EUROPEAN DDI USER CONFERENCE

EDDI
Conference Management Guide
2020

Author	Uwe Jensen, GESIS
Published	08.10.2021
Approval of the Guide	EDDI Program Committee 16.08.2021

Acknowledgment

The Guide at hand is an enhanced version of the
EDDI Manual written by Achim Wackerow (GESIS, 2010)
which was reviewed and updated by Catharina Wasner (GESIS, 2015)

Table of Content

1 Introduction ... 5

2 EDDI – The Annual European DDI User Conference ... 6

2.1 Purpose ... 6

2.2 Time and Location ... 6

2.3 Event Structure ... 6

2.3.1 Conference Days ... 6

2.3.2 Social Activities ... 7

2.3.3 Side Meetings ... 7

2.3.4 Tutorials ... 7

2.3.5 Equality & Diversity ... 7

2.3.6 Typical Schedule ... 7

3 EDDI Conference Management & Responsibilities ... 10

3.1 Main Conference Organizers ... 10

3.2 Conference Chairing & Committees ... 10

3.2.1 Conference Chairs - CC ... 10

3.2.2 Program Committee – PC ... 10

3.2.3 Organizing Committee - OC ... 10

3.2.4 The Local Organizing Committee - LOC ... 11

3.3 Internal Communication & Coordination Channels ... 11

3.4 Communication with the Public ... 11

3.4.1 Key Dates for Communications to the Public ... 12

4 Practical Conference Organisation – Timeline & Planning Documents ... 13

4.1 Conference Timeline ... 13

4.2 Conference Planning Documents ... 13

5 Tasks of the Conference Chairing (CC) ... 15

6 Tasks of the Program Committee (PC) ... 16

6.1 Organizing Keynote Speakers for the Plenary ... 16

6.2 Managing the Call for Papers (CfP) ... 17

6.2.1 CfP Structure and Content ... 17

6.2.2 CfP Publication and Reminder – Audience & Dates ... 18

6.2.3 CfP Submissions - Communication, Processing & Monitoring ... 18

6.2.4 Submissions of Presentations - Review Policy & Process ... 19
6.2.5 Submissions of Full Papers - Peer Review Policy & Process ... 19
6.3 Managing the Conference Program ... 20
6.3.1 Composition of the Program ... 20
6.3.2 Compilation & Promotion of the Draft, Pre-final, Final Program Version ... 21
6.4 Organize Session Chairs – Communicate Tasks & Regulations ... 22
6.4.1 Chairs of Plenary Sessions ... 22
6.4.2 Chairs of Concurrent Session - Communication with Presenter ... 23
6.4.3 Chair of Poster Session – Communication with LOC & Presenter ... 23
7 Tasks of the Organizing Committee (OC) ... 24
7.1 Management of the Website & Conference Information ... 24
7.1.1 Basic Web Pages to promote the yearly Conference ... 24
8 Tasks of the Local Organizing Committee (LOC) ... 27
8.1 Conference Venue – Locations, Infrastructure & Support ... 27
8.1.1 Conference Caterer ... 28
8.1.2 Conference Dinner ... 28
8.1.3 Informal Get-togethers ... 28
8.1.4 Technical Infrastructure & Personal Support ... 28
8.2 Accommodation & Transportation ... 29
8.3 Local Maps & Walking Instructions ... 30
8.4 Running the Registration Desk ... 30
8.4.1 Conference Registration Package ... 31
8.4.2 Conference Chair Package ... 31
8.4.3 Listings & other Organisational Materials ... 31
9 After the EDDI Conference - Ad-hoc Measures ... 32
9.1 Brief Conference Review & Handover to the new Host ... 32
9.2 Finances ... 32
9.3 Update Organisation Documents to prepare the next EDDIxx ... 32
9.4 Measures to promote the upcoming EDDIxx ... 32
9.5 Publishing the Conference Presentations ... 32
9.6 Publishing Full paper at IASSIST Quarterly Series ... 32
10 Hosting a EDDI Conference - Advance Planning ... 33
10.1 Expression of Interest & Requirements Hosting a EDDI Conference ... 33

10.2 Requirements to manage by the Local Host 33
10.2.1 Meeting Rooms, Catering, and Locations for Social Events 33
10.2.2 Technical Requirements 34
10.2.3 Organizational Tasks 34
11 EDDI Finance Policies & Budget Planning Process 35
11.1 Public Funding, Grants & Sponsorship of the Conference 35
11.1.1 Funding or Grand Proposal to Public Research Funder 35
11.1.2 Sponsoring Policy for Institutions from Academia 35
11.2 Local Conference Budget – Major Expenses & Revenues 36
11.2.1 Expenses of the Local Host(s) 36
11.2.2 Revenues of the Local Host(s) 36
11.3 Local Budget Planning with the Calculation Template 37
11.3.1 Estimating the Number of Participants 37
11.3.2 Planning the Amount of Fees for Conference Registration & Tutorials 37
11.3.3 Payer & Non-Payer Policy 38
11.3.4 Cancellation & Refund Policy 38
12 EDDI Policies for Authors making Submissions to the Call of Papers 40
12.1 Author Guidelines 40
12.2 Submission Preparation Checklist (2019) 40
12.3 Copyright Notice (2019) 41
12.4 Held Presentations - Preservation, Publication & Licensing Policy 41
13 EDDI Privacy Policy (2020) 43
14 EDDI Code of Conduct (2019) 45

1 Introduction

This Guide is designed for assisting all persons in charge of planning, organizing and realizing the EDDI Annual European DDI User Conferences.

The Conference Co-chairs and the members of the Program Committee (PC) and the Organizing Committee (OC) are commonly responsible for approving and further development of the EDDI Guide.

The first EDDI conference 2009 started with Plenary Sessions, Concurrent Sessions and a tutorial. Since then, the program structure has been developed step by step.

In 2012 a Poster and Software Presentation Session was added. Presentations for the Poster Session can be paper poster presentations shown on display boards/walls, computer presentations on the presenter's own laptops or projections shown on display boards/walls. The presenter is required to remain at the display board to answer questions. The topics of the Poster Session are a potpourri.

In 2013 a pre-conference day for the tutorials (tutorial day) was introduced for the first time because of the high number of regular presentations. In 2018 a Birth of a Feathers discussion was included in the program for the first time.

Due to the pandemic situation in 2020 and 2021 the EDDI conferences have been organized as virtual meetings. Considered as a temporary situation, the different requirements to plan a virtual conference are not reflected in this version of the EDDI management guide. Rather, this has been covered with a dedicated planning to meet the diverse needs to run EDDI 2020 and 2021 as virtual conferences.

In this sense the guide at hand describes the practice to organize face-to-face EDDI conferences until 2019. It may be adapted in the future to incorporate the experiences of future conference organizers.

2 EDDI – The Annual European DDI User Conference

2.1 Purpose

Since 2009 EDDI (European DDI User Conference) is the annual conference for users of DDI (Data Documentation Initiative), a metadata specification for the social, economic, and behavioral sciences. EDDI is designed to provide a forum where DDI users from Europe and the world can gather to showcase their work and their progress toward DDI adoption, as well as discuss any questions or challenges they may have about DDI standards and work products.

EDDI includes presentations, poster sessions, and discussion sessions. The conference closes with a "meet the experts" session in which users will have a chance to lobby for their point of view with representatives from the DDI Alliance. The philosophy of EDDI is to be an open, inclusive DDI community-building activity. A similar conference (NADDI) started successfully in April 2013 in Lawrence, Kansas, USA: the 1st North American DDI Conference.

2.2 Time and Location

EDDI usually takes place in the first week of December. This time of the year is chosen to avoid conflicts with other DDI-related events. The annual IASSIST conference (International Association for Social Science Information Service and Technology) is usually in the last week of May and the DDI workshops in Dagstuhl are in October. The exact date of EDDI is dependent on different factors like availability of the rooms or conflicting conferences. As a European User Conference EDDI takes place only in European countries. The goal is to have a rotation between all European countries but the location is dependent on candidates who are able to provide facilities for hosting the conference.

2.3 Event Structure

The event has both a traditional 'academic' Conference and a community support and building function. As such, the event is composed of days where there is a Conference, and in surrounding days, time is also made available for tutorials, side meetings and associated events for development of the DDI standards.

The composition of the event has changed since its inception to meet the changing needs of the community.

2.3.1 Conference Days

Conference Days are traditionally Tuesday and Wednesday. The 1st. conference day begins with a Plenary Session, opened by the Co-chairs with short welcome notes to the participants, the host and other key persons and an introduction to the upcoming program. It follows a welcome speech of the host and a keynote speech. The Plenary Session on the 2nd day may vary according to the considerations of the PC (e.g., a panel discussion; or a 2nd keynote speech) which may take place either at the beginning or at the end of the day.

Concurrent Sessions follow after the plenary and consist of 2 to 5 presentations with duration between 10 to 20 minutes, plus 5-10 minutes for discussions. Other forms of sessions are possible as well. Further details are described at Typical EDDI Schedule (see 2.3.6)

2.3.2 Social Activities

Socializing and professional exchange with DDI users has always been an important aspect of EDDI conferences. Therefore, the LO should recommend locations for Informal Get-Togethers for the evenings on Sunday, Monday and Wednesday. A Conference Dinner takes place on the first conference day. Breaks should be arranged generously like 90 minutes for lunch and 30 minutes for refreshment breaks.

2.3.3 Side Meetings

Side meetings foster community building, networking and work progress of the DDI community and with organisations in the field metadata standards developments. Before and/or after the conference days side meetings of different groups are common practice, e.g.:

- Working Group Meeting of the DDI Alliance
- DDI Developers Meeting
- Organisational, project or business meeting (e.g., CESSDA projects, Colectica)

A meeting organizer is responsible for contacting the PC at an early stage in the conference year to prepare all arrangements for the meeting (see 7.4).

2.3.4 Tutorials

Tutorials are a way of introducing the various aspects of DDI to an audience. These are normally training or related activities open to all participants, which would not fit into the traditional 'academic conference' format. They usually take place the Monday preceding the conference. Past tutorials have ranged from introductions to DDI, through to specific aspects of DDI standards, work products or aimed at specific user groups.

2.3.5 Equality & Diversity

The conference actively encourages equality and diversity. The conference has, since 2018 run an Equality & Diversity scholarship that has provided subsidies to a number of potential participants that have been under-represented in previous Conferences. This has been funded either through the host institution obtaining grants or through the use of monies received through sponsorship. Hosts are encouraged to seek similar or other mechanisms.

The Conference seeks to have a diversity of Chairs of sessions, and of discussion panels.

2.3.6 Typical Schedule

A typical structure of the EDDI conference and surrounding meetings are presented in the following. It is open for adjustments and formats in detail.

Monday to Friday – week prior to the conference days

- optional frame for DDI developers meeting, DDI specification meeting or other extended workgroup meetings
- Schedule to be prepared by the meeting organizer

Sunday – Arrival Day

- 19:00 Informal Get-Together

Monday – Tutorials Day

- Half day tutorials - full day tutorial would take place at the same time slots
    - 08:30 Registration
    - 09:00-10:30 – Half day Tutorial 1 Part 1
    - 10:30-10:45 Break
    - 10:45-12:15 - – Half day Tutorial 1 Part 2
    - 12:15-13:15 Lunch
    - 13:15 -14:45 – – Half day Tutorial 2 Part 1
    - 14:45-150:00 Break
    - 15:00-16:30 - – Half day Tutorial 2 Part 2
- Slot for Side Meeting if not conflicting with tutorial participation
- 18:00 Informal Get-Together

Tuesday – 1st. Conference f Day

- 08:15 Registration
- 09:00 – 10:15 Plenary Session
    - Welcome & Opening by the chair
    - Welcome speech of the host
    - Keynote speaker 1. Day
- 10:15 – 10:45 Break
- 10:45 – 12:00 Regular Presentations in Concurrent Sessions
- 12:00 – 13:15 Lunch
- 13:15 – 14:45 Regular Presentations in Concurrent Sessions
- 14:45 – 15:15 Break
- 15:15 – 16:15/16:45 Regular Presentations in Concurrent Sessions
- 16:15 – 16:45 (optional) Birds of Feather Discussions

18:30 Drinks – 19:00 Conference Dinner

Wednesday – 2nd Conference Day

- 08:30 Registration
- 09:00 – 10:00 Plenary Session
    - Panel or Keynote speaker 2. Day
- 10:00 – 10:30 Break
- 10:30 – 12:00 Regular Presentations in Concurrent Sessions
- 12:30 – 13:30 Lunch
    - Parallel: Poster and Software Presentation Session
- 13:30 – 14:30 Regular Presentations in Concurrent Sessions
- 14:30 – 14:45 Break
- 14:45 – 15:30 Plenary Session
    - Presentation on important topics of general interest
    - Reports of DDI Alliance Working Groups
    - Questions and Grumbles
    - Announcement of next year's NADDI
    - Disclose of the next year's EDDI host name and invitation
    - Acknowledgements - Fair well

PC, OC, LOC, and the local host of the next year meet in the afternoon after the conference.

- 18:00 Informal Get-Together

Thursday

- Slot for Side Meetings / Schedule to be prepared by the meeting organizer

3 EDDI Conference Management & Responsibilities

3.1 Main Conference Organizers

Since its inception, EDDI has been organized jointly by one or more local host(s), and GESIS - Leibniz Institute for the Social Sciences and IDSC of IZA - International Data Service Center of the Institute for the Study of Labor. GESIS and IZA support the conference by providing technical and personal resources. The DDI Alliance has supported each EDDI conference as an official DDI event and may provide resources for DDI training and/or specific developmental issues during the course of the event.

3.2 Conference Chairing & Committees

The conference management is divided between the Conference Chairs and three Committees as outlined in the following. The operational tasks of the CC and the PC; OC, and LOC to organize the yearly conference are explained in detail in the sections 5 to 6.

3.2.1 Conference Chairs - CC

The CC can consist of one Chair or two Co-Chairs. Currently two persons share this position as equally responsible Co-Chairs. They are appointed by the PC on a consensual basis and represent EDDI internally and externally. In particular the Conference Chairs guide the Program Committee (PC), the common, regular meetings between OC and LOC and leads the EDDI conference.

3.2.2 Program Committee – PC

The PC consists of about 4-6 volunteer members – preferably representing different institutions - plus the Conference Chairs. The PC should include at least one person from the local host institution(s), PC members of the previous conference to ensure continuity, and new members. The Conference Chairs and the PC of the previous conference help to build the PC for a new EDDI conference year. The PC meets on regular base to prepare the yearly EDDI conference program, and – among others tasks - to decide upon base EDDI policies after consultation of the OC and LOC.

3.2.3 Organizing Committee - OC

The OC consists of one person from the Conference Chairs and the LOC members. It is advantageous to appoint experienced person(s) to support operational tasks at PC, OC or LOC (like setup of timelines, checklists, program production), to maintain EDDI website content, and to manage user functions of technical system(s) like for the CfP and submissions; the conference registration and the website itself. A representative of IDSC of IZA is a member of the OC because it provides the server to run the website of the EDDI conference series.

The OC meets on a regular basis to coordinate all important organizational issues for the EDDI conference.

3.2.4 The Local Organizing Committee - LOC

The LOC consists of people appointed by the local host. It is responsible for preparing and running the conference day-by-day. The LOC should provide the following roles:

- main LOC contact person to the PC and OC,
- a Registration Manager to handle all external requests of Cf. participants regarding local arrangements (registration, accounting, cancelation, hotels, travel etc.)
- and further OC members.

The person(s) can delegate requests, tasks and requirements to other persons from the LOC or responsible host entities. The LOC coordinates all local tasks and requirements with further involved units and persons of the host and/or cooperating partners to run the conference overall.

3.3 Internal Communication & Coordination Channels

The main channels for internal communication and coordination of the Conference Chairing, PC and OC/LOC are:

- **Separate E-mail lists** with all members of the PC and OC/LOC respectively.
    - PC: eddiYY-prog@googlegroups.com and the
    - OC/LOC: eddiYY-org@googlegroups.com.

All members of LOC and PC can subscribe to the other list for transparency.

Unlimited sending of e-mails from outside to the PC Mailing list as the official conference contact should be possible.

- **Separate Conversation channels** for regular online meetings of PC and OC, e.g., Skype.

Regular bi-weekly calls are recommended at the beginning of a new conference planning phase.

- **Separate Document space** for PC and OC/LOC, e.g., Google docs, to share planning documents relevant for each committee.

The internal channels for the PC and OC should be set up after the first meeting of PC in January, which starts planning the EDDI conference in the current year. The LOC may implement related channels to meet local communication and coordination needs.

3.4 Communication with the Public

To ensure positive public relations and to announce and promote the conference following actions are to plan and to carry out along with the Timeline to reach the EDDI target group.

- Announcements of a new scheduled conference, Call for Paper, reminder, news and information on the EDDI conference are prepared by the PC. The final text for distribution is signed by the CC.

- The PC reviews at begin of a new conference year the internal document that comprise all e-mail distribution lists relevant as public relations channels.
- Regularly updating and maintenance of the website is one of the main assignments of the OC (see section 7.1).

Following channels are used for official communications and exchange with the external audience:

- **EDDI contact**: E-Mail: eddiYY-prog@googlegroups.com

The Program Committee contact address acts as the contact to the public. This single point is set to have a central overview of all requests to the EDDI except all conference registration issues.

- **Registration manager:** Name & E-mail address.

This contact is responsible for supporting Cf. participants regarding all aspects of the conference registration, payment or cancellation of a conference registration. The support may be a contact at the LOC or a related unit, like a university conference service.

3.4.1 Key Dates for Communications to the Public

The prominent dates - as part of the timeline (see 4.1) - to inform EDDI user and DDI interest groups are as follows:

- 15. May Call for Papers
- 15. July 1. Reminder - Call for Papers
- 15. August 2. Reminder- Call for Papers
- 1. September Submissions / Author & Reviewer registration closed
- 9. September Slot for Prolongation
- 24. September Notifications of Acceptance of all CfP Submissions
- 24. September Draft program published
- 24. September Conference Registration opened (until last Cf day)
- Mid October Pre-Final Program published
- Mid November Detailed Program published
- Mid December Current EDDI finished - Save the Date / Host of the next EDDI

4 Practical Conference Organisation – Timeline & Planning Documents

The organisation of the yearly EDDI is shared among the CC and committee members. Their operational tasks are described in the sections 5 to 7.

The role and handling of the yearly timeline is explained 4.1. The support to the practical conference organisation is given by several planning documents and template as introduced in 4.2.

4.1 Conference Timeline

The realisation of a yearly EDDI is shaped by a Timeline of the conference year that informs on conference days, registration dates, Call for Papers, submissions deadlines and alike. The internal planning version describes the major tasks, milestones and responsibilities for the PC, OC and LOC for each month from January to December. This version is accompanied by checklists to subdivide the major task into detailed to-dos with further details and context information allowing a step-by-step planning.

The timeline includes three monthly reviews of the realized, pending and upcoming tasks by PC and OC/LOC. This gives the committees in an early stage the options to revise or adjust tasks and timing of to-dos within the overall plan. Thus, the timeline is an important instrument to review progress of work by the committees. It might be adjusted by common agreement according to arising needs.

An updated timeline from the previous year is provided as draft in January to the PC, OC and LOC for discussion and agreement. The yearly timeline has finally to be approved by the PC – preferably in February - to determine all important dates and organisational tasks to organise the EDDI successfully at an early stage

The dates in the short version of the timeline (next page) represent major milestones in preparing a current EDDI conference. They implicitly indicate the major steps to achieve these conference requirements. Operational steps of such tasks are outlined more detailed in full-version of the yearly Timeline.

4.2 Conference Planning Documents

Several templates and checklists have been prepared in past years to support the proactive and effective planning of the conference and to foster daily operations of recurring tasks. All these materials are provided via the main internal EDDI platform at Google drive and documented in a structured manner.

Major EDDI policies and regulations that guide the accomplishment of certain organisational tasks and needs, e.g., Local Conference Financing, Privacy etc., are described in section 11 to 14.

Conference Timeline – Example 2020 - Short version

May 2020	
Friday, 15.05.	Call for papers (CfP) posted
Friday, 22.05 (00:00 CEST)	Online Submission System (CfP): Author & Reviewer registration opened
September 2020	
Sunday, 30.8. (24:00 CEST)	Deadline for CfP submissions – Author & reviewer registration closed
Tuesday, 22.9. (00:00 CEST)	Conference registration opened (Early bird rate)
Tuesday, 22.9.	Notifications of acceptance of CfP submissions
Tuesday, 22.9	Draft program
Tuesday, 22.9.	If applicable Call for Diversity Scholarships applications
Wednesday, 30.9	Deadline for Diversity Scholarships applications
October, 2020	
Friday, 09.10	Notifications of acceptance of Diversity Scholarships applications
Monday, 12.10.	Pre-final program
Sunday, 25.10. (24:00 CET) Monday, 26.10.(00:00 CET)	Early bird registration closed Regular registration opened
November 2020	
Sunday, 8.11. (24:00 CET)	Deadline Final version of Full Papers, Communications / Short Papers due
Sunday 15.11. (24:00 CET) Monday, 16.11. (00:00 CET)	Regular registration closed Late registration opened
Monday, 16.11.	Detailed program
December 2020	
Monday 30.11.	Tutorial's day
Tuesday/Wednesday, 1.-2.12.	**Conference days**
Tuesday 1.12.	Conference dinner
Wednesday 2.12. (24:00 CET)	Late registration closed
Thursday 3.12.	Side meetings

5 Tasks of the Conference Chairing (CC)

The operational tasks of the CC (in addition to the internal management as described in 3.2.1) in organising a yearly conference are to

- Allow a smooth transfer of the current host to the new host at the end of the conference
- Invite the PC to the first meeting to start planning the new conference
- Contact and invite Keynote speaker(s), local host Speaker(s), or any guests as well as presenter of workshops or instructor of tutorials after decision in the PC
- Answer requests to the PC about new conference hosts
- Inform the audience about the CfP and reminder along the agreed timeline
- Inform people about recognized contributions to the CfP and the results of the approval process
- Inform the DDI user groups and interested communities about a finished conference, new conference date or any other EDDI News via selected communication channels.

Leading the conference is a particular task of the CC and includes to

- Open and close the conference
- Welcome speakers and guest
- Make acknowledgments to the host's people
- Inform on changes of the program or alike
- Guide the topics of the closing session.

6 Tasks of the Program Committee (PC)

Based on their primary responsibilities (compare 3.2.2) and led by the CC the tasks of the of the PC members are to

- Review and decide upon drafts to host a conference as first sent to the CC
- Decide upon the timeline of the yearly conference considering the proposed modifications and needs of the OC
- Discuss potential content of key notes and consider speakers
- Discuss and decide upon sponsorship options, regulations and implementations
- Search for resources and consider options to implement diversity scholarships
- Prepare and distribute the Call for Papers
- Review all submissions and to decide upon all types of presentations to include in the program
- Discuss needs for and content of potential tutorials and their instructors to offer at the tutorial day
- Compose and setup the conference and program structure with the program items of the two conference days, tutorials, side meetings, workshops, social events, conference dinner, and alike.
- Organise chairs for different session types (plenary & keynotes, presentations, poster, panel discussion or alike) including structured advice for chairs on how to lead a session and required materials.
- Maintain the content to provide at EDDI Website.

Special notes on the different topics from above are given in the following sub-sections 6.1ff.

6.1 Organizing Keynote Speakers for the Plenary

Examples of the person specification for previous Keynote speakers are:

- Background in metadata and standards for research data:
- Current Role and occupational background: e.g., specific organisational background working with specific data types (e.g., statistical data), or having experience in overarching conceptual or technical developments on standards interoperability, and last but not least speaking as a representative of national, European, or international cooperation of a group, a project or an organisation about challenges and development in one of the field the EDDI user are concerned with.
- Country: A Keynote speaker from the host country who is able to give a good overview of the status of metadata standards in that country or is able to give a broader European perspective.
- Timing and network working: Since Plenaries are important for the success of the conference their organization needs to be started early in the year and should be one

of the topics of the agenda of the first PC meeting in January. Speaker's availability, time efforts and costs: Costs for the keynote speaker will be expected to be covered within the budget for the Conference

- Contact person and conditions for an invited speaker: The CC/PC should act as the main contact for a potential speaker candidate. The contact person has to make sure that the speaker knows more about the expectations for the keynote (e.g., date, topic, and length of the speech), costs of participation and any other practical arrangements or conditions (like travel, accommodation). The person might encourage the speaker to attend both conference days and should also find out its technical requirements for the presentation.

6.2 Managing the Call for Papers (CfP)

The CfP is developed by the PC members in several steps and versions along the defined EDDI timeline (see 4.1). The final CfP is published at the EDDI website, which is the reference for further communications to the public. The proposals are submitted and managed via the agreed online proposal submission system.

EDDI regulations for submitting authors on how to provide, license, preserve and publish presentations and papers are covered by "EDDI Policies for Authors making Submissions to the Call of Papers" in section 12.

6.2.1 CfP Structure and Content

The structure of the call includes overall following section. The CfP is fully published at the EDDI web page "Call for Papers".

- Title/Place/Date/Host of the conference
- Description of the conference
- Description of the possible topics (currently eleven)
- Description of content types (Scientific, Impact, Project Report) that address topics
- Description of the presentation forms
- Recommend options to combine content types with the presentation forms
- Main regulations on how to provide a submission (compare section 12)
- Date of opening of the linked online submission system with further information
- Deadline for the submission (about 1. September) and due time for full papers.

  Note: The deadline for the Call for Papers may be extended by the PC if sensible.
- Date of acceptance (around last week of September)
- Link to the EDDI conference website
- Conference primary contact e-mail address

  Note: This is the Program committee at eddiYY-prog@googlegroups.com.

6.2.2 CfP Publication and Reminder – Audience & Dates

The CfP should ideally be ready and published ahead of the yearly IASSIST conference which normally takes place at the end of May. Reminders for the call are to be sent out at the mid-point for the submission period and two weeks prior to the deadline of the CfP. Examples of E-Mail announcements and a reminder about the EDDI Calls are provided as templates.

The yearly EDDI call and the two reminders are circulated via several e-mail lists which should cover the major European groups and communities that are interested in the developments of the practical work with and application of the DDI standard and beyond.

The respective internal distribution list contains relevant e-mail lists and contacts from past years and current knowledge about new contacts options – thus the list should be reviewed and updated every year.

6.2.3 CfP Submissions - Communication, Processing & Monitoring

The Primary EDDI contact - that is the EDDI PC - serves as a main point of communication with persons who have questions regarding the CfP content or concerns preparing a related submission of a proposal. This contact – and at first hand the CC individuals – are also responsible to support persons in case of failures in the functionality to submit a proposal and/or any other question in the handling of the proposal submission system and the registration functionality for authors and reviewers.

The co-chairs lead this process and sign the confirmation e-mail to the submitter after successful submission of a proposal to the system. Overall, a continuous monitoring of the conference email account and answering any questions that come in should be ensured, also by considering the absences like holidays.

Incoming submissions need to be monitored and reported by the CC to inform the PC at the regular meetings providing current overviews (e.g., no. of submission; diverse submission types). Such overview is also used to start first evaluations of the submission situation before the regular review starts as a separate process. This overview is also required to decide upon a prolongation of the deadline for submissions in time and to inform the audience respectively.

Part of the monitoring is

- First to set up a structure list with details on the submission (title, income date), the content and submission type and in the submitter (first name, last name, e-mail address). It is to control that this information is complete, fully readable and understandable information.

Any uncertainties at this stage, like unreadable files, texts or incomplete information about the submitter, should be clarified by one of the co-chairs with the submitter in advance of the beginning review process by the PC itself.

- The co-chairs (or other committee members) might as an additional effort invite considerable presenters who did not yet submit a proposal to consider a contribution to the conference.

6.2.4 Submissions of Presentations - Review Policy & Process

The review of proposals is performed by the PC and starts with the day after the submission deadline. The review period is two weeks long and starts from the preparatory monitoring of the submissions as prepared by the CC.

The documentation of the submission is created as a formatted excel list which comprise the content exported from the submission system. All PC members get this list and the abstracts, when the submission system was closed and all proposals are complete and received.

In a first step the CC submits the documentation of the submissions to the PC and informs on questions or anomalies occurred monitoring the submission phase to take further actions where necessary.

The review may start as a first step, to make sure that formal requirements of the CfP are met by all submissions, e.g., to check if only the allowed combinations of content and submission type were applied, the amount of word in the abstract is correct or alike.

Secondly the PC members read over all the abstracts and evaluate if the proposal is appropriate and fits to the content related conditions set in the CfP. The results of the review of all submission except full paper (see below) should be described by a set of criteria, that contains at minimum the items

- definite yes / maybe, but definite yes after adjustment of …
- no, but considerable after adjustment of … / no, but considerable as presentation
- definite rejection due to ...

The results of the review from each involved reviewer are summarized and discussed in the PC for final decision making around the 24th September. The results of the review process for each submission should be documented in a sufficient manner for quality control and to re-use the information at later phases preparing the conference. In particular the machine-readable overview provides the required basis to compile the different versions of the program in word, html and pdf format (see next para).

When the decisions have been made the co-chairs send out the acceptance letter by e-mail to the submitter and/ or to contact those submitters where modifications of the proposal are required. In such cases they can ask e.g., for dedicated adjustments to avoid rejection where possible. Or they communicate modifications with the submitters, like to change the presentation type, or to take other measure that allows better fitting of the proposal to the call. They also communicate any other follow-up questions as necessary with the submitter to improve the draft to be adequate for the conference programme.

6.2.5 Submissions of Full Papers - Peer Review Policy & Process

The review of full paper drafts should follow the principles of the Reviewer Guidelines (see internal material). The PC and the CC are responsible for finding reviewers.

6.3 Managing the Conference Program

The creation of the conference program is the responsibility of the PC and CC along the guiding milestones of the timeline.

6.3.1 Composition of the Program

The composition of the conference program is done after the review of the drafts. The common rule is to inform on accepted submission, draft program and opening of the conference registration at the same point of time at the end of September.

The exchange with colleagues who have already put together conference programs is important at this stage. It has proved useful that 1-2 colleagues develop drafts of the program structure once the review of all submissions is ready and all decisions about acceptances have been made. The drafts are discussed, modified and finally decided by the PC members.

Major steps and rules to compose the program structure that contain all information already made available during September (presentations) are outlined in the following. Basically, these steps describe the process to compile a draft version for publication finally.

Step 1: Group the individual contributions and types of presentations into sessions

In congruence with presentations types from the CfP the program should be composed by thematic coherent sessions and a balanced diversity of topics for the whole conference.

The base program structure consists – beyond the common plenary items like keynotes, panels discussion - two concurrent sessions. Potential variations regarding the process of the conference and its structure allow adjustments like on length of sessions, numbers of speakers per session etc. The experience of the last few years shows that modification of the schedule and presentation types is sensible.

- Considering different interests of attendees, it is sensible to organize sessions with diverse topics in concurrent sessions.
- Thus, sessions with different target audiences should be found out to occur at the same time.
- The number of parallel tutorials and sessions should approx. correlate with the expected number of participants in order that each presentation has enough participants.
- If a presentation does not fit into any session, it might be useful to change regular presentations into poster/software presentations.

Step 2: Organize all sessions into slots of the conference schedule

Having a first structure of all session items, they must be arranged into slots which fit overall to the structure of the conference schedule (compare for a typical structure 1.3.4)

- It should be watched out that no one is not double booked for the same time, like for two presentations or being a presenter and session chairing in parallel.

- Thus, the schedule is thoroughly to check to ensure that all scheduled obligations of persons (like speaker, chair, or panellist) do not conflict with their attendance, availability or other conference arrangements at al.

6.3.2 Compilation & Promotion of the Draft, Pre-final, Final Program Version

The PC is responsible to compile the program in congruence with the timeline for publishing on the EDDI website and printing of the final program by the LOC. The program will be developed and published in three versions.

Version 1 – the Draft Program – published approx. September 24 at the related web page

It should be published at the EDDI web page "Program" late September together with notifications of acceptance and the opening of the registration. The PC should actively inform the EDDI audience by E-mails about the draft program and the opening of the registration.

It contains all accepted proposals and the full schedule of all (concurrent) events of the conference including breaks and conference dinner. Details of the schedule format and the content to cover regard:

- Monday: Tutorials & Workshops / Side meeting: Day, Location, Title, Instructor
- Tuesday & Wednesday: Conference days: location and complete schedule with
- Keynote: title, abstract, keynote speaker
- Title of concurrent sessions and special types like Panel discussion
- Presentations per sessions: title, abstract, authors.

Version 2 – the Pre-final Program - published approx. October 15 at the web page

The PC should actively inform the EDDI audience by E-mails mid-October about this program version and the upcoming closing date of the Early bird registration (approx. 27.10.).

It comprises changes concerning the program content; information about all meeting places should be available as possible.

Version 3 – the Final Program - approx. 15 November ready for Print and the web page

The PC should actively inform the EDDI audience by E-mails mid-November about this program version and the upcoming closing date of the Regular registration (approx. 17.11.) and other relevant news.

The PC is responsible to finish the final program basically until mid- November to publish it at the webpage and – after final corrections in late November by the PC - to handover to the LOC for printing. It must be ready in time to give the LOC sufficient time for local last-minute corrections, printing and preparing for the welcome bag. To guarantee a timely provision and smooth workflow PC, OC and LOC make sufficient arrangements in advance.

This includes structured provision of all information to include in the paper version of the program. Compared to the web version of the program the processing of the print version has more information and respective sections to consider.

The print version has a defined standard format and contains the following main sections:

- Standard Front page Content List
- Information of the Venue
- Schedule: Time and place of all sessions, tutorials, side meetings, social events
- Title, Presenter, Instructor or Organizer and abstract for each Keynote, Discussion Session, Presentations in Concurrent Sessions, Posters / Software Demonstrations, Tutorials and Closed Side Meetings
- Names and institutional affiliations of all speakers, chairs, tutorial instructors
- List of Authors
- Organization Index
- Funding and Sponsoring Organizations
- "About EDDI" text and "EDDI Committees" list and conference chairing in charge of an EDDI year with the Name, Affiliation and Country of its members
- EDDI Code of Conduct
- Map of the area.

This information contributed with the (internal) final version must be as correct and complete as possible before it is printed and distributed to the attendees.

6.4 Organize Session Chairs – Communicate Tasks & Regulations

The PC recruits the session chairs. It informs elected persons on regulations or alike to guide the task of the different roles by e-mail.

Sessions chairs should be invited and appointed on behalf of the PC until mid-November. The chairs should be in place before the conference programme is ready to print in the second half of November. This time planning considers that the session chairs need to inform the presenter in time about and to request information from it (bios; presentation file). And also, the presenters need sufficient time to submit the requested information early enough.

6.4.1 Chairs of Plenary Sessions

This task of the Conference Chairing regards introducing the speakers, to keep track of time and to announce schedule changes etc. in the morning plenary. The plenary chairs – normally one person of the CC per plenary - should also be appointed until within until mid-November.

6.4.2 Chairs of Concurrent Session - Communication with Presenter

This role includes communication with the presenter ahead of the Conference to

- Get the required information on bios and presentation files
- Check functioning of required presentation and session facilities
- Ensure each presentation is saved to the relevant storage
- Introduce the presenter
- Ensure that presentations and discussion take place within the planned timeslots of the session.

The LOC provides a chair package containing cards to inform the presenter about the remaining minutes (5/2/0) for the presentation.

The PC and LOC are responsible to prepare and implement a technical solution to systematically preserve all held presentations to allow their publication after the conference. A technical support volunteer should be available for assistance in case of trouble.

The communication of the PC with potential Session Chairs is done with two standard e-mails during November (see section 6.4). With the first e-mail the PC invites candidates to become a session chair. The second informs confirms an accepted chairing of an invited person and informs on regulation for chairing the session.

On this basis the chairs should keep contact until the session day with the presenter by informal e-mail like for exchange of additional information, to answer questions and to remind them of missing information.

6.4.3 Chair of Poster Session – Communication with LOC & Presenter

The responsible person has to collect the base technology and room/space requirements for the poster session and to communicate this with the LOC to proof it against available local resources. Preferably it might be a person from the host having better local knowledge and direct contacts.

These tasks should be done at an early stage – in the first half of the year - to have enough time to find a suitable place or to find alternatives if required and to achieve a stable ground for planning all rooms and facilities.

At a later stage – best around the beginning of October - when the number of Poster and the Presenter are known, one has to find out the facility requirements of the presenters. As a base it is common to ask the presenters to bring their own hardware. It is up to the local committees to what extent further hardware will be provided on request beyond the usual contribution.

7 Tasks of the Organizing Committee (OC)

The Organizing Committee's primary responsibility is to ensure successful conferences performance and a focus to keep continuity of successful organisational policies and secured administrative practices and workflows. In this respect the OC supports the responsible LOC in preparing and running an EDDI conference on the basis of local host's conditions and available resources, like a local conference system and alike.

Support of the OC and PC regards also the budget planning of the LOC, which is described with more details in section 11.2.

7.1 Management of the Website & Conference Information

The EDDI website maintenance is one of the main assignments of the OC. It is responsible for the design, content provision, and regular updates in close cooperation with the LOC and the PC. The OC informs on required information and collects them from the other committees to put in on the website; it ensures the availability of all technical functions.

The website informs about the conference series at all and in particular about past events and the current conference year. The necessary content is to

- Present clear information about conference time schedules and deadlines, and contacts like Conference Chairing, Committee Members, Registration Manager
- Inform on online submission of conference papers, presentations and posters, and the organization of the review process
- Provide host and venue information, as well accommodation, conference dinner and travelling details
- Inform on the program, conference fees, registration and payment modalities, and the online registration system.

7.1.1 Basic Web Pages to promote the yearly Conference

Following pages of the EDDI website inform on a yearly conference. The content is edited step-step along the approved timeline of the respective year

- **Main Page**, which is the index page of the yearly conference

This page comprises in particular the Date, City Country, and Name of the host (host). It introduces the host and the venue of the conference. It may promote and inform on further topics like on Funder, Sponsors or Scholarships.

- **Overview**

It summarizes information on tutorials, program and keynote speakers of the first and second conference day, and side meetings. All relevant dates are setup in form of a timeline table.

- **Accommodation**

This page informs about travel options to and within the city of conference, hotels and reservation, and the conference dinner

- **Call for paper**

The page describes the objective of the conference, categories and regulations for submissions to the call. A related Submission System needs to be in place as well to manage all necessary submission steps.

- **Registration**

The page informs on conference fees, registration process, regulation and support contact. It gives access to the functions of the registration system.

- **Program**

The page provides in time table format an overview of all conference events, plenaries and concurrent sessions, presentations and authors with links to abstracts. It informs after the conference about how to access the published presentations for each conference.

- **Organizers and Partners**

It informs on Conference Co-chairs, members of the Program Committee and the Organization Committee, and organising and supporting institutions.

- **Privacy**

The Privacy page explains how EDDI use personal data provided by the users (see section 13).

- **Code of Conduct**

The page describes key principles and rules of conduct that apply to the EDDI conference and its participants (see section 14).

Specific pages and functions regard the Call for Papers, a Submission System and the Conference Registration. Such functions may be provided by the local host (via university tools or alike) or a future EDDI system.

7.2 Organising Side Meetings – Procedure for Organizer, PC, OC & LOC

Side meetings shall foster community building, networking and work progress of the DDI community and with organisations in the field metadata standards developments (see section 2). To held side meetings within the EDDI conference schedule require two actions to be taken by the organizer of a side meeting.

At first the side meeting organizer makes – as early as possible in the conference year - a proposal to the PC. Due to overlaps of committee members also normally the PC/LOC should be informed in parallel at an early stage. To ease this procedure the organizer should provide with the proposal the required details to PC and OC/LOC like title, name of the organizer, day, duration, and expected no. of participants. Getting this information ASAP with the proposal is necessary to prepare the program in time (by the PC) and to plan and reserve the required room and equipment facilities (by OC/LOC).

While a base approval is required by the PC the organizer must secondly contact the LOC to start organisational arrangements of the side meeting. In this respect side meeting organizers are responsible for the preparation, performance and cost absorption (when charged by the local host e.g., for catering, technical and organisational needs). If the local host shall support the organisation of the meeting the organizer works in close cooperation with the LOC and the OC respectively. This is required to include the requested means also to the general organisational planning and local conduct at all.

8 Tasks of the Local Organizing Committee (LOC)

The Local Organizing Committee's primary operational responsibility is to carry out all on-site arrangements and logistics before, during and after the conference. All major tasks of the LOC are part of the Conference Timeline (see 4.1). An annotated short overview of these tasks is given in the following sections. The internal checklist “EDDIxx_LOC_Tasks” describes the details of the operational tasks the LOC has to carry out in a current conference year between January and November.

It is well-established practice in this context that the LOC talks to members of the OC or LOC of previous years, which are a good source of information. The exchange of such experience might be helpful for most questions.

The first major task for the LOC – having the agreement to host the conference and the exact date in hand - is to decide upon the conference venue at the beginning of the year.

A second important task of the LOC is to search for at least one prominent keynote speaker from the host country at an early stage in cooperation with the PC (see 6.1). Persons of interest for the conference are often high-level experts, which often already have a full calendar in the year of the conference.

A third initial task of the LOC in January is to provide a picture of the conference site and the logo(s) of the hosting organization(s) to the website manager. As soon as possible also all relevant information on location, accommodation, travelling and contacts should be given to the website manager to present it on the website.

8.1 Conference Venue – Locations, Infrastructure & Support

The detailed room requirements have been described for the advance planning becoming a host at section 10.2.1. In summary the venue requires the reservation of following rooms and areas:

- One combined plenary/session room plus a second session room;
- Four rooms for tutorial and side meetings;
- One area for poster and software demonstrations;
- One area for breaks and lunch related to tutorials and conference sessions;
- One registration desk area in the morning of the tutorials and the conference days.

Locations of the conference and suggested hotels are - ideally - within walking distance. The location for the conference dinner and the places for informal get-togethers should also be easily reachable. Local organizations specialized in conference planning like Visitors’ Bureau or university departments are sources of support in this respect.

If local units of the hosting organization are responsible for certain tasks or even for the organization of a conference as a whole, they must be involved in all phases of the planning. Additional time is to consider for the communication with responsible planning units at universities or large research institutions.

Preparing the decision upon the location and/or before contracting an intended conference venue LOC members should always make personal site visits of the conference location(s) if not yet done. It is important to get an exact impression of the place and the details, like size of rooms, seating arrangements, technical equipment, area for breaks, position of entrance, and place for registration and help desk and some more details.

If the conference venue is a hotel, it should have a department for events experienced in conference management. If the venue is a university the LOC should ascertain the resources the university can contribute as soon as possible. In both cases the LOC may work together with a conference service representative of the hotel or the university through the whole year. It is important to stay in close and regular monthly contact to exchange news and to avoid unexpected problems and misunderstandings in this way.

8.1.1 Conference Caterer

Catering for lunch and refreshment breaks is needed during the tutorial's day and the conference days. Catering for side meeting or related events are to consider on demand from organizers. Ideally lunch includes a warm lunch and seating possibilities, the refreshment breaks include coffee, tea, cold drinks and possibly fruits and cookies.

8.1.2 Conference Dinner

The LOC has the responsibility to find a venue for the conference dinner at the evening of the first day of the conference. The purpose of the dinner is to support communication between the conference participants and to foster the building of new professional networks.

Related enquiries for a sufficient location should start as early as possible with respect to the local situation at the beginning of December, like high number of visitors of fares, Christmas markets and alike. Thus, first considerations may begin at the same time or just after booking of the conference rooms.

8.1.3 Informal Get-togethers

The LOC has the responsibility to organize locations for informal get-togethers of the participants. It would be nice to have different locations of the local scene each evening. As possible, a local café, trendy pub, snack bar or restaurant should be located not too far from the conference venue and serve a decent variety of snacks and drinks. In past years reservations (10-15 persons) have been arranged for the day of arrival (Sunday 7 pm), tutorials days (Monday 6 pm) the second conference days (Wednesday 6 pm). For the day of the dinner or days with side events the same places might be offered without reservations.

8.1.4 Technical Infrastructure & Personal Support

Requirements regarding technical infrastructure and support have been described in sub-section 10.2.2 planning to host a conference.

How successful a conference proceeds are especially dependent on the planning, quality and coordination of the technical infrastructure, equipment and personal support of the conference venue. Therefore, it's planning and financing should be thought through on an early stage and checked several times later on.

The LOC is also responsible to prove the seating arrangements in all conference locations, like preferred U-Shape format for tutorials and side meetings. The conference service representative can be of help in doing so.

8.2 Accommodation & Transportation

The LOC has also the responsibility to find one or more conference hotel(s) ideally with a reduced rate for conference participants. Organizations specialized in conference planning, like conference service representatives of universities, may be able to negotiate better prices. If such a support is not available potential hotels and sales staffs are to contact making relevant reservations and negotiation on preferred rates. Initial contacts can be made via telephone/e-mail but should be followed up by face-to-face site visit.

In particular, it must be clarified with the hotels how many and for how long the room contingents are reserved, how the preferred registration procedure looks like for EDDI participant (e.g., by mail or online-form; regulation of the code for preferred room rates) and under which conditions a room reservation can be cancelled.

Reservations should be made with hotels of different price categories considering the price level of the country and average expenses of past years conference locations. Depending on the number of hotels, quota and prices of reserved rooms the LOC should provide suitable hotels as alternative like with lower room rates (without discount rates or EDDI quota reservation). When a decision is made contracts with the service offering parties have to be signed. It is good to stay in close contact with all involved persons and / or parties.

The LOC provide sufficient information on how to travel to the conference venue and the accommodations. Written information about Transportation comprises tree levels.

- How to travel by train or plain to the conference city and relevant destinations (main station; airport)
- how to travel from airport or main station to the hotels,
- how to go from the hotels to a) the tutorial, b) to the conference venue c) to side meetings

In addition, the OC creates a map of the conference venue. The LOC provides related maps like for the area of the conference locations etc.

The LOC has to provide the website manager with detailed information on the conference hotel and other recommended hotels in congruence with current Timeline.

The information should include website address, email address, booking code, phone number, offered room rates and a list of alternative accommodations, furthermore with information for participants how to get to each conference meeting place and room. Any kind of map (google map, campus map, plan of the buildings) can be helpful. A map including all locations (conference, hotels, social events etc.) is helpful. Besides, information on the hosting city can be interesting for participants.

8.3 Local Maps & Walking Instructions

The LOC prepares sufficient information about naming of the venue area, the relevant buildings, and all meeting rooms to easily find all locations of the conference. This includes clear notice on the relevant entrances, and instructions on how to reach conference rooms, registration desks during the conference days, place for tutorials and side meetings including floor and room number information.

There are three basic media to cover the information:

- **Map of the conference**: Informs on conference venue, main station / airport, conference hotels, informal get-together, place of the conference dinner. In past years the OC created related Google maps.
- **Map of the conference area**: Presents all EDDI locations at the area of the conference venue with name of building(s), entrance(s), room names or numbers, and positions of the locations (like name of a building section, floor number or alike). Available materials at the host's place like campus map, plan of the building, map of floors and rooms or alike might be modified by the LOC according to the conference needs.
- **Signposts** at the building entrance and core meeting points like the registration desk.

All such information is published in the conference program (copies of the maps) and in particular with the table of the conference schedule. This overview of all events of the program informs also on all building(s), rooms and related position of the locations.

8.4 Running the Registration Desk

In the morning of the tutorial day and the two conference days the LOC should set up a registration desk along the following schedule.

- **Tutorial day**: in the morning half an hour before tutorial starts until half an hour after the start of the tutorial, if there is a second tutorial in the afternoon again half an hour before tutorial starts until half an hour after the start of the tutorial
- **First conference day**: one hour before program starts until lunch break
- **Second conference day**: in the morning half an hour before program starts until half an hour after the start of the program

At these days LOC members or appointed service persons are in charge to

- Arrange signpost to the registration desk and the meeting rooms and
- Provide signs with the room's timetable of the day outside the meeting rooms.

It is good to have at least two people on duty at the Registration Desk. They are expected to answers to participant's questions. As an accompanying measure for the registration desk and committee members the LOC prepares a list with phone numbers to call if specialized support is needed. In this respect, the LOC should be prepared to handle any kind of emergency like last minute changes in the schedule or taking someone to the hospital.

At least one competent person should be in charge for smooth maintenance of all technical facilities required in the plenary, the sessions, tutorial and side-meetings of the conference and give technical support on request.

8.4.1 Conference Registration Package

The conference registration package includes:

Mandatory:

- Name tag (with conference logo, name of the attendee plus institution and country)
- Conference program including Program Schedule, Abstracts on presentations, tutorials and side meetings, maps etc.
- List of participants (with name, organization, email address)

Optional:

- City map
- List of restaurants and bars, local attractions, shopping areas
- Merchandise articles

The local visitors' bureaus often provide city maps and other useful items free of charge which can be included in the registration package. Plans for ordering the content of the registration packages and merchandise articles like t-shirts, bags, and other materials should be done after organizing rooms and finances.

8.4.2 Conference Chair Package

The LOC is responsible providing the session chair package which includes:

- **Time cards** showing “5 minutes left”, “2 minutes left” “1 minute left” and “0 minutes left”.

8.4.3 Listings & other Organisational Materials

The LOC is responsible providing the following lists:

- Special list of participants for each tutorial to provide among the instructors and participants. Related lists can be provided for participants of side meetings if organizers demand it.
- Other lists for internal management like for dinner participation.

9 After the EDDI Conference - Ad-hoc Measures

9.1 Brief Conference Review & Handover to the new Host

Traditionally the current CC, PC, OC, LOC, and the local host of the next year EDDI meet after the conference was closed to held a short review and to wrap-up of experience. People of the next year's host should attend this meeting also to get in contact with this year's organizers to ease further support.

The participants of the meeting may outline first actions to organize the next conference and to decide upon a first meeting date in mid-January of the upcoming conference year.

9.2 Finances

- Invoice participants for unpaid fees
- Budget report of the old LOC to the PC
- New LOC prepares draft of the budget for the upcoming EDDI

9.3 Update Organisation Documents to prepare the next EDDIxx

- Update of the base planning documents: Timeline, Checklist for the LOC
- Update of the Manual according to new findings or requirements.

9.4 Measures to promote the upcoming EDDIxx

- Save the Date message for the upcoming EDDI by E-Mail via the distribution channels
- Create a website with basic information about the new EDDIxx. They should go online before the NADDI (end of March).

9.5 Publishing the Conference Presentations

- Check if all presentations are available, licensed and ready to preserve at ZENODO; information of the participants
- The Poster Session Chair must ask presenter from the poster session to send him the poster file or respective material of the software demonstration.

9.6 Publishing Full paper at IASSIST Quarterly Series

- Follow up measures by the CC to support authors.

10 Hosting a EDDI Conference - Advance Planning

10.1 Expression of Interest & Requirements Hosting a EDDI Conference

Possible hosting institutions should express their interest as early as possible and contact the OC 1.5 years or earlier before the conference. Applicants should understand the requirements and conditions for hosting the conference according to this manual, especially the facilities and organizational tasks as described in the following subsections of 10.2 about the different requirements.

The final confirmation by an email from the PC to the new host for the EDDIxx should also express which facilities the host will be provided to run the EDDIxx.

10.2 Requirements to manage by the Local Host

10.2.1 Meeting Rooms, Catering, and Locations for Social Events

To held EDDI conference sessions, tutorials, workshops and/or side meetings the following meeting rooms and facilities are required:

1) **Conference rooms:**
   - One room for the plenary session/concurrent sessions with a capacity for 120 people for two days;
   - One room for concurrent sessions with a capacity for 60 people for two days.
2) **Tutorials rooms:**
   - Two rooms for tutorials taking place at the day before the conference with a capacity for approximately 35 people in U-shape seating order.
3) **Workshops & Side Meetings rooms:**
   - One or two rooms are needed for side meetings takings place two to five days the week before the conference and one to two days directly after the conference with a capacity for approximately 20-35 people in U-shape seating order
   - Note: Ideally side meetings are not taking place on the day of the tutorials. The same rooms can be booked for tutorials and side meetings.
4) **Poster/software session area:**
   - The space should be available next to or integrated in the lunch area.
   - The area is required parallel to lunch on the second day.
   - The space should be sufficient for 6 to 8 poster and/or software demonstrations.
5) **Registration desk**
   - This area is needed at the tutorial day for tutorial participants, instructors and people of the program and organizing committee as well as for the morning of both conference days for conference participants.

6) **A refreshment area and refreshment breaks**
    - This area is needed at the tutorial day, each of the two conference days and for the side meetings.
    - Note: Organizers of the side meetings are responsible for the payment of the side meeting catering.
7) **Area for lunch and lunch breaks**
    - Area needed for the tutorial day and the two days of the conference.
    - Each area is to consider for the side meetings, but depending on size, place and duration such meetings. Needs and arrangements should be communicated in direct contact with the meeting organizers.
8) **Dinner Place**

This might be decided after the decision about the conference venue was taken. Requirements have been defined at 8.1.2.

9) **Places for Informal Get-Togethers**

This might be decided after September. Requirements have been defined at 8.1.3.

10.2.2 Technical Requirements

Technical equipment and infrastructure that is needed regards:

- At least two Microphones and sound systems for each meeting room,
- Projectors and screens for each meeting room,
- One presentation computer with internet access for each meeting room,
- Wireless LAN in the whole conference area,
- Enough power outlets for side meeting/tutorial/side meeting rooms and for the software demonstrations at the poster/software session,
- Technicians for the whole conference or technical emergency contacts,
- Display and poster boards, tables, chairs, and electrical extension cables, which is finally to define in consultation with the poster session chair. It is common to ask the presenters to bring their own notebook.
- Seating arrangement with usual seating for the plenary room and concurrent session room, and preferred U-Shape format for tutorials and side meetings.

10.2.3 Organizational Tasks

The local host should be able to provide men power to

- Organize rooms, technical equipment/staff, conference hotel, catering, locations for social events,
- Prepare information for the EDDI webpage,
- Arrange the registration process,
- Prepare the conference registration package,
- Run the registration desk and
- Arrange local maps and walking instructions.

11 EDDI Finance Policies & Budget Planning Process

GESIS and IZA support the annual conference providing technical and personal resources at all. These contributions are made ahead and without further expenses for the local host. Overall expenses of the main organizers GESIS and IDSC of IZA to host and maintain the EDDI website and support of the DDI Alliance to the EDDI are until now not part of the budget of an EDDI conference at all.

The annual conference is financed by the registration fees and subsidies of the hosting institution(s). All fees are used to cover the operating costs of the conference and tutorial days. Costs for side meetings, workshops or alike can be charged to the organizer.

Part of the agreement with the PC on hosting a EDDI conference is that the local host(s) consent(s) to pay for any uncovered costs for the conference if the planned revenues (fees for the conference including tutorials; costs for side meetings; grant funds, etc.) will not cover the incurred expenses. On the other hand, it is not the purpose of the budget calculation to earn a surplus with the conference. It is common policy that the local organiser(s) of a conference prepare the budget plan and inform the PC about the basic figures for review, comments and common agreement latest in February of the conference year. This includes in particular the proposed amount of the fees for conference (early, normal, late booking) and the tutorials (half-day and full-day).

Guidelines and policies are providing support to the local planning in the upcoming sections.

11.1 Public Funding, Grants & Sponsorship of the Conference

To support conference financing, it is recommended to the LOC and the host to raise additional funds by requesting public funding and/or negotiating grants from academic institutions, organisations or business sponsorship.

Three typical categories or sources of financial support might be considered to do so.

11.1.1 Funding or Grand Proposal to Public Research Funder

Good experience has been made with proposals to national research funding bodies that requests for financial support of costs for conference locations, catering or alike. Options and regulations differ from county to country and must be investigated individually for a current conference place and the responsible LOC.

A public funding approval often defines how the funding needs to be published by the conference organizer.

11.1.2 Sponsoring Policy for Institutions from Academia

A second source of financial support might be grands from academic institutions or organisations in terms of sponsoring a dedicated EDDI conference. The normal way is to contact such organisations by personal contacts, specialised E-Mails about conference sponsoring and via a dedicated section at the EDDI conference website. Offering space for sponsoring and where the organisations can present themselves regard until now two places: the EDDI website and the EDDI Program.

The PC decided for the EDDI 2019 to launch the following policy to become an official sponsor for this conference year:

- Euro 2000 - One page of Program and logo on EDDI 2019 website.
- Euro 1000 - One page of Program.
- Euro 500 - Half page of Program.

The PC will decide upon the respective policy on a yearly basis as long as no other funding and sponsoring concept (like at IASSIST, NAADI or ESRA) has been approved.

11.2 Local Conference Budget – Major Expenses & Revenues

The entire conference budget has to be calculated carefully to get an overview of incomes and expenses as early as possible and to plan in advance for measures to achieve a balanced local budget overall.

In this respect it is recommended that the host raise additional financial resources (see 11.1). These measures allow to balance the conference financing and decrease financial risks of the host overall. Furthermore, it provides options to keep the fees as low as possible to foster conference participation as much as possible and opens options for scholarships as well.

11.2.1 Expenses of the Local Host(s)

Major expenses of the local host(s) regard the following expenditure items. Every item needs detailed cost calculation as outlined in section 11.3.

- Cost of conference venue: rooms for tutorials, conference days, side meetings
- Costs for the conference dinner: regards rent of the locations, welcome drink, the menu, personal costs, decorations (flowers etc.).
- Cost for catering: regards lunch and breaks during tutorials and conference days; expenses for side meetings on behalf of the organizer are to consider as well.
- Cost for technical support like infrastructure, equipment and persons
- Cost of the registration desk
- Cost of the registration package (like printed program, bags etc.)
- Scholarship expenses might be considered if costs could be covered.
- Cost of keynote speakers’ travel and accommodation

11.2.2 Revenues of the Local Host(s)

Major revenues to finance the conference expenses of the host regard primarily the conference fees. Additional from the following items may balance the budget. Thus, the following items are to consider.

- Conferences fees
- Funding from public bodies
- Sponsoring and advertisements from public or private organisations
- Reimbursements like for catering for side meetings

11.3 Local Budget Planning with the Calculation Template

Before starting the calculations few simple guidelines should be considered based upon the experience from past years, which means:

- The costs for the conference should be calculated for different venues and participation scenarios (few, middle, lots persons).
- The costs for the conference dinner and cost for catering should be calculated for different service offers and participation scenarios.
- In general, it is also better to make a conservative estimate regarding attendance than to plan on a maximum number of people.
- The Payer and non-Payer Policy (see section 11.3.3) and the Cancellation and Refund Policy (see section 11.3.4) is part of the calculation.

OC and PC recommend the usage of the available calculation template supporting the local budget calculation.

The template allows for flexible calculations considering different scenarios of attendance and venue alternatives. The spreadsheet package also helps monitoring the per capita costs of the conference. The OC provide the package to the current LOC or to an academic organisation that plans or negotiate to become a host of an EDDI conference.

11.3.1 Estimating the Number of Participants

The estimation of the number of participants is a key factor and pre-condition especially for the appointed host and the LOC to early plan expectable expenses and revenues.

However, the early (and as accurate as possible) estimation of costs and incomes by fees of a potential number of participants (within a range of min and max no. of persons) interferes e.g., with the finical capacities of the host, local funding and sponsoring options, capacity and costs of conference and meeting rooms, travel conditions and some others.

One helpful instrument to get a rough number of participants on an early date is the no. of early bird registrations. This mean is used since EDDI 2013 and covers a time range roughly between late September and late October, while the registration at regular rate is usually available between late October and mid-November.

11.3.2 Planning the Amount of Fees for Conference Registration & Tutorials

EDDI fees are kept as low as possible to foster the conference participation to the widest audience. The clearest way of determining fees is to calculate as accurately as possible the total cost of the conference.

The following categories need to be considered in planning the budget.

1) **Conference fee categories**

This rate is the main revenue and has to cover all expenses of one registered user visiting fully two EDDI conference days including the conference dinner.

There are three types of rates to consider for the planning

- Early registration rate
- Regular registration rate
- Late registration rate

2) **Tutorials fees categories**

This rate is the revenue to cover all expenses of a user who participate in half-day or full day-courses:

- Half day tutorial fee
- Full day tutorial fee

11.3.3 Payer & Non-Payer Policy

In past years the PC and OC agreed upon the following three basic policy rules on registration and payment of conference and tutorial fees.

1) **Payer of Conference Fees**

All conference participants and all tutorial instructors, session presenters, session chairs, PC, and OC members are expected to complete the registration process including full payment of the conference fee within the registration's deadlines.

2) **Non-Payer of Conference Fees**

Invited Keynote Speakers are usually exempt from conference fees, hotel and travel costs. This means that they are invited to attend activities at least in the day of the plenary at no charge. This information should be conveyed to individuals at the time of initial contact to avoid any misunderstandings.

3) **Payment of Fees by People from the Host**

In general, it is expected that people from the hosting institution(s) register and pay the fees when attending the conference like all other participants. Related exemptions are commonly approved by the OC and LOC.

11.3.4 Cancellation & Refund Policy

It should be clearly stated that registrants for the EDDI conference who cancel on or before a pre-set date will receive a refund of the total amount paid less an administrative charge, if a transfer to another person is not possible. Registrants who cancel after this date will not receive a refund. Some exceptions should be expected, e.g., if international registrants were not accepted for visas.

The following text represents this policy of past years and is published on the EDDI website.

“Where the registrant is unable to attend the conference days, and who is not in a position to transfer his/her conference place to another person, refund arrangement applies, which is commonly agreed between OC and LOC. Usual regulation of past years was:

- Cancellation up to November 1, full refund minus an administrative charge of 50 EUR
- November 1, 20xx onwards: No refund”

12 EDDI Policies for Authors making Submissions to the Call of Papers

Conference submissions – specified in the annual Call for Papers – are processed by the PC (see section 3.2.2). General guidelines to manage the contend and promotion of the Call for Papers by the PC are described in sections 6.2.

The content of these regulations related is published at the annual EDDI conference webpage. Major regulations and release policies are included in the CfP web page as well.

Note: The selected EDDI CfP Submission System shall be agreed between PC, OC and LOC and is part of the web facilities at all (see section 7.1).

12.1 Author Guidelines

Important dates of the submission and review process are defined for each annual conference as part of the yearly conference timeline. This comprises e.g.

- Deadline of Call for Papers - potentially extended until MM, DD, YYYY
- Opening of the online submission system
- Notification of acceptance of proposals
- Final version of full papers due

  Note: All details of the structure of the CfP are summarized in section 6.2

Specific regulations regard the submission of **Full papers, Communications / Short Papers**

- For Full papers and Communications / Short Papers, ***a draft suitable for review*** must be submitted by the deadline of the CfP (MM, DD, YYYY) (potential extension until)
- The paper reviews will be sent to the authors by MM, DD, YYYY.
- The final version of accepted papers (addressing the review comments) will be due on MM, DD, YYYY.
- **Full papers** (a suggested 8-12 pages plus appendices) and **Communications** (a suggested 4-6 pages plus appendices) must follow the rules of IASSIST Quarterly. For formatting, see the IQ Word template.
- Please pay attention to the details in the template and submit your contribution in Microsoft Word document file format (or RTF or OpenOffice) and PDF format.
- Accepted papers have to be submitted in Microsoft Word document file format (or RTF or OpenOffice) and PDF format.

12.2 Submission Preparation Checklist (2019)

On making a submission to the conference, authors are required to check off the following items on the Submission Preparation Checklist form.

1. “The submission has not been previously published, nor is it before another conference for consideration (or an explanation has been provided in Comments to the Director).
2. We recommend using a Creative Commons license for the presentation. Such a license allows us to upload a copy of the presentation to a public repository like Zenodo. See a selected list of EDDI20 presentations in this repository.
3. Suggested license is "Creative Commons Attribution 4.0 International (CC BY 4.0)".
4. I consent to the inclusion of my name and affiliation in the conference program.”

12.3 Copyright Notice (2019)

The general text about current Copyright & Licences of Conference contributions is as follows:

“Authors who submit to this conference agree to the following terms:

a) Authors retain copyright over their work, while allowing the conference to place this unpublished work under a Creative Commons Attribution License, which allows others to freely access, use, and share the work, with an acknowledgement of the work's authorship and its initial presentation at this conference.

b) Authors are able to waive the terms of the CC license and enter into separate, additional contractual arrangements for the non-exclusive distribution and subsequent publication of this work (e.g., publish a revised version in a journal, post it to an institutional repository or publish it in a book), with an acknowledgement of its initial presentation at this conference.

c) In addition, authors are encouraged to post and share their work online (e.g., in institutional repositories or on their website) at any point before and after the conference.”

12.4 Held Presentations - Preservation, Publication & Licensing Policy

Since EDDI 2018 full papers can be published in the journal IASSIST Quarterly.

All accepted and held presentations have been published in past years together with its abstracts after the conference at the EDDI website. Since EDDI 2017 they have been published in parallel at the open-access repository Zenodo to allow quick access of the EDDI audience. To ease management overall the presentations have been published only at Zenodo since EDDI 2018.

As said above EDDI expect from authors that held presentations are preserved and published under a CC license. Such a license allows EDDI putting a copy of the presentation to an open access repository like Zenodo.

To ensure preservation and visibility of the author’s contributions and to allow interested readers unrestricted access to EDDI presentations a respective licensing is required.

Therefore, authors are requested to add a license notice on the bottom of your first slide. Suggested license is "Creative Commons Attribution 4.0 International (CC BY 4.0)". To see how this looks like compare resources at:

- EDDI20 presentations at zenodo and how
- to add a license and to mention exceptions: https://doi.org/10.5281/zenodo.55613

During the conference days, the current EDDI practice is to store all presentations for each presentation slot in the presentation notebook ideally before the session starts. Just after presentations the held presentations are stored at a central place to prepare the publication at Zenodo.

The preservation and publication process is supported by the necessary technical means. They are organised by a responsible person at the PC in cooperation with the LOC and provided during the conference. The responsible person at the PC informs the presenter and sessions chair two weeks before the conference about this procedure (compare section 6.4). This person also takes care of the publication at Zenodo. Information on access to the published presentations for each conference is provided at the EDDI website.

13 EDDI Privacy Policy (2020)

The text is published at the EDDI website https://www.eddi-conferences.eu/privacy-policy/

EDDI are committed to protecting your personal information and being transparent about what we do with it. We comply with the requirements of the General Data Protection Regulations (GDPR; Regulation (EU) 2016/679) with regard to personal information.

EDDI – European DDI Users' Conference

EDDI is the annual conference for users of DDI (Data Documentation Initiative), a metadata specification for the social, economic, and behavioral sciences. EDDI comprises of the Conference Co-Chairs as main contact persons and the members of the Program Committee and the Local Organization Committee, all respectively appointed for an annual EDDI conference. EDDI is the data controller of the user registries it maintains. We are happy to answer any questions about personal data processing you may have.

- Contact information page https://www.eddi-conferences.eu/committees/

What does EDDI's privacy policy do?

Our privacy policy explains how we will use personal data that you share with us. We are legally required to tell you how we will use this information and give you the opportunity to tell us not to use your information in that way.

How and for what purpose do we process personal data?

We collect, store and process personal data needed to prepare and run the EDDI conference. We only process personal data when it is necessary, and no other data will be asked for than what is essential for our purpose. We collect the following personal data when you submit a conference proposal or register to a conference:

1. **Username and Password;**
2. **First Name, Last name, Affiliation, and Email address.**

Information of B. are used to run the submission process, to set up the conference program and to provide announcements to the registered Users of the EDDI conferences.

EDDI does not use personal data for automated decision-making or profiling.

Information we provide to third parties

The captured information will be used only for the stated purposes. We do not provide, sell or share any personal information about registered users to third parties, other organisations, other users, and alike. We will only disclose your personal data to third parties if there is a legal obligation or basis to do so, as referred to in Section 6 GDPR.

How is your information stored?

Your information will be stored at the server hosting the EDDI system and/or the local host's server. The data is password protected and accessible only to EDDI administrators. Personal data will be stored for three years from the last time the user logged in.

Third-party websites

This statement is not applicable to websites of third parties that are connected to our website by means of links. We advise you to go through the privacy policy of these third parties thoroughly.

Use of cookies

We use cookies to ensure the best experience for the users of our website. A cookie is a small text file sent from a web service to the user's computer. Cookies do not harm the user's computer or files, and EDDI never utilises cookies in a manner that would infringe on users' privacy. Web browser applications allow disabling cookies.

Web analytics

Our website uses Google Analytics, a web analytics service provided by Google, Inc. („Google"). Google Analytics uses „cookies" to help the website analyze how users use the site. The information generated by the cookie about your use of the website (including your IP address) will be transmitted to and stored by Google on servers in the United States. On behalf of the website provider Google will use this information for the purpose of evaluating your use of the website, compiling reports on website activity for website operators and providing other services relating to website activity and internet usage to the website provider. Google will not associate your IP address with any other data held by Google. Further information concerning the terms and conditions of use and data privacy can be found at http://www.google.com/analytics/terms/gb.html.

Updating, Amending, Removing or Obtaining information we hold on you

The accuracy of your information is important to us. You can access and edit your personal data in your profile by logging into the EDDI system.

As an individual, you have a right under the GDPR to update or amend the information we hold about you, to ask us to remove your personal information from our records and to obtain information from us, including a description of the data that we hold on you. We will assist you to the best of our ability in the exercise of your rights.

- You may also contact EDDI's Data Protection Officer:
  Mari Kleemola, mari.kleemola [at] tuni.fi

14 EDDI Code of Conduct (2019)

The following text has been published first in EDDI 2019 program.

The European DDI (EDDI) holds its conferences to provide forum where DDI users from Europe and the world can gather to showcase their work and their progress toward DDI adoption, as well as discuss any questions or challenges they may have about the standard.

To provide all participants – members and other attendees, speakers, exhibitors, staff and volunteers – the opportunity to benefit from the event, EDDI is dedicated to a positive, safe and harassment-free conference experience in which diverse participants may learn, network and enjoy the company of colleagues in an environment of mutual human respect and regardless of gender, sexual orientation, gender identity, gender expression, disability, physical appearance, ethnicity, religion or other group identity or political beliefs. We recognize a shared responsibility to create and hold that environment for the benefit of all. Harassment, therefore, is specifically prohibited.

Harassment is any verbal or non-verbal behaviour that threatens another person or group and that reinforces social structures of domination related to gender, gender identity and expression, sexual orientation, disability, physical appearance, body size, race, age and/or religion. Examples of harassing behaviour include

- The gratuitous use of sexual images in public spaces,
- Deliberate intimidation,
- Stalking,
- Following,
- Harassing photography or recording,
- Sustained disruption of talks or other events,
- Inappropriate physical contact, and
- Unwelcome sexual attention.

Speakers are asked to frame discussions as openly and inclusively as possible and to be aware of how language or images may be perceived by others, especially given the international aspect of this organization.

All participants are expected to observe these rules and behaviours in all conference venues, including online venues, and conference social events. Conference participants seek to learn, network and have fun. Please do so responsibly and with respect for the right of others to do likewise.

If you wish to notify a breach of the Code of Conduct, please speak to or write to the conference Co-Chairs or with a member of the Program Committee. You will receive an acknowledgement of your complaint as quickly as is practicable but at a maximum within 24 hours.

Participants asked to stop a hostile or harassing behaviour are expected to comply immediately. Conference participants violating these rules may be sanctioned or expelled from the conference without a refund at the discretion of the EDDI Program Committee.

On behalf of the Program Committee, eddi19-prog@googlegroups.com

- **Mari Kleemola** (Conference Co-chair)
  mari.kleemola@tuni.fi - FSD - Finnish Social Science Data Archive, Finland
- **Jon Johnson** (Conference Co-chair)
  jon.johnson@ucl.ac.uk - CLOSER, UCL, United Kingdom