

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

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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.

Edmonton Sprint Summary Report

11-15 April 2016

Attendees: Wendy Thomas, Jon Johnson, Larry Hoyle, Dan Gillman, Arofan Gregory

Conference Call Additions: Oliver Hopt, Barry Radler, Jay Greenfield

Overview

This sprint is focused on preparing the model for the Q2 2016 Development Review. The goal of the sprint is to complete a consistency review of the DDI4 modeling, particularly reviewing consistent use of patterns and documentation content. Tracking of specific progress on selected DMT issues is found on the [Task Management](#) page.

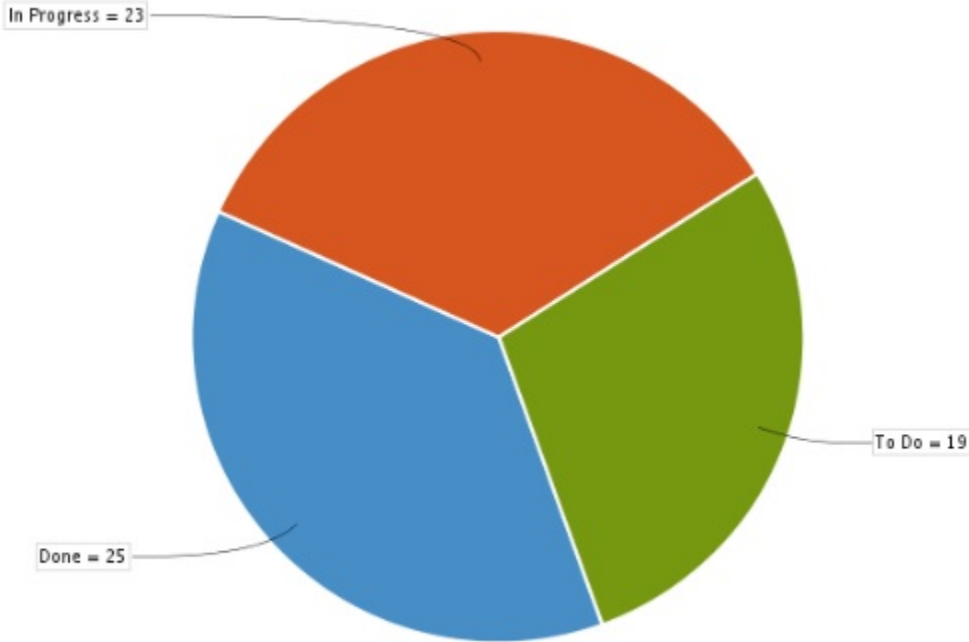
Completed Work

In terms of our overall goals the Sprint has been highly successful. We have accomplished 14 of 17 major goals. We have made substantial progress on preparing both the Data Capture and Data Description packages for review in Q2 2016. This has included:

- Review of the models from each of these business groups, ensuring full documentation, and clarification of relationships between models and consistent use of patterns
- A new Physical Data Description model has been developed by the Modeling Team as it was a requirement of the Q2 2016 review. This was done with the understanding that this is an iterative development process and that this will undergo further development in conjunction with the Logical Data Description work.
- There is now a working approach to model revision that needs a final review by the Modeling Team.
- There were documents drafted to address our intent for determining and recording GSIM, RDF, and DDI 3.2 relationships to the Classes within the Packages.
- Prior to the meeting a selection of 30+ DMT issues were selected as those we needed to address prior to a Q2 2016 development review release. We have completed or begun progress on all of the selected issues except for 3 which were tabled as out of scope for this Sprint.
 - These are found on the Task Management page.
 - Those in progress often require final review prior to moving into Drupal or being published.
 - All documents related to this work are linked to the specific DMT issues listed in JIRA.
- Extensive progress was made on documentation, both class level and high level.
- A draft of an updated document for modelers is almost complete and we have captured decisions on modeling conventions in Drupal. These will be moved to the decision document page within the Modeling Team section when completed.
- The purpose, construction, binding, and documentation of Functional Views have been agreed on and drafted. This will be completed prior to the Norway Sprint.
- The XML Binding document is now in line with the current XML binding process.

Modeling Team Status at End of Sprint

The pie chart below indicates the overall state of progress through the DMT Issue tracker. We have completed 37% of the issues, 34% are in progress, and the remaining 28% have not been started. Note that 17 of the 25 completed issues were resolved during the sprint.



Norway Sprint, May 2016

Sprint Report

[Documents from the Sprint](#)

Overview

This Sprint has a primary focus of finalizing, documenting, and testing the Codebook Functional View. During this week participants will be divided into groups to accomplish these goals.

Codebook and Methodology content developers will work closely with modelers and people from the production framework to finalize the Codebook Functional View. The methodology group will also look forward to continuing their work with the Methodology model and expanding its current list of methods.

Traditional codebook/DDI 2.x users also will be invited to this Sprint to create a checklist and documentation of use cases and ways of exploiting the Codebook Functional View. These will be used to inform the developers for future developments and possible uses that are currently not accounted for.

Outcomes of the Norway Sprint include but are not limited to:

- Final Codebook Functional View, possibly related XML and RDF instances
- A “repository” of methodologies from the Methodology content developers
- Checklist and/or documentation of how current Codebook/DDI 2.x users would like to see and/or codebook

Preparing for the Sprint

Read or Review	Link
Codebook comparison	Document
How to create a Functional view	Document
Functional View - Business Perspective	Document
Step-by-Step Functional View	Document

Local Information

The Norway Sprint will be held one week prior to the IASSIST Conference, on 23-27 May, 2016. The location: [Knutholmen](#) in Ka lvåg, Norway. This is a nearly 4 hour boat ride from Bergen. We carefully selected the location and feel it is optimal for the work we will be doing. We were also sensitive to price and feel the overall cost is competitive in price to what you would find in a larger metropolitan area.

Hotel & Meals:

We have already reserved the following accommodations for each participant:

- Accommodation in single room, Sunday night through Thursday night (5 nights)
- Breakfast, Monday-Friday (5 days)
- Hot lunch with dessert, Monday-Friday (5 days)
- 3-course dinner, Sunday-Thursday (5 days)
- (Soda with meals/breaks are not included and are provided at additional cost to each participant)

Cost per person: NOK 4,095 for meals, NOK 4,500 for single room. Each participant will be responsible for paying for her/his own meals and room (you can make payment onsite by credit card -- no need to pay in advance).

If you would like to reserve additional nights at Knutholmen, please contact the hotel directly: Telephone: 577 96 900, Email: post@knutholmen.no. Additional nights can be added for NOK 995 per person (this includes breakfast).

Meeting space:

We have reserved meeting space for the Sprint, including a large meeting room, as well as a smaller break-out room. Space will include technical equipment, including projector and flip chart. Fresh fruit, coffee/tea, and cakes will be available during breaks. The DDI Alliance is covering the meeting space expenses.

Transportation:

Each participant is responsible for her/his own transportation to and from Kalvåg. The hotel has travel information, here: <http://www.knutholmen.no/reisa-hit/?lang=en>.

To get to the hotel from Bergen, you take a boat to Smørhamn (5 km from the hotel). There is a bus directly to Kalvåg/Knutholmen to all departure/arrivals with this boat. According to the hotel, "You don't need schedule for this because the bus are waiting for you." The bus stop to take in Kalvåg has the name Kalvåg (you can also tell the bus driver that you are headed to Knutholmen). The boat schedule: https://www.norled.no/contentassets/dda9d4d3d61d4b158bc23c5692747de5/bergen_nordfjord_bergen_010515.pdf. According to the schedule, the boat departs Sunday at 16:30 from Bergen and arrives at Smørhamn at 20:20. From Smørhamn to Bergen, you can traveling by the same boat Friday at 16:30 or Saturday at 8:05. Tickets can be purchased online, here: <http://booking.norled.no/Default.aspx>.

The hotel has requested that you post your travel times to/from the hotel here:

https://docs.google.com/spreadsheets/d/1_ae1YoztR-Oc1YdkW0PsLApVYNJakIQUOckKxh5o3dY/edit#gid=0

The hotel will use this information when planning your arrival

/departure. Please add your travel information to the Google Doc by Monday, 9 May.

Participants

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Design Principles

Technical Committee – 2016-04-28 [Based on the document Design Principles, written at Dagstuhl 2015]

Process:

The original document was reviewed by the Technical Committee on 2016-04-28. The recommended decision principles were supported with the minor addition of the word “conceptualization” added to the 3rd principle under Capability. The actions planned by the Technical Committee include the following:

- Forwarding of the recommended Design Principles to the Modeling Team for comment
- A second review of the Design Principles to the original set for coverage
- Request to present on the Design Principles at the meeting of the Scientific Board in May 2016 for acceptance of the Design Principles and discussion on the development of metrics related to the individual principles

Design Principles

DESIGN

The model

- is developed in an agile, modular and iterative manner
- is responsive to community needs to produce actionable metadata
- should balance complexity with functionality and understandability
- is extensible and strives towards compatibility between different versions
- is maximally interoperable with relevant community standards
- supports a plurality of implementations

DOCUMENTATION

The documentation of the model

- is clear, complete, and timely
- is concise, comprehensible, accessible, and useable by multiple communities
- provides justification for design decisions.
- provides reference and functional perspectives

CAPABILITY

The model and its documentation

- support the discovery, reuse, exchange, and sharing of (meta)data
- support the conceptualization, capture, production, management, and analysis of (meta)data
- support audit and reproducibility across the (meta)data lifecycle

Discussion of metrics

The discussion of metrics should address who would use the metric and how the information obtained from the metric would be used. For example, what are the consequences of non-compliance?

Documentation:

- Readability score
- Acronym usage
- Structure of documentation to reflect principles -- easy to mark as having or not
- Quality is empirical so there needs to be a measure of use

Design:

- proportion of classes that carry forward
- change information
- time between updates in relationship to the number of changes
- metrics on JIRA issues
- is there a way to use labels in JIRA to identify an issue with a design principle
- is there a way to tie up usage of DDI to responsiveness principle?
- complexity - how deeply nested are classes in the model - gratuitous complexity
- compatibility with previous versions

Capability:

- ?

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.

DDI Controlled Vocabularies Working Group Report 2015/2016

Submitted by Sanda Ionescu, Chair

Group Members

- Sanda Ionescu, ICPSR, University of Michigan, *Chair*
- Stefan Ekman, Swedish National Data Service (SND)
- Anne Etheridge, United Kingdom Data Archive (UKDA)
- Taina Jääskeläinen, Finnish Social Science Data Archive (FSD)
- Alexander Jedinger,, GESIS -- Leibniz Institute for the Social Sciences
- Hilde Orten, Norwegian Social Science Data Service (NSD)
- Sebastian Kocar, Slovenian Social Science Data Archive (ADP)

Accomplishments

Membership changes:

Alexander Jedinger from GESIS has replaced Meinhard Moschner who has retired. Sebastian Kocar, currently an Endeavour Executive Fellow at the Australian Data Archive has joined our group, after contributing a draft for an “Other Materials” CV that we intend to finalize in the upcoming months. Bodil Stenvig, from the Danish Data Archives (DDA) is no longer a member of our group.

- New CV lists published in the past year (V. 1.0)
 - Data Source
 - Sampling Procedure
 - Kind of Data Format

We currently have a total of 22 CV lists published on the DDI Alliance site.

- In development:
 - Type of (Other) Material (contribution from the Slovenian Data Archive)
 - Instrument Type
 - Kind of Data By Provenance