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Cross Pillar Activities Task 1: CESSDA Resource Directory

D3 Report on Resource Directory Activities in 2022

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Executive Summary

This document describes activities carried out in 2022 within the cross-pillar task CESSDA Resource Directory (RD). The main activities during the year included the completion of a policy and development strategy for the RD, a review of Zotero/RD as a platform for the tools directory, compilation of a user guide and some promotional activities, as well as maintenance work and the addition of new resources in the RD. In January 2022 the RD contained 603 resources, an increase of 179 resources (42%) from the year before.

Abbreviations and Acronyms

CESSDA	Consortium of European Social Science Data Archives
CROSSDA	Croatian Social Science Data Archive
CSDA	Czech Social Science Data Archive
DAG	CESSDA Data Archiving Guide
DASSI	Data Archive for Social Science in Italy
DANS	Data Archiving and Networked Services
ERIC	European Research Infrastructure Consortium
FORS	Swiss Centre of Expertise in the Social Sciences
GESIS	Leibniz-Institute for the Social Sciences
MK DASS	Macedonian Social Science Data Archive
RD	CESSDA Resource Directory
SP	CESSDA Service Provider
SND	Swedish National Data Service
WG	CESSDA Working Group

Introduction

This report covers the 2022 activities regarding the CESSDA Resource Directory[1] (RD), a structured and documented collection of information on available documents, tools, and support services for data archive professionals. The work has been carried out in the cross-pillar task CESSDA Resource Directory which is part of CESSDA Agenda 21–22. The task was divided into three subtasks: 1. Maintenance and regular updates of the CESSDA Resource Directory; 2. Contributions to the Resource Directory; and 3. Tools Directory. The different activities carried out within each subtask are presented in thematic sections below.

The activities were carried out by FORS (lead partner), CROSSDA, CSDA, GESIS, MK DASS and SND. The team's new members, GESIS and MK DASS, started their RD work at the end of July with training for RD editors. During the training period in August-September, the new editors were introduced to the review work by using a trial version of the RD. The training period was followed by the review of resources in categories 1 to 3,[2] based on the Guide for the RD Editors, and under supervision of the editor responsible for the category.

During the year, the team met every two weeks, which made it possible to track the progress, continuously collaborate, discuss, and solve problems that arose.

Policy and development strategy

Since the work on the RD began in 2018, team members have gained experience and knowledge about the service and curation process both as editors and managers of the RD. In order to formalise the processes developed over the years, work began in 2021 to compile relevant documentation for the RD.

An assignment for subtask 1 was to produce a policy and development strategy for the RD. This work continued in 2022 and resulted in a report that includes a collection development policy for the RD, a guide on the curation process for RD editors, development strategies, as well as a governance and maintenance strategy for the RD.[3]

The collection development policy defines the aim and target audience of the RD and the criteria for selecting and appraising resources for inclusion in the RD. The Guide for the RD

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[1] CESSDA Resource Directory: https://www.zotero.org/groups/2382601/cessda_resource_directory/library (accessed 2022-12-08).

[2] 1) Organisation, 2) Digital object management, 3) Communication and support.

[3] Bornatici, Christina, Kudrnáčová, Michaela, Kranjec, Irena, Glavica, Marijana, & Alfredsson, Iris. (2023). *D1 CESSDA Resource Directory Policy and Development Strategy (1.1)*. Zenodo. https://doi.org/10.5281/zenodo.5554473

Editors is a detailed step-by-step guide explaining how to assess resources, which metadata to add, and how to proceed. The development strategies deal with the acquisition process, collaboration with CESSDA WGs and teams, technical developments, and the promotion of the RD. The governance and maintenance strategy describes an envisioned governance model for the RD, especially in the perspective of its sustainability.

After including technical tools and service resources in 2021,[4] the subtask on the tools directory continued in 2022 with an analysis on how fit the Zotero/RD is as a platform for the tools directory, taking into account outputs from other projects.[5] Five existing resource services were reviewed, and the analysis concluded that the tools directory should be kept as a part of the RD. Both have a similar purpose and the same audience, and it is preferable to find all relevant resources in one place. The policies for the tools directory could also be included in the general RD policies. The recommendation was also to revise the metadata structure and to develop interoperability features in the next phase of the development of the tools directory.

Maintenance and update

Experience shows that resources can easily become outdated and that new resources of value are constantly being developed. Therefore, the maintenance and update of the RD is an important task that has to be carried out regularly. After the initial collection of resources in 2018, a major update of the RD was carried out in the autumn of 2020. In 2022 it was time to ask the SPs to assist in a new update of the RD. In parallel with this major update the RD team also added resources from other sources, following a strategy adopted in 2021.

Adding and reviewing SPs resources

The RD mainly contains information on resources created by CESSDA member SPs and it is essential to involve them in updating and expanding the content of the RD. At the same time, it is important for this work not to become too extensive and burdensome for the SPs.

Therefore, before the new update of the RD in 2022, the collection tool used in 2020 was simplified. It was decided that SPs should only review resources created by their own organisation, excluding collaborative resources produced in international projects or in

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[4] Christina Bornatici, Marijana Glavica (2021). *D5 Resource Directory Populated with Information about SP's Data Archiving Tools*. (Restricted).

[5] Marijana Glavica, Iris Alfredsson, Irena Kranjec, Christina Bornatici, Michaela Kudrnáčová (2022). *D6 Review of Zotero/Resource Directory as a platform for the Tools Directory*. https://doi.org/10.5281/zenodo.6901846.

CESSDA tasks. In addition, the tools category was not included as a special effort was made in the autumn of 2021 to collect information about these tools.

An individual collection tool was created for each of the 23 CESSDA member SPs. 14 SPs who already provided resources to the RD received a collection tool filled with names and links to these resources. Each resource was to be reviewed and marked if it was supposed to be kept as it is, updated or removed. If the link was changed, it was asked for an updated link to be attached. In total, there were 194 resources to be reviewed, ranging between 1 and 43 per SP. All 23 member SPs were asked to add any other resources they thought relevant for the RD. For new resources, a title and a link had to be provided.

An email with a link to the collection tool was sent out on 24-27 May, and a reminder was sent out three weeks later. In total, 18 out of 23 CESSDA SPs answered, and this resulted in suggestions to keep 84 resources as they were, to update 38 resources, and to remove 40 resources from the RD. 32 resources were not reviewed, mainly because 5 SPs did not respond. 107 new resources were suggested to be added to the RD.

During the autumn the editors' board reviewed the suggestions from the SPs and the result of their review was:

- 91 resources kept unchanged
- 36 resources updated
- 27 resources removed
- 54 new resources added

Some resources proposed to be removed by the SPs were retained as they were still considered relevant. Only half of the proposed new resources were accepted by the editorial board. The main reason for their refusal was that the resource was not available in English (28). Another common reason for rejection was that the resource was not considered relevant to the RD target group (19), and a smaller number were rejected because the resource was not sufficiently specific and developed (6).

When the editorial board had finished their review, each of the SPs was contacted and thanked for their contribution. Feedback was also provided on why the editors had not always followed the SP's recommendations to change or remove, and why some of the suggested new resources were not added to the RD.

Content maintenance and regular updates by the RD editors

The maintenance and update work performed by the RD editors during 2022 mainly consisted of two larger tasks. First, tags were added to all resources to further improve their

findability. Second, to ensure that the resources are described in a consistent manner, all resources, except for tools, were reviewed according to the Guide for the RD Editors.

Tags

Tags are keywords that describe the content of a resource and offer users an additional way to find relevant resources. All resources should have at least one tag. Tags should be written in lower cases (except for acronyms), in singular form and in British English.

In 2022 all resources were checked and where tags were missing, relevant tags were added. On average, there are 3-5 tags for each resource. Tags were harmonised in such a way that different variants of tags were changed to agreed variants (e.g., American English vs British English, singular vs plural, acronym vs full term, and avoidance of overly general terms). In addition, an effort was made to tag similar resources with the same tags.

Review of metadata based on the Guide for the RD Editors

The review conducted by the SPs did not include resources from CESSDA projects, CESSDA tasks or resources produced outside CESSDA. In addition, the SPs only checked if the resource was up-to-date and available. A review based on the Guide for the RD Editors would also give a more consistent description of the resources. Therefore, all resources, except for category 4-Technical Infrastructure which was checked in 2021, underwent further review by the editorial team.

Using the RD collection development policy all resources in categories 1 to 3 were checked for relevance, and irrelevant resources were removed. Metadata was checked with special attention to the links and the extra field. The extra field is used to add CESSDA member, observer or partner SPs, if the institution/company field is not available or already filled in by one institution/company.

Adding resources from the CESSDA Training Working Group

The second subtask was linked to the work of the CESSDA Training Working Group (WG). One of the main goals was to include resources developed by the Training WG and to support the usage of the content of the RD in the Data Archiving Guide (DAG).[6] After the discussions in 2021, both the DAG and RD teams agreed that they share the same audience and that both DAG and RD would benefit from collaboration between the teams.

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[6] CESSDA Data Archiving Guide: https://dag.cessda.eu/ (accessed 2022-12-08).

Resources from the CESSDA Data Archiving Guide (DAG)

DAG is an important resource for training new staff in social science data archive work and is thus also a very relevant resource for RD. In the discussion between the two teams, it was decided to include not only DAG in the RD but also the various resources mentioned in it.

In November, the list of DAG resources was exported separately for each current DAG chapter (i.e., resources listed in the 'Sources and further reading' section of chapters 1 to 4). In total, 132 resource items were retrieved after deleting duplicates. For each item, it was first checked whether it was already included in the RD. This was the case for 43 items (33%). The tag 'CESSDA Data Archiving Guide (DAG)' was then added to these resources. The rest of the resources were evaluated for inclusion following the Collection Development Policy developed in 'D1 CESSDA Resource Directory Policy and Development Strategy'. A first RD editor evaluated the resources, and another RD editor reviewed the conclusions. Resources with questionable relevance for the RD were discussed at editorial board meetings. In total, 31 new resources from DAG were added to the RD and received the above-mentioned tag and 58 DAG resources were not relevant for the RD purpose. The most frequent reasons for resource rejection were: the link led to a general landing page, some resources were country-specific and did not apply to any other countries, some resources were too brief while there were already similar resources in the RD which were more informative. Currently, 68 items have the tag 'CESSDA Data Archiving Guide (DAG)'.

Resources added for the Dataverse Training

A successful collaboration with the Training WG resulted in the inclusion of more than 20 resources about Dataverse. In September 2022 DANS organised a train-the-trainer workshop on Dataverse. Participants were directed to the RD where they could find an overview of existing materials on Dataverse by using the tag "Dataverse training". The tag has been retained and can be used when planning new dataverse training events.

The collaboration with the Training WG should be strengthened in the coming years, but at the same time it should be pointed out that the training resources are primarily aimed at researchers who are not the main audience for RD.

Adding resources from the CESSDA Newsletter

In collaboration with the CESSDA Newsletter team the Resource section of the CESSDA Newsletter was regularly scanned. The eleven issues published during the year included nearly 60 resources that were reviewed. At the end of 2022, 26 of these resources were included in the RD.

Promotion

User guide

Another main task connected to the collaboration with the Training WG was to compile a user guide for the RD.[7] The task was postponed from 2021 due to the delay of D1 to which it is strongly linked.

The aim of the user guide is to present the Resource Directory, the type of resources collected there and how to find resources. The guide also answers questions about how to find resources within the Zotero library and how to make the best use of Zotero.

Presentation of the RD

CESSDA Tools Directory discussion forum

In the second half of 2021, the RD was updated with information on the tools used by CESSDA member SPs for activities linked to a data archiving service. This collection was carried out in close collaboration with colleagues at the various SPs. To demonstrate the results of their efforts and to hear their views on how best to describe these resources, all participants were invited to a discussion forum on 23 February 2022.

The event gathered 16 participants from 14 different SPs. After a general presentation of the RD and a more detailed demonstration of work done with the tools directory, a discussion followed with many good ideas for further development of the tools directory.

RD introduction for the Mentorship Programme

In collaboration with the Mentorship Programme team, it was decided to arrange an information session on the RD for mentors and mentees in the Mentorship Programme 2021-2022. On 25 May, 9 out of 12 participants in the Mentorship Programme gathered for a presentation of the RD and a demonstration based on different use cases, followed by feed-back from the participants and a discussion on development strategies and future activities.

News for the CESSDA newsletter and website

A news on main achievements regarding the RD over the last two years will be included in one of the first newsletters of the year. The news also briefly explains what the RD is, for whom it is, and how it can be used.

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[7] Christina Bornatici, Michaela Kudrnáčová, Ilona Trtíková, Iris Alfredsson. *D4 Resource Directory User Guide.* (Restricted).

Overview of the RD content at the end of 2022

The resources have been organised under four main categories following the CoreTrustSeal requirements and the Open Archival Information System model:

1. **Organisation** covers resources dealing with institutional management;

2. **Digital object managemen**t deals with activities around the acquisition, curation, dissemination and long-term preservation of data;

3. **Communication and support to users** gathers resources on support, assistance and advice to users of the services;

4. **Technical infrastructure** includes resources on hardware, software and tools needed to run the service, implementation and maintenance of technical systems and technical resilience.

Table 1 shows the distribution of resources by categories and subcategories at two time points, in December 2021 and in January 2023. At the end of 2022 activities, the RD contained 603 resources. The number of resources had increased by 42% since December 2021 with an increase in all categories and subcategories except one. It should be noted that a resource can belong to several categories and subcategories.

Table 1: Comparison of the total number of resources and the number of resources per category and subcategory between December 2021 and December 2022

	RD 2022 project (January 2023)	RD 2021 project (December 2021)
Total	**603 (+42%)**	**424**
1 ORGANISATION	124 (+31%)	95
1.1 Organisational Structure	40	40
1.2 Staffing, management and financing	10	8
1.3 National and international cooperation	26	12
1.4 Certification	51	40
1.5 Monitoring	20	6
2 DIGITAL OBJECT MANAGEMENT	115 (+60%)	72
2.1 Pre-Ingest - Acquisition	44	32
2.2 Ingest - Curation	70	36

2.3 Access - Dissemination	51	37
2.4 Preservation	36	28
3 COMMUNICATION AND SUPPORT TO USERS	253 (+43%)	178
3.1 General information about the institution	30	20
3.2 Data deposit	98	61
3.3 Data access	64	48
3.4 Data management	107	61
3.5 Data (re)use	55	34
4 TECHNICAL INFRASTRUCTURE	159 (+49%)	107
4.1 Pre-Ingest - Acquisition	19	10
4.2 Ingest - Curation	46	31
4.3 Access - Dissemination	58	42
4.4 Preservation	34	17
4.5 Communication & user support	25	16
4.6 Other	33	26

Conclusions

By 2022, significant work has been done to achieve the goal of making RD a comprehensive and up-to-date collection of essential resources that will help build sustainable and mature data archives, support the development of new services and features within existing data archives, and inform data archive professionals on general data archiving practices and emerging topics.

In 2022 the RD-team finalised the RD policy and development strategy, maintained and updated the collection in collaboration with the SPs, developed a user guide and began promoting the RD. Collaboration with the DAG team, as well as other teams in the Training WGs and in other WGs (e.g., the Mentorship team) has improved the content of the RD, but also provided opportunities to introduce the RD to these teams.

There are still things to improve and ideas for this are presented in the Development Strategies.[8] Some of the ideas presented in the strategy are listed below:

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[8] Bornatici, Christina, Kudrnáčová, Michaela, Kranjec, Irena, Glavica, Marijana, & Alfredsson, Iris. (2023). *D1 CESSDA Resource Directory Policy and Development Strategy (1.1)*. Zenodo. https://doi.org/10.5281/zenodo.5554473

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- Incorporation of the RD into the CESSDA website (compare Training Resources) and adding features presented in the Development Strategy;
- Coordination of which resources should be in the Resource Directory and Training Directory respectively;
- Establishing a RD Contributors Community with representation from each SP. This body regularly collaborates with the RD Editorial Board, updating and adding resources from the SP and informing the SP about the RD;
- Organised collaboration with all CESSDA working groups and other CESSDA teams on which resources should be included in the RD;
- A submission form where any user could propose new resources and request changes in current resources;
- Explore the possibility of making the RD an access point to restricted CESSDA deliverables, as well as SPs' resources that can be shared with other SPs but not outside CESSDA.