DDI Alliance Meeting
Monday, May 30, 2016, 08:30-17:00
Norwegian Centre for Research Data (NSD)
Room 104 (There is a doorbell outside the NSD house to ring to get in) -- Map

Agenda -- Meeting of Members				
Time	**Subject**	**Detail**	**Lead**	**Purpose**
08:30-09:00	Light Breakfast			
09:00-09:10	Welcome		Steve	Introductions
09:10-09:30	State of the Alliance 2016	See Strategic Plan, Moving Forward process	Steve	Update group on last year's work
09:30-10:30	Panel Discussion	Updates from the following groups: Marketing, Training, Technical Committee, and Moving Forward	Amber Barry Wendy Achim	Review activities and get buy-in on future direction
10:30-11:00	Alliance Budget	-Current status and future projections -New membership levels -Member Forms -Recommendations for project management and tools development -Vote on budget	Jared	Group vote
11:00-11:15	Break			
11:15-12:15	Strategic Plan 2017 onwards	Overview of process and timeframes	Steve	Get feedback
12:15-12:25	Executive Board Election		Steve	Fill seat vacated by David Schiller
12:25-12:30	Proposed Date for Next Meeting	Monday, May 22, 2017, in Kansas (IASSIST is May 23-26, 2017)	Steve	Agree on best day to meet
12:30-13:30	Lunch			

Agenda -- Meeting of Scientific Board

Time	Subject	Detail	Lead	Purpose
13:30-14:00	Scientific Board election results and goals for the year	-Status and future directions -ISO standardization	Chair	Set goals for what to accomplish
14:00-15:00	Moving Forward	-Edmonton sprint -Norway sprint -Release plan and timeline -Challenges	Steve Wendy Michelle Achim	In-depth discussion of DDI4 development
15:00-15:15	break			
15:15-15:30	TIC Design Principles paper	Discuss the Design Principles paper	Wendy	Endorse the Design Principles and find a means of moving forward on the metrics (what is captured, who uses them, and how)
15:30-15:45	Related Initiatives	Report on related initiatives (e.g., CSPA, HLG, SDMX)	Steve	Update group on progress
15:45-16:00	Technical Committee report DDI Lifecycle	Update of the Technical Committee on recent activity DDI Lifecycle 3.3 update	Wendy	Update group on progress

Reports for Information (Discussion by Exception)

16:00-17:00	EDDI Report NADDI Report Working group reports -Vocabularies	Brief (five-minutes each) reports	Various	Update group on progress

18:30 - Informal group dinner at Wesselsstuen. The reservation is under Heidi's name.
Booking reference is: B6W4MRR. Address: Wesselstuen, Øvre Ole Bulls plass 6, 5012 Bergen.

State of the Alliance

Strategic 2014-17

http://www.ddialliance.org/system/files/DDIAllianceStrategicPlan2014-2017.pdf

Three core work areas:

- Standards maintenance and development
- Expanding the DDI Community – Marketing and partnerships
- Restructuring to achieve our priorities

Standards maintenance and development

- Manage and maintain the two existing product lines (Codebook and Lifecycle)
- Review and vote on RDF Vocabularies
- Develop a next generation model-based DDI specification
- Continue to publish new Controlled Vocabularies
- Gain ISO certification

Expanding the DDI Community – Marketing and partnerships

- Build partnerships and strategic alliances
- Assess the current state of DDI usage, community needs, and resources
- Improve the DDI website
- Create new materials explaining the value of DDI to people who are not DDI specialists
- Build a community around DDI training and increase access through innovative mechanisms

Restructuring to achieve our priorities

- Review governance arrangements, including structure and Bylaws
- Review revenue and funding request models

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

- ?

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**	

2016-2017 Training Group Plan

The DDI Training Committee (Kelly Chatain, Michelle Edwards, Jane Fry, Jon Johnson, Amber Leahey (Chair), Jared Lyle, Dan Smith, Achim Wackerow) meets regularly, typically every other week as needed, to plan, prepare, and coordinate training projects for the DDI Alliance. We began our work in 2015 (with Mary Vardigan as the Chair), by identifying five important training resources that we thought the Alliance should provide on the new website. Moving forward, the group will continue to develop and promote training for new users and support the activities of the DDI Alliance.

Goals of Training

- Improve people's comfort level and competence in working with DDI
- Bring in new users (and members) and provide training for the new users
- Gear training to specific audiences
- Develop expertise within the community for training purposes

New Developments / Planning for 2016-2017

After a successful 2015-2016 year, we learned a lot about training needs, training material development, and training opportunities for the upcoming year. In concluding the website survey, and focus group testing at NADDI 2015, the training group is confident that the website and general training content are moving in the right direction. There are some areas for improvement that the Training Group has identified and would like to see fostered over the next year. Further discussion is required: in addition to group meetings, there are plans to have a training and reusable documentation workshop held at Dagstuhl in October 2016.

Major takeaways the Training Group feels should be addressed over the next year, include:

1. A need for more interactive, introductory multimedia for our online users. This will include an "Introduction to DDI" video, and development of 1-2 instructional videos, short tutorials, interactive webinar workshops, etc.
2. There is still confusion about the different DDI versions, specifically, when and how to use them. More information and specific instruction on the different versions is required.
3. There is a need for basic instruction about what DDI is and how it works: people are still struggling unless they can see something and interact with it. The Training Group would like to explore the possibility of including an open online editor, similar to the W3C School, which provides online templates and visualization of HTML coding. (link)

4. Getting started and instructional tutorials should be assessed (for usability, use cases, applicability, etc.), and utilized / promoted throughout the community training efforts.
5. There is still some confusion about what is DDI, and this could be a branding issue. The Training Group will work more closely with other DDI groups including the Marketing Group to evaluate understanding of the brand.
6. Evaluate the Train the Trainer program and how the trainers can be utilized for training purposes.

Ultimately, we would like to offer a continuum of online training, from basic to more advanced, to encourage DDI use.

Using students is one option for developing some of the training materials for a relatively low cost. Another possibility is a CLIR fellow with expertise in Data Curation.

As with the Marketing Group, the Training Group discussed future activities spanning the upcoming fiscal year through the two following years.

The group recommends expenditures of $10,000 in FY2017, $15,000 in FY2018, and $15,000 in FY2019.

Now through FY2017 (July 1, 2016 - June 30, 2017)

Training activity	Cost	Training Goals/Audience
Introduction to DDI video	In-kind contributions; and $5000 student assistance for items 1, 2, 3	New users
Short tutorials	In-kind contributions; student assistance (see note above)	Comfort level and competence; new users
Enhanced DDI Lifecycle Diagram	In-kind contributions	Comfort level and competence; new users
Interactive Online Open DDI Editor on DDI site	In-kind contributions; student assistance (see note above)	New users
Promotion, metadata evangelism, capitalizing on the topicality of metadata (overlaps with Marketing)	Coordinate funding / cost sharing with Marketing	New users
Train the trainer	In-kind contributions	Evaluate train the trainer program; discuss outputs

Reusable documentation / training	$5000 for Expert Workshop for travel (October 2016)	Develop material on basis of work and rules which will be achieved in Dagstuhl Oct 2016.

Total $10,000

FY 2018 (July 1, 2017 - June 30, 2018)

Training Activity	Cost	
Reusable Documentation / Training	In-kind contribution	Develop training / trainers
Support training for future versions of DDI; workflow development	In-kind contribution	Develop training / trainers
DDI-LMD Migration tools	$5000	Support existing users
DDI-LMD Updates (getting started guides, other training)	In-kind contribution	New users
Train the trainer	$10,000 (October 2017, fiscal year 2018)	Develop community expertise

Total $15,000

FY 2019 (July 1, 2018 - June 30, 2019)

Training Activity	Cost	
Professional training video on Lifecycle-LMD	$10,000	New users
Training modules by audience	In-kind contribution	New users
Train the trainer	$5000	Develop community expertise

Total $15,000

Background: 2015-2016 Progress

Over the 2015-2016 year, the group has completed some aspects of the first three goals listed below:

- ***Online DDI Training Center on redesigned Website.*** This training center will pull together everything currently on the site related to training and present it in a well-organized way. Status: Completed, ongoing review

- ***Online introductory module.*** This may be a set of slides or a Camtasia video. The focus will be very high-level: what DDI is and why it is important to use it. Status: Started, on-hold

- ***Audience-focused introductory pages on DDI.*** The group has developed DDI for Librarians, Managers, Archives and Repositories, Researchers, and Developers. Status: Completed

- ***DDI lifecycle tools list.*** This will be an interactive version of the lifecycle diagram. The group will assemble tools and resources grouped by components of the life cycle, linkable from the stages of the life cycle diagram. Status: Started, ongoing

- ***Set of use cases.*** This will be a set of use cases related to incentivizing researchers to document data. We can use a small survey as an example to demonstrate what DDI can offer to the researcher. We also want the "wow factor", showing how to generate a readable codebook that can accompany a dataset. Status: Getting Started Guides completed, additional use cases / tutorials being discussed

Technical Committee Report – 2015/2016

Members:

Wendy Thomas (Chair), Joachim Wackerow (Vice-Chair), Arofan Gregory (Technical Consultant), Johan Fihn, Dan Gillman, Jay Greenfield, Larry Hoyle, Jeremy Iverson, Jon Johnson, Olof Olsson, Flavio Rizzolo, Dan Smith

Purpose:

The purpose of the Technical Committee is to model, render, maintain, and update the DDI specifications to meet community needs and align with Alliance strategic goals. The TC receives input from substantive working groups of the Scientific Board, DDI users and developers, and other interested parties. This includes the development of conceptual models, implementation of models in various technical forms, monitoring the metadata landscape and related developments, and initiate and plan possible future directions for the standard.

Primary accomplishments of 2015/16:

- Completed the review of open issues on DDI Lifecycle 3.1 and 3.2
- Provided the Executive Board with a recommendation on DDI License and Copyright following a complete review of options
- Completed the review of the first DDI4 Development Review package
  - 73 issues were reported and resolved either by direct implementation or filing a recommended action on the Modeling Team issue tracker
- Reviewed and disseminated document on approval of DDI Agency ID Submissions
  - Currently 75 registered Agency IDs
- Completed revision of the content of the DDI Lifecycle 3.2 high level documentation in preparation for publication
- Moved development repository for DDI Codebook and DDI Lifecycle to Bitbucket repository
- Working with Michael Iannaccone (ICPSR) resolved the problem of support for content negotiation on the DDI Alliance site opening up the ability to publish RDF vocabularies in a similar manner to XML schemas
- Clarified the roles of the TC Chair and Vice-Chair and ran elections for those positions
  - Elected: Wendy Thomas – Chair, Jon Johnson – Vice-Chair
  - Thanks to Joachim Wackerow for his many years of service as Vice-Chair
- Worked with Modeling Team to clarify expectations for the package of materials to be provided for future development reviews of DDI4 content
- Reviewed the Design Principles document drafted at the October 2015 Dagstuhl Sprint and began identifying possible metrics that would assist TC in evaluating packages of materials for DDI4 review

Activities scheduled for 2016/2017:

- Review the Question types available in DDI Lifecycle 3.2 to determine how they are being used and develop a clear set of guidelines for what is supported in DDI; use to determine extent of 3.3 coverage
- Prepare revised DDI Lifecycle 3.2 high-level documentation for publication

- Public review of RDF Vocabularies XKOS and DISCO and resolution of submitted issues
  - Note that PHDD was reviewed in light of the W3C specifications (CSVW) and has been withdrawn from consideration for public review due to the high level of duplication
  - Anticipated date: late June 2016
- Development review of DDI4 (Q2 2016) including resolution of submitted issues
  - Anticipated date: July 2016
- Public review of DDI Lifecycle 3.3 including resolution of submitted issues
  - Anticipated date: late August 2016
- Revision of the technical structure for Controlled Vocabularies
  - Expand publication format options such as SKOS
  - Assist in meeting tools requirements for capturing content for publishing Controlled Vocabularies
  - Focus on developing a closer and clearer relationship between TC and the Controlled Vocabularies group for improved coordination between these two groups and better support for the work of the Controlled Vocabularies group.

Report of Moving Forward Project

Annual DDI Alliance Meeting, May 30, 2016

The work of the Moving Forward Project (MF) is done in working teams which meet on a regular basis on conference calls. Additionally several working meetings (sprints) took place as face-to-face meetings. These meetings had a dedicated focus on specific topics. Usually it is a mixed group of participants coming from different working teams.

Mature work products are forwarded to the Technical Committee (TC) for integration and possibly public reviews. Core members of the TC are involved in teams of MF. This assures good communication between the development work in MF and integration and maintenance in TC.

All work of the Moving Forward Project is documented on the wiki of the DDI Alliance. All information is publicly available to support the idea of transparency.

The model-based approach proved to be successful. Same patterns are used throughout the model in different packages. This assures model integrity by consistent usage of same approaches in various contexts. The feedback of the Q1 2015 Development Review of a DDI 4 package was very helpful in this regard. The comments of external experts in the Dagstuhl 2015 working meeting pointed to important design approaches regarding patterns and interplay with other specifications.

The Data Capture Team achieved an abstract model to provide home for various data collection sources like survey, register data, and data from devices. This is an important step forward that DDI is not only survey-centric.

The Data Description Team developed a flexible model which is able to describe data in various forms like single numbers (datum), case records, episode data, and aggregate data. The approach supports ideas from the big data field like data lakes. It is combined with the variable chain from the Generic Statistical Information Model (GSIM) (Conceptual Variable, Represented Variable, Instance Variable).

The Simple Codebook View Team mapped DDI Codebook elements to DDI 4 classes. The latest working meeting (sprint) in Norway focused on the DDI 4 Codebook View, which will have similar feature as DDI Codebook, but is a subset of DDI 4. The goal is to test the whole DDI 4 approach with this well-known subset of metadata and to support migration of DDI Codebook users to DDI 4.

The Methodology Team integrated the model from weighting (SDI group), worked on a generic approach, and is working on a generic process model for multiple usages in DDI 4.

The Production Process and Tools Support Team enhanced the production framework on a number of different levels. The production framework enables the web-based input of models, the transformation of the model to binding representations (like XML Schema and OWL/RDF-S), and the generation of item-level documentation. DDI 4 is a model-driven approach. Therefore the production framework - for generation of products (specification, documentation) driven by the model – plays a crucial role. Work

was done on migration of the process chain of multiple steps into a cloud-based, continuous integration server.

Working Teams

List of current teams:

- Active Data Management Plans Team
- Data Capture Team
- Data Description View Team
- Enhanced Citation Team
- Methodology Team
- Modelling Team
- Qualitative Data Team
- Simple Codebook View Team
- Study Inception / Data Management Plan Team
- Production Process and Tools Support Team

All teams have dedicated pages on the wiki. The team information includes the purpose of the group, list of members, and working and output documents. The information can be accessed by the list of current teams.

List of Working Meetings (Sprints)

All meetings had a length of five days. The longer face-to-face meetings enable a dynamic in the work which is not achievable in shorter meetings or conference calls. The advantage is that participants are very focused on the goals of the meeting, and the discussions on specific topics happen much more efficiently.

Each meeting has a dedicated wiki page where detailed information is available including the goals, the outcome, and the list of participants.

- Kalvåg, Norway, 23-27 May, 2016, 13 participants. Focus was on finalizing, documenting, and testing the Codebook Functional View.
- Edmonton, April 11-15, 2016, 9 participants. Preparing the model for the Q2 2016 Development Review. The goal of the sprint was to complete a consistency review of the DDI4 modeling.
- Copenhagen, November 23-27, 2015, 8 participants. Focus was on the technical issues of the production framework.
- Dagstuhl, Germany, October 19-23, 2015, 22 participants. The meeting brought together representatives from several metadata standards to provide an external review of current DDI work, with an emphasis on the model-driven approach, the production framework, and the substantive content of the standard.

What worked?

Many teams made great progress. The general approach with teams focusing on multiple content and structural topics worked well. Many people are involved in this work. Recruitment of participants was less an issue as in the past. Nevertheless it is important to involve new people in this process to have benefit from multiple perspectives and to share energies.

Q1 2015 Development Review worked well and supported development work. The Dagstuhl meeting with external experts assured that the current work is done as part of a larger landscape of metadata specifications and that MF work is using state-of-the-art techniques. See summary on wiki.

The model-based and model-driven approach is acknowledged as appropriate technique for a complex metadata specification. The use of patterns throughout the model enables consistency.

The above special mentioned teams achieved outstanding results. This work includes partly research and application of state-of-the-art techniques in modeling.

The approach is very successful to organize the work in topic-oriented teams (continuously meeting in conference calls) and in intensive face-to-face working meetings with mixed topics.

What didn't work? Or what did we learn?

Some people are in many groups. This is an issue regarding the workload for each individual and regarding having different perspectives at the same time. It is also in sprints a practical issue that the same person can't be in two parallel subgroups. On the other hand it supports very well the communication between groups.

It was possible to organize that some people had specific roles in sprints focusing on tasks like moderation and documentation. Nevertheless the sprints would be more successful if more preparation work would have been done prior to the meeting. The same applies for work after the meeting: follow-up regarding open issues, finalizing documents, framing the output for multiple audiences, organizing open issues for future work in working teams and possible other working meetings. A project manager could help a lot in this regard.

The working groups have sometime an ad-hoc approach, where it is not always clear in advance what the agenda topics are. This could be improved by preparation and announcement of agendas and reliable meeting times. Agendas could be put in advance of the meeting to the wiki. While the meeting topics can be checked off if resolved or could be forwarded to a next meeting or other group in a transparent way. This approach would also help participants who are not always attending and possible cross-team attendance of people. The cross-team participation could be fostered in order to get more perspectives. This would also help that each group has a broader understanding of the overall MF work. This was already partly done by inviting people from other groups to a conference call.

From a project management perspective it would be very helpful that open and resolved topics are shown on the wiki page of each group in a way that people from same (and other) group(s) have a chance to understand it.

What is needed in the next 12 months (e.g., resources)?

Resources for a project manager and for development of software tools for the production framework are needed.

A project manager would be very helpful to organize the complex MF work. There are many groups/people involved focusing on many areas and levels. Each group seems to make good progress. But the overall effort would be more efficient and the results better if the work of the teams is more coordinated, the sprints better prepared and followed-up. The resources (time of participants, travel money for sprints from member institutions and DDI Alliance) would be used more efficiently.

The requirement would be that such a person has project management skills and an understanding how is done/can be organized in a non-for-profit environment with volunteering contributors.

The production framework requires the development of several smaller software tools. As the production framework plays a crucial role, it is important that these tools are developed in a robust, transparent, and sustainable manner. This work shouldn't rely on specific persons. It would be required that dedicated, described tasks can be outsourced to paid programmers.

Support for several working meetings (sprints) is required. Planned meetings are so far:

- two different meetings (each 25 people) in Dagstuhl, October 2016
    - 1st week, review of current work with external experts, usage of DDI together with other specifications
    - 2nd week, structured documentation, controlled vocabularies, funding proposals
- a smaller technical meeting after EDDI in Cologne, December 2016
- a meeting in the margins of NADDI 2017 might make sense, Ithaca, New York, April 2017
- a meeting in the margins of IASSIST 2017 might make sense, Lawrence, Kansas, June 2017

How to improve coordination among groups, especially how to coordinate around the top priorities of the Alliance?

A project manager could help here a lot, see above.

MF is using a wiki (Confluence), an issue tracking system (JIRA), and version system (Bitbucket) for the development, documentation, and communication work. These tools have been already broadly adapted by the teams. Nevertheless a more efficient use of these tools could help to support the work better.

The cooperation systems provide a large amount of publicly available information. Nevertheless it is often not easy to find the right information, especially for people not heavily involved in the work. Overview pages could be created to find resources easier. Information should be available on different levels. The bridge from the DDI Alliance website to the wiki could be enhanced.

A project manager could help here in the consistent use of these systems.

Coordination between team chairs could be improved. This could be a task of the chairs of the Advisory Group of the MF and of the Executive director.

The regular use of the MF email list could improve for internal communication between all involved people. Team chairs could inform on major achievements.

DDI Alliance Statement of Revenue and Expenses
Fiscal Years 2011 - 2016

	Actual FY2012	Actual FY2013	Actual FY2014	Actual FY2015	Budget FY2016	Actual as of April 30, 2016	Budget Remaining FY16
Total Revenue	$ 74,917	$ 84,807	$ 84,815	$ 87,419	$ 93,500	$ 79,595	$ 13,905
Expenses							
Staff Salaries	31,970	22,549	25,544	29,633	26,780	24,904	1,876
Consultants		4,970	4,970	27,425	20,000	20,360	(360)
Data Processing	2,760	2,217	1,879	3,003	2,521	2,461	60
General Expenses		73	15	150	-	115	(115)
Marketing					17,000	3,763	13,237
Research Supplies & Services	54,205	2,900	5,647	5,876	2,000	948	1,052
Training					15,000	2,041	12,959
Travel and Hosting	17,191	28,814	17,209	22,218	31,000	27,557	3,443

Travel - Details include:	25,180	
Dagstuhl Sprint 2015	16,272	
EDDI Sprint 2015	1,747	
IASSIST Sprint 2015	3,787	
NADDI Sprint 2016	2,870	
UNECE 2015	505	
Hosting - Details include:	2,377	
Dagstuhl 2015	1,114	
EDDI 2015	1,263	

Anticipated remaining expenses for FY2016:

Salary	1,800	
Algenta Technology	1,000	
IASSIST 2016	3,400	
Marketing	13,200	
Trainnig	12,900	
Total		32,300

	Actual FY2012	Actual FY2013	Actual FY2014	Actual FY2015	Budget FY2016	Actual as of April 30, 2016	Budget Remaining FY16
Transfer	(13,974)						
Total Expenses	$ 92,152	$ 61,523	$ 55,264	$ 88,306	$ 114,301	$ 82,148	
Revenue Over/(Under) Expenses	$ (17,235)	$ 23,284	$ 29,551	$ (887)	$ (20,801)	$ (2,553)	
Ending Fund Balance	$ 109,407	$ 132,691	$ 162,242	$ 161,355	n/a	$ 158,801	

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Membership

Submitted by icpsr-web on Mon, 2009-09-28 15:52

The DDI Alliance is a self-sustaining membership organization supporting the creation and development of the DDI specification as an international metadata standard for documenting social science data. The DDI Alliance welcomes the participation of diverse organizations in for-profit or not-for-profit educational, commercial, or governmental organizations that want to have a voice in the decision-making process for the standard.

See a list of our Current Member Organizations and Representatives (https://web.archive.org/web/20160821165028/http://www.ddialliance.org/ddi-membership).

Full Membership

Member organizations are entitled to send one representative to annual meetings of the DDI Alliance and to meetings of the Scientific Board (https://web.archive.org/web/20160821165028/http://www.ddialliance.org/node/939), the group that develops and provides stewardship for the DDI specification. Rules and guidelines for the Alliance are delineated in a set of Bylaws (https://web.archive.org/web/20160821165028/http://www.ddialliance.org/system/files/DDIBylaws2013.pdf).

Membership in the Alliance

Membership in the Alliance is open to for-profit or not-for-profit educational, commercial, or governmental organizations that want to have a voice in the decision-making process for the standard. Member institutions are entitled to send one representative to annual meetings of the DDI Alliance and to meetings of the Scientific Board, the group that develops and provides stewardship for the DDI specification. Rules and guidelines for the Alliance are delineated in a set of Bylaws (https://web.archive.org/web/20160821165028/http://www.ddialliance.org/system/files/DDIBylaws2013.pdf).

Membership Fee

The DDI Alliance member fee structure is a tiered pricing structure based on organization size and membership benefits. The basic membership fee for OECD countries for Fiscal Year 2017, which began on July 1, 2016, is $3000. See other fees in the table below.

Membership Categories & Benefits:

Contributor Membership. Contributor membership is designed to enable organizations (particularly small government agencies, academic institutions, and non-profit associations) to participate fully in the work of the DDI Alliance. Contributor members have all the rights and obligations described in the Bylaws. Contributor members are authorized to use the DDI Alliance logo on their websites.

Premium Membership. 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.

Annual Dues (USD) -- Fiscal Year 2017 (Beginning July 1, 2016)

Organization type/size	Membership		
	Premium	Contributor	
		OECD* Country	Non-OECD* Country
Educational and non-profit organizations	4,500	3,000	1,500
Government organizations			
Employing > 500	7,500	5,000	2,500
Employing 100-500	6,000	4,000	2,000
Employing 1-99	4,500	3,000	1,500

For-profit companies including vendors			
Employing 10,000+	30,000	20,000	10,000
Employing 5,000-9,999	22,500	15,000	7,500
Employing 500-4999	15,000	10,000	5,000
Employing 100-499	10,500	7,000	3,500
Employing 10-99	7,500	5,000	2,500
Employing < 10	4,500	3,000	1,500
OECD (Organization for Economic Co-operation and Development) categories signify a fee structure for organizations established within OECD member countries. Non-OECD country categories are included to encourage a broader, more inclusive membership body of organizations.			

Directed Contributions

If a member wishes to speed the development of DDI to accomplish a particular objective, it can make a contribution for development toward this goal. This contribution would be in addition to its annual fee. The member may wish, for example, to enhance the specification with a new module. This would be subject to an approval process as specified by the Bylaws which state that "Every proposal for a modification to an existing specification goes through a standard review process." These additional commitments of support may be in cash or in-kind contributions (for example, delivery of an agreed module).

Associate Membership

While the standard fee-based membership is strongly recommended as the best option for membership, the Alliance also offers the Associate Membership option, which does not require a membership fee and does not carry voting rights. Each Associate Member appoints a senior officer of the organization to sit on the DDI Alliance Expert Committee "with voice, but without vote." Associate member organizations are expected to engage one or more members of their staff in Alliance working groups as a condition of this category of membership.

For more information on joining this effort, please contact the DDI Secretariat, which is housed at ICPSR, at: ddisecretariat@umich.edu (https://web.archive.org/web/20160821165028/mailto:ddisecretariat@umich.edu). Or send us an email using the form below:

I'd like more information about becoming a member of the DDI Alliance:

For more information on joining this effort, please contact the DDI Secretariat, which is housed at ICPSR, at ddisecretariat@umich.edu (https://web.archive.org/web/20160821165028/mailto:ddisecretariat@umich.edu) or use the online form (https://web.archive.org/web/20160821165028/http://www.ddi-alliance.org/ddi-alliance-membership). A membership form (https://web.archive.org/web/20160821165028/http://www.ddialliance.org/system/files/DDIAllianceMemberFormwithBylaws2013.docx) and member representatives form (https://web.archive.org/web/20160821165028/http://www.ddialliance.org/system/files/DDIAllianceMembershipRepresentativesForm.docx) are also available.

Contact Us (/web/20160821165028/http://ddi-alliance.org/contact-us)

Outsourcing programmer's work

Knutholmen Sprint | 23–27 May 2016

On 26 May 2016 we had (1) a discussion at the sprint and later (2) a hangout call. Participants for both events include Achim Wackerow, Jared Lyle, Johan Fihn, Marcel Hebing, Oliver Hopt, Olof Olsson, Wendy Thomas.

Introduction

In the DDI Moving Forward project, we started with a large group of developers, many of which are either dropping out now for various reasons or have only a limited amount of time to use on DDI projects. One related problem might be that some institutions are getting sceptical how the DDI Moving Forward is performing and are therefore getting reluctant to invest more developer time.

The solution, which we are discussing, is to outsource specific programming tasks to external developers and to pay them. The major concern is that if we pay some programmers, the other ones (who did it for free so far) might feel deprived.

Conclusion / next steps

1. Get a **list of open software issues** regarding the production workflow.
2. Also we already have the developer group, it would be good to have **one person to be in charge** and to overlook both the architecture and the issues. In particular, this person should define the requirements for external projects and control the results.

3. The definition of tasks should **focus on input and output formats**. Furthermore, all external development has to be **open source**. These two points ensure reusability and interoperability.
4. When we have a list of open issues, we can first ask the developers which tasks they could do by themselves. Tasks that none of the developers can do (either to limitations in skills or limitations in available working time) could be given to external developers.
5. **Define how developers can make decisions** about the design of the technical infrastructure. One solution might be that the scientific board defines only the inputs (someone is editing the model) and outputs (definition of the DDI 4 product). After that, the developers would be free to make any decisions on how to get from the inputs to the outputs.
6. Jared will initiate **follow up discussions** on this issue

Related issues / parking lot

- We also see an urgent need for a **project manager** for the DDI 4 project.
- There is a [Production Process and Tools Support Team](#) in DDI 4 which is a subcommittee of the modelling team. However, this team has had limited meetings outside of sprints, primarily focused on setting up Bitbucket and Bamboo systems. We see the need to clarify **how to make decisions** regarding the production workflow outside of sprints. There are conflicting opinions on how much freedom the developers should get in making decisions.
- We discussed what participating institutions get out of the DDI Moving Forward project. One idea was that we should start to produce **articles** for high-ranking journals and conferences.

Open issues in the tools

The following tasks and issues are open regarding our tool suite:

- Generate resturcturedText documentation files from XMI source
  - Package
  - Class
  - View
- Generate GraphViz syntax from the XMI source (including references classes outside the package/class with properties)

- - Package
  - Class
  - View
- Build script for generating SVG/PNG from the Graphviz syntax files (simple)

Strategy development 2017-20

Strategy development process

Strategic planning: The process by which leaders of an organization determine **what it intends to be in the future and how it will get there**. To put it another way, they develop **a vision for the organization's future** and determine the **necessary priorities, procedures, and operations (strategies)** to achieve that vision. Included are **measurable goals which are realistic and attainable**, but also challenging; **emphasis is on long-term goals and strategies**, rather than short-term (such as annual) objectives.

Possible strategic planning process (World Bank)

1. Agree on a strategic planning process.
2. Carry out an environmental scan.
3. Identify key issues, questions, and choices to be addressed as part of the strategic planning effort.
4. Define or review the organization's values, community vision, and mission.
5. Develop a shared vision for the organization.
6. Develop a series of goals or organizational status statements which describe the organization in a specified number of years – assuming it is successful in addressing its mission.

Strategy process (continued)

7. Agree upon key strategies to reach the goals and address key issues identified through the environmental scan.
8. Develop an action plan that addresses goals and specifies objectives and work plans on an annual basis.
9. Finalize a written strategic plan that summarizes the results and decisions of the strategic planning process.
10. Build in procedures for monitoring, and for modifying strategies based on changes in the external environment or the organization.

DDI Alliance context

- Many processes assume some capacity for shared "strategic retreats" or similar
- We don't have that capacity - and I don't think we need it
- Aim is to have the Executive Committee serve in this role
- We need contributions from ALL members of the DDI community to the process
    - Particularly in

Timelines

Activity	Responsibility	Completed by
Environmental scan. Key issues, questions, and choices to be addressed	Community consultation: Member survey and online discussion through member's email list	October 2016
Review of Alliance vision and mission	Executive committee to draft for circulation (EDDI 2016) Feedback from members and community	December 2016 February 2017
Development of key strategic goals and action plan. Circulation of draft strategic plan	Executive committee to draft For circulation and discussion to members and community	End of April 2017
Review of draft plan and final approval	All members	IASSIST 2017

Questions for the group

1. Does this sound like a suitable process?
2. Whare are some of the key issues, questions, and choices **you think should** be addressed as part of the strategic planning effort?
3. Other issues?