

Marketing and Partnerships Plan

Work to Date

The Marketing and Partnerships group (Chuck Humphrey, Kelly Chatain, Marcel Hebing, Ron Nakao, Steve McEachern, Wendy Thomas, Arofan Gregory, Barry Radler) met monthly during the year and also organized a session during NADDI in Wisconsin in April to garner feedback on marketing priorities.

The group developed a list of strategic partners and marketing targets to approach with the following goals:

Increase DDI Alliance membership

- Increase use and adoption of DDI and get 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

For Discussion at this Meeting

- Do you agree with the priority stakeholders and partners listed below?
- Which two to three 2016 marketing activities do you think should be priorities?
- Any comments on which type of activity is most effective (conference, logos, webinar, etc.)?
- Which activities could we drop to save money?
- How much in-kind contribution is feasible to request?
- If we are not effective at bringing in new paying members, should we still do this work (i.e., Marketing)?

Stakeholders and Partners

The Executive Board prioritized the list of stakeholders (top five) 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 |

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| 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 | 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 |

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 W3C approval) | DDI use, legitimacy, general visibility and 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

Publication of DDI4 will of course require some intensive marketing efforts, but the group discussed the fact that marketing what we have now is perhaps even more important. DDI Lifecycle 3.2 and DDI Codebook 2.5 are good solid products and the Alliance needs to be actively promoting their use. To that end, we looked at marketing activities that could have a high impact and set up a tentative marketing plan for the upcoming fiscal year and two years beyond (see table below).

It was determined that many of the top five stakeholder groups could be reached through conferences. There are several ways to participate in conferences: mount a display in the exhibit hall, create a poster for the poster session, become a sponsor, get on the program by giving a presentation, provide marketing materials, etc. Each mode of participation has associated costs. Being on the program has a lot of impact, so we are focusing on that activity in the marketing plan. Some target conferences were identified but would need to be prioritized for impact and for stakeholder group. We estimate that we could attend four to five per year at most.

Partnerships have costs as well. Travel to meetings is often necessary and there are administrative costs in managing new relationships.

Another idea arose through the use of the evaluation results from the past two NADDI conferences to demonstrate the power of DDI. The evaluation forms were transformed into DDI metadata and the results calculated and displayed in real time for all to see. This was a very compelling exhibit of DDI's power. Something like this might be shown in presentations.

Webinars are a cost-effective way to reach stakeholders, and we plan to use them as well.

While some of these marketing activities have non-trivial costs, we are assuming that once DDI-Lifecycle MD is completed and funding for sprints is no longer necessary, we will be able to devote more resources to marketing, partnerships, and training.

This report does not include expenditures for meeting sponsorships or sprints.

We are suggesting expenditures of \$15,000 in each of FY2016, FY2017, and 2018 in line with the Strategic Plan. We are also assuming that we will get at least two new members in both 2017 and 2018, which begins to offset the expense.

Fiscal Year 2016 (July 1, 2015-June 30, 2016)

| Marketing Activity | Cost | Stakeholder | Goals | Complete? |
|--------------------------|------|-----------------------|---|-----------|
| European Survey Research | - | Survey organizations, | DDI use, general visibility and awareness | |

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| Association, July 2015, Reykjavik | | NSIs | | |
| Comparative Survey Design and Implementation (CSDI) 3MC Conference, Chicago, July 2016 | \$1500-2500 | Survey organizations; large studies | DDI use, general visibility and awareness | |
| Open Repositories Conference, Dublin, June 2016 | \$1500-2500 | Libraries | DDI use, general visibility and awareness | |
| Research Data Access and Preservation (RDAP) Conference, April 2016? | \$1500-2500 | Libraries | DDI use, general visibility and awareness | |
| International Digital Curation Conference, February 2016? | \$1500-2500 | Libraries | DDI use, general visibility and awareness | |
| American Library Association Conference, June 23-28, 2016, Orlando | \$1500-2500 | Libraries | DDI use, general visibility and awareness | |
| American Association for Public Opinion Research (AAPOR), May 2016, Austin | \$1500-2500 | Survey organizations | DDI use, general visibility and awareness | |
| International Statistical Institute (ISI), August 2017, Marakesh, Morocco | ? | Statisticians and Official Statistical Agencies | DDI use, general visibility and awareness Possible collaboration with GSIM, SDMX | |
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| Marketing collateral (brochures, buttons, thumb drives, posters, PPs, stock photos, designer's time) | \$2500 | All | General visibility and awareness | Yes, ongoing. Conference banner and stand |
| Website and Confluence | In-kind contributions (plus Alliance-paid time of Web developer) | All | Membership, DDI use, expand community, general visibility and awareness, training | Yes, ongoing |
| Logo | Time of designer -- \$250 | All | Update identity | Yes |
| Webinars | In-kind | All | Membership, DDI use, expand community, general visibility and awareness, training | |
| Videos | 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 | |
| <i>Quality control for DDI documentation</i> | <i>In-kind</i> | <i>All users</i> | <i>DDI use, work with other standards</i> | <i>Training group?</i> |
| <i>Upgrade GLBPM to serve as a standard</i> | <i>In-kind</i> | <i>All users</i> | <i>DDI use, work with other standards</i> | <i>Training group?</i> |

Total **\$15,000 (Five conferences)**

Fiscal Year 2017 (July 1, 2016-June 30, 2017)

| Marketing Activity | Cost | Stakeholder | Goals |
|---------------------------------------|--|------------------------|---|
| 3 conferences | -up to \$7,500 | See above for examples | DDI use, general visibility and awareness |
| Partnerships exploration | \$2500 | See above for examples | 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 |
| More professional video | \$5,000 | 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 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 |
|---------------------------|-------------|--------------------|--------------|
| Lifecycle-LMD marketing | \$5000 | All | |

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|---------------------------------------|--|-----------|---|
| 2 conferences | -up to \$5,000 | See above | DDI use, general visibility and awareness |
| Partnerships exploration | \$5000 | See above | 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**