Marketing and Partnerships Plan - 2016

The Marketing and Partnerships group consists of (Jared Lyle, Chuck Humphrey, Kelly Chatain, Ron Nakao, Steve McEachern, Wendy Thomas, Arofan Gregory, and Barry Radler)

The overarching mission of the DDI Marketing and Partnerships was established in 2014:
● Increase DDI Alliance membership
● Increase use and adoption of DDI; Increase number of new DDI users
● Encourage new people to become involved in DDI stewardship (expand the community)
● Work with other research standards bodies to integrate and exchange information between DDI and other standards

It became clear during 2015 that the following responsibilities should be added to the group's mission:
● Initiate and coordinate marketing activities to promote DDI to a broad set of existing and potential audiences
● Establish and maintain a DDI brand, basic description of DDI, and a core marketing message
● Ensure consistency in promotional and educational messaging by coordinating with other DDI working groups

Work accomplished in 2015-16

The Marketing and Partnerships group met monthly during the year. During 2015-16, we accomplished the following:
● Developed new DDI logo for website and print
● Created updated marketing materials (brochures)
    ● Created conference brochure template that can be customized
● Created DDI banner and banner stand for conferences
● Developed rolling DDI presentation for display at conferences
● Attended (and sponsored) IASSIST 2015
● Attended AAPOR 2016 conference; had sizable presence at conference:
    ○ 2 posters
    ○ 3 presentations
    ○ Booth (shared with ICPSR)
    ○ Reception for new and interested individuals/organizations
● Initiated another demonstration of the power of DDI to drive a survey research process by 'hosting' the NADDI conference evaluation; partnered with Colectica and Nooro

● Coordinated with Training for a feedback session at NADDI in Edmonton to garner feedback on website revamp

Goals for 2016

● Update existing tri-fold brochure
  ○ Highlight codebook Before and After
● Update and improve rolling DDI presentation
  ○ Secure dedicated laptop and/or monitor for display at conferences
  ○ Post on YouTube
● Work with Web and Training groups to maintain and improve website
  ○ Incorporate input from NADDI feedback session and working group discussions
● Attend AAPOR 2017 conference
  ○ Attend International Field Directors Conference (immediately follows AAPOR)
  ○ Advocate with AAPOR stakeholders on DDI's role in advancing Transparency Initiative
  ○ Organize DDI Reception and get it included in official program
● Formalize procedure and tool for performing conference evaluations
  ● **Solicit AAPOR 2017 annual membership survey**
● Identify and attend additional conference to attend
  ● Obtain more/better DDI tchotchkes and schwag
● Identify and target one standards body for outreach
  ● Determine goals of outreach and criteria for success
● Paid sponsor and booth presence at 3MC conference

For Discussion at Annual DDI Alliance Meeting

● Do you agree with the priority stakeholders and partners listed below?
● What metric does DDI use to determine marketing success?
  ○ How is metric operationalized and/or quantified?
  ○ Separate metrics for separate activities?
● How can we more effectively utilize the budget resources made available to Marketing and Partnerships?
  ● How much in-kind contribution is feasible to request?
● Any comments on which type of activity is most effective
  ● Conference
  ● Website
  ● One-on-one outreach

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Stakeholders and Partners

In 2015 the Executive Board prioritized the list of stakeholders (top five bolded) and the participants at NADDI added to the list:

Stakeholder	Goals of Outreach
National statistical agencies	Membership, DDI use, expand community
European infrastructure projects, including CESSDA	Membership, DDI use, expand community
Academic libraries	Membership, DDI use, expand community
Health sciences	Membership, DDI use, expand community
Large research projects (MIDUS, HRS, PSID, ELSA, IPUMS, WLS, VETSA, National Children's Study, etc.)	Membership, DDI use, expand community
Data collectors/firms/Survey research organizations	Membership, DDI use, expand community
Government agencies/funders (NIH, NSF, etc).	DDI use, general visibility and awareness
Social media and related services (Facebook, Twitter, Wikipedia, Open Stack Exchange)	General visibility and awareness
NISO	Work with other standards
Journals/publishers	DDI use, general visibility and awareness
Institutional repositories	Membership, DDI use, expand community

In 2015, the group also looked at organizations to partner or work with, and the top three were prioritized by the Executive Board:

Partner	Goals of Partnership
W3C (RDF vocabularies may go through	DDI use, legitimacy, general visibility and

W3C approval)	awareness
Dublin Core (contact made through Dagstuhl)	General visibility and awareness; interchange of standards
ISO (the Alliance is moving forward with ISO certification)	DDI use, legitimacy, general visibility and awareness
CASRAI (research administration metadata)	Interchange of standards; interoperability
EML (Ecological Metadata Language) through DataONE	Interchange of standards; interoperability
CDISC (Clinical Data Interchange Standards Consortium)	Interchange of standards; interoperability
Research Data Alliance	General visibility and awareness; DDI use; expand community

Marketing Activities and their Costs

The 2015 Marketing Plan identified **conference participation** as the activity with the highest impact and likelihood of communicating effectively with top stakeholders. It was estimated that the DDI Alliance could attend 4-5 conferences a year. This was an ambitious target and failed to take into account that neither promotional materials, the DDI website, nor procedures or goals for a conference presence were quite ready. Even more fundamentally, the Marketing group needed these activities to align with a core marketing message for DDI. At its most basic that message has become Document, Discover, Interoperate. DDI makes your data independently understandable for other researchers as well as for machine processing and analytic systems. DDI is a free open standard that describes research data throughout its lifecycle and can introduce efficiencies in survey and other research processes. Conference and other marketing activities are now corresponding to that message.

Regarding conference participation, the Marketing group identified the most important ways to have a conference presence:
- **be in the program – get papers/presentations accepted**
- mount a display or have a booth in the exhibit hall
- create a poster for the poster session
- sponsor an invited reception
- become a conference sponsor and increase visibility

The AAPOR 2016 experience reinforced these ideas. Having DDI papers and posters as part of the conference program lends gravitas to the topic and drives traffic to the booth where interest can be responded to in-person.

Another idea that was not fully capitalized on in 2015 was to use DDI to host and field conference evaluations. Such an application was demonstrated at NADDI 2015, 2016, and at IASSIST 2015 and proved an effective demonstration of DDI's capabilities. These demos show DDI driving the entire survey process from instrument development through the fielding process and display of results. A key goal of 2016 should be to formalize a DDI conference evaluation tool or set of procedures that can be replicated easily and shopped out to the conferences DDI attends. There will be costs associated with accomplishing this but the marketing benefits are manifold; such demonstrations can establish impactful presence at multiple conferences while the process and results can also generate papers or presentations.

Webinars are a cost-effective way to reach stakeholders, and we plan to use them as well. This will have to done in conjunction with the Training group. Efforts should be made to record the conference evaluations mentioned above and to post them to YouTube. Furthermore, we have created a draft of a rolling DDI presentation to be used at conferences, but that could also be uploaded and used more broadly.

The Marketing group's efforts now and in the foreseeable future will concentrate on promoting DDI Lifecycle 3.2 and DDI Codebook 2.5. These are good solid products that are currently being used and these should be the gist for our marketing mill. In most of 2015 we have successfully avoided mention of the future version of DDI. We believe calling inordinate attention to the next iteration of DDI muddies the marketing message among current and potential DDI user communities. Adding to this potential confusion has been a plethora of published names for the next version of DDI:
● DDI 4
● Moving Forward (MF)
● Views
● DDI Lifecycle
● Model Driven (MD)
● Various versions above with "lifecycle" thrown in
The Marketing group suggests some messaging discipline be brought to bear; let us determine the name for the next DDI version and use it consistently. Publication of DDI4 will of course require some intensive marketing efforts, but until a new version is ready for public review or use the Marketing group proposes that it not be mentioned widely in any external promotional efforts or materials.

Because Marketing did not attend as many conferences as planned, we enter FY 2017 with a roughly $10,000 surplus, some of which can be earmarked to support registration and travel at more conferences. In addition to rolling this amount over into 2017, we propose keeping expenditures of $15,000 in each of FY2017 and FY2018 in line with the Strategic Plan and what

was approved at the 2015 Members Meeting. We are also assuming that new members in 2017 and 2018 will offset these expenses.

Fiscal Year 2017 (July 1, 2016-June 30, 2017)

Marketing Activity	Cost	Stakeholder	Goals
American Association for Public Opinion Research (AAPOR), May 2017, New Orleans	$1,500-2,500	Survey organizations	DDI use, general visibility and awareness; Memberships
International Field Directors Conference, May 2017, New Orleans	$1,000-1,500	Survey directors, programming and field staff	DDI use, general visibility and awareness; Memberships
Comparative Survey Design and Implementation (CSDI) 3MC Conference	$1,500-2,500	International survey organizations, large studies	DDI use, general visibility and awareness; Memberships
International Blaise Users Conference Oct 4-6, 2016		Survey organizations and Blaise users	http://www.blaiseusers.org/page.php
Potential Conference Targets			
European Survey Research Association		Survey organizations, NSIs	DDI use, general visibility and awareness
Open Repositories Conference		Libraries	DDI use, general visibility and awareness
Research Data Access and Preservation (RDAP) Conference		Libraries	DDI use, general visibility and awareness
International Digital Curation Conference		Libraries	DDI use, general visibility and awareness

American Library Association Conference		Libraries	DDI use, general visibility and awareness
International Statistical Institute (ISI)		Statisticians and Official Statistical Agencies	DDI use, general visibility and awareness Possible collaboration with GSIM, SDMX
International Converence on Questionnaire Design, Development, Evaluation, and Testing (QDET2)		Survey research organizations and NSIs	DDI use, general visibility and awareness https://www.amstat.org/meetings/qdet2/index.cfm
	$1,500-2,500		
Other Marketing Activities			
Conference Evaluation Tool	$5,000-7,500	All	Membership, DDI use, expand community, general visibility and awareness, training
Marketing collateral (brochures, buttons, thumb drives, posters, PPs, stock photos, designer's time)	$2,500	All	General visibility and awareness
Laptop and Monitor for Multimedia Displays	$2,500	All	Membership, DDI use, expand community, general visibility and awareness, training
Website and Confluence	In-kind contributions (plus Alliance-paid time of Web developer)	All	Membership, DDI use, expand community, general visibility and awareness, training
Webinars – Rolling Presentation	In-kind	All	Membership, DDI use, expand community, general visibility and awareness, training

Create and update/maintain social media	In-kind	All	General visibility and awareness
Quality control for DDI documentation	*In-kind*	*All users*	*DDI use, work with other standards*
Upgrade GLBPM to serve as a standard	*In-kind*	*All users*	*DDI use, work with other standards*

Total   **$15,000**

Fiscal Year 2018 (July 1, 2017-June 30, 2018)

Marketing Activity	Cost	Stakeholder	Goals
DDI 4 marketing	$5000	All	
2 conferences	-up to $5,000	See above	DDI use, general visibility and awareness
Partnerships exploration	$5000	All	Interchange of standards; interoperability
Webinars	In-kind	All	Membership, DDI use, expand community, general visibility and awareness, training
Website and Confluence	In-kind contributions (plus Alliance-paid time of Web developer)	All	Membership, DDI use, expand community, general visibility and awareness, training
Social media	In-kind	All	General visibility and awareness
Quality control for DDI documentation	*In-kind*	*All users*	*DDI use, work with other standards*
Upgrade GLBPM	*In-kind*	*All users*	*DDI use, work with other*

			standards
Total		**$15,000**	