software producers, data producers, statistical agencies, individual researchers, other standards)
- c. Renew active and engaged membership at the institutional level in the DDI community (strengthening the commitment)

## 2. **Training: Enabling trainers to do what they need to do**

- a. Recruit much needed human resources to offer multifaceted DDI training.
- b. Build-up online training presence to expand current offering of training.
- c. Support new trainers and users with easy-to-understand and reusable tools for DDI Training

## 3. **Business Structure**

- a. Establish a periodic review of organizational structure
- b. Develop a sustainable business model for the Alliance
- c. Develop an organizational succession plan for the Alliance

# Standards and work products

## **1. Maintaining multiple lines of specifications and controlled vocabularies**

- a. Offering stable specifications and controlled vocabularies (reference Work Products)
- b. Enable DDI specs to adapt to changes in information technologies and bindings (XML, RDF, Schema, ...).
- c. Production testing/validation for quality assurance
- d. Improve documentation/examples/best practices guidelines

## **2. Improvement of interoperable and distributed DDI infrastructure for use and reuse of DDI resources.**

- a. Introduce validation tools, testing support, and profiles/views for users for the purpose of interoperability
- b. Test cases, test bed, test harness
- c. Guidance on which DDI specification and which parts of DDI for specific use cases
- d. Rules for validation/reporting
- e. Technical DDI services, especially resolution of DDI URNs to DDI resources (URLs)
- f. Standardized query/exchange protocol enables building repositories and reuse of DDI metadata in the web
- g. Best practices for using all components together

# Standards and work products

## 3. Registries/repositories

- a. Specify DDI's vision of building DDI into Common Data Element registries (Strategic Plan & Vision)
- b. Identify ways for establishing portals/registries for supporting existing and growing legacy DDI metadata repositories.
- c. Leveraging technologies of topic 3 above, especially standard query and exchange protocols/interfaces

## Next steps

- Finalise Alliance budget and work program - subsequent to the acceptance of the Strategic Plan
- Need to identify for each part of the strategic plan:
  - resources (including money, time and in-kind contributions)
  - responsibilities (e.g. party/organization/team).
- Similarly, the resource constraints within the Alliance will by necessity limit the extent to which we can achieve the goals set out in this Plan.





DDI Alliance Financial Report  
Annual Meeting of Member Representatives  
28 May 2018  
Jared Lyle, Executive Director

# Financial Report

This document summarizes the overall financial position of the DDI Alliance at the close of FY2018 (July 2017 - June 2018) and includes a draft budget for FY2019.

According to the Alliance [bylaws](#):

“The Executive Board sets the overall budget...[and] shall establish a budget that provides financial support for the successful operation of the Alliance that may include support for some portion of the time of the Executive Director, Alliance duties and functions as determined by the Executive Director and the Secretariat, expert consultation, meetings, training, and funds for innovation and testing.”

## Overview of FY2018 Budget

[Appendix A](#) provides an overview of the FY2012-FY2017 actual budgets. It also provides three views of the FY2018 budget: the Budget FY2018 column lists what was budgeted for the Alliance at the start of FY2018, the Actual FY2018 column lists all expenses that have been processed by the Alliance fiscal year-to-date, and the Forecast column lists actual expenses plus expected expenses through the remainder of the fiscal year.

Below are details for each of the main FY2018 budget categories, as well as a summary of the FY2018 budget.

## Revenue

### Membership fees

- [Membership fees](#) are based on organization size and membership benefits. The basic membership fee for OECD countries is \$3,000 USD.

- The expected income for FY2018 was \$101,000, but actual income was \$111,500. The positive variance is due to conservative budget estimates and an increase in membership (Roper Center for Public Opinion Research, University of Applied Sciences HTW Chur, University of Wisconsin Institute on Aging - MIDUS study).

## Expenditures

### Staff Salaries & Data Processing

- Staff salaries and data processing expenses are expected to match what was budgeted. Staff salaries cover secretariat staff at ICPSR, including 10 percent of the Executive Director, 5 percent of an accountant, and 6 percent of a Web developer. Data processing funds computing services of secretariat staff.

### Consultants

- Three consultants were hired this fiscal year. A Drupal programmer was hired to complete programming tasks related to the Drupal-based modeling platform used for DDI 4 development (<http://lion.ddialliance.org>). An RDF consultant was hired to develop concepts, select appropriate techniques, and give general advice regarding questions in the area of Semantic Web technologies. A project manager was hired to coordinate DDI 4 work and to bring the effort to a consistent result.

### General Expenses

- The bulk of general expenses, other than credit card and wire fees, are Google Cloud Services expenses, where DDI production workflows are hosted.

### Research Supplies & Services

- Expenses covered GoToMeeting subscription fees. Expenses were lower than anticipated since DDI URN registration at IANA work has not been completed. \$4,000 was budgeted for this work.

### Marketing

- Marketing spent about a third of its budget allocation (\$5,735 of \$15,000 budgeted) on conference sponsorships, as well as printing and shipping materials to conferences.

### Training

- Training did not spend any funds in FY2018. They had budgeted \$5,000.

## Travel and Hosting

- Travel funds covered three sprints (two at Dagstuhl in October and one at NADDI in April), as well as travel to participate in a UNECE ModernStats World Workshop in April in Geneva and a May IASSIST presentation.

## Summary

- The overall FY2018 income is expected to exceed expenditures by \$19,529.
- The overall FY2018 expenditures are expected to be lower than budgeted due to reduced expenditures from Marketing (\$9,265 lower), Training (\$5,000 lower), Research Supplies & Services (\$4,052 lower), and Travel and Hosting (\$6,000 lower).
- The fund balance for the Alliance is expected to be \$184,665 at the end of FY2018. Of this, \$26,541 is committed to North American DDI (NADDI) reserves (\$9,985) and prepaid sprint travel (\$16,556). The uncommitted fund balance (i.e., funds that are unencumbered by previously allocated expenses) at the end of FY2018 is anticipated to be \$158,124.

## Overview of FY2019 Budget

The budget for FY2019 (July 2018 - June 2019) has not yet been set or finalized by the Executive Board. The plan is to use the 2018 Annual Meeting of Member Representatives and Scientific Board meeting to determine Alliance priorities, which will inform the decisions made by the Executive Board when they finalize the budget in June.

[Appendix B](#) provides an overview of the FY2019 draft budget, which includes all committed expenses (i.e., expenses needed to continue daily operations of the Alliance, such as funding secretariat staffing, or new short-term expenses already approved to by the Executive Board), as well as proposed new expenses. Committed expenses are listed in green font. Proposed new expenses are listed in red font.

The FY2019 draft budget was compiled with input from the Executive Board, as well as from direct feedback from the leads of the Scientific Board, the Technical Committee, the Marketing & Partnerships working group, and the Training working group.

Below are summaries for each of the main draft FY2019 budget categories.

## Revenue

### Membership fees

- We are estimating that revenue will continue at the same level as FY2018.

## Expenditures

### Staff Salaries & Data Processing

- Salary expenses are projected to increase by three percent.

### Consultants

- The RDF and DDI 4 project managers were hired halfway through FY2018. Each is projected to have half of his/her contract remaining in FY2019.

### Research Supplies & Services

- No change, other than to support work to update the DDI Registry web site.

### Marketing

- Marketing is requesting for FY2019:
  - Conference travel/attendance: \$2,000 (10%)
  - Sponsorships and presence: \$8,000 (50%)
  - Marketing materials, print, swag: \$7,000 (40%)
- Barry Radler, chair of the Marketing & Partnerships working group, noted larger expenses that should be considered on a longer timeframe. These include:
  - Redesign/reorganization of the Alliance website
  - Hiring a dedicated marketing/promotions coordinator
    - Expanded use of PRNewswire service (beyond just promoting NADDI)
    - More exposure at conferences via a dedicate promoter (would include travel costs)
    - There are also potential synergies between a dedicated promoter and a dedicated training function sponsored by the Alliance

### Training

- Training agreed in FY2018 to allocate their funds to support a proposed DDI Train-the-Trainers training workshop.

### Technical Committee

- The Technical Committee (TC) is requesting funding for an annual TC meeting. This would be a recurring item in the DDI Alliance budget. The timing and content of the annual meeting will be based on the work program of the TC. The meeting would cover specific work that would take advantage of focused and concentrated activity of all or a major sub-group of the TC. For example, a meeting to address the movement of DDI-C, DDI-L and DDI4 completely into COGS.
- The TC currently consists of 11 members (6 from North America, 5 from Europe) so that location would be based on who would be attending and the timing of the meeting

(taking advantage of other travel plans by these members). The meeting should be 3-5 days in length dependent upon the work plan with clear, measurable outputs. Attendance would depend on availability and work plan. Estimated costs per person are \$1,980.

- Wendy Thomas, Chair of the TC, provided the following context:
  - “From the beginning of the DDI Alliance the TC (then the Structural Reform Group) held a yearly face-to-face meeting in Ann Arbor, MI at ICPSR. These were often held in conjunction with the ICPSR OR meeting if a significant number of members were already attending the ICPSR meeting. The last TC face-to-face meeting was in October 2012 at Dagstuhl. Following this meeting the Moving Forward Project started and funds were shifted. At the time this was expected to last only a few years. It should also be noted that DDI4 is only a portion of the work managed by the TC and the loss of this yearly face-to-face meeting has affected our ability generate products in a timely manner. In 2017 a small group of 4 TC members met in Minneapolis for one week. During this period we completed the entry of approximately 70 commits based on over 80 filed issues. This meeting also addressed the entry of documentation into COGS for processing and output testing. This meeting took place in Minneapolis where 3 of the members reside and obtained UKDA support for Jon Johnson’s travel funds.”

## Scientific Board

- Joachim Wackerow, Chair of the Scientific Board, is requesting the following funds in FY2019:
  - Dagstuhl workshop (Oct 1-5, 2018): funding for 8 or 9 people, 2/3 coming from North America. Workshop on interdisciplinary use of metadata specifications: half of the people should come from DDI (12 or 13), two third might need funding, resulting in 8 or 9 people. The workshop is a great opportunity to put DDI 4 into a larger picture. DDI 4 has great potential to be applied in cross-domain setting, especially regarding data description and process. The reason is that DDI4 avoided many domain-specific perspectives and that DDI4 is model-based which offers together with the main representations XML and OWL many options in combining with other technologies. This workshop is understood as the third in the series after two workshops on DDI and interoperability with other standards in 2015 and 2016. Based on 2016 and 2017 Dagstuhl workshops, average total funding request: \$16,000.
  - Berlin working meeting (Dec 26-30, 2018): 10 people, 1/2 coming from North America. This meeting before EDDI, will focus on two levels, conceptual topics (model, views for user needs, bindings, balance between these requirements) and technical topics (issues which came up before and after the prototype release). Both levels have the main goal of consolidation of DDI 4. Based on past sprint funding, estimate funding requests to be \$8,000.

- Working meeting in first half of 2019 with similar funding needs. This meeting will be a continuation of the Berlin meeting. Time and location have to be determined. Based on past sprint funding, estimate funding requests to be \$8,000.
- OWL/RDF: 20,000 USD
  - Continuation of OWL/RDF work after prototype release. The current contract covers all the work for the prototype. Some work was quiet difficult because the model and the technical representation of it did still change. Open issues (based on the original plan) are:
    - Integration and/or mapping of/to other vocabularies
    - Testing the round-trip of metadata between RDF and XML. Review of the ontology based on the results. Related test cases.
    - Validation of RDF instances. Test cases. Tools.
    - JSON-LD binding

## Summary

- The budget for FY2019 (July 2018 - June 2019) has not yet been set or finalized by the Executive Board.
- If all committed expenses (\$83,472) are approved, there will be \$25,028 remaining of net income before dipping into reserves.
- If all requested funds are approved, total expenses will surpass total revenue by \$71,752 (net loss).
- While the FY2018 projected unallocated ending fund balance is \$158,123.98, the Executive Board will need to determine what level deficit, if any, the Alliance is willing to run during FY2019.
- The Executive Board will use the 2018 Annual Meeting of Member Representatives and Scientific Board meeting to determine Alliance priorities, which will inform the decisions made by the Executive Board when they finalize the budget in June.

	<b>Actual FY2012</b>	<b>Actual FY2013</b>	<b>Actual FY2014</b>	<b>Actual FY2015</b>	<b>Actual FY2016</b>	<b>Actual FY2017</b>	<b>Forecast FY2018*</b>	<b>Actual FY2018</b>	<b>Budget FY2018</b>
<b>Total Revenue</b>	\$74,917.00	\$84,807.00	\$84,815.00	\$87,419.00	\$85,345.00	\$98,074.00	\$111,500.00	\$111,500.00	\$101,000.00
<b>Expenses</b>									
Staff Salaries	\$31,970.00	\$22,549.00	\$25,544.00	\$29,633.00	\$28,989.00	\$22,401.77	\$28,000.00	\$19,426.74	\$28,412.00
Consultants		\$4,970.00	\$4,970.00	\$27,426.00	\$20,360.00	\$1,945.12	\$29,083.97	\$14,383.97	\$33,000.00
Data Processing	\$2,760.00	\$2,217.00	\$1,879.00	\$3,003.00	\$3,224.00	\$2,433.26	\$3,400.00	\$2,473.04	\$3,500.00
General Expenses		\$73.00	\$15.00	\$150.00	\$113.00	\$341.70	\$789.64	\$814.90	
Marketing					\$6,567.00	\$16,398.33	\$5,734.86	\$3,630.32	\$15,000.00
Research Supplies & Services	\$54,205.00	\$2,900.00	\$5,647.00	\$5,876.00	\$948.00	\$2,748.00	\$948.00	\$948.00	\$5,000.00
Training					\$1,073.00	\$0.00	\$0.00	\$0.00	\$5,000.00
Travel and Hosting	\$17,191.00	\$28,814.00	\$17,209.00	\$22,218.00	\$40,646.00	\$30,464.11	\$25,000.00	\$23,114.86	\$31,000.00
Transfer	-\$13,974.00								
<b>Total Expenses</b>	\$92,152.00	\$61,523.00	\$55,264.00	\$88,306.00	\$101,920.00	\$76,732.29	\$92,956.47	\$64,791.83	\$120,912.00
<b>Revenue Over/(Under) Expenses</b>	-\$17,235.00	\$23,284.00	\$29,551.00	-\$887.00	-\$16,575.00	\$21,341.71	\$18,543.53	\$46,708.17	-\$19,912.00
<b>Ending Fund Balance</b>	\$109,407.00	\$132,691.00	\$162,242.00	\$161,355.00	\$144,780.00	\$166,121.71	\$184,665.24	\$212,829.88	\$146,209.71
<i>Committed Ending Fund Balance</i>							\$26,541.26	\$26,541.26	\$26,541.26
<i>Uncommitted Ending Fund Balance</i>							\$158,123.98	\$186,288.62	\$119,668.45

Currency in USD

\*Forecast compiled May 18, 2018



# DDI Marketing and Partnerships Group

## Report and Plan 2018

**Team:**

Barry Radler

Kelly Chatain

Jared Lyle

Steve McEachern

Ron Nakao

Dan Smith

Wendy Thomas



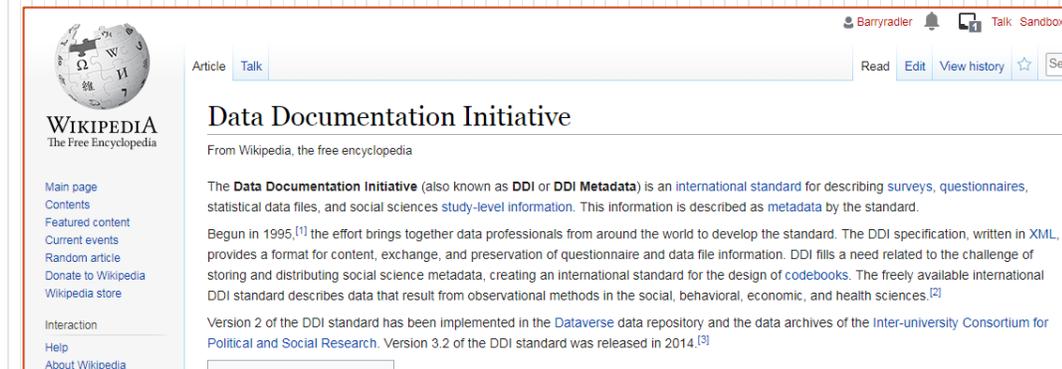
# Mission Statement

- Coordinate marketing activities, establish DDI brand, ensure consistent messaging
- Interface with other standards bodies (Partnerships)
- Goal: Increase the DDI user community and DDI Alliance membership



# What worked during the past year?

- Promotional activities
  - APDU webinar
  - Response to OMB and NSF Request For Information
  - Opened PRNewswire account for distributing press releases
    - Promoted NADDI
    - Opportunities to expand use?
- Online presence
  - Update time-sensitive content on website
  - Twitter account: @DDIAlliance
  - Updated Wikipedia page
  - Monitoring website traffic with Google Analytics



All Users  
100.00% Users

+ Add Segment

May 10, 2017 - May 10, 2018

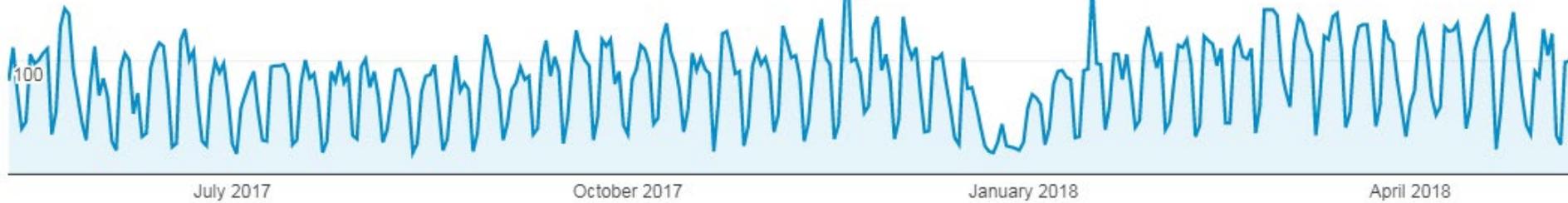
Overview

Users vs. Select a metric

Hourly Day Week Month

Users

200



Users

23,055



New Users

23,092



Sessions

33,839



Number of Sessions per User

1.47



Pageviews

83,942



Pages / Session

2.48



Avg. Session Duration

00:02:30

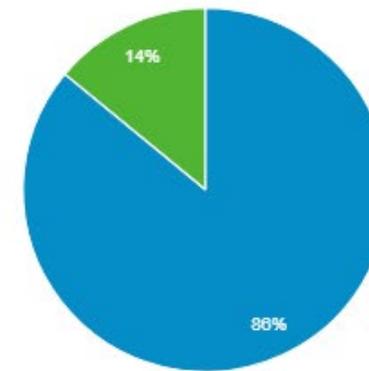


Bounce Rate

55.97%



New Visitor Returning Visitor



Country ?	Acquisition			Behavior		
	Users ? ↓	New Users ?	Sessions ?	Bounce Rate ?	Pages / Session ?	Avg. Session Duration ?
	23,055 % of Total: 100.00% (23,055)	23,103 % of Total: 100.05% (23,092)	33,839 % of Total: 100.00% (33,839)	55.97% Avg for View: 55.97% (0.00%)	2.48 Avg for View: 2.48 (0.00%)	00:02:30 Avg for View: 00:02:30 (0.00%)
1.  United States	7,104 (30.40%)	7,108 (30.77%)	9,738 (28.78%)	56.37%	2.58	00:02:14
2.  Germany	1,436 (6.15%)	1,410 (6.10%)	2,430 (7.18%)	48.64%	2.91	00:03:09
3.  United Kingdom	1,250 (5.35%)	1,215 (5.26%)	1,843 (5.45%)	51.98%	2.51	00:02:14
4.  Canada	1,184 (5.07%)	1,171 (5.07%)	1,794 (5.30%)	54.57%	2.62	00:02:41
5.  China	910 (3.89%)	904 (3.91%)	1,131 (3.34%)	76.39%	2.12	00:02:56
6.  Australia	786 (3.36%)	780 (3.38%)	1,052 (3.11%)	53.61%	2.36	00:02:11
7.  India	786 (3.36%)	780 (3.38%)	925 (2.73%)	66.59%	1.83	00:01:45
8.  Netherlands	600 (2.57%)	595 (2.58%)	768 (2.27%)	50.91%	2.53	00:02:14
9.  France	479 (2.05%)	469 (2.03%)	743 (2.20%)	47.91%	2.93	00:02:49
10.  Finland	418 (1.79%)	403 (1.74%)	804 (2.38%)	53.73%	2.46	00:02:46

Page ?	Pageviews ? ↓	Unique Pageviews ?	Avg. Time on Page ?	Entrances ?	Bounce Rate ?	% Exit ?
	83,942 % of Total: 100.00% (83,942)	65,196 % of Total: 100.00% (65,196)	00:01:40 Avg for View: 00:01:40 (0.00%)	33,629 % of Total: 100.00% (33,629)	55.97% Avg for View: 55.97% (0.00%)	40.06% Avg for View: 40.06% (0.00%)
1. /	19,209 (22.88%)	15,232 (23.36%)	00:01:19	14,094 (41.91%)	49.75%	45.68%
2. /explore-documentation	6,327 (7.54%)	5,113 (7.84%)	00:02:20	907 (2.70%)	71.06%	45.39%
3. /resources/tools	4,676 (5.57%)	3,547 (5.44%)	00:01:12	1,379 (4.10%)	52.51%	31.05%
4. /training/getting-started-new-content/create-a-codebook	3,324 (3.96%)	2,558 (3.92%)	00:03:42	2,272 (6.76%)	60.90%	66.67%
5. /training/why-use-ddi	3,142 (3.74%)	2,714 (4.16%)	00:02:10	1,513 (4.50%)	74.27%	50.03%
6. /controlled-vocabularies	3,116 (3.71%)	1,887 (2.89%)	00:02:27	955 (2.84%)	50.31%	38.41%
7. /training/getting-started	1,780 (2.12%)	1,043 (1.60%)	00:00:37	147 (0.44%)	29.29%	10.39%
8. /about/about-the-alliance	1,628 (1.94%)	1,202 (1.84%)	00:00:56	245 (0.73%)	62.20%	24.45%
9. /resources/markup-examples	1,505 (1.79%)	811 (1.24%)	00:01:12	215 (0.64%)	61.29%	23.85%
10. /specification/ddi-lifecycle/3.2/	1,306 (1.56%)	963 (1.48%)	00:02:23	286 (0.85%)	45.55%	37.21%

# What worked during the past year?

- Promotional activities
- Conference attendance
  - Ongoing use of promotional printed and electronic materials, conference schwag
  - Continued promotion to communities/conferences
    - Sponsorships, exhibitions, and ads at IASSIST, AAPOR, ESRA, APDU, EDDI, NADDI



# What worked during the past year?

- Promotional activities
- Conference attendance
- Coordination with other DDI groups
- Increased user community (Partnerships)
  - Four new DDI Alliance members since May, 2017
  - AAPOR Transparency Initiative – webinar in August, 2018
  - Some followup last week at AAPOR



# Challenges looking forward

- Establishing relationships with other standards bodies
- Refining process of promotion among working groups
  - Steps: Attention → Interest → Education → Training, documentation, tools
    - How to improve hand-off among groups/steps?
    - How to engage new community members?
    - Maintain email list of users, conference attendees/invitees
- Identifying customers? Users vs. active individuals?
  - Identifying metrics for success of promotions:
  - “Half the money I spend on advertising is wasted; the trouble is I don't know which half.” - John Wanamaker (1838-1922), considered a "pioneer in marketing”



# Plans for next 12 months

- Promote:
  - Prototype review
  - Updates to DDI 3.3 and XKOS
    - Coordinate with TC
- Improve website
  - Develop email list (list-serves, conference attendees, invitees)
- Continue/expand conference presence and attendance
  - Consider more sponsorships, “getting in the program” is ideal
- Begin feedback and input process from members
  - Consider sit-down interviews with each DDI Alliance member



# Resources required next 12 months

- 2018 budget (\$17k)
  - Ongoing - marketing materials, printing brochures, conference schwag,
    - PRNewswire?
    - Website development?
  - Ongoing - conference sponsorships, advertising, attendance/travel
- 2019+: Outsource tasks not being accomplished by volunteer contributions
  - Dedicated Marketing and Promotion position:
    - Website design and maintenance
      - Updating Wiki, social media
      - Press releases, promoting user conferences
      - Conference attendance and active outreach
      - Grant writing



## Technical Committee Report for 2017/2018

Submitted by: Wendy Thomas, Chair on behalf of the Technical Committee

During the 2017/2018 period the Technical Committee addressed the full range of DDI products:

- The TC continues to work with the Controlled Vocabularies Working Group to better integrate their production work with that of the TC by:
  - Consulting with the CV Group on the Controlled Vocabularies development and management system under construction by CESSDA
  - Adding class level documentation to DDI-Codebook and DDI-Lifecycle providing reference to existing DDI published CVs
  - Providing technical support for creating alternate bindings for CVs produced from the new system
- A sub-group of the TC had a face-to-face meeting for one week in June 2017. The group met in Minneapolis, MN with travel support provided by the UKDA. The group consisted of Wendy Thomas, Jon Johnson, Jeremy Iverson, and Dan Smith and focused on bringing the DDI-Lifecycle 3.3 schema up to date with the resolved issues in JIRA. We also reviewed the open source COGS tool created by Colectica to manage the process of updating DDI schemas and documentation in the future (currently all is hand-crafted). The documentation of DDI 3.2 was loaded into the system as a means of testing the documentation production aspects of COGS using the Sphinx tool used by DDI4. Documentation for both the 3.3 review and for an update of 3.2 documentation (which is planned following review of 3.3) will be produced with this system. It may also be used to produce documentation for an updated DDI-Codebooks so that all DDI product documentation has a familiar look and feel.
  - A review of the COGS system and the current Drupal ([lion.ddialliance.org](http://lion.ddialliance.org)) as options for DDI 4 development was prepared at Dagstuhl 2017. The COGS system was approved for use following the DDI 4 Prototype Review as a system which meets the needs of the development project as articulated by the project members.
- XKOS completed a public review at the end of 2016-2017. Thanks to Franck Cotton and Thomas Francart the issues were resolved and the vocabulary and documentation updated. XKOS is scheduled for release in mid-June.
- The schema including class level documentation is complete for DDI-Lifecycle 3.3 and is available for download at:
  - [https://bitbucket.org/DDITC/ddi-l\\_3](https://bitbucket.org/DDITC/ddi-l_3)
  - The formal review period will begin in early June for a period of 6 weeks. The plan is to complete this review period prior to the DDI Prototype review.
- In February 2018 the Technical Committee began to review the model of the DDI Prototype provided by the Modeling Team which followed work done by the working groups through 10 December 2017. Initial work focused on issues which affected the work of the RDF group or addressed consistency issues found during the creation of documentation and examples. Since April 2018 the TC has begun to address integrity issues which can be followed at:
  - <https://ddi-alliance.atlassian.net/wiki/spaces/DDI4/pages/409763841/DDI+4+Prototype+TC+Integrity+Check+-+2018>

During the first half of 2018/2019 TC plan to focus on:

- Publishing XKOS
- Resolving issues raised in the DDI 3.3 review and preparing it for publication
- Preparing for and managing the results of the DDI 4 Prototype Review
- Reviewing issues filed for DDI-Codebook
- Shifting DDI Lifecycle and DDI-Codebook production work to COGS
- Preparing for the shift of DDI 4 development work to COGS from Drupal

## DDI Alliance

### Strategic Plan 2018-2022

Draft for comment - 15 May 2018

#### Introduction

As the DDI Alliance moves into the next phase of its development, there are some overarching priorities that the Alliance needs to address. Framed broadly, these priorities fall into three core areas: the DDI community, the Alliance as an organisation, and the set of DDI standards and work products that the Alliance maintains.

The strategic plan is developed along the following lines to address these broad priorities:

1. Community and outreach: how do we engage with the DDI community and understand the community's needs?
2. Organisational needs: what structures and systems does the Alliance need in order to meet those needs, and how will it maintain those structures and systems in the long term?
3. Standards: what products does the Alliance provide and maintain, and how do those products meet the needs of the Alliance and the broader community

The DDI Alliance budget and work program, to be developed subsequent to the acceptance of the Strategic Plan, are then intended to align with these strategic priorities. This will include the need to identify resources (including money, time and in-kind contributions), and responsibilities (e.g. party/organization/team) for each part of the strategic plan. Similarly, the resource constraints within the Alliance will by necessity limit the extent to which we can achieve the goals set out in this Plan.

## Working principles

The specific strategic activities proposed in the plan have been established with the following principles in mind:

- 1) Don't leave anyone behind--no dead end with any prior DDI track
- 2) Lower barriers to entry/use
- 3) Respond primarily to user demands/requests
- 4) Market, market, market
- 5) Simpler is always better
- 6) Let user requests drive development

## Strategic Priority Area One: The DDI User Community

### PROBLEM STATEMENT:

The DDI community is driven by volunteers and the standard's success is directly related to its ability to attract, develop, and retain individuals willing to contribute their time and efforts. Users in the DDI context can be understood as both the formal members of the Alliance, but also more broadly other agencies, archives, statistical agencies, software developers, data providers, and related entities. These users can have complementary but also sometimes conflicting needs to be addressed by the Alliance and by its standards and work products.

By extension of this idea, understanding the community and its needs is probably the most important thing DDI can do to ensure its future. Doing so is likely to activate a virtuous cycle of growing membership, use, tools, and usability of the standard.

By enabling better interaction and engagement with the community, the Alliance is able to better understand the needs that the Alliance products are supporting. In doing so, better engagement with the members and the broader community of users should also enable additional resources to become available to the Alliance for contributions to community efforts. The core concerns to address in Strategic Actions in this area focus on understanding and support of the needs of the DDI user community and membership, and the expansion and extension of the user community into related areas and disciplines<sup>[a]</sup>.

### STRATEGIC ACTIONS:

1. Engagement with Global Digital Research Infrastructure.

Now is the time to make the successes of DDI specifications more widely known in the community making up global digital research infrastructure. This global community has focused on building infrastructure to support interdisciplinary research on today's big science topics. The interoperability of metadata for discovery and access to research data is an essential component of these national and international infrastructure developments. DDI specifications can play an integrating role in making social, economic, and behavioural data available to emerging interdisciplinary research endeavours. This strategic direction identifies three actions in which the DDI Alliance can increase its engagement with Global Digital Research Infrastructure.

- a. Develop best practices to map and translate DDI for DataCite, schema.org and other key metadata repository services.
- b. Engage with RDA IG's and WG's, CODATA, and Force 11 to advance DDI's integration into the larger digital research infrastructure framework.
- c. Increase communications with other metadata standards setting organisations for discipline-specific research data types.
- d. Fostering usage of DDI with other metadata specifications. Promoting cross-domain usage of DDI (therefore identifying suitable parts of DDI for this purpose)

## 2. Solving Common Problems with Current DDI Users. [\[b\]](#)

Periodically, DDI Alliance faces the criticism that its products are unknown to researchers even though the Alliance is working to solve common problems confronted in research and is often engaged with current DDI users in finding solutions. Three actions are proposed to strengthen the working relationship of the DDI Alliance with current DDI users and to create new possibilities to engage with researchers who are not yet familiar with the Alliance even though in need of metadata solutions in their research.

- e. Prepare guidelines to assist end users in their choice of DDI specification
- f. Create validation tools and profiles to support interoperable DDI metadata across tools and organisations
- g. Assist software developers of DDI tools through a gap analysis on needed tools, guidelines for software usability, training, and support letters to funders

## 3. User group development program

Recognising that there are often similar sets of needs among categories of DDI users, there is an interest in establishing user communities within the broader Alliance. This action proposed establishing an initial user group among national statistical organisations - major data producers for whom the documentation, discovery, and interoperability of their data are vital to their operations. Over the years, the DDI Alliance has worked with some NSO's to integrate DDI specifications with their implementation of the Generic Statistical Information Model and the Generic Statistical Business Process Model. The DDI Alliance and NSO community share common goals to establish and maintain high quality metadata standards for social, economic, and behaviour data. This strategic direction proposes three actions to strengthen the relationship between NSOs

and the DDI Alliance and to communicate the benefits of such partnerships with other data communities.

- h. Create an NSO advisory committee<sup>[c][d]</sup>
- i. Promote successful DDI uses by NSOs
- j. Use NSO outreach model to establish similar groups within other user communities

## Strategic Priority Area Two: The DDI Alliance as an Organisation

The Alliance has a broadening set of both members and user needs, bringing with it new requirements for the standards and outreach that we do. One impact of this broadening reach is the need to become more “professional”<sup>[e][f][g]</sup> in the way the Alliance operates. This professionalisation includes the maintenance and development of our core organisational infrastructure (such as websites, marketing and project management). At the same time, we want to retain the core volunteer culture that formed the foundation of the Alliance, and continues to drive the participation of many members and participants in the Alliance. We are facing a period of volunteer and staff renewal, requiring the need to expand our core development base and volunteer community.

### 1. Generational Renewal

- a. Recruit the next generation of knowledgeable and skilled core technical development team
  - i. Who is actively engaged in this now? What are their organizations? What is the committee membership? Does it have a rotation? A leadership? Can we set up a schedule with a rotation of membership and leadership, with the leader of the committee responsible for identifying and planning for new leadership and new membership, say every two years?<sup>[h][i][j]</sup>
- b. Expand skilled marketing team that is connected to relevant communities<sup>[k]</sup> (archives, software producers, data producers, statistical agencies, individual researchers, other standards)
  - i. ~~Who is actively engaged in this now? What are their organizations? What is the committee membership? Does it have a rotation? A leadership? Can we set up a schedule with a rotation of membership and leadership, with the leader of the committee responsible for identifying and planning for new leadership and new membership, say every two years?~~

- c. Renew active and engaged membership at the institutional level in the DDI community (strengthening the commitment)
  - i. How many institutions do we have now? Can we show graph of membership over time?
- 2. Training: Enabling trainers to do what they need to do
  - a. Recruit much needed human resources to offer multifaceted DDI training.
    - i. Develop a role for a membership appointed DDI Alliance designated “Trainer”
      - 1. The official DDI Trainer will work with the DDI Alliance Training Working Group and offer dedicated support for training in all formats and types; as needed and in close collaboration with the various WGs and Executive Board requirements for at least a 1-year period.
      - 2. DDI Trainer will provide support for in-person training at conferences, workshops, seminars, as requested and funding permits.
  - b. Build-up online training presence to expand current offering of training.
    - i. Extend the current offering of online training materials to support self-driven, passive training through online and web-based training delivery
    - ii. Develop web-based video tutorials such as “What is DDI?”, “How to get started with DDI?”, “Building reusable questionnaires with DDI”, etc.
  - c. Support new trainers and users with easy-to-understand and reusable tools for DDI Training
    - i. Develop reusable checklists for getting started with DDI
    - ii. Develop and maintain a listing of organizational DDI user profiles, licensed openly for reuse
    - iii. Develop, gather and share reusable training materials (e.g. training toolkits for different audiences and use cases)
- 3. Business Structure
  - a. Establish a periodic review of organizational structure
  - b. Develop a sustainable business model for the Alliance
  - c. Develop an organizational succession plan for the Alliance

### Priority area Three: [Standards and Work Products](#)

PROBLEM STATEMENT:

The DDI Alliance currently maintains two lines of the DDI standard (DDI-C and DDI-L), with a third line in development. This is complemented by a set of controlled vocabularies, registry services and related products, which serve to support the needs of the wide range of users in the DDI Community. Strategic actions on DDI Standards are intended to provide orientation on which standards and work products to develop and maintain, and why. There is need to be able to maintain the existing standards to ensure that we can continue to support small scale users such as academic libraries and research centres, while continuing to develop the new line of DDI4 model-based standards<sup>[l]</sup> and associated work products to support the expanding user base in communities such as statistical agencies and data producers.

#### STRATEGIC ACTIONS:

1. Maintaining multiple lines of specifications<sup>[m]</sup> and controlled vocabularies
  - a. Offering stable specifications and controlled vocabularies (reference Work Products)
  - b. Enable DDI specs to adapt to changes in information technologies<sup>[n]</sup> and bindings (XML, RDF, Schema, ...)
  - c. Production testing/validation for quality assurance
  - d. Improve documentation/examples/best practices guidelines
2. Introduce validation tools, testing support, and profiles/views for users for the purpose of interoperability
  - a. Test cases, test bed, test harness
  - b. Rules for validation/reporting
3. Working DDI infrastructure: a network of resource-based ... (Achim to add)
4. Registries-repositories
  - a. Specify DDI's vision of building DDI into Common Data Element registries (Strategic Plan & Vision)
  - b. Identify ways for establishing registries for supporting existing legacy DDI metadata<sup>[o]</sup>
  - c. Develop standard query and exchange protocols/interfaces

<sup>[a]</sup>Perhaps "into areas and/or disciplines that offer synergies for DDI"? A bit more focused on relationships whereby DDI can benefit, rather than just outreach to common areas of data management and documentation...because those areas happen to be similar. A subtle but important distinction.

Also part of this thought, especially below in 1a-1d: how do we determine what are fruitful relationships to pursue? How do we avoid dead-end collaborations, or ones in which the cost/benefit ratio is not in DDI's favor?

<sup>[b]</sup>A fundamental conundrum that needs to be acknowledged is the difficulty in knowing who uses DDI. As an open standard, users can just use DDI and we might never know about it. I believe I mentioned this in last week's call. Before we can solve "current DDI Users" problems, we first need to identify them, we need a better handle on the size and composition of our customers.

It may also help to get a handle on our audience characteristics by classifying or categorizing our audience by scope or extent of use? E.g., NSO's concerns should probably be given considerably more weight than an individual researcher's?

[c] An advisory committee is ambitious. NSOs would expect active guidance. Can the DDI Alliance this really provide with the background of small resources and that NSOs are very experienced organizations in their field

[d] This again might not be the ideal wording - an advisory committee has a significant function that may be more than we intend

[e] Is there a better term to use here?

[f] Seems appropriate considering you are juxtaposing it with the volunteerism ethic currently driving many DDI operations.

[g] experts?

[h] Do we need to remove these substatements??

[i] Useful detailed questions and suggestions.

[j] We should replace with answers :).

[k] The Alliance would do well to consider a salaried marketing position that would be dedicated to nurturing organizational-level outreach and increasing awareness of DDI. Volunteer efforts, as worthy as they are, just don't have the legs or chops to accomplish meaningful development along these lines. DDI really needs someone who can move the needle.

[l] Since its inception DDI 4/Model-Based/etc was always framed as a continuation of the DDI-Lifecycle line. Has this changed, and if so where is the documentation announcing that change?

[m] During the discussion on this topic, the question arose about the sustainability of maintaining multiple specifications. I believe that the hope is that DDI-Model will allow us to express specifications for DDI-Codebook and DDI-Lifecycle.

I believe that 3b is related to this point.

[n] Could we build in a regular external review of our technologies to ensure we're up to date?

[o] could re3data.org be such a registry?

## What are your organization's metadata needs for the next 12 months?

The new content of DDI 3.3

=====

Converting our in-house questionnaire design to DDI3 from our in-house system QSL (Questionnaire Specification Language)

=====

more metadata on geodata, social media data etc.

=====

"I'd like to mention a few requirements that we have at StatCan for describing data and metadata across the GSBPM. They might be shared by other NSOs too. These are requirements that come up often in Enterprise Architecture and Strategy discussions at Statistics Canada regarding our modernization projects. I'd like to submit them for your consideration, although they might not directly impact the strategic plan.

The most pressing need for us is to better understand how we are going to use DDI 4, SDMX and other standards, as data exchange models for interoperability across multiple data capabilities to implement coherent, integrated, end-to-end statistical production solutions. There are many objects across DDI 4 data description, conceptual, representations, workflow and others that can help, but it's unclear how they could be put together in a coherent fashion to implement this type of solutions, which include machine learning and other advanced analytics techniques. Knowing where DDI 4 is heading vis-à-vis GSBPM, data capabilities, and some key statistical production use cases, could inform the StatCan's modernization roadmap and help us align better with the DDI 4 strategic plan.

A big part of StatCan's modernization is to have metadata-driven processes. Beyond encoding business logic in the process and workflow models, there is also the question of whether DDI 4 provides enough fine-grain data description to support those processes. One of them is data provenance and lineage. We've been looking at standards like PROV, and it would be useful if DDI could integrate somehow with PROV, or represent similar traceability of datums across datasets. For instance, in areas like National Accounts, we need to trace all the datums that have contributed to an aggregate value, including knowing how the value was aggregated, why, and what type of agent performed the aggregation. That kind of traceability is also required in other areas of the model, e.g. conceptual, to determine how concepts evolve over time, how they merge, split, change, etc. This is also actionable metadata in the sense that it can be used to automate statistical production as well.

There is a level of detail where metadata becomes organization-specific, and perhaps even process-specific. DDI shouldn't be concerned with that level. However, I think there is still no clear line between "too detailed and specific metadata for DDI 4" vs. "very detailed, but still generic enough to include in the DDI 4 model". That's probably a discussion that needs to happen with concrete use cases and trade-offs analyses.

Integration with other standards for interoperability is also key. I mentioned PROV already. Another one, in the NSO context, is VTL, a standard language for defining validation and transformation rules developed in the context of SDMX. Integrating with VTL could bridge the gap we currently have in transformation languages on DDI representations and would allow us to express complex rules that can be easily implemented wherever DDI is used.

I mentioned PROV and VTL only as examples. There is no reason for limiting DDI 4 to either, they just illustrate the type of functionality we need. The more such functionality is in DDI, in one form or another, the better.

This is by no means an exhaustive list, but it includes some of the requirements we have as we implement the statistical production modernization at StatCan.

=====

In the next 12 months, our biggest needs are support for Classification Management and Non-Survey data capture. We are very excited that both of these features are included in the upcoming DDI 3.3 Lifecycle release.

=====

We are documenting the processing and public use data for one of our surveys. The ability to describe a process and its underlying methodology is critical.

=====

To have a common set of metadata elements across disciplines (best core elements from disciplines with attention to compatibility with the DDI codebook and the DDI lifecycle if possible) and easy tools to capture, conceptualize and input that metadata to prepare for tri-agency driven RDM & data deposit/sharing in Canada for publicly funded research data. /

## What are your organization's metadata needs for the next 5 years?

Flatter content for the standard. Good mapping between versions. Clear transformation paths

=====

Ongoing questionnaire creation and building our repository (using Colectica) which will replace dozens of spreadsheets and information silos.

=====

more metadata on geodata, social media data etc.

=====

Looking over the next 5 years, we need a metadata specification which is mature, production ready, implementable, well tested, and has a documented and enforced change management process in place for incremental improvement. The only viable option, from the DDI Alliance, which fulfills these requirements is DDI Lifecycle (3.x).

=====

Expansion of the nearer term one year needs given above is a primary concern. Using the metadata describing variables to drive the processes is another goal.

=====

To have metadata supporting "data" deposits where the actual data cannot be shared, or where the original data was significantly transformed into something else, but where a practical and understandable metadata standard could support transparent information about / - instruments, scales and code and related materials including XML files stripped of data, / - common case study, ethics / sharing metadata, and / - actual data security protocols in place whether local or otherwise. / / To have some broad variations of the core set of metadata elements and related support tools. Currently curating mixed data across qualitative/quantitative/experimental/computation methods and mixed primary/secondary data sources is quite difficult,

## What does your organization need from the DDI Alliance in the next 12 months?

To get the standard updated in a timely fashion.

=====

Better and richer examples. DDI is not simple. We have bought into Colectica to minimise exposure to DDI, but still have questions/concerns as to what goes into where. Many elements could contain metadata, and many structures exist that do similar things. knowing which is best isn't easy to work out.

=====

How do we organize DDI literacy in the university. I would like to advocate to DDI awareness so that the researchers, students and professors have resources for documenting their research and/or surveys

=====

More information on the progress of DDI 3.3 and DDI 4

=====

Over the next year, we hope that the DDI Alliance continues with efforts to discover users'™ needs, and investigate how the current products (Codebook, Lifecycle, and Controlled Vocabularies) can be extended and improved to address user needs. I really appreciate the effort to gather feedback using this survey, thank you.

=====

We need continued support of the DDI by the Alliance.

=====

Produce a journal and community concerned with metadata about metadata standards, successful metadata subsets (for interoperability or project / program / study focused), and reproducing original applications of metadata standards.

## What does your organization need from the DDI Alliance in the next 5 years?

The DDI Alliance was formed to produce standards products. It needs to act like a business in terms of its development with clear short term goals that fit into a broader development plan. This shouldn't be an academic research project...interesting but unfocused. If we want to

explore these areas academically in order to determine what is needed in a standard it should be done in a way to feed into the standards development process not take it over.

=====

Continued support for DDI3 and 'easy to implement' upgrade paths to versions that follow.

=====

Software. Inuitive interface software.

=====

Good documentation and explanation of DDI 3.3 and DDI 4 (more detailed Field Level Documentation, USE CASE Examples, Trainings)

=====

Over the next 5 years, we would like to see the DDI Alliance to be a good steward of its published specifications by supporting them, evangelizing their use, and lobby for their inclusion in any recommendations or publications related to data documentation published by professional organizations, funding agencies or government departments.

=====

Traditionally, it seems to me the Alliance is by and for data libraries and archives. With increasing participation from NSOs, it might be useful to have parallel efforts, with one geared towards needs specific to NSOs.

=====

Support to customize our own metadata standards based on metadata standards like DDI, but taking from other standards.

## Please provide your feedback about the "Engaging with the Community" section of the draft strategic plan.

We do need to engage our current community so that they are not lost and can position themselves to contribute to and take advantage of DDI development. We also need to identify and pursue the needs of communities that do not have available standards that fit into our larger mandate and see if we can meet their needs. Interaction with the broader standards community would bring awareness of DDI and an understanding of its role within the standards world.

=====

Really like the fact that your focus is on ' understanding the community and its needs' I think that will help us as data technician/librarian/documentalist to work more efficiently because we know that if we facing an issue with DDI (documentation/software/events)... we can find help or upcoming resources or project will be soon on track to fulfill our needs

=====

No remarks from Insee on the strategic plan. We support the actions mentioned in the "Community" strategic area, specifically the actions about an NSO advisory committee and promoting successful DDI uses by NSOs. We would be interested in contributing to these subjects.

=====

I encourage the DDI Alliance to find ever increasing success where it has already found success.

The uptake of DDI Lifecycle by the NSO community is a very big success, and a feather in the cap for the DDI Alliance. I encourage the Alliance to capitalize on this success and continue to pursue and support this user group. I also encourage the DDI Alliance to leverage this success in their marketing to other types of user groups, as usage by official providers lends a large amount of credibility.

In addition to community engagement, the DDI Alliance should also be cognizant that a majority of people who use DDI or DDI tools are not part of the community nor wish to develop standards. General users may use a tool to help them perform a task. For general users, the Alliance should encourage awareness of their DDI usage and point out the high level benefits the DDI has enabled. For tool developers, the DDI Alliance should work to promote the feature set of DDI and why it would have a benefit over a home grown format.

## Please provide your feedback about "The DDI Alliance as an Organisation" section of the draft strategic plan.

clarity would help.

=====

I feel that the most important role of the DDI Alliance is to market and promote adoption of its published specifications. With increasing adoption of DDI, more organizational members, technical volunteers, and in kind contributions will follow.

## Please provide your feedback about the "Standards and Work Products" section of the draft strategic plan.

The DDI Alliance was created as a standards development body. It doesn't seem to have the coordinated resources to get this done and does not support the divisions of duty that it has in its by laws. This should be the primary focus of the alliance.

=====

Great! Nothing to add.

=====

I disagree with the premise that the DDI Alliance's existing specifications are for small scale users and that only DDI4 is suitable for statistical agencies and data producers. These statements are proven false by the large scale adoption of DDI 3.2 by statistical agencies and large commercial contractors. I do not think that the DDI Alliance should belittle and abandon its existing published specifications on hopes for a future version of unknown quality.

To be frank, I am a huge supporter of moving to a model based architecture and have advocated for multiple bindings to DDI since joining this community in 2004. I was excited when the moving forward project began. The two goals, specifying the model in a standard way instead of within the XML schema, and creating a technology platform for generating the XML schema, RDF, and other bindings, are both goals that the Alliance should continue to pursue.

However, the steady focus on these two simple goals was lost, the number of active participants shrank, and the moving forward project is now an overly-complicated subset of DDI Lifecycle's content with no backwards compatibility or upgrade path for current users. I hope that the Alliance can distill the good ideas and binding implementations planned during the moving forward project, combine those ideas with the current published Lifecycle specification, and find a way forward which includes an upgrade path for current users into a model based world.

## Do you have other feedback you would like to provide about the DDI Alliance and/or the draft strategic plan?

I am concerned about the added areas of focus when we do not support the core functions of the organization. We should clean up our act and become effective at that before branching out into any new areas. We need to a) support the maintenance and development of the standard (ALL of our product), b) market our product as well as the Alliance and provide support for users, and c) then pursue peripheral work.