

DDI DIRECTIONS

A NEWSLETTER OF THE DATA DOCUMENTATION INITIATIVE

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From the Director

In this issue of DDI Directions, in addition to reporting on conferences and meetings, we highlight the contributions of DDI members engaged in working groups or committees. The vast majority of Alliance progress would not be possible without their efforts. If you see a group or committee to which you would like to contribute, please feel free to reach out to the chair (listed on the [web site](#)), or directly to me.

Also in this issue, we have a new column, "Read-Write-Execute (RWX)", written by Knut Wenzig (DIW Berlin), that will highlight both existing and new DDI and metadata-related publications produced by the DDI Community. Special thanks to Knut for writing this column. And special thanks to Kelly Chatain for compiling and editing these newsletters. Starting in 2017, the DDI Newsletter will begin publishing quarterly instead of three

NADDI 2016 Report

With 75 registered participants representing 34 organizations, many of whom were new to the DDI community, the 4th Annual North American DDI Conference was held in Edmonton, Alberta, Canada April 7-8. The Health Research Data Repository hosted the event, supported by the Faculty of Nursing at the University of Alberta.



The [conference program](#) of 15 presentations and 4 workshops reflected a wide variety of potential and practical uses of DDI within the social science community and beyond, such as helping to drive a new health data ecosystem, managing heterogeneous longitudinal weather data, and addressing the needs of geospatial data and time-based media. Keynote addresses were given by Dr. Lawrence Richer, Associate Director of the Women and Children's Health Research Institute, and Dr. Larry Hoyle ("The Evolution of DDI - Concepts and Technology"), Senior Scientist at the University of Kansas Institute for Policy & Social Research. In addition to the program, [Colectica](#) and [Nooro Online Research](#) partnered to provide a demonstration of DDI's interoperability by creating, distributing, and documenting the conference's feedback survey in real-time.

NADDI 2017 will be held at Ithaca, New York on April 5-7, 2016.

Annual Meetings Held in Bergen, Norway



The DDI Alliance Annual Meeting of Member Representatives and the Meeting of the Scientific Board were held on May 30 in Bergen, Norway, in advance of the IASSIST 2016 conference. The Annual Meeting of Member Representatives included a [State of the Alliance](#) presentation by Steve McEachern's (Chair of the Executive Board), as well as reports from the [Marketing](#), [Training](#), and [Moving Forward](#) groups; the Meeting of the Scientific Board included an [activity report](#) by the Technical Committee. Both meetings were well attended and productive.

New Members!

times a year.

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CESSDA

Consortium of European
Social Sciences Data Archives

The DDI Alliance recently welcomed the Consortium of Social Science Data Archives (CESSDA) as a Full Member. Hossein Abroshan, Chief Technical Officer, is the Member Representative.

m·stats data science and
statistical software



The Alliance also recently welcomed [mStats DS – Data Science and Statistical Software](#) (Marcel Hebing, representative) and the University of Wisconsin Institute on Aging – [MIDUS](#) study (Barry Radler, representative) as Associate Members.

New Member Representatives

Ben Abrahamse has replaced Katherine McNeill as the member representative for the [Massachusetts Institute of Technology \(MIT\)](#), and Tayyeb Akram has replaced Simon Saint-Georges as the member representative for [Epidemiology France, Aviesan - ITMO SantPublique](#). Welcome, Ben and Tayyeb, and thank you for your service, Kate and Simon!

New Premium Membership option



Members now have the option to become premium members. Premium membership provides all the rights and obligations described in the Bylaws, with additional marketing and visibility benefits. Premium Members are featured on the DDI Alliance website and are authorized to use a “DDI Alliance Premium Member” logo on their own website. It is expected that Premium members would include software vendors providing products or services based on DDI, large users or implementers of DDI, serious stakeholders in the mission of the DDI Alliance, and any organization that finds value in having its contributions and commitment to DDI publicly recognized.

Updates from Working Groups and Committees

Marketing and Partnerships Group

The goals of the DDI Marketing and Partnerships group are to increase adoption and use of DDI, to grow the DDI Alliance membership, and to coordinate DDI branding and messaging. The Executive Board has identified attendance at professional conferences as an important vehicle for accomplishing these aims, and the Marketing and Partnerships group has been developing marketing materials, displays, and procedures to maximize impact at these conferences. This past spring the Marketing and Partnerships group represented the DDI Alliance at the American Association of Public Opinion Research

(AAPOR) conference in Austin, Texas, where we shared a booth with ICPSR, distributed marketing materials, sponsored a reception, and had a number of DDI presentations and posters on the AAPOR program.



In the coming months, we will be conducting followups with contacts made at the AAPOR conference, and attending and sponsoring the Conference on Survey Methods in Multinational, Multiregional, and Multicultural Contexts (3MC) in Chicago. We are also coordinating a presence at the International Blaise Users Conference in The Hague in October.

A primary vehicle for promoting and marketing DDI is the DDI Alliance website. A new DDI logo and website design was unveiled in 2015, and the Marketing and Partnerships group will continue working with the Web group during the next three months to modify and improve the website, guided by formal feedback gathered via a session at the NADDI 2016 conference as well as informal and ad hoc suggestions from the DDI community. The Marketing and Partnerships group will also be coordinating with the Training group to create DDI introduction/tutorial to serve as a video on the website and/or as a rolling presentation displayed at our conference booth.

Training Group

The purpose of the Training Group is to improve people's comfort level and competence in working with DDI, bring in new users (and members), gear training to specific audiences, and develop expertise within the community for training purposes. Training Group priorities for the next quarter include updating the web site and creating interactive, introductory multimedia for our online users.

Technical Committee

The Technical Committee has had a busy summer. We are preparing a number of products for review. This includes packaging, documenting, preparing announcements, setting up the pages and issues trackers for each product and then responding to the comments received during the review. Each of the next few months is focused on getting a different product out for review:

- June – RDF Vocabularies: DISCO and XKOS
- July – Q2 2016 DDI4 Development Review
- August – DDI-Lifecycle 3.3 followed but updated high level documentation for DDI-Lifecycle 3.2

- September – Special development release of the Codebook Functional View of DDI4

Moving Forward

DDI Moving Forward is an ongoing project to develop the next version of DDI (4). DDI is transitioning to a model-driven specification to support new content and domains, to provide needed flexibility in rendering and packaging, and to ensure a sustainable development process for DDI going forward. The model will enable use-case driven "functional views" of the full model so that prospective DDI users can receive only the subset of DDI classes they need for a specific task or function (e.g., create a simple codebook). The transition also includes moving to a fully automated production framework to create the specification, bindings, and documentation. [Read more information about the DDI work products and how they all fit together.](#)

The DDI Alliance welcomes members of the DDI community to contribute to Moving Forward efforts, but also emphasizes that DDI 4 is still in development. In the meantime, the DDI Alliance encourages the use of its existing and fully functioning [DDI 2](#) (Codebook) and [DDI 3](#) (Lifecycle) versions.

Moving Forward Sprints

The Moving Forward project hosted development sprints in April and May. The first sprint, held in Edmonton, Canada at the same time as the North American DDI conference, focused on completing a consistency review of the DDI 4 modeling, particularly reviewing consistent use of patterns and documentation content. The second sprint, held in Norway prior to IASSIST 2016, focused on finalizing, documenting, and testing the Codebook Functional View.

The next Moving Forward sprints are planned for October at Schloss Dagstuhl - Leibniz Center for Informatics in Germany. The first week will bring together representatives from other metadata standards to review the current DDI work and discuss how best to work collaboratively. The second week will extend and build upon the progress made during the past three years of development, focusing on four main areas of work: creating re-usable multi-purpose documentation; controlled vocabularies; complex data capture and description; and funding proposals.

Read more about the sprints on the DDI [Collaboration Wiki](#).

News of the Executive Board

Bill Block selected as Vice Chair of Executive Board



Bill Block was selected by the Executive Board in April to serve as Vice Chair. In addition to serving as Vice Chair, Bill will lead Annual Meetings of the Membership Representatives in the absence of the Chair of the Executive Board.

Margaret Levenstein joins the Executive Board



ICPSR's new director, Dr. [Margaret Levenstein](#), joined the Executive Board in June. Maggie has extensive experience working with and stewarding data, including serving as the executive director of the



Michigan Census Research Data Center (MCRDC), a joint project with the U.S. Census Bureau. We are excited to welcome Maggie to the Executive Board.

George Alter leaving Executive Board

We thank George Alter, ICPSR's former director, for his service on the Executive Board. George has been a long-time champion of high quality metadata, especially DDI metadata. While George plans to remain active in the DDI community, we'll miss his many contributions to the Board.

Scientific Board Election Results



In May, elections were held for the positions of Chair and Vice-Chair of the Scientific Board. Achim Wackerow (GESIS) was elected as Chair, with Michelle Edwards (CISER) elected as Vice-Chair. The Scientific Board: 1. Contributes to the substantive content of DDI standards and

semantic products and approve major version revisions. 2. Evaluates technical proposals through the Alliance standards review process. 3. Undertakes research and testing concerning proposals for DDI standards and semantic products. 4. Develops and promulgates best practices for use of DDI standards and semantic products. 5. Assesses progress and barriers to progress. 6. Suggests future directions and activities for the Alliance. The Technical Committee is a standing committee of the Scientific Board. The Scientific Board also has direct oversight of the Moving Forward project (DDI4).

Announcements

EDDI16

The 8th Annual European DDI User Conference (EDDI16) will take place December 6-7, 2016 in Cologne, Germany. EDDI16 is organized jointly by [GESIS](#) - Leibniz Institute for the Social Sciences and [IDSC of IZA](#) - International Data Service Center of the Institute for the Study of Labor. The meeting will bring together DDI users and professionals from all over Europe and the world. This year, the conference organizers are encouraging papers which focus on re-use of software and re-use of administered software. Examples of this could be question banks, re-use of software components and provision of services which foster re-use. Also encouraged are papers which discuss barriers to the creation and uptake and maintenance of such re-use. Anyone interested in developing, applying, or using DDI is invited to attend and present. More information is available on the Conference [web page](#).

DDI Webinar

On September 28th at 19:00 UTC, Jon Johnson (Centre for Longitudinal Studies, Institute of Education, University College London – CLOSER), Jared Lyle (ICPSR), and Barry Radler (University of Wisconsin Institute on Aging – MIDUS study) will be presenting a Webinar, titled "A DDI Primer: An overview and examples of DDI in action," for the [ICPSR Data Fair](#). [Register now](#). Feel free to share widely!

New SAS import for Colectica for Excel

SAS import for Colectica for Excel is here! The Colectica Team is happy to announce the release of a new version of Colectica for Excel and Colectica for Excel Professional. New features included in this update are:

- Importing SAS sas7bdat data files
- Importing SAS sas7bcat catalog files

For more information [visit the Colectica website](#).

Blaise/Colectica partnership

Colectica and Blaise Statistics Netherlands have agreed to enter into a long term partnership starting with building two software products. These two products will allow survey researchers to build surveys faster, to leverage metadata standards, and to generate rich documentation and reports. The tools will improve transparency into the data capture process. Blaise Colectica Visual Survey Designer will offer an intuitive survey design surface and questionnaire palette, allowing survey designers to build questionnaires without learning a domain specific language. Surveys designed with this tool can be fielded using Blaise 5 on the desktop, on the Web, and on mobile devices. The software will store questionnaire specifications using open standards, and can connect to metadata repositories and question banks powered by Colectica software. Blaise Colectica DDI Connector will convert Blaise 5 data models to and from the Data Documentation Initiative's (DDI) standard for documenting surveys and statistical data. "This partnership will make it possible that more types of users will be able to use Blaise 5 with less training and less programming knowledge required. This leads to faster Survey Development and this is enhanced by the possible use of a Question Bank and standardized DDI metadata. I'm very pleased with this partnership" Harry Wijnhoven MSc, Member of the Board of Directors and Dep. CIO of Statistics Netherlands/CBS and CEO Blaise. The survey design tools will launch at the 17th International Blaise Users Conference (IBUC) www.aanmelder.nl/ibuc2016 . IBUC takes place from 4-6 October 2016 in The Hague, Netherlands.

Read-Write-Execute (RWX)

The DDI Community has produced a rich store of DDI and metadata-related publications over the last 20 years. Read-Write-Execute (RWX) will highlight some of these existing publications as well as new work as it is produced. This first column will feature some of the foundations of DDI in scientific literature. (Thanks to Achim Wackerow for his suggestions.) At the same time, a bibliography of DDI articles, working papers, and presentations is being built and is available at Bibsonomy.org with easily reusable bibliographic metadata. This metadata will also be made available on the DDI Alliance website. Suggestions for papers and topics for RWX, or the bibliography, are appreciated and can be sent to: [Knut Wenzig, knut.wenzig@diw.de](mailto:Knut.Wenzig@diw.de).

Foundations of DDI in Scientific Literature

In her paper "The DDI matures: 1997 to the Present", Mary Vardigan (2013), the former Director of the DDI Alliance, presents a timeline of the conceptual and organizational development of DDI. The initial SGML Codebook Committee meeting occurred in 1995, but 1997 was the year of the first "instantiation in XML" (Vardigan 2013: 45). DDI started (in versions 1 and 2) to describe data sets by the codebook approach, which is still supported and widely in use. From version 3 on the scope was broadened to document the whole

lifecycle of data, using data collection as a starting point, and finally enabling repurposing and reuse of DDI elements.^[1] The paper ends with a list of high level design goals, referred to in “Developing a Model-Driven DDI Specification” (Participants in 2012 Dagstuhl Seminar on DDI Moving Forward, 2012), on which the next version of DDI is based.

The first reference listed in Mary Vardigan's paper is “Providing Global Access to Distributed Data Through Metadata Standardisation - the Parallel Stories of NESSTAR and the DDI”, submitted by the Norwegian Social Science Data Services and prepared by Jostein Ryssevik (1999). The “relative distance between the end-users of a statistical material and the production process” (p. 2) was identified as the fundamental problem to be solved. As discovery systems were provided to address this problem, the need for metadata standards like DDI emerged. The authors recall that DDI used the new (at the time) XML language, and that the defined XML code could contain the description of the document itself, of the study, the file, the variables, and other study-related materials. Already in this early paper RDF (Resource Description Framework^[2]) is described as an application “that provides the foundation for metadata interoperability across different resource description communities.” (p. 5) Using DDI as a language, the medium NESSTAR could deliver a great range of interconnected services and platforms. Even if the last release of NESSTAR is more than one year old, the ideas in the article - whether or not realized by the software - deserve to be revisited. Using the metaphoric antonym of Bazaars vs. Cathedrals, the same authors (Ryssevik 2000) conceptualize their vision of - even then! - metadata systems that cover the complete life-cycle.

The article “The Data Documentation Initiative”, by Grant Blank and Karsten Boye Rasmussen (2004), was published in Social Science Computer Review, one of the top ranked academic journals in the “Information Science & Library Science” category. The authors describe the requirements of data documentation in the social sciences, how DDI as an XML based standard can be used to store information presented in codebooks, and how “standardization creates new opportunities for software development to aid users.” (p. 314)

Today, after 20 years, we can read and reevaluate those ideas only because people took the time to write them down. In this sense contributing to the scientific inventories of knowledge should be understood as a best practice and an integral part of software development for the academic community.

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[1] Version 3 is described in Vardigan, Heus, Thomas 2008.

[2] Vardigan (2013: 48) expects that RDF will be used in the upcoming version of DDI as a connection to the semantic web.