

# DDI Alliance Executive Board Meeting

## 27 June 2024

*Present: Libby Bishop, Cathy Fitch, Jon Johnson, Maggie Levenstein, Jared Lyle, Steve McEachern*

### FY25 Funding Requests -- Funding Requests + Budget Approval

The Board reviewed fiscal year 2025 funding requests received from community members (see Appendix A), including the Scientific Board's evaluation and recommendations for scientific and technical requests (see Appendix B). Appendix A includes Board approvals, with approved total expenditures of \$129,106 USD and expected income of \$80,000.

The Board also discussed reviewing the following questions at the October meeting:

- How to improve the call for funding proposals next year?
- How to strengthen funding proposal connections with DDI strategic priorities?
- What is the appropriate level of the fund balance (reserves)? The Board discussed the need to not spend reserves unnecessarily and to never let reserves dip under more than one year of funding.

### Project Report Template for FY25 Funded Projects

During the May 2024 Executive Board meeting, it was suggested to create a project report template for funded projects so members can better assess the outcomes and continued funding of projects.

The Board reviewed and approved the draft template in Appendix C. Newly-funded projects will be asked to complete a final report using this template before the 2025 annual meeting.

### Membership Benefits

The Board recommended that the smaller group that met in March to review the DDI Alliance membership levels and benefits returns by September with recommendations.

## Appendix A.

These are the FY2025 (July 1, 2024 through June 30, 2025) funding requests submitted by Alliance members as of April 22, 2024. A message was sent to the entire DDI community soliciting funding requests. The DDI Scientific Board evaluated requests related to scientific or technical activities from the perspective of the Alliance Scientific Plan, and then provided feedback about the requests to the Executive Board.

ITEMNO	Scientific Board Priority	Source	Activity	Report on FY24 outcomes	Individual Total	Requested Total	Approved Total	Comments
<b>Recurring Expenses</b>								
		Staff Salaries				\$45,000	\$45,000	
1	N/A		Secretariat staff salaries		\$45,000			
		Research Supplies & Services				\$6,456	\$1,456	Moved marketing materials to dedicated Marketing WG.
2	N/A		<a href="#">DDI Registry web hosting</a>		\$900			
3	N/A		Zoom virtual meetings		\$300			
4	N/A		Mailchimp newsletter software		\$156			
5	N/A		Marketing materials		\$5,000			
6	N/A		Wire fees (estimate)		\$100			
		Alliance Travel & Hosting				\$4,000	\$4,000	
7	N/A		Annual meeting hosting		\$1,000			
8	N/A		IASSIST conference sponsorship		\$1,000			
9	N/A		Meeting attendance (e.g., UNECE)		\$2,000			
<b>Funding Requests</b>								
		DDI Secretariat				\$21,800	\$0	Moved website migration to TC.
10	N/A		DDI website migration		\$21,800			
	N/A	Marketing					\$10,000	
		Daryl Hepting				\$10,000	\$5,000	
			Survey of Tools Used in the Open Data Community		\$10,000			
		Developers Group				\$10,000	\$5,000	
1			Hackathon		\$10,000			
		Technical Committee				\$18,520	\$15,000	
1			Face-to-Face Meeting in the UK		\$14,320			
1			Infrastructure Support Costs		\$4,200			
		DDI-CDI				\$16,500	\$13,200	6600
1			Software/Documentation Tooling Support	<a href="#">FY24 Outcomes Report</a>	\$9,000			
1			External-facing Face-to-Face Event	<a href="#">FY24 Outcomes Report</a>	\$7,500			
		Dagstuhl Workshops				\$13,000	\$13,000	
1			Two Dagstuhl workshops	<a href="#">FY24 Outcomes Report</a> <a href="#">FY24 Outcomes Report</a>	\$13,000			
		Scientific Board				\$3,700	\$3,700	
1			Face-to-Face meeting at EDDI (Chur, Switzerland)		\$3,700			
		Training Working Group				\$26,500	\$13,750	Reduce conference attendance & webinars by 50%
1			Conference attendance		\$18,000			9000
1			Webinars	<a href="#">FY24 Outcomes Report</a>	\$7,500			3750
3			Translations		\$1,000			1000
					<b>Total:</b>	<b>\$175,476</b>	<b>\$129,106</b>	
			ESTIMATED REVENUE			\$80,000	\$80,000	
			SURPLUS / (LOSS) -- if all recurring expenses and funding requests are approved			-\$95,476	-\$49,106	
			PROJECTED BEGINNING FUND BALANCE (1 July 2024)			\$344,316	\$344,316	
			PLUS SURPLUS/LOSS			-\$95,476	-\$49,106	
			ESTIMATED FORECAST FUND BALANCE (30 June 2025)			\$248,840	\$295,210	

These are the FY2025 (July 1, 2024 through June 30, 2025) funding requests submitted by Alliance members as of April 22, 2024. A message was sent to the entire DDI community soliciting funding requests. The DDI Scientific Board evaluated requests related to scientific or technical activities from the perspective of the Alliance Scientific Plan, and then provided feedback about the requests to the Executive Board.

ITEMNO	Scientific Board Priority	Source	Activity	Report on FY24 outcomes	Individual Total	Requested Total	Approved Total	Comments
*Currency in USD.								
*Last updated 30 June 2024								
Scientific Board Priority Levels:								
	Priority 1 - Strong recommendation that the funding request is prioritized for approval by the EB for the FY							
	Priority 2- Recommendation that the funding request is prioritized for funding by the EB for the FY							
	Priority 3 - Recommendation that the funding request is not prioritized for funding by the EB for the FY							
	N/A - Not reviewed by the Scientific Board (since not related to scientific or technical activities)							



Jared Lyle &lt;lyle@umich.edu&gt;

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## Funding request

1 message

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**Daryl Hepting** <Daryl.Hepting@uregina.ca>  
To: secretariat@ddialliance.org

Tue, Apr 23, 2024 at 2:31 AM

Dear DDI Executive Board,

My name is Daryl Hepting and I am a Professor of Computer Science at The University of Regina, in Regina, Canada. I came to know about the DDI Alliance from my research interest in using Linked Open Data to publish the results of a student feedback instrument that I have given to students in my classes at their examinations for more than 10 years. (A pdf version of the feedback instrument is available at <https://www2.cs.uregina.ca/~hepting/assets/teaching/pdf/feedback-instrument.pdf>) I encountered the DISCO (DDI-RDF Discovery) Vocabulary at the Linked Open Vocabularies website (<https://lov.linkeddata.es/dataset/lov/vocabs/disco>). I contacted Wendy Thomas at the beginning of 2023 and I made a presentation to a meeting of the TC about 1 year ago (April 27, 2023) on the topic of "Publishing Linked Open Data". I have since broadened the scope of my efforts to include all forms of open data, not just using RDF.

I propose to design, administer, and analyze a survey delivered on the qualtrics platform that would seek to understand the open data community and the tools they use. How many respondents know about and use DDI Alliance products? I propose a modest budget of 10,000 USD for the purpose of hiring a graduate student for 2 semesters. I would work with you to ensure that the data collected meets the needs of the Data Documentation Initiative.

I believe that this request matches your strategic priorities: engaging the DDI community, expanding the DDI community, and aligning DDI development. The survey contributes to market research. It would also help to engage the DDI community and the results would help to strengthen the community, as would collecting and publishing data about institutional projects that use DDI products. The survey could help to understand existing and potential DDI users, what gaps in documentation that they have identified, and what other standards and tools that they find useful. Sponsoring such a survey on its own would help to raise the profile of the DDI.

I hope that you will consider my request. Please let me know if you have any questions or concerns.

Best regards,  
Daryl

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# DDI Alliance Budget Request for Fiscal year 2024/2025 : Hackathon 2024/2025 in Chur, Switzerland

Submitted by the DDI Developers Group

## Overview

Thanks to the Hackathon 2023 the DDI Developers Group has finally been re-established and the hackers provided four valuable proofs of concept which are further developed within the teams. The results have been extremely well received by the community and DDI leadership (EB and SB). This shows the void this group is filling and the need for yearly iterations of the Hackathon. The results in written code by far outweigh the costs according to the old motto of the DDI Developers Groups - "no tools, no standard". We therefore want to establish the Hackathon as a yearly event for the DDI Developers community similar to Dagstuhl is for the scientific community. This is the application for the 2025 iteration which is supposed to be held early in December 2024 in Chur, Switzerland as an extension of the EDDI conference by two days with possible overall cost saving potential.

## Budget

Though the Hackathon 2023 used only a third of its budget. Nevertheless, we would like to reserve the same amount (10.000 USD) as we cannot foresee how much travel costs are needed for participants. As of time of application Hackathon 2024 has not happened yet and therefore cannot be used as a reference for 2025. The costs in 2023 were only low as there were no overseas participants needing funding, only two Europeans and some participants only could participate virtually due to a transport strike in their country. As the DDI Developers Group is quickly growing we want to reserve the full travel budget for 2 x European (1.500 USD) and 2 x Overseas (3.500 USD) plus more budget for food and drinks (5.000 USD). As predicted in the last request for 2023/2024 our group almost doubled thus having the potential of doubling our food and drink expenses or requests for travel support.

## Technical Committee Face-to-face meeting

**Members:** Wendy Thomas, Jon Johnson, Darren Bell, Johan Fihn, Oliver Hopt, Jeremy Iverson, Flavio Rizzolo, Dan Smith

**Request:** Funding covers all members for a 3 day meeting in the UK during July/August 2024

**Purpose:** To have a functioning replacement for DDI Website and related production infrastructure based on AWS.

The 2023 Face-to-Face TC identified the need for a new infrastructure to support the development of DDI products based on AWS. The DDI Alliance website needs to be moved from the current Drupal site as a result of changes at ICPSR. The TC is currently scoping the information and software requirements for integrating both of these, which is due to be completed in May/June 2024.

The agenda will focus on establishing the new infrastructure and website services, the movement of content, and defining long-term maintenance and management of this space.

As there is an urgency to the proposed meeting, it is not possible to align with other conferences,

Description	Cost	People	Unit	Total
Hotel	175	7	4	4900
Flights (Overseas)	1500	4	1	6000
Travel (within Continent)	300	3	1	900
Subsistence / day (B/D)	80	6	4	1920
Meeting facilities (inc lunch)	25	8	3	600

<b>TOTAL</b>				<b>\$14,320</b>
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**Technical Committee - Infrastructure support costs**

<b>Item</b>	<b>Cost</b>
Running the AWS infrastructure to support product development and the DDI Alliance website	\$1,200
Software development costs (contingency)	\$3,000
<b>Total</b>	<b>\$4,200</b>

The TC suggest that the AWS infrastructure costs currently \$1200, be considered as a recurring cost (as the DDI Alliance website has historically been).



## DDI -CDI WG Budget Request for the Financial Year 2024/2025

### Overview

The budget requested would fund the activities of the DDI-CDI Working group for the period covering Fiscal year 2024/2025. It includes a request for funding to hire expert consultancy regarding features of the documentation and syntax representations and to support existing software tools aimed at the user community, and to provide for an external-facing face-to-face event to raise the profile of DDI-CDI, and engage more closely with the DDI and user communities.

Each of these activities is described separately, and cost estimates provided. Total request for funding is \$16,500.00.

### Alignment with the Goals of the Alliance

The alignment with the goals of the DDI Alliance are in two major areas:

- (1) Maturity of the DDI Alliance as regards the new DDI-CDI specification and related work products

The production of DDI specifications – notably DDI-CDI – is becoming more professional and standardized/consistent, and this is reflected not only in improved user documentation and tooling, but also in the production process itself (as envisioned by the TC).

- (2) Alignment with other standards/communities

DDI-CDI is becoming better known among the FAIR community, and is an important part of alignments with standards used in the world of official statistics as well. These alignments take several different forms (outreach through WorldFAIR/CDIF, FAIR Impact, and EOSC; engagement with The UN/ECE Modern Stats community and SDMX; engagement with W3C; etc.)

This proposal supports both of these goals, by providing support both within the DDI-CDI WG for its own production, by offering better documentation and tools to end users, and by providing opportunities to reach out and engage with target communities outside the immediate DDI Alliance itself.

### Support for User Documentation and Production Software Tools

This request is made for two related activities which build on work performed under the FY 2023/2024 budget for software tools for supporting the user community, and on the existing tooling for producing the current specification. This work produced a version of the tooling which the DDI-CDI WG uses to provide an integrated browser for field-level documentation of the model and all available syntax representations, and for a similar set of documentation to be produced for community subsets of the standard.

The request for FY 2023/2024 is to extend this functionality in line with the goals discussed at the Dagstuhl workshops and in recent face-to-face meeting in Paris, and to integrate it as part of a sustainable production workflow employing a batch process, in line with the approach advocated by the

TC for producing specifications . Major goals include the extension and improvement of the field-level documentation to make the production of the specification more sustainable, and to make it more easily accessible to a broader audience. This includes better support for the combined use of DDI-CDI and the GSIM model, which is important in promoting adoption within the official statistics community. Refinements to existing tools, and consulting on syntax representations currently under development would also be provided by this resource.

Specific deliverables/features include:

- Mobile-friendly field-documentation. The goal would be to have only one version of the documentation which supports both regular displays and small displays.
- Extension of the field-documentation with diagrams for associations and inheritance which support some interactive approach (like the hierarchical edge bundling), i.e. focus on one class to see relationships with other available classes. Links would go directly into the field-level documentation. This approach supports easier access for specific perspectives (like the subsets but on another more visual dimension).
- Standalone production (batch) of the model-to-text tool for the generation of the field-level documentation with a jar file (without the need of interactive steps in Eclipse/Acceleo). This would enable the use of the tool for a broader audience, and allow DDI-CDI WG production to be more sustainable and easily performed.
- Generalization of the model-to-text tool for any UCMIS model. The current approach has some DDI-CDI specifics. This would support the planned publication of UCMIS itself as a DDI product. A strong candidate for application of a generalized UCMIS tooling is GSIM, as per recent discussions with Flavio Rizzolo and others.

Funding request is for \$9000.00 to cover these activities (an estimated 3 person-weeks of effort).

### External-Facing Face-to-Face Event

Over the past two years the DDI-CDI WG has held two face-to-face meetings in the margins of other events, resulting in engagement with other communities in a productive fashion, as well as helping to push forward the work within the group. In FY 2022/2023 a side-meeting was held in Gothenburg Sweden, in the margins of the RDA Plenary, including a 2-day working meeting and a presentation of DDI-CDI to the attendees at the RDA Plenary. In FY 2023/2024 a 2-day working meeting was held in the margins of the COSMOS Conference, and a day-long meeting with the UN/ECE Modern Statistics community and SDMX was attended by several working group members. (This meeting also witnessed the finalization of the DDI-CDI 1.0 Candidate Release 2 draft, and preparatory work for the release pending approval by the DDI Alliance.)

We are proposing to hold a similar event in the coming fiscal year. The timing of this meeting is to some extent opportunistic – we are looking to hold the meeting in the margins of another meeting or conference which will allow for engagement with an external audience, as well as support work within the DDI-CDI WG.

Our budget request for FY 2023/2024 was \$6000.00, which was slightly less than was necessary to support all planned attendees – the result of an unanticipated increase in the cost of air fares. The amount requested for this year is slightly higher, to reflect that short-fall. Ideally, most participants will be able to secure funding from their host organizations to attend the workshop or meeting which we co-locate the DDI-CDI face-to-face with. With the establishment of the “qualitative” (non-quantitative) sub-group, we would also like to encourage the involvement of some of our new members in these activities. Another possibility is stronger engagement with the DDI Developer’s Group.

The amount requested is \$7500.00 (support for 3 or 4 participants is anticipated, with costs varying depending on where the meeting will be held).

### Total Request

Software/Documentation Tooling Support: \$9000.00

External-facing Face-to-Face Event: \$7500.00

Total: \$16,500.00 USD

# Report on Work Completed by Joachim Wackerow for the DDI-CDI WG: FY 2022/2023

## **Description of Work:**

From the budget request document:

### **Syntax Representations/Support for User Software Tools**

This request is made for two related activities which build on work performed under the FY 2022/2023 budget for software tools for supporting the user community. This work produced a version of the tooling which the DDI-CDI WG uses to provide an integrated browser for field-level documentation of the model and all available syntax representations. Because user communities will subset the classes of the model which they use, the tools have been adapted for their use to reflect these choices as an integral part of the community implementation guide. This has the effect of making the specification more approachable, by presenting only those aspects (model and syntax) of interest to the particular community. These tools will be provided free of charge in support of the standard.

The request for FY 2023/2024 is to extend this functionality in line with the goals discussed at the recent face-to-face meeting in Gothenburg, Sweden in March of 2023. One major goal is to produce a syntax representation in an object-oriented programming language: Python (as the major language for data science applications) was identified as the best candidate. Such a syntax representation would require integration with the tooling for the production of the DDI-CDI documentation, and with the community-facing version of that same software.

Funding request is for \$9000.00

## **Deliverables:**

The syntax representations website which is intended as a supporting resource for developers (not as part of the release) has been updated. The current draft is available at [https://wackerow.bitbucket.io/ddi-cdi\\_encoding/rtd/](https://wackerow.bitbucket.io/ddi-cdi_encoding/rtd/). This includes representations which are directly generated on the basis of the model and also the ones which are generated on the basis of the XML Schema. The source of the files is written in a subset of restructured text which can be rendered for two targets - the mentioned website above and the same content as slides see:

[https://wackerow.bitbucket.io/ddi-cdi\\_encoding/revealjs/](https://wackerow.bitbucket.io/ddi-cdi_encoding/revealjs/). This includes Python and SHACL representations, as well as work performed by other members of the group.

The subsets tool has been further refined as discussed in Gothenburg.

**Approval:**

The work has been completed in a satisfactory fashion, and forms a key part of the plans for the upcoming production release. (Per Arofan Gregory, chair of the DDI-CDI WG)

**Invoice:**

Sent under separate cover.

# DDI-CDI Working Group Face-to-face Meeting: Paris, 8-9 April 2024



The DDI-CDI WG met for two full days at the CODATA offices in Paris, to focus on finalization of the second Candidate Release of the DDI-CDI 1.0 specification (CR2), and to work on related efforts for publication and support for adopters once the spec is released. Topics included: (1) preparing the draft specification for transfer to the Technical Committee for a final round of review and to start the approval process; (2) organization of the Git repositories to be ready for the upcoming migration of DDI products from Bitbucket to Github; (3) a revision and updating of the relevant DDI website pages; (4) continuation of on-going work on additional syntax bindings; (5) production of marketing collateral for the COSMOS and European Geosciences Union (EGU) meetings; (6) planning for the resolution of namespaces for DDI-CDI resources; and (7) preparation of a reference profile to help early adopters of DDI-CDI once released.

The meeting was a success, although some members of the group could not be available. The CR2 package was transferred to TC, which required making sure that the current Bitbucket repository is in a good state for migration to the new Github structure, which will be used for reviews and issue tracking moving forward. Several different syntax representations have and are being developed beyond the existing XML and RDF syntax representations included in the CR2 package. These include Python, R,

and SHACL. Some of these will be offered to the user community as available representations which may or may not become part of the official release in due course - the intention is to provide a repository of resources for the user community to employ, alongside the specification and "official" DDI Alliance products.

The COSMOS Conference on smart metadata, hosted by INSEE, included a number of DDI-CDI-related posters and presentations, and a marketing brochure was distributed. This included a link to the updated website (<https://ddialliance.org/Specification/DDI-CDI/>). The same brochure will be used at the EGU 2024 conference in Vienna, where DDI-CDI is featured as part of an EOSC Future project "Climate Neutral and Smart Cities" - a project which combined climate and air quality data with data from the European Social Survey, and featured both DDI-CDI and DDI Lifecycle being used in combination. There will be a presentation and a poster session, and the brochure will be distributed at that conference, which is attended by 20,000+ people.

Work was started on a reference profile of the DDI-CDI standard, based on a set of early implementations used to test the specification in the later stages of its development. This profile recommends a small number of classes and properties for implementation in RDF, to describe wide, long, and multi-dimensional data. It is intended to be useful as a simple profile, but also to act as an exemplar for adopters who need to design their own profiles. Inputs to this include the work on DDI-CDI implementation within some tools coming out of the Dagstuhl 2023 workshop, the Product Builder application at UKDA, work around the SDG Indicators dis-aggregations at the UN Statistical Division, and efforts around the production of the Cross-Domain Interoperability Framework (CDIF) in the WorldFAIR project.

The week in Paris did not end with the face-to-face DDI-CDI meeting: most attendees also went to the COSMOS conference at the end of the week, and several side meetings were held, including a discussion with the UN/ECE Modernization of Official Statistics group and the SDMX Initiative. Thanks to everyone who participated, and to CODATA for providing support for the event.

## DDI Dagstuhl Workshops - Funding Request for the Financial Year 2024/2025

**Dagstuhl organizers:** Michelle Edwards, Arofan Gregory, Simon Hodson, Steve McEachern, Hilde Orten, Joachim Wackerow

### Overview

The budget requested would fund DDI Alliance participation in the workshops at Schloss Dagstuhl for Fiscal year 2024/2025. It includes travel to a workshop on application and further development of the DDI-CDI specification, and a cross-domain workshop which addresses DDI Codebook, DDI Lifecycle, DDI-CDI, and XKOS and how they fit into a broader set of specifications for FAIR implementation.

These events are co-sponsored by CODATA, which matches the DDI Alliance's funding in order to ensure the success of the workshop. Since the collaboration started in 2018, CODATA has at least matched the Alliance's funding for participants as well as providing funding for its own staff. Additionally, for the last two years a significant number of participants for the cross-domain workshop have been funded by the CODATA-coordinated WorldFAIR project.

The request for funding from the DDI Alliance to assist with the 2024 workshops is **\$13,000.00**.

### Schloss Dagstuhl Cross-Domain Workshops: Goals and Focus

There will be two workshops held at Schloss Dagstuhl in Wadern, Germany in 2024. The first will be specifically focused on the DDI-CDI specification and its implementation and alignment with other specifications used in cross-domain systems. The second will look at a broader set of issues around cross-domain FAIR implementation. This second topic features DDI as a major component, and some of those whose travel to Dagstuhl might be funded through this request would attend both weeks.

The themes and focus of the workshops are as follows:

“Aligning Technology Architectures with Cross-Domain Metadata Models”, Oct 06 – Oct 11, 2024 (<https://www.dagstuhl.de/24413>):

Data-sharing across domain and infrastructure boundaries is becoming more common, and significant work has been done in aligning many of the standard models describing the information and data being exchanged. In order to guarantee the scalability and practicality of data-sharing implementations, these standard models need to be aligned with the emerging technology architectures designed to support exchange networks at this scale. This workshop will look at how the standard metadata models for cross-domain use - including DDI-CDI and related models - and architectural approaches can best be used to leverage the strengths of both.

“Evaluating and Refining Cross-Domain Metadata Exchange Frameworks”, Oct 13 – Oct 18, 2024 (<https://www.dagstuhl.de/24423>):

Through a series of Dagstuhl hosted workshops, and the CODATA-DDI collaboration, we have developed a framework for cross-domain interoperability, published by the EC-funded



WorldFAIR project. This framework is being employed both within data intensive science and between the scientific world and the world of official data, collected to inform policy making, including in relation to the Sustainable Development Goals and other components of the UN Agenda.

The effective use and uptake of such a framework will require methodologies to evaluate implementations. This workshop will explore such approaches, building on current work for FAIR assessment, and the experience gained from implementation in a range of case studies, including those in WorldFAIR. The workshop will focus on improvements to evaluation metrics, and to the metadata exchange frameworks themselves.

Some specific sub-themes have not yet been determined, nor the participants lists finalized, though a number of essential participants have been invited.

The DDI-CDI workshop will cover topics focused on better supporting user adoption of the specification, including refinement of existing features, consideration of requests for additional features, alignment with other standards, and mapping to other relevant DDI specifications (including DDI Codebook, DDI Lifecycle, and XKOS, but also with consideration to domains such as official statistics, and standards/models such as SDMX and GSIM). Potential adoption of portions of DDI specifications as W3C Recommendations is also a topic for this workshop.

The second workshop will focus on the Cross-Domain Interoperability Framework (CDIF), which recommends the use of DDI-CDI for data description in all domains wishing to support the FAIR principles for exchange across domain boundaries, and involves DDI Codebook and DDI Lifecycle as exemplary domain standards for SBE sciences, public health, and official statistics. This includes the coordinated use of DDI with other specifications such as Schema.org, DCAT, PROV-O, etc. CDIF is expected to be a major avenue for the adoption of DDI-CDI moving forward, and is produced in coordination with CODATA and RDA, and has attracted attention from other organizations concerned with FAIR implantation (e.g., EOSC Interoperability Framework, FAIR Impact). In this way, it offers a channel for collaboration between the DDI Alliance and other groups with shared interests.

These workshops continue a series of workshops on cross-domain approaches and collaboration with other standards which has been instrumental in recent developments and for DDI-CDI. Further information about [this series is available on the DDI website](#).

## Funding Request

We are requesting travel funding for three Europe-based participants, and four participants who would have to travel further (from North America, etc.). European travel is estimated at **\$1340.00** per participant, and non-European travel is estimated at **\$2040.00** (see below). These estimates include the cost of room and board at Schloss Dagstuhl for one week. These workshops are subsidized by Schloss Dagstuhl – Leibniz Center for Informatics (free seminar rooms, **€490.00** per participant per workshop/five days including full board). Participants whose travel is funded could include both members of the DDI Alliance working groups and outside experts invited to participate, such as implementers of DDI and representatives from other standards. Participants would be encouraged to obtain funding from their own institutions, but this is not always possible.

## Budget Details

The total budget request is for **\$13,000.00**. This will support travel and accommodation costs for three participants based in Europe, and for four participants coming from North America. (The cost of flights is significant, so these categories are estimated separately.)

Our request is based on the following estimates:

Accommodation with full board in Dagstuhl	€490.00	€490.00	€490.00
Hotel at Frankfurt airport	€150.00	€150.00	€150.00
Local transport at origin and destination	€200.00	€200.00	€200.00
Flight in Europe	€500.00	€500.00	
Flight transatlantic	€1200.00		€1200.00
Total cost per person from Europe for Dagstuhl meeting		<u>€1,340.00</u>	
Total cost per person from North America for Dagstuhl meeting			<u>€2,040.00</u>

With a conversion rate of 1.07 USD to 1 EUR\*, the totals are as follows:

Per person (Europe-based): \$1,433.80

Per person (North America-based): \$2,182.80

**For three Europe-based participants, and four North American participants, the total is:**

3 European: \$4,331.40

44 North American: \$8,731.20

Total: \$13,032.60, rounded to **\$13,000.00**.

# Workshop Report – DDI-CDI: Realising Interoperable Data Services in the Metadata Ecosystem

Schloss Dagstuhl – Leibniz Center for Informatics,  
24 September – 29 September, 2023, Wadern, Germany



A workshop on the emerging Data Documentation Initiative – Cross Domain Integration (DDI-CDI) metadata standard for supporting multi-disciplinary data sharing was held at the internationally renowned computer-science institute in Wadern, Germany. The event was sponsored by CODATA (the Committee on Data of the International Science Council), and the Data Documentation Initiative Alliance (DDI), and subsidized by Schloss Dagstuhl; it was organized by Arofan Gregory (Chair, DDI-CDI Working Group, DDI Alliance), Simon Hodson (CODATA), Hilde Orten (Sikt and DDI Alliance), Joachim Wackerow (DDI-CDI Working Group, DDI Alliance), Steve McEachern (Australian National University and DDI Alliance). The workshop brought together 25 participants from 21 organizations in 11 countries representing many different domains, including members of relevant standards bodies and data-sharing initiatives, computer scientists, and experts representing the use cases which served to focus the work.

The focus of the workshop was on implementing DDI-CDI, and supporting those who wish to learn more about the standard and implement it. The work was very productive, and was organized into several different areas:

- General overview of the specification and the problem space it is meant to address, including how it relates to other standards implemented in a modular way.
- Specific work around the creation of examples and implementation guides, including a methodology for creating community specific implementation guides, and worked examples for mining metadata embedded in a variety of data formats.

- A proposal on how non-numeric, non-coded data (e.g. qualitative data) could be described in an integrated fashion with quantitative data sets within the DDI-CDI model.
- Alignment of DDI-CDI with external models which describe the dependencies between variables in cross-domain integration scenarios, based on the RDA's I-ADOPT framework and ontology, and the OGC's Observations & Measurements standard.
- Syntax representation of the DDI-CDI model, including Python, Typescript, ShEx, SHACL, and JSON Schema.

In each of these areas, the outputs will be incorporated into the work of the DDI-CDI WG moving forward, and will result in the publication of guidance and documentation for users, tools for developers and implementers, and new features for the DDI-CDI model. Also considered were issues around better supporting implementers through interactions with the DDI Developer's Group and with a more responsive "beta" release process, and how this could fit into the work of the DDI Alliance overall.

Details regarding the event can be found on the [Schloss Dagstuhl site](#), and on the [DDI Alliance Workshop page](#) in Confluence.

# Workshop Report – Defining a Core Metadata Framework for Cross-Domain Data Sharing and Reuse

Schloss Dagstuhl – Leibniz Center for Informatics,  
1 October - 6 October, 2023, Wadern, Germany



A workshop on multi-disciplinary metadata interchange was held from 2-6 October at the internationally renowned computer-science institute in Wadern, Germany. It was attended by 24 participants from 22 organizations in 12 countries. It focused on the development of the Cross-Domain Interoperability Framework (CDIF), being developed through the EU-funded WorldFAIR project. The WorldFAIR project aims to develop a set of domain neutral standards and models which are aligned to support easier exchange of metadata and data across disciplinary and infrastructural boundaries. The event was sponsored by CODATA (the Committee on Data of the International Science Council), and the Data Documentation Initiative Alliance (DDI), and subsidized by Schloss Dagstuhl. The workshop was organized by Arofan Gregory (Chair, DDI-CDI Working Group, DDI Alliance), Simon Hodson (CODATA), Hilde Orten (Sikt and DDI Alliance), Joachim Wackerow (DDI-CDI Working Group, DDI Alliance), Steve McEachern (Australian National University and DDI Alliance), and Michelle Edwards (University of Guelph).

The workshop was organized around a series of themes:

- **Modeling events, observations, and samples:** this group produced a harmonized model explaining how scientific data, which is often based on measurement of events are a critical aspect of the occurrence of a measurement or sample.
- **Data discovery, access, and assessment of fitness-for-purpose:** this group reviewed existing work regarding data discovery and access, and how it could be extended to address evaluation and scalable provision of access to restricted data across networks of repositories.
- **Data integration and metadata/semantic mapping:** this group focused on the combination of data at a structural level, and the ability to equate similar semantics related to the data.
- **“Universals”:** this group looked at description of time, geography, units of measurement, and widely supported domain resources such as chemical classifications.

The outputs from these groups will result in direct contributions to the CDIF guidelines – a deliverable of the WorldFAIR Project – and in a number of separate publications. The CDIF guidelines recommend the use of domain neutral and web-friendly standards, such as Schema.org and DCAT (for discovery and cataloguing), PROV-O (for describing provenance), SKOS, XKOS, and OWL for describing controlled vocabularies and ontologies, and SSSOM for describing mappings. The focus of these guidelines is on the practical implementation of the FAIR principles in cross-domain scenarios.

The workshop was one of a continuing series of workshops held at Schloss Dagstuhl, in which issues regarding data sharing and interoperability – with a focus on standard metadata – are explored. These workshops form a key component of the [ISC CODATA Decadal Programme on ‘Making Data Work for Cross-Domain Grand Challenges’](#). Other workshops in this series were held in [2018](#), [2019](#), [2021](#), and [2022](#) at Schloss Dagstuhl.

Details regarding the event can be found on the [Schloss Dagstuhl site](#), and on the [DDI Alliance Workshop page](#) in Confluence.

Budget request for the FY2024 - 2025 from the DDI Alliance Scientific Board: Scientific Board meeting in Chur, December 2024

Submitted by the Scientific Board

The Scientific Board is planning a one-day physical meeting in Chur in December 2024 in the margins of EDDI. The purpose of the meeting is to work on tasks related to the Scientific Work plan for 2024-2026.

Several of the Scientific Board members will have their travels covered by their institutions.

Our expected need for funding from the DDI Alliance is estimated to be 3700.00 US dollars.

Details can be found in the table below.

Hotel Chur	\$185.00	6	\$1110.00		
Hotel Zurich	\$185.00	1	\$185.00		
Flight in Europe	\$550.00	1	\$550.00		
Flight trans Atlantic	\$1600.00	1	\$1600.00		
Local transport at origin and destination	\$100.00	2	\$200.00		
Total cost per person from Europe for Chur meeting			<u>\$1020.00</u>		
Total cost per person from Trans Atlantic for Chur meeting			<u>\$2255.00</u>		
Total cost Person Trans Atlantic - only hotel Chur			<u>\$370</u>		
Persons from Europe		1	<u>\$1020.00</u>		
Persons Trans Atlantic		1	<u>\$2255.00</u>		
Person Trans Atlantic - only hotel Chur		1	<u>\$370</u>		
SUM total in US dollar			<u>\$3645.00</u>	rounded to	<u>\$3700.00</u>

# DDI Alliance Training Working Group

## DDI Budget Request

Fiscal year 2024/2025

Submitted by: Hayley Mills (co-Chair), Kathryn Lavender (co-Chair)  
Submitted on: April 22, 2024

The Training Working Group requests \$26,500. The activities in this request directly align with the Alliance's strategic mission to engage and expand the DDI community through outreach, training events and resources, and audience-specific materials.

### Webinars

Since 2021 the Training Opportunities sub-group of the DDI Training WG has been organizing a program of hour-long webinars on topics related to DDI. These are aimed at a general audience, and are hosted by CODATA, using both the normal DDI Alliance distribution channels and the RDM lists maintained by CODATA to reach a broad potential audience. There have been several hundred attendees at these events – they typically draw between 30 and 70 people each.

The webinar series has been organized with the help of a paid consultant. Material development is done through a series of “mini-sprints” involving a small group of interested individuals who produce and review slides for the event. The recordings are published on the CODATA website (<https://codata.org/initiatives/data-skills/ddi-training-webinars/>), and the slides added to the DDI Zenodo community (<https://zenodo.org/communities/ddi-train/>). The materials are also provided to the Slide Review sub-group for modification and possible inclusion in the official Zenodo Training Materials resource, [https://zenodo.org/communities/ddi\\_training\\_material](https://zenodo.org/communities/ddi_training_material).

A series of four to five online topics is the target to be completed between July 2024 and June 2025, from a list of topics sign-offed by the Scientific Board. The webinars will also aim to give opportunities for new trainers to gain experience of training and learn more about DDI.

This budget proposal is requesting the same level of funding as the past three years to support the development of materials. The work of preparing draft slide decks and organizing and running the events requires approximately 3 weeks of person time for the consultant. This effort is in addition to the proviso that the consultant will also be available to help in the presentation and running of the events as needed. This comes to an estimated \$7500 for the year.

### Conference attendance

In addition to the web series, we would like to attend up to three in person conferences. These may include a combination of training events for data conferences which are



familiar with DDI, but not with practical applications (e.g. IASSIST or RDA), workshops or presentations for conferences which are new to DDI (e.g. ESRA), and conferences which have advanced DDI audiences (e.g. EDDI) were train-the-trainers or more advanced training is provided. Attendance will depend on the availability of trainers and whether proposals are accepted. Topics will be tailored to each conference's audience and familiarity with DDI products. In addition to reaching new audiences or providing advanced training, this will also provide the opportunity for trainers who would otherwise might not be able to attend and contribute because of organizational funding barriers.

The aim is for two people to attend up to three conferences. Costs include conference attendance fees, accommodation, and sustenance, this is estimated as \$6,000 per person per conference for an international conference and \$1500 per person per conference for two domestic conferences. In total, to support this work, we are requesting a budget of \$18,000.

## Translations

In 2023-2024 several introductory training materials were translated from English to French, and the first DDI training in French was carried out successfully. The translations were carried out by in-kind contributions. Due to the success of the translations and the growing international audience of DDI training, we would like to translate more slide decks into other languages, and so propose to translate up to three introductory training materials slide decks from English to Japanese. Preliminary research has indicated this would be estimated to be \$1000.

## Active Members of the DDI Training Working Group

- |                                |                       |  |
|--------------------------------|-----------------------|--|
| 1. Kathryn Lavender (Co-Chair) | ICPSR                 | kfrania@umich.edu  |
| 2. Hayley Mills (Co-Chair)     | CLOSER                | h.mills@ucl.ac.uk  |
| 3. Alina Danciu                | SciencesPo            | alina.danciu@sciencespo.fr   |
| 4. Adrian Dusa                 | RODA                  | dusa.adrian@unibuc.ro  |
| 5. Daniel Gillman              | US BLS                | gillman.daniel@bls.gov   |
| 6. Arofan Gregory              | Consultant            | ilg21@yahoo.com  |
| 7. Kaia Kulla                  | Statistics Estonia    | kaia.kulla@stat.ee   |
| 8. Jared Lyle                  | DDI Alliance          | lyle@umich.edu   |
| 9. Lucie Marie                 | CDSP                  | lucie.marie2@sciencespo.fr   |
| 10. Laura Molloy               | CODATA                | laura@codata.org   |
| 11. Hilde Orten                | SIKT                  | hilde.orten@sikt.no  |
| 12. Christophe Dzikowski       | INSEE                 | christophe.dzikowski@insee.fr  |
| 13. Catherine Yuen             | Understanding Society | <a href="mailto:catherine.yuen@essex.ac.uk">catherine.yuen@essex.ac.uk</a> |
| 14. Jennifer Zeiger            | ICPSR                 | zeiger@umich.edu   |
| 15. Alicia Urquidi Diaz        | Scholars Portal       | alicia.urquidi@utoronto.ca   |
| 16. Thibaud Ritzenthaler       | INED                  | thibaud.ritzenthaler@ined.fr   |
| 17. Jieun Jeong                | SciencesPo            | jieun.jeong@sciencespo.fr  |
| 18. Nicole James               | University of Essex   | njames@essex.ac.uk   |
| 19. Irene Koraki Folli         | University of Essex   | <a href="mailto:ekorak@essex.ac.uk">ekorak@essex.ac.uk</a>                 |

## FY 2024-2025 (June 1, 2024 - June 30, 2025)

Training Group Activity	Purpose / Goal	Audience	Cost (USD \$)
Funding for up to three workshops/training in person conferences.* (Training opportunities chair)	DDI will be promoted by submitting workshops/training, to be held at conferences. Travel costs and conference fees are covered for the instructors.	Variety of users/audiences	\$18,000
Webinars (Webinars chair and consultant)	A series of four or five webinars on DDI to organise, with the help of a consultant. <a href="#">List of topics</a>	New and advanced users	\$7,500 + In-kind contributions
Web page update (Getting started pages chair)	Members of the Training Group continue to update and make changes to training-related content on the DDI website.	New users	In-kind contributions
Translation of materials to Japanese (Slide deck review chair)	Introductory training materials translated from English to Japanese; est for three slide decks based on internet search	New users, DDI Trainers	\$1000
Translation of materials to Spanish (Slide deck review chair)	Introductory training materials translated from English to Spanish	New users, DDI Trainers	In-kind contributions
Training Material creation (Slide deck review chair)	Members of the Training Group continue to produce Training Material (including exercises) on Zenodo and the DDI website (with the help of the DDI assistant).	New and advanced users, DDI Trainers	In-kind contributions
Training requests (Requests chair)	Members of the Training Group continue to reply to questions and provide training when relevant.	Intermediate and advanced users*	In-kind contributions
<b>FY25 TOTAL</b>			<b>\$26,500</b>

\*The budget will allow 1 international and 2 domestic conferences, or 6 domestic conferences.

\*The chairs discourage doing one-off training for beginners; beginners should be directed to review the existing materials and webinars before requests for training are considered.

# Training Work from Arofan Gregory: FY 2023/2024

## Original proposal (attached)

Summary (work as agreed): A series of four to five online topics has been the target for the previous three cycles, and this would remain the target for 2023/2024. The work of preparing draft slide decks and organizing and running the events requires approximately 3 weeks of person time for the consultant. This effort is in addition to the proviso that the consultant will also be available to help in the presentation and running of the events as needed. This comes to an estimated \$7500 for the year.

## Work completed:

The following webinars have been completed with the aid of Arofan as a consultant.

- The DDI Variable Cascade: Describing Data to Optimize Reusability and Comparison.
- Statistical Agencies Using DDI Metadata Standards: Promoting Transparency and Reusability of Data.
- DDI, FAIR, and the Emergent Role of Active Metadata
- The DDI Standards and Technology: Adapting to Change’.
- Questions and Survey Instruments in DDI: Maximizing the Value of Your Metadata. Planned 22 May 2024 (speakers: Arofan Gregory, Becky Oldroyd and Eric Sigaud)

See <https://codata.org/initiatives/data-skills/ddi-training-webinars/> for links to slides and recordings, and a description of each webinar (top listings for 2023). In addition to these, a focused webinar was provided to Statistics Spain.

## Confirmation from the funding recipient group that the work has been satisfactorily accomplished:

The current and previous co-chairs of the DDI Training Working Group (Alina Danciu, Hayley Mills and Kathryn Lavender) confirm that the work has been satisfactorily accomplished.

## Invoice for the completed work:

Please see attached.

## DDI Alliance Budget Request for Fiscal year 2023/2024: DDI Training Webinar Series

### Overview

For two years, the Training Opportunities sub-group of the DDI Training WG has been organizing a program of bi-monthly hour-long webinars on topics related to DDI. These are aimed at a general audience, and are hosted by CODATA, using both the normal DDI Alliance distribution channels and also the RDM lists maintained by CODATA to reach a broad potential audience. There have been several hundred attendees at these events – they typically draw between 30 and 70 people. Further, these webinars lead to the development in 2021 of the EDDI “Training FAIR” which reached an even larger audience.

These events have been organized with the help of a paid consultant. This budget proposal is requesting funding at the same level as for the past two years to support the development of materials. This has been done through a series of “mini-sprints” involving a small group of interested individuals who produce and review slides for the event. The materials are then provided to the Slide Review sub-group for modification and possible inclusion in the Training Materials resource.

### Budget and Details

A series of six topics has been the target for the first two cycles, and this would remain the target for 2023/2024. The work of preparing draft slide decks and organizing and running the events requires approximately 3 weeks of person time for the consultant. This effort is in addition to the proviso that the consultant will also be available to help in the presentation and running of the events as needed.

To support this work, we are requesting a budget of \$7500.00.

Appendix B.

## Scientific Board recommendations for approval of DDI Alliance funding requests for the FY2024 - 2025

The Scientific Board has evaluated the incoming funding requests and provide recommendations for approval as specified in column E and F of the FY 2024 - 2025 [budget request sheet](#).

The criteria of our evaluation are the following:

- Requests should be in line with the Scientific Work Plan (which is now structured according to the priorities of the Strategic Plan).
- Contribute to promotion of DDI, related to existing and new projects, addressing new audiences, networking etc.
- Contribute to the development of DDI products and to the work of the SB, TC and Working groups
- Contribute to tools development
- Funding requests that are likely to be realized within the FY 2024 - 2025
- Over spending compared to the estimated revenue for the FY should be within a frame that can be justified. We see it as important for money to be spent for useful purposes.

Our evaluation is based on three levels:

- Priority 1 - Strong recommendation that the funding request is prioritized for approval by the EB for the FY
- Priority 2- Recommendation that the funding request is prioritized for funding by the EB for the FY
- Priority 3 - Recommendation that the funding request is not prioritized for funding by the EB for the FY

Partial funding is suggested for some activities

As shown in the approved budget request sheet for the FY 2023 - 2024, estimated revenue for the current fiscal year is \$94,500. The forecast fund balance by 30 June 2023 was \$340,810, while the estimated loss was -\$84,086. The forecast fund balance for June 30 2024 was estimated to \$256,715.

With an expected revenue for the FY 2024 - 2025 similar to that of the former FY, we feel that our recommendation and priorities are justified, even in the case that all approved funding requests will be spent.

By May 3rd 2024, however, as much as 2/3 of the approved funding requests for scientific and technical activities for the the FY2023 - 2024 (\$75256 out of approved \$107330) have not yet been reimbursed. The balance for June 2024 is therefore expected to be adjusted significantly.

We on the Scientific Board are keen to we encourage activities of benefits to the DDI Community and strongly recommend our priorities for approval by the Executive Board.

Appendix C.



*Please complete each section (200 word maximum per section).*

### 1. Objectives and Activities:

*Did you do what you set out to do? List the primary results, including any metrics, of the project.*

### 2. What Did You Do With the Money:

*How did you end up spending the money? Explain any significant variances between the budgeted and actual expenditures.*

### 3. Challenges and Lessons Learned:

*Identify any significant challenges encountered during the activity. Describe the lessons learned and any changes made to the activity as a result.*

### 4. Sustainability and Future Plans:

*If relevant, describe how the outcomes will be sustained beyond the funding period. Outline any plans for future activities or next steps.*

### 5. Supporting Documentation:

*Include any relevant documents such as data sets, reports, photographs, or testimonials.*

Signatures:

- **Project Leader:**
- **Date:**