

# DDI Alliance Executive Board Meeting

## 1 April 2020

*Present: Maggie Levenstein, Jared Lyle, Steve McEachern, Barry Radler, Joachim Wackerow, Jane Fry (Guest)*

### Training Working Group Update

Jane Fry, co-chair of the Training Working Group, provided an update on the group's recent activities and upcoming plans. See Appendix 1 for the group's report.

Jane was asked whether the Training Working Group will continue the introductory workshops at conferences next year. She indicated they plan to continue to offer the workshops. It was noted that tutorials could be taught not only at conferences with a DDI-aware audience (like IASSIST and the DDI user conferences) but at survey methodology conferences and similar summer schools, such as ESRA, RC33, AAPOR, and conferences where large studies with comparison across space/time like ESS and SOEP are in focus. Additionally, conferences on official statistics might be an opportunity like events of the UNECE and Eurostat.

It was encouraged that the Alliance announce via mailing lists and on the web site about funding opportunities for workshop instructors.

Jane was asked whether the Training Working Group plans to continue work on the training library, including hiring an editor. Jane indicated they do plan to continue developing the training library.

The Board expressed appreciation to Jane and Anja Perry, the other co-chair, for their efforts to renew activities of the Training Group. It was noted the large number for working group participants, including several members who had not previously engaged in Alliance activities.

### Annual Meeting

The Board discussed the date and duration of the virtual annual meeting, which is taking the place of the in-person annual meeting that was cancelled due to the COVID-19 pandemic. It was suggested to use the same date (18 May) but reduce the length of the meeting to 1-2 hours. The major points of discussion for the meeting will include Alliance business (annual report, budget report), plus the outcomes of the Scientific Board restructuring working group and the membership feedback research project. It was suggested that the Scientific Board meeting be held first, with the membership meeting second.

Steve, Bill, and Jared will meet separately to draft an agenda.

## New Partnership MOU

Since late 2019, the Board has discussed a possible partnership with an international organization. Steve and Achim have been working with the possible partner to draft a Memorandum of Understanding. Steve shared the draft MOU with the Board and requested members to review and send him comments.

## SDMX

The SDMX Secretariat, which coordinates the development and promotion of the SDMX standard, requested a call to learn about DDI's governing and membership structure. The SDMX initiative is supported by seven international organisations, including the United Nations and World Bank. Jared will follow-up with the SDMX contact. Interested Executive Board members were invited to join the call. Arofan Gregory was recommended as a good source of information about past collaboration with SDMX. It was noted that contact with SDMX is a good opportunity to share best practices and initiate future collaboration.

## DDI Trademark Renewal

Jared was contacted recently by a University of Michigan lawyer indicating the DDI mark is coming due for Section 8 and 15 Declarations, which is due the 6<sup>th</sup> year after the original registration. After this, the U.S. registration needs to be renewed at ten years (four years from now), and then every ten years.

Since the mark was filed on behalf of the DDI Alliance rather than the University of Michigan (DDI's host institution), the Alliance will need to pay the legal fee directly. The cost to maintain it for this particular filing will be about \$900-\$1,000 USD. If this renewal is not done, the international registrations based upon this U.S. Registration would also lapse. The Board agreed to renew the DDI trademark.

## Upcoming Calls

Due to the shift in call dates, we will need to reschedule the next call.

## Appendix A.

### DDI Training Working Group Annual Report (2019-2020) and Budget Proposal (FY2021)

#### *Background*

The DDI Training Group consists of 16 members and meets the first Tuesday of the month. The co-chairs (Jane Fry and Anja Perry) started their positions in August 2019 and their first priority was to update [the mandate](#) of the group. Once this was completed a call went out to solicit more members for the group as there were few members left on it. Many of the members from the Dagstuhl Train-the-Trainer Workshop 2018 were eager to continue the work they were already doing and volunteered to be part of this group. As well, a number of other individuals volunteered. While this number may seem large for a Working Group (WG), the co-chairs knew that there was a lot of work to be done and the WG would be divided into subgroups to accomplish the targeted tasks.

The first meeting of the reconstituted WG was in January 2020. As most of the members were new this past year, we spent the first 3 meetings ensuring that everyone understood the mandate and solicited ideas for DDI training in the future. By the third meeting, a consensus was reached that 4 sub-groups needed to be formed: Gap analysis WG; Slide deck review WG; Training opportunities WG; and Training website update WG. The members of the larger WG self-selected for these sub-groups. At this point in time, the sub-groups are putting together their work plans and have met once.

In addition, a [Zenodo community](#) for the DDI Training Group was established to collect and promote slides and other material from past DDI workshops. The Training Group also worked on a workshop fee waiver for DDI members according to the DDI by-laws. This waiver and an additional conference fee discount for instructors were introduced for IASSIST 2020, which was then cancelled. Further waivers are planned for EDDI 2020 and IASSIST 2021.

#### *Training Plan*

There are a number of goals we hope to accomplish in the next year. They are mostly focused on the topics of each of the sub-groups.

- **Slide decks:** To finish a set of introductory slide decks that can be used by anyone, either in a presentation of their own; or in learning about DDI themselves. This set of slide decks will form the core of the DDI Training Library. For example, they will include DDI introductory decks, information on the different versions of DDI, different DDI use cases. This will include the services of a professional editor to ensure consistency in branding throughout the decks. Slides developed at Dagstuhl in 2018 build the groundwork for these slide decks.
- **Training gaps:** To identify the gaps in training in the slide decks and determine how to fill these gaps. One of these gaps is to produce short, introductory videos to be used for training and marketing.

- **Training Opportunities:** To identify different DDI training opportunities, e.g., webinars; conferences. To try to take advantage of these opportunities.
- **DDI Training web pages:** To assess the appropriate DDI training pages, and make plans to update them, as needed. This update will include the DDI Training library mentioned in the first goal. This group will need some support to update the pages.

Our overarching goal is to offer a continuum of online training resources from basic to more advanced to encourage DDI use. These training resources will be offered in a variety of mediums, from prepared self-selected slide presentations to webinars to in-person training.

### *Discussion*

The co-Chairs have met with the Chair of the DDI Marketing WG, Barry Radler, a number of times as we realize that we should be working with them to promote the knowledge about DDI and to promote its use. We hope to continue these meetings as they have proved fruitful so far.

The members of the DDI Training WG are quite enthusiastic about ensuring that new and relevant training materials be freely available to DDI users of all levels. We look forward to seeing what the next year will bring. We welcome any feedback or comments.

### *Budget*

The group spent \$5,000 of the budgeted \$15,000 in FY2020 and requests \$15,000 for FY202.

### **FY2020 (July 1, 2019 - June 30, 2020)**

<b>Training Group Activity</b>	<b>Purpose / Goal</b>	<b>Audience</b>	<b>Cost</b>
Discount / waiver workshop fees (for DDI members)	According to DDI by-laws, DDI members can participate in DDI workshops for free. We started this as a pilot project with IASSIST 2020.	new and advanced users	0
Teaching at conferences	Workshops were scheduled to be held at NADDI, EDDI, IASSIST.	new and advanced users	In-kind contribution
Training Library set-up	Teaching material for the Training Library based on material produced at the 2018 Dagstuhl Train-the-Trainer Workshop.	DDI trainers	In-kind contribution

Professional editing	A professional editor is reviewing and checking slides developed by the Training Group for consistency, quality and branding. He will give support in organizing the Training Library, and assists in developing further content.	DDI trainers	\$5000
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**Total                    \$5,000**

**FY2021 (July 1, 2020 - June 30, 2021)**

<b>Training Group Activity</b>	<b>Purpose / Goal</b>	<b>Audience</b>	<b>Cost</b>
Videos (to share on social media)	4 short videos (introductory and marketing) will be produced by Kristi Winters ( <a href="#">example here</a> )	new and advanced users	\$1100
Funding for workshops (travels and fees)	DDI will be promoted by submitting workshops to 2 or 3 conferences. Travel costs and conference fees are covered for the instructor.	new users	\$7400
Professional editing	A professional editor will continue working with the Training Group and identify gaps in the Training Library; develop material for newly developed content; and develop virtual training material.	DDI trainers	\$5000
Discount / waiver workshop fees (for DDI members)	We will offer a workshop fee waiver for DDI members and a conference fee discount for instructors at 2 conferences (EDDI and IASSIST).	new and advanced users	\$1500
Web page update	Members of the Training Group update and make changes to training related content on the DDI website.	new and advanced users, DDI Trainers	In-kind contribution
Training Library set-up	Members of the Training Group continue to produce material for the Training Library on the DDI website.	new and advanced users, DDI Trainers	In-kind contribution
Teaching in webinars or at conferences	Members of the Training Group engage in teaching activities to increase DDI knowledge in the research community.	new and advanced users	In-kind contribution

**Total                    \$15,000**

*Report Submitted by:*

Jane Fry, co-chair

Anja Perry, co-chair

April 1, 2020