# Proposal for tasks for member of the Scientific Board 2021-04-23

* Form 3 small groups of SB members
* Each group is assigned the following task:

1. Evaluate if the strategic actions points sections 2 – 4 in the ‘Standards and Work products’ chapter of the draft Strategic Plan are suitable for tasks in the Scientific Plan (each group looks at one section, 2, 3, or 4).
2. Evaluate if related tasks would be realistic for the immediate term (1-2 years).
3. Identify relationships between the strategic action points and tasks specified in the work plans of the working groups, and evaluate if the task is doable by the group within the timeframe.
4. Identify gaps between what the working groups are focusing on and important things in the strategic action points.

* Group 1 looks at action points 2 ‘Maintaining multiple lines of specifications and controlled vocabularies’ and related tasks.
* Group 2 looks at action points 3 ‘Improvement of interoperable and distributed DDI infrastructure for use and reuse of DDI resources. Adding useful components around the specifications for users.’
* Group 3 looks at action points 4 ‘Registries/-repositories’.

-The strategic actions points 2 – 4 in the ‘Standards and Work products’ can be found in Appendix B in the EB minutes of 2021-03-16 at <https://ddialliance.org/system/files/20210316_ExecutiveBoard_minutes.pdf>.

-The work plans of the working groups are included in this document.

-A template for providing input on the task will be provided last week of April 2021.

DDI Controlled Vocabularies Group

Work Plan for 2021-2022 and Beyond

Ongoing tasks and goals:

1. Identify DDI elements that are good candidates for creating CVs.
2. Create, and publish new Controlled Vocabularies for DDI elements, with a focus on DDI Lifecycle CodeValueType elements.
3. Review and revise existing Controlled Vocabularies and publish new versions as appropriate.
4. Create, and follow up on issues regarding the CVs and related DDI elements in the DDI-C and DDI-L issue trackers.
5. Update Usage information for existing vocabularies as new DDI versions are published, or new qualifying elements are identified.
6. Engage in CV-related work for DDI-CDI and other DDI products as needed.
7. Promote and popularize the DDI Alliance Controlled Vocabularies in the DDI user community as well as in the wider community of data users and curators via posters and presentations held at professional meetings.

Specific goals for 2021-2022

1. Specific goals for 2021-2022
2. Review new CodeValueType elements introduced in DDI 3.3 to find good candidates for creating CVs.
   * Current focus: new sections describing instrument development activities introduced in the Data Collection module
3. Create and publish CVs for elements identified under 1. above.
4. Review DDI 3.3 inline documentation for the elements that already have CVs, to identify those instances where there is no reference to an available DDI CV.
   * Submit issue(s) in the DDI issue trackers requesting that the reference to existing CVs be added to the inline documentation.
5. Work with Technical Committee and ICPSR to set up the process for publishing CVs on the DDI Alliance site, including resolution support.

DDI Alliance - Marketing and Partnerships Working Group

RE: Response to request for description of short- and long-term plans

The DDI Marketing and Partnerships Group was inaugurated in 2014 by Mary Vardigan to organize promotional and strategic communication efforts among varied stakeholders in the DDI Alliance. Its responsibilities include coordinating marketing activities, establishing a DDI brand, and ensuring consistent messaging about DDI and the Alliance. Its broad goals include promoting DDI in order to increase size of the DDI user community and increase DDI Alliance membership.

The group currently consists of 6 members: Jared Lyle, Steve McEachern, Ron Nakao, Barry Radler (chair), Dan Smith, and Wendy Thomas.

Below is a list of activities that are occurring and may be complemented *in the next year*:

* Issuing press releases and announcements about new products and versions. In the past year we’ve helped managed the release or review of DDI 3.3, SDTL, and CDI. Marketing will continue to promote CDI and other developing products.
* Managing and reorganizing the DDI Alliance website to improve content, layout, and usability. Marketing has been working with Jared and ICPSR web masters, as well as coordinating with other groups to assign responsibility for managing appropriate menus/pages (Training responsible for Learn, Technical Committee responsible for Products, etc., with some overlap and collaboration).
  + Moving all publications to one page and have search/browse, but that is somewhat outside Marketing’s purview.
  + Marketing reports on website usage metrics (Google Analytics) at each annual member’s meeting.
* These new products have made us realize that “DDI” is no longer one standard, but rather a suite of products for managing data and metadata. We have begun to adopt such language in our promotional communication. Similarly, we’ve been encouraging the invocation of the FAIR principles when describing DDI in outward-facing communication.
  + As part of the ‘rebranding’ of DDI as a suite of products, we’ve been working with Training to create separate logos for each product. These will be made available in a variety of formats on the DDI Alliance webpage for general use.

The following major Marketing activities or plans *are longer term*:

* Until the past year, the Marketing group had made attendance at professional conferences a primary vehicle for the direct marketing and promotion of DDI to new audiences. Having DDI representative getting out, spreading the word, and ‘pressing the flesh’ at such events plays an important role in impacting DDI brand awareness and the possible adoption of the standard by different people and organizations. Our outreach efforts in this area took the form of conference sponsorships, staffing booths in exhibition areas, distributing brochures and various promotional gimmicks, and, importantly, making sure that DDI papers and presentations were represented in the conference program. For the past few years the Marketing group has tracked the conferences and their stats on [its wiki](https://ddi-alliance.atlassian.net/wiki/spaces/DDI4/pages/7864367/Marketing+and+Partnerships+Group).
  + This past year has seen a stark reduction in this activity due to the pandemic. In the coming years Marketing might consider re-evaluating the conferences list and which ones allow booths, and which ones will be in person again in the next year. Also, Marketing should consider whether there are virtual sponsorship opportunities at any of the conferences we have previously designated.
* Coordination with Training and Technical committee of the following:
  + Training Resources (aka Training Library)
  + Promotional videos
  + Webinars/tutorials
* Dissemination of stakeholder research. Marketing recently completed the soft launch of a research project to gain feedback from a variety of DDI community stake holders. This research took the form of structured interviews (via Zoom) conducted with representatives of five different types of organizations. While producing an executive summary of this initial research project is likely to be accomplished soon-ish (and shared with the EB and other groups as needed), there exists the possibility to adapt and expand the approach to a broader sample of DDI Alliance members and stakeholders. One option is to query a small sample (as was done for the soft launch) of the DDI community each year. Another cheaper option is using traditional survey instruments to gauge feedback, but these have been poorly received in the past. The interviews we did achieve 5/5 completes and have a lot of rich data (which admittedly hasn’t been fully summarized or digested yet). We will likely revisit web surveys as a vehicle before we try interviews again, using the feedback we received on the interview to develop this instrument.

Suggestions for new efforts:

* Develop a formal marketing strategy.  The establishment of a Marketing group in 2014 was a first step, but the following recommendations are from the 2011 Breckenhill report and they still largely hold true: "The DDI Alliance may have an ‘in‐house’ PR problem in need of addressing in that the emergent stakeholders do not see themselves as well served although they very strongly support and need the DDI products and tools.  The broader need for an external/outward‐facing Marketing Plan and implementation strategy to promote even more take‐up of the standards and Alliance membership needs to be addressed.... Beyond reaching the user community there is a need to attract the interest of the vendors of statistical software tools and perhaps – for 3.X in particular – some part of the business intelligence software industry.  Get their attention and a solution to the lack of DDI tools could be on the horizon instead of being somewhat out of sight as is now largely the case, with some notable exceptions. It is beyond the scope of this review to develop a full‐fledged marketing strategy for the DDI standards and the Alliance but a plan and the resources – it will not be inexpensive ‐ to both create and execute it is required if the organization is going to take the next critical steps in its development.  Organizations do not grow linearly; they do so in steps and each step is progressively more demanding in terms of the resources required to take it.  A marketing strategy is one of the key needs – among the others already indicated – to take the Alliance forward."
* Relatedly, address the “Partnerships” aspect of the Marketing and Partnerships group.  From the same report quoted above: "...attract the interest of the vendors of statistical software tools and perhaps – for 3.X in particular – some part of the business intelligence software industry."
  + There have been previous outreach efforts by the Marketing group to entities such as the AAPOR Transparency Initiative, but there has been little sustained activity or followup. Some new partnerships (e.g., CODATA) are pursued outside of the purview of the Marketing group.
* Add to and refresh the Marketing and Partnership group's membership.  Membership has not appreciably changed since 2015 - new membership will diversify and broaden reach and ideas.

# MRT Future Activities (2021 -2023)

*Arofan Gregory on behalf of MRT, 1 March 2021*

## Introduction

This document has been written in response to a request by the DDI Scientific Board for a brief description of expected activities of the MRT group in the short and medium term. This subject was discussed within the group, and a general consensus reached on the points given below.

We have been asked to look at two different frames: the coming year, and then a 2-3 year horizon. This may not really be how we would divide the work, so I have taken a small liberty with this, counting the next year from now rather than from the DDI fiscal years starting in July ("Immediate Term") and then describing the 2-3 year vision ("Medium Term").

## Immediate Term (March 2021 - June 2021)

The immediate work of the MRT is to finalize the first production version of the Cross Domain Integration specification. We are aiming to complete the spec for submission to TC by the end of June 2021.

We are not intending to expand the functionality/scope beyond what is already in the current review draft - any extensions to functionality will be prioritized for the next revision moving forward.

We will incorporate changes from feedback and on-going issues in Jira (IDs, Annotations, etc.)

Examples will be enhanced to better show how the model can be used/implemented, and more complete mappings will be provided to other DDI specifications (Codebook and Lifecycle). Further, we hope to include some mappings to external standards which were not included in the review package, notably to SDMX and DCAT.

We will enhance both high-level and detailed documentation of the model and other supporting artefacts (e.g., XML Schemas).

We plan to review and revise the package organization to support a more modular approach in future, and to provide guidance to users on how implementation guides for specific applications can be created, to identify the supported subset of the model in a given community or implementation.

## Medium Term (2-3 Year Horizon)

In terms of the scope of DDI-CDI, we see it remaining essentially a complement to other metadata standards, especially Codebook and Lifecycle, with a focus on cross-domain use. We envision at least one major revision to the specification in the next few years, to reflect implementations and to support emerging needs within the area of cross-domain research.

Resources will limit the extent of additional feature support which can be implemented within this time frame, even with existing work in the DDI 4 model which has not yet been addressed. Additional features to CDI will need to be identified in collaboration with the SB and TC, to make sure they occupy the right place(s) within the overall suite of work products (e.g., within DDI-CDI, within DDI-Lifecycle, within both).

Overall goals for the medium term include:

• Respond to input from implementers (e.g., BLS, EOSC, ALPHA/INSPIRE, R Libraries project, Dataverse, and any others which emerge).

• Coordinate with the TC to maintain/enhance alignment with other DDI deliverables/specifications

• Identify and prioritize areas for further work (some examples):

o Produce a more formalized methodology for mapping to other standards and/or incorporating them in the model directly

o Address more diverse "data"/qualitative/deep linking (to handle more than traditional numeric data, support annotation layers and access control, etc.)

o More fully describe the integration of DDI-CDI into the emerging FAIR ecosystem (FDOs, FIPs, FDPs, etc.)

o Explore more complete support for digital units of measure and consider additional standards alignments from external domains

o Align the process and provenance description and the upper model with SDTL and emerging other provenance frameworks

o Identify features for optimizing interactions with external ontologies and vocabularies, in line with emerging best practice in other domains

• Create a modular architecture for the specification

o To support focus on specific functional areas

o To provide a framework for specific Implementation Guides around needed functions/enhanced ease of use

• Establish MRT as a regular WG for the duration of active CDI development o To achieve better integration within overall organization

o To establish a core group to maintain a coherent and consistent model across functional areas/modules

o To establish sub-groups to focus on specific functional areas/implementations, and to recruit more active participation from inside and outside the Alliance

• Continue co-ordinations with Training WG, Marketing WG, and other DDI groups around webinars and other outreach/review activities

## General Notes

It was agreed within the MRT that we would like for the Scientific Board to establish organization-level relationships with external standards bodies where needed/appropriate (today we sometimes feel like technical discussions take place with no higher-level dialogue in place.)

Further, although we manage to work together fairly well across the different sub-groups within the Alliance (Training, Marketing, TC, MRT, etc.), having the Scientific Board provide a more substantial frame for this is seen as desirable. We very much want to support collaboration across groups, but we feel the right place for this to be coordinated is within the SB, and not on an ad-hoc basis within technical committees and working groups.

Technical Committee Work Plan

*2021-03-01*

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.

# Work Plan 2021/22

Continue work identified in DDI Roadmap as approved in 2019 within minor 2020 updates

Roadmap document: https://ddi-alliance.atlassian.net/wiki/spaces/DDI4/pages/491555/Technical+Committee?preview=/491555/1998258178/DDI\_Roadmap\_2021-02-25\_update.docx

* DDI-CDI review, vote for publication, and publication if approved. CURRENT STATUS: This has been shifted from the last quarter of the current fiscal year due to adjustments in the DDI-CDI workplan following feedback from presentations/review.
* Codebook 2.6 review, vote for publication, and publication if approved CURRENT STATUS: Group has been working on outstanding issues since June 2020 and has addressed approximately 65% of 2.6 issues
* Long term discussion on the Codebook future structures
* Lifecycle 3.4 – Complete the move of Lifecycle to the COGS modeling base, testing of input and output for coverage and consistency. This will include testing multiple outputs (XML schema, RDF, JSON, UMI to begin with). CURRENT STATUS: Evaluated input issues and are currently correcting that script. Output scripts accurately reflect stored content.
  + COGS as a processing tool has advantages for Lifecycle as noted when agreed on in 2019 including; auto generation of output structures based on translation rules from object descriptions stored in structured CSV file; ability to add new output formats as needed; ability to generate output and test new content as created;
  + Review implications of multiple outputs on modeling, incorporating discussions and approaches from the Moving Forward work where appropriate; this may require minor remodeling of some choice or sequence usage
* Comparison and mapping work – continue work from 2020/21 creating a content model for overall DDI coverage, product coverage, and mapping. Includes exploring means of expressing mapping for various needs. CURRENT STATUS: Created a content model as a basis for comparison. Working on specific areas of comparison; Classifications, Variable Cascade
* Complete work with CV and ICPSR in setting up the publication process for CVs to DDI space including resolution support
* Resolution process for DDI URNs – Continue Include sentence or two about HTTP based resolution process in our work plan for next year (see agenda from meeting in Minneapolis for additional points) CURRENT STATUS: Discussed requirements
* Integrate update of assigned DDI Alliance web pages into standard publication processes
* XKOS support – work with group managing XKOS maintenance and development and ensure clear expression of the role of XKOS in DDI Suite
* SDTL support – work with SDTL group to ensure effective use of SDTL with other products as appropriate

# 2021 through 2023

* Defining roles of individual products
  + How products work together
  + How advances/changes in one product affect other product development
  + Role of products needs to be clear - use case driven rather than content coverage
  + CDI has a goal of integration to other standards (a hub for integration)– how does this impact current standards and their development - Relatively urgent question in terms of funders - is it a stand alone thing, an integration thing
  + Get feedback from people using CDI to see exactly where and how it’s being used and who that community is
* Inclusion of common functionality
  + where to integrate from CDI
  + Review of Moving Forward work to identify areas of improvement (Questionnaire, data description, geographic description, separation of logical and physical clarification and simplify, descriptive content for codebook)
  + Clarify how products work together
* Mapping between products
  + Moving content across products - Identify content that should and can move between products or subsets of products
  + The needs to be a unified approach with expressions of mapping appropriate to needs of target audiences
* Recruitment of new additional members both on TC part and SB part
  + more people, more use cases,
  + integration of technical contacts
* Review Moving Forward content and organize for easy mining of content and discussion

# General Goals from TC perspective:

* We need to have a discussion of how products work with each other to meet overall goals
* The TC perspective regarding each product is presented on
  + [Overview of Current Products | Data Documentation Initiative (ddialliance.org)](https://ddialliance.org/products/overview-of-current-products)
  + [Developing Products of the Alliance | Data Documentation Initiative (ddialliance.org)](https://ddialliance.org/products/developing-products-of-the-alliance)
* Mapping is a TC level activity which should involve the groups supporting existing and new products
* Recover the discussion of issues over time and layout points and decisions over time
* Align different product implementations over time - how does that work and what does it look like

**Training Group Report, March 2021**

(Jane Fry & Anja Perry)

When we look back on the mission we had for this year, we realize that we were very ambitious. Having said that though, we are satisfied with the work that we have been able to accomplish, even though it was not as much as we had wanted to do. The initial steps getting the group set up and determining the various resources with which we were dealing was time consuming but worth it. As well, we had to determine the copyright and intellectual property rights for all of the training slides. And finally, we had to work through all of the available slides to determine what would be used and what work was needed for these slides to be ready for use. Our situation is similar to seeing an iceberg in the ocean - when we started, we only saw the tip of the work that needed to be done.

Accomplishments:

*\** Established 4 Subgroups

* Review of Slide Decks
* Training Opportunities
* Gap Analysis (work has been completed so this group’s work is done)
* Training Webpages Updates

*\** Determined the copyright and IP that will be used for all of the training materials.

*\** Established a partnership with CODATA

*\** Put together a ‘DDI Training Request form’ that is now used on the website.

*\** Established the [Zenodo ‘DDI Training Group’](https://zenodo.org/communities/ddi-train/?page=1&size=20)

*\** Identified conferences where we could participate

* EDDI (4 presentations from this group), CODATA Go-Fair (1 presentation)

*\** Established the list of metadata tags that will be used to update content on the ‘Events’ page

*\** Put together a template to be used for all of the slides

We are very thankful for the work of the committee members who are volunteering their valuable time to this Training Group. It is no small task that everyone is doing. Having said that, we have encountered some challenges in this area also and to that end, we are looking for some more committee members who are able to dedicate some time to this committee.

**The Training Opportunities sub-group:**

Plans for the coming year:

\* Continue supporting incoming queries regarding training coming from the website.

\* To conduct ongoing tutorials and webinars in collaboration with CODATA and other groups inside DDI.

\* Host informal user discussion events (birds of a feather) on DDI related topics.

\* Continue to recruit new members.

\* Create and maintain an expert list to engage in the activities listed above.

\* Translation of material into non-English languages.

Due to COVID we see a need to conduct virtual activities to support networking and learning in the DDI community which is not currently possible due to the lack of face-to-face conferences. We anticipate that such activities will become a more regular feature of normal working life even after COVID is no longer a factor.

Plans for the forthcoming 2-3 years:

\* Continue the above activities, adjusting for possible return of face-to-face events.

\* Increased/continued collaboration with CODATA to reach out to new communities of users.

\* Establish training collaborations with FAIR related organizations (FAIR’s FAIR, GoFAIR, RDA, EOSC etc.).

**The Training Webpages sub-group:**

Plans for the coming year:

\* To finalize the reorganization and content of the Training webpages under the ‘Learn’ tab

* This includes redesigning the introductory pages targeting the new user who has no previous knowledge of DDI.
  + What is DDI
  + Why Use DDI
  + Who Uses DDI
  + How to Use DDI
* This includes putting the training resources (principally from Schloss Dagstuhl) in the Training Materials.

\*To put together introductory videos on DDI with Marketing.

\* To update and make consistent the content of the webpages under the ‘Events’ tab

* This includes putting all of the presentations into the template so there is consistent branding.
* This includes depositing the materials in the Zenodo Training Materials Repository
  + The materials on the DDI webpages will link to the Repository

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# Report to DDI Alliance Scientific Board: SDTL Working Group

March 3, 2021

Current activities:

The SDTL Working Group is charged with maintaining Structured Data Transformation Language, which was added to the DDI Alliance suite of standards in December 2020.

Structured Data Transformation Language (SDTL) is an independent intermediate language for representing data transformation commands from statistical analysis packages (e.g., SPSS, Stata, SAS, and R). SDTL was designed to be integrated into DDI metadata files to provide machineactionable descriptions of the provenance of variables and data files. SDTL is compatible with all versions of DDI, and it has applications in the DDI-Cross Domain Integration standard. SDTL was created by the Continuous Capture of Metadata (C2Metadata) Project, which was funded by the US National Science Foundation.

An open comment period for SDTL was held in July and August 2020. The DDI Alliance membership voted to adopt SDTL in November, and the SDTL product page was launched in December. An introduction to SDTL was published in the IASSIST Quarterly in December (<http://hdl.handle.net/2027.42/156015>).

In preparation for the comment period, a full range of documentation for SDTL was developed and provided through the COGS system. The SDTL standard was already managed in COGS, and an SDTL User Guide was added. The User Guide includes both an overview of SDTL and a chapter on “SDTL Best Practices and Conventions.”

SDTL Working Group meets monthly. [Notes](https://ddi-alliance.atlassian.net/wiki/spaces/DDI4/pages/1157791768/Notes+from+WG+meetings) from WG meetings are available on the DDI Alliance Confluence system.

Since SDTL 1.0 was released, there have been a few small additions to SDTL (i.e., elements for datetime constants) and several adjustments to the documentation. These changes are all documented on the [SDTL Working Group Confluence site](https://ddi-alliance.atlassian.net/wiki/spaces/DDI4/pages/899547182/SDTL+-+Structured+Data+Transformation+Language+Working+Group).

Public presentations:

● A webinar introducing SDTL for the benefit of DDI Alliance members was presented on November 2, 2020. A recording is available.

● SDTL was included in a session on “FAIR Provenance” at the CODATA/GO FAIR Convergence Symposium on December 2, 2020.

● A paper proposal has been submitted for the International Digital Curation Conference, which will be held April 19, 2021.

● A paper proposal has been submitted for the Provenance Week 2021, July 19-22.

Future activities:

We expect that there will be minor adjustments to the SDTL standard as it is applied in new ways. Up to now, the development of SDTL has been driven by the C2Metadata Project, which ends in September 2021. We hope that the next phase will involve integration of SDTL and C2Metadata Project tools into data production workflows.

A subgroup of the SDTL Working Group is developing a grant proposal for extending SDTL to cover data created by statistical analysis commands, such as regression and factor analysis. The C2Metadata Project limited its scope to data transformation commands, but statistical analysis can produce new variables, like predicted values from regression models and indexes based on weights derived from factor analysis. The new project is being developed in partnership with the STATO ontology of statistics at the University of Oxford e-Research Centre.

SDTL Working Group

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