

**DDI Alliance Annual Meeting of Members**  
**May 26, 2020, 13:00-15:00 [UTC](#)**

Join Zoom Meeting:

[https://us02web.zoom.us/j/86033483859?](https://us02web.zoom.us/j/86033483859?pwd=THIKRytQZ3hnV0JDeWNiOVhpUIBgdz09)

[pwd=THIKRytQZ3hnV0JDeWNiOVhpUIBgdz09](https://us02web.zoom.us/j/86033483859?pwd=THIKRytQZ3hnV0JDeWNiOVhpUIBgdz09) Meeting ID: 860 3348 3859

Password: 285310

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<b>Agenda -- Meeting of Members</b>			
<b>Time</b>	<b>Subject</b>	<b>Detail</b>	<b>Lead</b>
13:00-13:05	Welcome		Steve McEachern, <i>Executive Board Chair</i>
13:05-13:20	State of the Alliance FY2020	-Update about last year's work -Framing priorities for the next year  <a href="#">Presentation link</a>	Steve McEachern  Bill Block, <i>Executive Board Vice-Chair</i> , facilitator
13:20-13:50	Group Reports	- <a href="#">Training</a> - <a href="#">Marketing &amp; Partnerships</a> - <a href="#">Scientific Board</a> - <a href="#">Technical Committee</a>	Jane Fry, <i>Training Group Co-Chair</i> Barry Radler, <i>Marketing Group Chair</i> Achim Wackerow, <i>Scientific Board Chair</i> Wendy Thomas, <i>Technical Committee Co-Chair</i>  Bill Block, <i>facilitator</i>
13:50-14:15	Alliance Budget	-FY20 <a href="#">Financial Report</a> -FY21 <a href="#">Budget proposals</a>	Jared Lyle, <i>Executive Director</i> Steve McEachern
14:15-15:00	Planning	-Focus for the next year -Interim Strategic Plan -Status of the Moving Forward project	Steve McEachern

# DDI Alliance

## State of the Alliance and Strategic Directions

Steve McEachern

Chair, Executive Board, DDI Alliance

May 2020

# Overview

1. State of the Alliance
2. Working group presentations
  - Marketing, Training, Technical Committee, Scientific Board
3. Strategic Directions
4. Budget
5. Discussion

# State of the Alliance - 2020

- The Alliance has had an active year in 2019-20
- The core of our activities has been around major new work product releases:
  - DDI Lifecycle Release 3.3: March 2020
  - DDI – CDI Public Release: April 2020
  - DDI Training Library: established in October 2019 (Dagstuhl)
- The other major activity for the year has been the review of the Scientific Board, chaired by Ingo Barkow
- Presentations from our working groups are going to provide an overview of the activities in each of these domains

# Working group activities

- Scientific Board: revisiting the role and functions of the SB
- Modelling group: DDI-CDI
- Technical Committee: DDI Lifecycle 3.3
- Training group: Training library
- Marketing group: Coordination of promotions, marketing research project

# Managing Uncertainty

- COVID has changed the dynamics of current interaction within the Alliance, and with the international community more generally
- There are both challenges:
  - Fewer opportunities for face-to-face interaction
  - Funding and membership support is more uncertain
- But conversely also opportunities:
  - Higher demand for data, and more recognition of the need for comparative data
  - Heavier use of online technologies
  - Opportunities for remote collaboration

# Strategic directions for the Alliance

- The Executive Board has been working over the past 18 months to establish an updated strategic direction for the Alliance.
- We established three broad areas for consideration
  - Organisational structures and revenue and expenditure streams
  - Member needs and stakeholder management
  - Technical direction and standards development
- The changes associated with COVID-19 mean that there will be high levels of uncertainty
  - In particular, we do not know when (if??) international travel is likely to commence again on a broad basis
- As such, we are advocating putting a hold on the development of a full strategy

# Proposed response: strategic directions

- Given these uncertainties, we are looking to set broad directions for strategy, while maintaining maximum flexibility within the Alliance (both strategically and financially)
- The Alliance is well-placed to take advantage of the possible opportunities resulting from COVID-19
  - We have an international, established, remote-working community
  - Our new work products provide a potential focus for taking advantage of these opportunities
- Our three releases for the last year allow us to set some priorities for action over the next 18 months
- We are recommending focusing efforts for the next financial year on the **consolidation** and **promotion** of our new work products
- Budget priorities have also been aligned where possible with activities associated with these new products

# Budget

- 2019-20 Budget Review:

- [https://docs.google.com/document/d/1zUG89Dzjx1HMq4s71c4LUhi\\_eaHDDHqhb1La-Xygi8g/edit](https://docs.google.com/document/d/1zUG89Dzjx1HMq4s71c4LUhi_eaHDDHqhb1La-Xygi8g/edit)

- 2020-21 Budget Proposals:

- [https://docs.google.com/spreadsheets/d/1GqNSHDKxcR8fw0esCXdp\\_x8sPKGM1d-dGJo7ldqILpQ/edit](https://docs.google.com/spreadsheets/d/1GqNSHDKxcR8fw0esCXdp_x8sPKGM1d-dGJo7ldqILpQ/edit)

# DDI Lifecycle 3.3

- Promotion of Lifecycle 3.3 – PR Newswire - Marketing
- ~~Videos (to share on social media) – Training group~~
- *(Other activities?)*

# Training library

- Completion of the training library
  - Professional editing – Training group
- Training videos
  - ~~• Videos (to share on social media) – Training group~~
  - ~~• Training videos – Marketing group~~
  - Training tutorials – Scientific Board
- Promotion:
  - Funding for workshops (travels and fees) – Training group
  - Discount / waiver workshop fees (for DDI members) – Training group
  - *(See Marketing expenses)*

# DDI-CDI

- Public release review and response
  - Dagstuhl DDI-CDI workshop – Scientific Board
  - (Dagstuhl cross-domain workshop) – Scientific Board
- Full release: December 2020
- Next steps
  - DDI-CDI working meeting – Scientific Board
  - DDI-CDI (and Lifecycle) Libraries: proposal from Statistics Canada – Scientific Board

# Joint costs

- Primarily this is in the area of Marketing
- Training videos
- Webinars:
  - Aligned with promotion of each of the three new products
  - Looking for members to provide possible support/use of facilities
  - Training, DDI-CDI outreach and promotion have already been raised
  - *Promotion of DDI-Lifecycle 3.3??*
- Promotional materials: tchotchkes, flyers, etc.
- Project assistant/manager (**0.2 FTE??**)

# Operational costs

## Organisational meetings

- Face-to-face meeting of the Technical Committee
- Face-to-face meeting of the Acting Committee of the Scientific Board

## Recurring expenses

- ICPSR salaries, Alliance travel and hosting, research supplies, etc.

## Contingency fund

- Members with challenges in payment
- Meeting and travel and meeting costs – once travel can resume
- *(Note: This may be double counted in the budget – should be a reduction in revenue, not an expense?)*

# Next steps

- Members:
  - Feedback on Strategic Direction (today or by comments)
- Executive Board
  - Strategic Directions briefing paper: end of June 2020
  - Finalisation of budget: June Executive meeting

# Discussion

- Please use the Raise Hands function in Zoom if you'd like to speak, or list your question/comment in the chat

## **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

**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	\$6850
Webinar software	Webinars (using Zoom) will be used for teaching and promoting DDI to a wide audience.	new and advanced users	\$550
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 (updated May 4, 2020)

# DDI Marketing and Partnerships Group

## Report and Plan 2020

**Team:**

Barry Radler

Jared Lyle

Steve McEachern

Ron Nakao

Dan Smith

Wendy Thomas



# Mission Statement

- Coordinate marketing activities, establish DDI brand, ensure consistent messaging about DDI and the Alliance
- Goal: Promote DDI in order to increase size of the DDI user community and increase DDI Alliance membership



# Activities during the past year

- Coordinating releases/reviews
  - Lifecycle 3.3, CDI
  - Training, TC, MRT
  - Rebranding suite
- Monitoring web traffic



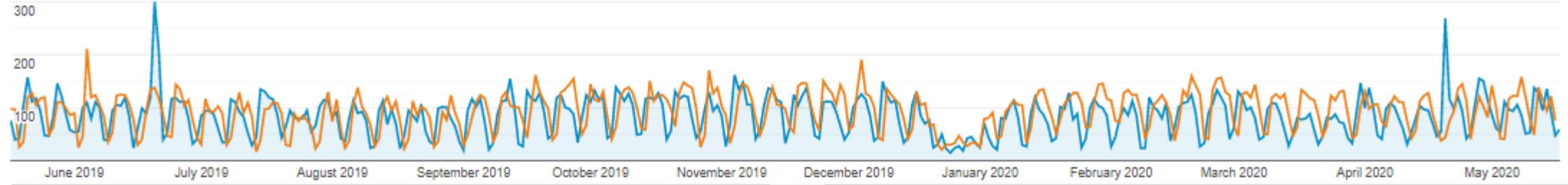
Status	Production Use
Year started	1995
First published	1996
Latest version	DDI 3.3 (April 15, 2020, 32 days ago)
Organization	DDI Alliance
Committee	Scientific Board and Technical Committee
Related standards	XML



# Audience Overview

May 17, 2019 - May 17, 2020: ● Users

May 17, 2018 - May 17, 2019: ● Users



Users

**-10.03%**

25,030 vs 27,819



New Users

**-9.02%**

24,996 vs 27,475



Sessions

**-8.78%**

35,029 vs 38,399



Number of Sessions per User

**1.39%**

1.40 vs 1.38



Pageviews

**-7.12%**

84,461 vs 90,934



Pages / Session

**1.82%**

2.41 vs 2.37



Avg. Session Duration

**6.01%**

00:02:29 vs 00:02:20



Bounce Rate

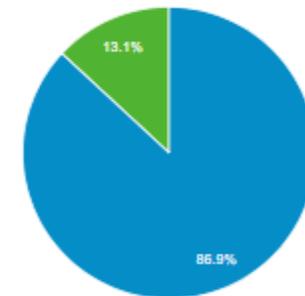
**-2.18%**

56.16% vs 57.42%

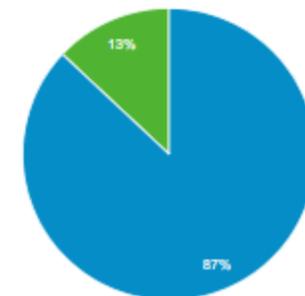


■ New Visitor ■ Returning Visitor

May 17, 2019 - May 17, 2020



May 17, 2018 - May 17, 2019



# Audience by country

Country	Users	% Users
1.  United States		
May 17, 2019 - May 17, 2020	7,967	31.51%
May 17, 2018 - May 17, 2019	8,876	31.83%
<b>% Change</b>	<b>-10.24%</b>	<b>-1.00%</b>
2.  Germany		
May 17, 2019 - May 17, 2020	1,499	5.93%
May 17, 2018 - May 17, 2019	1,511	5.42%
<b>% Change</b>	<b>-0.79%</b>	<b>9.42%</b>
3.  Canada		
May 17, 2019 - May 17, 2020	1,249	4.94%
May 17, 2018 - May 17, 2019	1,547	5.55%
<b>% Change</b>	<b>-19.26%</b>	<b>-10.95%</b>
4.  United Kingdom		
May 17, 2019 - May 17, 2020	1,248	4.94%
May 17, 2018 - May 17, 2019	1,369	4.91%
<b>% Change</b>	<b>-8.84%</b>	<b>0.55%</b>
5.  France		
May 17, 2019 - May 17, 2020	818	3.24%
May 17, 2018 - May 17, 2019	854	3.06%
<b>% Change</b>	<b>-4.22%</b>	<b>5.65%</b>

6.  Netherlands		
May 17, 2019 - May 17, 2020	764	3.02%
May 17, 2018 - May 17, 2019	751	2.69%
<b>% Change</b>	<b>1.73%</b>	<b>12.21%</b>
7.  India		
May 17, 2019 - May 17, 2020	722	2.86%
May 17, 2018 - May 17, 2019	949	3.40%
<b>% Change</b>	<b>-23.92%</b>	<b>-16.09%</b>
8.  China		
May 17, 2019 - May 17, 2020	702	2.78%
May 17, 2018 - May 17, 2019	624	2.24%
<b>% Change</b>	<b>12.50%</b>	<b>24.08%</b>
9.  Australia		
May 17, 2019 - May 17, 2020	701	2.77%
May 17, 2018 - May 17, 2019	806	2.89%
<b>% Change</b>	<b>-13.03%</b>	<b>-4.07%</b>
10.  Japan		
May 17, 2019 - May 17, 2020	612	2.42%
May 17, 2018 - May 17, 2019	432	1.55%
<b>% Change</b>	<b>41.67%</b>	<b>56.25%</b>

# Behavior by pages viewed

Page	Pageviews	% Pageviews		
1. /				
May 17, 2019 - May 17, 2020	19,766	23.40%		
May 17, 2018 - May 17, 2019	21,294	23.42%		
<b>% Change</b>	<b>-7.18%</b>	<b>-0.06%</b>		
2. /explore-documentation				
May 17, 2019 - May 17, 2020	5,835	6.91%		
May 17, 2018 - May 17, 2019	6,353	6.99%		
<b>% Change</b>	<b>-8.15%</b>	<b>-1.11%</b>		
3. /resources/tools				
May 17, 2019 - May 17, 2020	4,419	5.23%		
May 17, 2018 - May 17, 2019	5,008	5.51%		
<b>% Change</b>	<b>-11.76%</b>	<b>-5.00%</b>		
4. /controlled-vocabularies				
May 17, 2019 - May 17, 2020	3,347	3.96%		
May 17, 2018 - May 17, 2019	3,398	3.74%		
<b>% Change</b>	<b>-1.50%</b>	<b>6.05%</b>		
5. /training/getting-started-new-content/create-a-codebook				
May 17, 2019 - May 17, 2020	3,263	3.86%		
May 17, 2018 - May 17, 2019	3,553	3.91%		
<b>% Change</b>	<b>-8.16%</b>	<b>-1.12%</b>		
6. /training/why-use-ddi				
May 17, 2019 - May 17, 2020	2,398	2.84%		
May 17, 2018 - May 17, 2019	3,033	3.34%		
<b>% Change</b>	<b>-20.94%</b>	<b>-14.88%</b>		
7. /training/getting-started				
May 17, 2019 - May 17, 2020	1,638	1.94%		
May 17, 2018 - May 17, 2019	1,917	2.11%		
<b>% Change</b>	<b>-14.55%</b>	<b>-8.01%</b>		
8. /about/about-the-alliance				
May 17, 2019 - May 17, 2020	1,636	1.94%		
May 17, 2018 - May 17, 2019	1,549	1.70%		
<b>% Change</b>	<b>5.62%</b>	<b>13.71%</b>		
9. /training				
May 17, 2019 - May 17, 2020	1,319	1.56%		
May 17, 2018 - May 17, 2019	1,429	1.57%		
<b>% Change</b>	<b>-7.70%</b>	<b>-0.62%</b>		
10. /specification/ddi-lifecycle/3.2/				
May 17, 2019 - May 17, 2020	1,316	1.56%		
May 17, 2018 - May 17, 2019	1,331	1.46%		
<b>% Change</b>	<b>-1.13%</b>	<b>6.45%</b>		

# Activities during the past year

- Membership feedback research
  - Original plan: structured interview with 50+ participants
  - Modified plan: pilot project with 5 participants
  - Finalize pilot; engage in informal assessment, promotion, and feedback
    - Effort, time, “care package”



# Plans for next 12 months

- Promote
  - Coordinating with the efforts of nearly all working groups.
  - Alternatives to conferences and other in-person promotion due to COVID-19



# Longer term DDI Alliance goals

- Dedicated DDI Alliance position (50-100%):
  - Website design and maintenance
    - Updating Wiki, social media
  - Membership maintenance
  - Press releases, promoting user conferences
  - Conference attendance and active outreach
  - Revenue generation, grant writing
  - Support training activities



DDI Alliance  
Annual Meeting of Members  
Scientific Board Report

**May 26, 2020**

# Overview

- Scientific Board Restructuring
- DDI Cross Domain Integration (DDI-CDI)
- Cooperation with CODATA
- Outlook

# Scientific Board Restructuring

## Motivation and Goal

- Motivation: experience shows that the current set up - a Scientific Board of approx. 40 member representatives has limited impact regarding the role of the Scientific Board in the bylaws
- After the last Scientific Board Meeting a temporary working group was setup for this purpose
- Goal: Proposal of a new Scientific Board structure
- Current status: Draft proposal which will be finalized in the next weeks (attached to the agenda of this meeting)

# Scientific Board Restructuring Proposal

- Be comprised of 7 scientific experts
- elected by the Designated Member Representatives of the Alliance
- the Executive Director and the Chair of the Technical Committee will serve on the Scientific Board as ex officio members
- external experts may be appointed by the Scientific Board for limited terms
- Members will be elected following an Annual Meeting and serve for a term of four years except for the initial election where three will be elected for two-year terms and four for four-year terms.
- The Chair and Vice Chair of the Scientific Board will be elected by the Scientific Board soon after the regular biennial member elections for a term of two years.

# Scientific Board Restructuring

## Next Steps

- Finalize documents (expected within the next weeks)
- Preparation of a vote for the membership on the proposal
- If accepted → start of nomination and election process for Scientific Board members
- Current Chair and Vice-Chair of «old» Scientific Board remain in their current positions until new Scientific Board is elected.

# Scientific Board Restructuring

## Raised Issues need Clarification

- Relationship and responsibility of Scientific Board versus Executive Board
  - Areas should be clearly described in the bylaws
  - Which board relates to which working groups
- Voting rights of Member Organization versus Associate Member Organization
  - A controversial issue is the planned candidacy of individuals from Associated Member Organizations for election to the new Scientific Board
    - Competing goals
      - Organizational distinction between regular members and associate members
      - Limited number of dedicated individuals from members
    - **Possible resolution: Individuals from Associated Member Organizations may only stand for election, with an exception approved by the Executive Committee**

# Scientific Board Restructuring

## Further Information

- Scientific Board [Review and Restructuring](#)
- Scientific Board [Operational Guidelines](#)
- Proposed [Bylaws changes](#)
- [Slides](#) from Scientific Board Annual Meeting

# DDI Cross Domain Integration

## DDI-CDI

- Ideas on DDI 4 Core were presented in annual meeting 2019
  - The “core” of a model-driven DDI
- Dagstuhl Sprint in October 2019
- [MRT](#) working group worked on this (Modeling, Representation, and Testing Lifecycle)
- DDI 4 Core is now DDI-CDI
- First [Public Review](#) Release April 2020

# DDI-CDI

## Functionality

- Describe data formats:
  - Rectangular/unit-record
  - Long/event
  - No-SQL/”big data”
  - Multi-dimensional
- Describe data provenance/process
  - Procedural process
  - Declarative process
- Describe “foundational” metadata
  - Codes/categories/classifications
  - Concepts, variables, etc.

Recommended reading: [Introduction](#)

# DDI-CDI

## Current Status/Timeline

- Public review period ongoing through July 2020
- Series of webinars to recruit meaningful review from other domains
  - CODATA is supporting this activity
- Revised review version released in September 2020
- Focused review at intensive Dagstuhl workshop or virtual equivalent
  - CODATA has offered to convene a working group of reviewers from external domains to feed requirements into MRT
- First production release early 2021

# DDI-CDI

## Further Information

- [Report](#) from Scientific Board Annual Meeting
- [Slides](#) from Scientific Board Annual Meeting
- [Announcement](#) of public review at DDI Alliance website

# Status of Moving Forward Project

- Created for doing research and development regarding the next generation DDI 4
- The realization turned out to be ambitious. The original goals changed.
- „DDI 4 Modeling Group“ developed to „MRT - Modeling, Representation, and Testing Lifecycle Working Group“
- Visible results of Moving Forward efforts
  - DDI Cross Domain Integration
  - Some findings are finding their way into DDI Lifecycle
- Task of MRT developed to two activities:
  - Improvement of DDI-CDI
  - Organization of distribution / cooperation regarding DDI-CDI**MRT might become a more generic CDI working group**

# Workshop on „Interoperability of Metadata Standards in Cross-Domain Science, Health, and Social Science Applications II”

- [2nd Dagstuhl workshop](#) together with [CODATA](#) - Committee on Data of the International Science Council ([ISC](#))
  - [Workshop summary](#)
- This work continues ...
  - 3rd workshop in Oct 2020 (Corona?)
  - Working groups in relationship to CODATA [decadal program](#)

*Topic belongs to the strategic goal „Engagement with Global Digital Research Infrastructure”*

# Proposal:

## Training as Comprehensive Bracket

- Training could be seen as **glue between all activities**
  - DDI-C, DDI-L, DDI-CDI, Controlled vocabularies, marketing, and website
- Training library with specification-agnostic versus specification-specific material
- Reusable parts for training and documentation of specifications: mutual improvement and benefit
- Focus on online materials
  - Self-teaching slides with explaining text
  - Videos
- Training could be understood as marketing in a wider sense

# Corona Impact

- Face-to-face meetings are not possible for an unforeseen time
  - Relates to planned meetings of TC, MRT, tutorials at conferences
- Idea: Rededication of funding for planned travel /meeting
  - Could be used for paid support to improve training material and documentation in a comprehensive sense

# Scientific Board Further Information

- [Slides](#) from Scientific Board Annual Meeting

# Technical Committee Report for 2019/2020

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

## Work completed in 2019/2020

The Technical Committee focused most of this past year on 2 major areas, product publication and shifting our production work to an automated system in line with the DDI Roadmap work.

- The primary accomplishment of the Technical Committee over the past year has been the final review, modification, and publication of DDI-Lifecycle Version 3.3. During this process we were able to test out the documentation production features of the COGS system, resulting in refinements and adjustments in our approach. The new version of Lifecycle covers a significant expansion of the standard into areas where it has been weak
  - Opened up existing parts of the standard to broader application in the areas of data capture (expanding to non-question-based capture) and flexibility in the use of the control constructs (Lifecycle process model) for describing data management processes
  - Improved relationship to the work of GSIM including an improved alignment of conceptual content and the addition of Statistical Classification in line with the GSIM model
  - Added the content developed by the Survey Development and Implementation working group covering:
    - Data Capture Development – The development and testing work associated with creating and fielding data capture instruments including question and measurement development, translation, quality testing, and delivery methods
    - Sampling – The methodology used for sampling, management of sample frames, and defining complex sampling processes
    - Weighting – The source, process, purpose, and guidance for weighting. This includes a means of instructing analysis tools on the appropriate use of weights in analysis.
  - Revision of Methodology, Quality Information, and Variable Cascade content to increase clarification on the purpose and use of this content.
  - Support for DDI as a Property Graph (properties on items and references)
  - Quality Statement improvements (useful for Eurostat reporting)
- Thanks to the continued work of Franck Cotton and Thomas Francart the new product XKOS – Extended Knowledge Organization System was published in June 2019. XKOS is currently under use by INSEE, FAO, and the UN as a means of publishing Statistical Classifications. XKOS is currently accepting and resolving issues with a small group of dedicated members.
- In October 2019 the TC held a face-to-face meeting funded by the Executive Board. Meetings in the previous 3 years had been small targeted meetings with 3-4 members dealing with a limited number of issues. The 2019 meeting, hosted by the Minnesota Population Center, had 3 main work areas: DDI Roadmap, Production Framework, and DDI-Lifecycle Version 3.3 review and entry. This meeting supported the completion of a good deal of work in a short, concentrated period. A full report is available at <https://ddi->

[alliance.atlassian.net/wiki/spaces/DDI4/pages/723255303/In-person+Meeting+21-25+October+2019?preview=/723255303/731054081/TC\\_October\\_2019\\_Meeting\\_Summary.pdf](https://alliance.atlassian.net/wiki/spaces/DDI4/pages/723255303/In-person+Meeting+21-25+October+2019?preview=/723255303/731054081/TC_October_2019_Meeting_Summary.pdf)

- The TC worked with the MRT on setting up for the public review of DDI-CDI Cross Domain Integration currently underway.
- We continue to work with the Controlled Vocabulary group in identifying and publishing new and updated Controlled Vocabularies. We have increased documentation in DDI-Lifecycle to strengthen the tie between DDI Controlled Vocabularies and their use in DDI-Lifecycle.
- The TC has begun discussions of the implications of the DDI Roadmap for organizing, describing, marketing, and training for DDI products.

## Workplan for 2020/2021

The Technical Committee is exploring how we do our work this year. In the past few years we have viewed our membership as individuals who have both an overall interest in the technical products of the DDI and specific areas of concern. We have been flexible in terms of meeting attendance based on agenda items and on encouraging feedback to the group through comments on JIRA issues, wiki content and email communications. In taking this approach we try to keep the burden on TC members reasonable, acknowledging not all members have interests in all areas we work in. This year we are exploring how to bring in people from the DDI community to work on specific task areas. We have recently started with a call for input to a DDI Codebook review and update. The immediate response was very good, and we continue to invite people into this process. We have also identified small working groups within the TC who are focusing on specific goals for the TC, using the regular TC meeting time to support the work of these smaller groups when possible. The major task areas for this year are:

- Continued improvement of the DDI-Lifecycle high level documentation. With the publication of DDI-Lifecycle version 3.3 this type of documentation has been separated from the specification package allowing updates to the content without having to version the specification. Some goals of this work
  - Work with Training Working Group to provide content that can be reused in training products, such as images and graphics, which should be consistent between the two platforms
  - Republish high level documentation for DDI-Lifecycle version 3.2 with material common between versions 3.2 and 3.3
  - Explore a set of documentation that supports implementation of DDI-Lifecycle on a technical level
- DDI-Lifecycle version 3.4 – This next version has specific goals
  - The content will be the same as version 3.3 but the expressed in a technical structure that supports more flexibility
  - Express content in multiple bindings/representations: XML Schema, RDF/OWL, JSON, and UML
  - Move to an automated production process that will expand the ability to support and test new content and work in a more iterative manner
  - Test the transformation processes for input and output to this system to ensure lossless transfer of content into the internal registry and export of consistent content to the various bindings/representations

- DDI-Codebook review and update
  - We have recently put out a call for those interested in working on an updated version of DDI-Codebook to be reviewed and published this year. We are soliciting additional issues and looking for individuals who would like to assist the TC with this work. Initially we will focus on issues to be resolved for the update. These include suggestions to improve interaction with DataVerse, support for new projects using or interacting with DDI-Codebook and covering some related content that has been added DDI-Lifecycle. The goal is to improve functioning within the current DDI-Codebook development constraints.
  - Long term we will be discussing the role of DDI-Codebook within the DDI Suite of Products and any implications for future coverage, structure, and development rules.
- Roadmap work – Definition of the DDI Suite of Products and each product produced by the DDI Alliance
  - Creation of an overarching conceptual content model for the DDI Suite of Products
  - Describe individual products in terms of their coverage within the full suite, technical requirements, intended applications, and binding/representation options. We will be working with members of the different product groups as well as Marketing and Training to develop this information and present it in appropriate ways for different purposes.
  - Use the overall and specific models to explore alignment with external standards to identify differences in coverage, perspectives, gaps that should be addressed, and points where metadata and data need to transfer between systems.
  - Use models to facilitate the translation of metadata between products. This will help organizations managing DDI content who need to interact with users who require different products for different applications.



DDI Alliance Financial Report  
Annual Meeting of Member Representatives  
26 May 2020  
Jared Lyle, Executive Director

# Financial Report

This document summarizes the overall financial position of the DDI Alliance at the close of FY2020 (July 2019 - June 2020) and includes a draft budget for FY2021.

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 FY2020 Budget

[Appendix A](#) provides an overview of the FY2012-FY2020 actual budgets. It also provides three views of the FY2020 budget: the Budget FY2020 column lists what was budgeted for the Alliance at the start of FY2020, the Actual FY2020 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 FY2020 budget categories, as well as a summary of the FY2020 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 FY2020 was \$105,000, but actual income is \$97,500 with forecasted income at \$97,500. The negative variance is due to one dropped membership by the University of California, Berkeley, as well as non-payment by one full member.

## 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. Salary and data expenses have remained the same for the last 6 years even though ICPSR salaries have increased by an average of three percent each year.

### General Expenses

- The bulk of general expenses are credit card and wire fees. Expenses were lower than anticipated since DDI URN registration at IANA work has not been completed. \$4,000 was budgeted for this work.

### Research Supplies & Services

- Expenses covered GoToMeeting and Zoom virtual meeting subscription fees, as well as Google Cloud Services expenses, where DDI production workflows are hosted. The Alliance transitioned to Zoom virtual meetings in September and cancelled its GoToMeeting subscription shortly thereafter. The transition led to some cost savings. Other expenses included hosting fees for the DDI Registry, a hosted DNS SRV record-based resolution service for DDI agency identifiers..

### Marketing

- Marketing is projected to spend about a third of its budget allocation (\$8,495.75 of \$30,000 budgeted). This covers the pilot membership feedback project.

### Scientific Board

- The Scientific Board is projected to spend about half of its budget allocation (\$12,817.63 of \$25,000 budgeted). This funded travel support for the DDI 4 Core sprint and the Interoperability of Metadata Standards workshop.

### Technical Committee

- The Technical Committee is projected to spend about a third of its budget allocation (\$5,102.32 of \$17,000 budgeted). This funded travel support and hosting costs for an in-person Technical Committee meeting.

## Training

- Training is projected to spend a third of its budget allocation (\$5,000 of \$15,000 budgeted). This funded the Training tutorials editor.

## Travel and Hosting

- The Alliance sponsored IASSIST 2020 (\$1,574.52). Although the conference was cancelled, the sponsorship will roll over into 2021.

## Summary

- The overall FY2020 income is expected to exceed expenses by \$28,004.83.
- The overall FY2020 expenses are expected to be about half (\$69,495.17) of what was budgeted (\$129,900) for the fiscal year.
- The fund balance for the Alliance is expected to be \$269,030.14 at the end of FY2020. Of this, \$21,076.03 is committed to North American DDI (NADDI) reserves. The uncommitted fund balance (i.e., funds that are unencumbered by previously allocated expenses) at the end of FY2020 is anticipated to be \$247,954.11.

## Overview of FY2021 Budget

The budget for FY2021 (July 2020 - June 2021) has not yet been set or finalized by the Executive Board. The plan is to use the 2020 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.

The [FY21 budget planning](#) document 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. Additionally, a message was sent to the entire DDI community soliciting funding requests. The FY21 budget planning document 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 by the Executive Board), as well as funding requests from the DDI committees, working groups, and the community.

## Summary

- The budget for FY2021 (July 2020 - June 2021) has not yet been set or finalized by the Executive Board.

- The Executive Board will use the 2020 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.

	Actual FY2012	Actual FY2013	Actual FY2014	Actual FY2015	Actual FY2016	Actual FY2017	Actual FY2018	Actual FY2019	Forecast FY2020*	Actual FY2020	Budget FY2020
<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	\$100,500.00	\$97,500.00	\$97,500.00	\$105,500.00
<b>Expenses</b>											
Staff Salaries	\$31,970.00	\$22,549.00	\$25,544.00	\$29,633.00	\$28,989.00	\$22,401.77	\$32,315.63	\$29,825.53	\$35,000.00	\$25,210.49	\$35,000.00
Consultants		\$4,970.00	\$4,970.00	\$27,426.00	\$20,360.00	\$1,945.12	\$14,383.97	\$33,189.83			
Data Processing	\$2,760.00	\$2,217.00	\$1,879.00	\$3,003.00	\$3,224.00	\$2,433.26	\$4,071.84	\$3,050.94			
General Expenses		\$73.00	\$15.00	\$150.00	\$113.00	\$341.70	\$915.73	\$271.50	\$53.62	\$53.62	\$4,000.00
Marketing					\$6,567.00	\$16,398.33	\$6,226.42	\$6,235.00	\$8,495.75	\$8,495.75	\$30,000.00
Research Supplies & Services	\$54,205.00	\$2,900.00	\$5,647.00	\$5,876.00	\$948.00	\$2,748.00	\$1,848.00	\$5,531.97	\$1,451.33	\$1,405.56	\$900.00
Scientific Board									\$12,817.63	\$12,817.63	\$25,000.00
Technical Committee									\$5,102.32	\$5,102.32	\$17,000.00
Training					\$1,073.00	\$0.00	\$0.00	\$10,251.70	\$5,000.00	\$0.00	\$15,000.00
Travel and Hosting	\$17,191.00	\$28,814.00	\$17,209.00	\$22,218.00	\$40,646.00	\$30,464.11	\$24,001.36	\$20,679.71	\$1,574.52	\$1,574.52	\$3,000.00
Transfer	-\$13,974.00							-\$55,702.73			
<b>Total Expenses</b>	\$92,152.00	\$61,523.00	\$55,264.00	\$88,306.00	\$101,920.00	\$76,732.29	\$83,762.95	\$53,333.45	\$69,495.17	\$54,659.89	\$129,900.00
<b>Revenue Over/(Under) Expenses</b>	-\$17,235.00	\$23,284.00	\$29,551.00	-\$887.00	-\$16,575.00	\$21,341.71	\$27,737.05	\$47,166.55	\$28,004.83	\$42,840.11	-\$24,400.00
<b>Ending Fund Balance</b>	\$109,407.00	\$132,691.00	\$162,242.00	\$161,355.00	\$144,780.00	\$166,121.71	\$193,858.76	\$241,025.31	\$269,030.14	\$283,865.42	\$216,625.31
<i>Committed Ending Fund Balance</i>									\$21,076.03	\$21,076.03	\$21,076.03
<i>Uncommitted Ending Fund Balance</i>									\$247,954.11	\$262,789.39	\$195,549.28

Currency in USD

\*Updated May 25, 2020

These are the recurring and requested expenses for FY2021 (July 1, 2020 through June 30, 2021). Recurring expenses are anticipated regular expenses of the Alliance. Funding requests represent all funding requests submitted by Alliance members as of May 25, 2020. Each major Alliance committee or group was asked to submit a funding request. Additionally, a message was sent to the entire DDI community soliciting funding requests. All submitted funding requests are listed below. A link to the full funding request description is also provided.

	ITEMNO	Activity	Requested
<b>Recurring Expenses</b>			
		Staff Salaries	
	1	Salaries	\$35,000
		<i>Total</i>	\$35,000
		Research Supplies & Services	
	2	DDI Registry web hosting	\$900
	3	Zoom virtual meetings	\$381
	4	Wire fees (estimate)	\$100
		<i>Total</i>	\$1,381
		Alliance Travel & Hosting	
	5	Annual meeting hosting	\$1,000
	6	Meeting attendance (e.g., UNECE)	\$2,000
		<i>Total</i>	\$3,000
		COVID-19 Contingency Fund	
	7	Contingency fund. A contingency to support members for membership payments during the pandemic	
		<i>Total</i>	\$30,000
<b>Funding Requests</b>			
		<a href="#">Training Group</a>	
	8	Videos (to share on social media)	\$1,100
	9	Funding for workshops (travels and fees)	\$6,850
		Webinar software	\$550
	10	Professional editing	\$5,000
	11	Discount / waiver workshop fees (for DDI members)	\$1,500
		<i>Total</i>	\$15,000
		<a href="#">Marketing Group</a>	
	12	Training videos	\$2,000
	13	Webinars	\$2,000
	14	Promotion of DDI-Lifecycle 3.3	\$2,000
	15	Promotional materials	\$2,000
	16	Project assistant/manager (0.2 FTE)	\$15,931

These are the recurring and requested expenses for FY2021 (July 1, 2020 through June 30, 2021). Recurring expenses are anticipated regular expenses of the Alliance. Funding requests represent all funding requests submitted by Alliance members as of May 25, 2020. Each major Alliance committee or group was asked to submit a funding request. Additionally, a message was sent to the entire DDI community soliciting funding requests. All submitted funding requests are listed below. A link to the full funding request description is also provided.

ITEMNO	Activity	Requested	
		<i>Total</i>	\$23,931
	<a href="#">Technical Committee</a>		
17	Face-to-face meeting of the Technical Committee		\$15,140
		<i>Total</i>	\$15,140
	<a href="#">Scientific Board</a>		
18	Face-to-face meeting of the Acting Committee of the Scientific Board		\$7,000
19	Dagstuhl DDI-CDI workshop		\$9,000
20	Dagstuhl cross-domain workshop		\$9,000
21	DDI-CDI working meeting		\$9,000
22	Training tutorials (may overlap with Training)		\$15,000
		<i>Total</i>	\$49,000
	Community requests		
	<a href="#">Statistics Canada</a>		\$18,750
		<i>Total</i>	\$18,750
		<i>Total Expenses</i>	\$191,202 USD
	ESTIMATED REVENUE (per 2019-2020 revenue)		\$97,500
	SURPLUS / (LOSS)		-\$93,702
	FORECAST FUND BALANCE (30 JUNE 2020)		\$247,954
	PLUS SURPLUS/LOSS		-\$93,702
	FORECAST FUND BALANCE (30 JUNE 2021)		\$154,252
For noting: Travel-related expenditures			
* There has been no explicit provision made for travel activity in the budget, due to current limitations associated with COVID-19			
* The Board is not ruling out support for such activity in this financial year, but believe such expenditure cannot be reliably forecast at this time.			
* Instead, the Executive Board will consider requests for meeting funding once circumstances become clearer. Such requests if approved would be drawn from the Alliance reserves.			

## **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

**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	\$6850
Webinar software	Webinars (using Zoom) will be used for teaching and promoting DDI to a wide audience.	new and advanced users	\$550
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 (updated May 4, 2020)

Here's a few items that Marketing is requesting support for, either directly or indirectly.

- Training videos (\$2k)
  - Have discussed coordinating promotional and training videos
- Webinars – few in-person conferences likely this year (\$2k)
  - ICPSR webinar software is expensive, \$25/hr x 12 hours.
  - Some support for conference attendance and promotion this year?
- Promotion of 3.3 (\$2k)
  - PRNewswire subscription – we have still have a membership (was only \$100/year for a non-profit), but if we do a nation-wide press release I would earmark about \$2k
    - ***US - nationwide, possibly Europe and Anglosphere***
- Tchakis (\$2k)
  - We'll need to replenish much of our stock soon, I believe. We're going to use the swag promotionally and instead of distributing to folks at conferences, send a "DDI care package" to our members. This will serve as an entre for the pilot research project and subsequent outreach efforts. Also need money for shipping.
  - **Dedicated staff (\$??k)**
    - E.g.: Project director, coordinator.
    - Cross-organization effort to support administrative, training, and promotional efforts of the Alliance. Many other non-profit standards organizations (e.g. DataCite, ORCID, etc.) have multiple full-time staff which has directly translated to successful, efficient, and popular organizations. Such a support position would leverage (exploit) all the contributions that so many volunteers and organizations make to the Alliance, and devote consistent attention to the many fronts the Alliance is progressing on instead of doing so piecemeal (e.g., hiring consultants for training, website design, conference travel, etc.). This position would report directly to the Executive Director who would likely welcome the additional oversight if it freed up more of his/her 10%+ effort. Without such an investment, the DDI Alliance is likely to remain a relatively small and ineffective concern.

## Proposal for face-to-face meeting of Technical Committee in 2020/21

Submitted 2020-03-02 by Wendy Thomas, Chair, Technical Committee

The Technical Committee is taking on several broad ranging work tasks over the coming year. Following the publication of DDI Lifecycle 3.3 we will begin work on updating DDI Codebook to address approximately 40 issues that have been filed against the standard addressing areas of compatibility with DataVerse and better alignment with other DDI products. We are also looking at the Roadmap which involves a better integration of DDI products and moving towards a more effective production model. One aspect of this is the movement of DDI Lifecycle to COGS and the production of a version 3.4 which takes the content of version 3.3 and expresses it in a new more serialized XML plus additional expressions including RDF, JSON, and UML. This is intricate work and involves technical as well as intellectual issues regarding:

- Vision - how do we get out of being just a XML Serialization; what does this mean in terms of marketing
- Bindings - RDF, JSON, UML
- How do we fit into the broader discussion with DCAT, PROV-O, etc. What's the best way of packaging these up
- Implications for production, maintenance, tooling, training for Lifecycle
- How can we leverage COGS across other DDI products?
  - Can we use COGS for Codebook?
  - Is there a role for COGS in CDI

We are not committed to a specific time or place but are targeting September/October in Minneapolis as this seems to work well with our overall workplan and three members live in Minneapolis, reducing the overall cost.

Invitees will begin with members of the Technical Committee involved in the Lifecycle 3.4 work and COGS implementation. We will also seek up to 4 additional participants who could contribute substantially to achieving the goals of the meeting. This is in keeping with the TC working model of reaching out to the DDI community to identify and involve members in specific development areas. We will put out a general call with enough detail to allow an assessment of an individual's ability to contribute to the work.

Costs are dependent upon location:

Transportation costs are similar for Europe and US given the split of location between our members. Hotel costs while individually higher in US would be lessened by locating the meeting in Minneapolis where 3 members reside and would require no transportation or housing support. Estimated costs if DDI supported all attendees would be \$15,000-\$16,000. Fewer attendees or institutional support of attendance would lower this cost. Co-occurrence with another event would also lower costs. All these issues would be taken into consideration when scheduling.

**Per Person: 10 persons (Minneapolis \*3 members live here):**

		European	North American	Total (5 European 2 US)
Airfare:		\$1000	\$400	\$5800
Ground Transport:		\$100	\$100	\$700
Hotel:	\$120/night for 6 nights	\$720	\$720	\$5040
M&I:	\$60/day for 6 days	\$360	\$360	\$3600
<b>Total per person:</b>		<b>\$2180</b>	<b>\$1580</b>	<b>\$15140</b>

## DDI Alliance

### Budget Requests for the Financial Year 2020/2021

Joachim Wackerow, Chair of the Scientific Board, 2020-04-07

The proposals comprehend the areas of the new acting committee of the Scientific Board, DDI-CDI, cross-domain work, and training.

#### Acting Committee of the Scientific Board

The temporary working group is working on a proposal for an Acting Committee of the Scientific Board. The planned face-to-face meeting in March couldn't take place because of the Corona pandemic. Nevertheless, the group is trying to finalize a proposal including bylaw changes for May.

Dependent on the outcome and the next steps, there are two options of a face-to-face meeting: the temporary group might need a final meeting or it could be the kick-off meeting for the planned Acting Committee of the Scientific Board.

The approved amount in 2019/2020 was 7,000 USD. The approved amount for 2019/2020 will not be used in 2020/2021 because of the Corona crisis.

#### Budget Request

The amount of **7,000 USD** is requested for 2020/2021 again. It can fund:

- Accommodation support for all members of the Acting Committee
- Possibly travel support for the two external advisory experts

### DDI-CDI and Cross-Domain Work

#### Plans regarding DDI-CDI

DDI-CDI will be now published as Public Review Release. The review period is planned for three months. Multiple webinars and conference calls with interested groups are planned while this period. Improvements of DDI-CDI will be made on the basis of the review outcome. An intermediate working release of DDI-CDI is planned for the end of July. A Dagstuhl workshop as an intense review is planned for October. The focus will be on the integration of data and metadata from different domains. The idea is to have participants from three different perspectives, power users of other domain-specific standards, technical people from other domain-agnostic standards like W3C vocabularies, and people of the MRT working group (DDI-CDI development). Further improvement based on the output of the Dagstuhl workshop is planned for November. The final public review is planned for December.

A multiple-day face-to-face meeting is planned for the first half of 2021 in the margins of a conference which is relevant for the work on metadata integration like events of GO-FAIR, RDA, and CODATA. This meeting will focus on the application of DDI-CDI, especially as integration tool in interaction with other metadata standards, and on possible extensions of DDI-CDI.

## Plans regarding “Interoperability of Metadata Standards in Cross-Domain Applications”

A third Dagstuhl workshop is planned in this series for October. The workshop is intended to provide an opportunity for face-to-face work and a ‘sprint’ for working groups which are currently in the process to be build. The working groups emerged from discussions at the [CODATA-DDI Dagstuhl Workshop on ‘Interoperability of Metadata Standards in Cross-Domain Applications’ held in October 2019](#). A core group has continued the work and has been refining the approach for most of these groups. The organizers are now taking the step to formalise and expand these working groups as part of the preparation for the [ISC CODATA Decadal Programme on ‘Making Data Work for Cross-Domain Grand Challenges’](#). The working groups focus on following topics: Semantic Interoperability and Conceptual Framework, Policy Monitoring Indicators, Infectious Disease, and Resilient Cities.

The DDI-CDI workshop will take place on October 5-9 in Dagstuhl. The third workshop on “Interoperability of Metadata Standards in Cross-Domain Applications” will take place on October 12-16 in Dagstuhl. A few participants of the DDI-CDI workshop will also participate in the cross-domain workshop.

The working meeting on DDI-CDI is planned in the time frame of April to June 2021.

### *Budget Request*

Following support is requested for the mentioned events:

- Dagstuhl DDI-CDI workshop: **9,000 USD** (travel/accommodation support for approx. 4-5 people)
- Dagstuhl cross-domain workshop: **9,000 USD** (travel/accommodation support for approx. 4-5 people)
- DDI-CDI working meeting 2021: **9,000 USD** (travel/accommodation support for approx. 4-5 people)

### **DDI Training**

I suggest that the tutorial program of 2019/2020 can be continued in 2020/2021. I sent a related message to the chairs of the Training Group and the Marketing Group.

Here is the citation from last year’s proposal:

“In terms of maintaining a good user base and increasing the use of DDI, it is important to provide a continuous offer on DDI tutorials. The tutorials should be taught in the margins of conferences where the audience might be interested in DDI. It is even more important in terms of outreach to provide this at conferences where the audience is not really aware of DDI but might be interested. Examples are survey methodology conferences like ESRA and RC33 but there are much more opportunities. Furthermore tutorials should be taught at summer schools of empirical social sciences. Examples are the ICPSR and GESIS summer schools. It seems to be important to support travel and accommodation of interested instructors. The details on how to offer these possibilities (yearly tutorial plan, tender for instructors) need to be determined.”

15,000 USD were approved for this purpose in 2019/2020.

For multiple reasons, this approach couldn't be developed in full extent in the current budget year.

I propose that this will be continued in the upcoming budget year. It could be a program which describes the goals and offers travel funding to tutorial instructors. The program could be announced on the website and the DDI users list. Possible instructors could apply. The co-chairs of the training group – together with the Executive Director - could approve the applications according to the program criteria.

Ideally, the tutorials could be taught not only at conferences with a DDI-aware audience (like IASSIST and the DDI user conferences) but at other conferences. Using metadata in a structured sense could be understood as a method like many other methods in the empirical social sciences. Therefore I see survey methodology conferences and similar summer schools as an important target audience. I think it is important to address conferences which focus on survey methodology, panel studies, and large comparative studies to raise further awareness for DDI. I'm thinking of ESRA, RC33, AAPOR, WAAPOR, and conferences where large studies with comparison across space/time like ESS and SOEP are in the focus. Additionally, conferences on official statistics might be an opportunity like events of the UNECE and Eurostat.

### ***Budget Request***

An amount of 15,000 USD is requested for this purpose.

Note: The training group might have made a similar proposal.

## DDI libraries proposal – DRAFT

As one of the leading metadata standards, DDI enables machine-actionable and interoperable metadata-driven solutions. The better the data is described and annotated using DDI, the easier it is to find, the more efficient it is to process, and the simpler it is to harmonize and integrate. The agility that DDI brings to NSOs and other data producing organizations, used in conjunction with DDI-enabled solutions and a modern data platform, will drastically shorten the idea-to-insight timeframe.

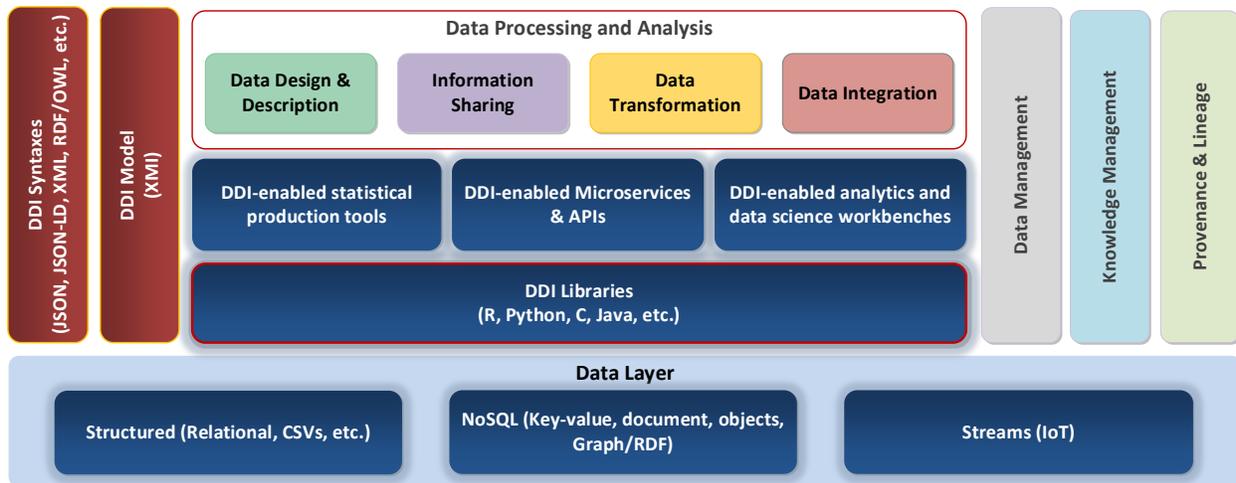
As part of the StatCan metadata vision, strategy and roadmap work that is taking place this year, to advance the use of DDI in the organization, StatCan will be advancing work that entails developing reusable software libraries to access, manipulate and store DDI objects. Understanding the DDI model, parsing the schemas and creating objects in memory for different languages will simplify development of DDI solutions since it will take care of the DDI representation complexity for everybody. These libraries can be implemented once and shared across multiple tools over the years.

The intent is to move this work into the open source development space to allow for a community based approach to moving these key pieces of infrastructure forward. There are many advantages of this approach such as Open source solutions geared toward the DDI Standard will allow for a thriving community, bound by a common drive to support and improve a solution that the community benefit from. There will be an increased visibility to the code base and it will allow for others in the community to contribute, thus increasing the overall transparency of the standard.

The Proposal is to have Initial seed funding for this project split between the DDI Alliance and Statistics Canada, with each contributing \$25k, for a total investment of 50k. Once the overall scoping of the work takes place the costing will be refined.

To advance this work a consultant will be hired working potentially with StatCan Innovation Team, who will provide the language expertise and work closely with a DDI expert who will be in charge of the DDI semantic alignment.

DDI consists of a specification in the form of a UML model representation, i.e. XMI, and syntax representations, e.g. XML Schema, JSON-LD, RDF/OWL, etc. together with documentation in various forms. Such a specification can describe a data layer, consisting of various types of data, from very structured to NoSQL and streams. It can also describe the concepts associated with the data, and the various processes around it. We envision a rich ecosystem of reusable and shareable libraries, micro-services and tools, all built around a community of vendors and open source developers that can provide a marketplace of evolving components and services. This extended ecosystem can be leveraged to implement data production solutions and advanced analytics, including Big Data and machine learning. The next diagram shows an overview of the implementation stack.



Such an ecosystem can be enabled by a rich DDI libraries layer (center). These libraries should span both lifecycle and CDI. This project will tackle the definition of a generic framework for both DDI versions and will focus on the development of libraries for a meaningful fragment of CDI.

We discussed two approaches:

- (i) Create a UML platform specific model (PSM) for the family of languages we want to support (R, Python, Java, etc.) from which code can be generated in each language.
- (ii) Create a generic C++ library that can then be used by any of these languages.

The libraries consist of classes and their methods. There are many code generators that create classes and basic getters and setters from UML. However, we want to provide developers a richer set of methods capable of manipulating composite objects not just individual ones. Some entities, e.g. a classification, a value domain, are composite objects that span multiple classes that usually need to be managed together. We could provide methods that manipulate an entire entity, e.g. `getClassification()`, part of an entity, e.g. `getItemLevel()`, and relationships to other entities for navigation, e.g. `getRelated()`. This would help developers manipulate entities without having to learn the intricacies of the highly-connected DDI model.