RDAP14: Learning to Curate Panel

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Accessed November 14, 2019 12:21 PM EST
Learning to Curate: Lessons from an ICPSR Pilot

Jared Lyle
RDAP 2014
Background
Data Sharing (N=935)

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Pienta, Alter, & Lyle (2010). “The Enduring Value of Social Science Research: The Use and Reuse of Primary Research Data”. [http://hdl.handle.net/2027.42/78307](http://hdl.handle.net/2027.42/78307)
What is Curation?
A well-prepared data collection “contains information intended to be complete and self-explanatory” for future users.
A corollary: Do no harm.
Collaborative Curation
Partnerships

“We propose that domain specific archives partner with institution based repositories to provide expertise, tools, guidelines, and best practices to the research communities they serve.”

Support:

INSTITUTE of Museum and Library SERVICES
Ron Nakao, Stanford
Jen Doty, Emory
Joel Herndon, Duke
Rob O’Reilly, Emory
Libbie Stephenson, UCLA
Jon Stiles, UC Berkeley
Pilot Goals
For participants:

- Apply curation theories to practice through actual data processing.
- Will have a fully curated data collection ready for archiving at the end of the session.
- Interact with and ask questions of other data specialists within a working environment.
- Gain first-hand experience using ICPSR’s internal tools and workflows for curation.
- Understand level of effort to work through collections and provide assistance to researchers.
- Learn about things not thought about (e.g., costing, standardized workflows).
For ICPSR:

• Engage with outside data curators to learn what others are doing and thinking.

• Polish internal procedures and tools by opening them to outside review and critique.

• More data will be curated and archived, benefiting the ICPSR membership and the entire social science community.

• Better utilize resources of the OR community, including personal relationships and, especially, their wide-ranging expertise.

• Train a data curation community of support
Schedule

Week 1 - Introductions & Data Sources

Week 2 – Acquisition

Week 3 - Review

Week 4 – Processing

Week 5 – Metadata

Week 6 – Dissemination
The Virtual Data Enclave (VDE) provides remote access to quantitative data in a secure environment.
Lessons Learned
Your ideas on collaborative curation?
Thank you!

lyle@umich.edu
Reasons to Participate

- well-timed with new RDM hires
- higher-up support for involvement in RDM projects
What's in it for us?

- learn from gold standard holders:
  - ICPSR processing pipeline and tools
  - implications of providing premium level service for staffing and resource allocation

Nobel Prize Illustration by Howdy, I'm H. Michael Karshis on Flickr / CC BY 2.0
The Data

- Panel Data - all states in the United States, 1972-2007, annual
- Coded Data - state-level data policies on home schooling, and relevant court cases
- Publicly-Available Data - a mix of demographic, economic, and social data from sources such as the BEA, the Census Bureau, the NCES
- No issues with regard to sensitivity of data or proprietary restrictions
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Issues and Considerations

- Data assembled for particular project, not with long-term archiving and research in mind
- Discrepancies in documentation:
  - variable names
  - unclear citations
  - broken URLs
  - variables in data missing from codebook, and vice-versa
Issues and Considerations, Cont.

- Long history with the Principal Investigator for the project, which meant lots of context about the project and the data
- Useful in clarifying ambiguities in the data, e.g. “it makes sense to us” citations
- Even with that context, there was still much work and back-and-forth involved
Absent that prior history, the climb would have been much more steep.
Conclusions and Implications

- Overall: very impressive to “see how the sausage is made”
  - ICPSR processing pipeline
  - Hermes
  - SDE infrastructure
Realistically, providing premium level of data archiving service is not possible with existing staffing levels and resources.
Intent to archive dataset with ICPSR still holds, but delayed by:

- necessity for further documentation from investigators
- demands on our time from other projects

Future plans for archiving datasets created by campus researchers informed by lessons learned from participating in pilot project
Contact

- Jen Doty – jennifer.doty@emory.edu
- Rob O’Reilly – roreill@emory.edu
Learning to Curate
@Duke

Joel Herndon
Data and GIS Services
Duke Libraries
• Duke’s Institutional Repository
• Largely a home for scholarly publications and dissertations
• A few data collections attached to papers, but limited research data
Presidential Donor Survey
2000-2004

- Alexandra Cooper (Duke)
- Michael Munger (Duke)
- John Aldrich (Duke)
- Clyde Wilcox (Georgetown)
- John Green (University of Akron)
- Mark Rozell (George Mason)
Presidential Donor Survey
2000-2004

- FEC data on political donations
- Stratified by candidate
- Survey topics include:
  - political activities
  - political attitudes
  - political attributes
Initial Impressions

- Codebook included
- PI(s) available
- IRB protocol available
(Initial) Challenges

- Codebook alignment
- Documentation Issues
- Confidentiality
- Missing Data

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**2000-2004 Presidential Donor Survey**

--Panel--

**Table of Contents**

1. General Introduction
2. Study Description
3. Study Design
4. Notes on the Weights
5. File Structures
6. Codebook of Variables
7. A note on String Variables
8. A note on Unremoved Cases

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**2. Study Description**

3. Study Design:

Following the 2000 United States presidential election, a team of conducted a mail survey of donors who had contributed to any of eight presidential candidates. These included two Democrats (Bill Bradley and Al Gore), five Republicans (Gary Bauer, George W. Bush, John McCain, Jeb Bush, and John McCain), and Green candidate Ralph Nader. Each candidate’s sample included approximately 300 donors sampled from public lists of donors maintained by the Federal Election Commission. Streets for Ohio, Kansas, and Bush were oversampled for substantive reasons. No data was collected on modest (<$200) donors for the Forbes group, as his campaign did not participate in public funding. Note that these samples were ALL drawn from individuals who gave before July 31, 2000.

The ten-page survey instrument contained items designed to collect data on donor demographics, political attributes, attitudes, and activities, on how the donors were solicited, and on how many, how often, and to whom they gave. It was sent directly to named donors via first-class mail. Each envelope was addressed to a specific donor and included a personalized cover letter explaining the project. All letters were individually signed by hand. Business-reply return envelopes were provided with these materials. Approximately one month after the initial mailing, a follow-up request was sent to all sample members who had not returned a response. The text of the cover letter was changed to reflect a repeat request; otherwise, the contents were identical to the first mailing. One additional mailing was done for all remaining non-respondents, except those in Nader’s strata. Participants were given the option of responding anonymously to the survey by erasing the unique identifying number written in pencil on their surveys. Eight percent of the total sample chose to respond anonymously, with the highest rates of anonymous respondents from the Bauer (11%), Forbes (10%) strata, and the lowest rates of anonymous responses from the Gore (6%), McCain (4%), and Bush (4%) strata. The three waves were sent over the period from August to November of 2001.

Following the 2004 United States presidential election the team sent slightly...
Explorations
Data Sets

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- Subjects
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- Duke Departments
- Issue Date
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If you would like to submit data, please contact askdata@duke.edu.

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Collections
- Data Sets
  Data sets independently archived.

http://dukespace.lib.duke.edu/dspace/handle/10161/8356
2000-2004 Presidential Donor Survey

Aldrich, John; Munger, Michael C.; Cooper, Alexandra; Rozell, Mark; Wilcox, Clyde; Green, John

2013-10-01

Download Files

Abstract:
Following the 2000 United States presidential election a team of faculty conducted a mail survey of donors who had contributed to any of eight presidential candidates. These included two Democrats (Bill Bradley and Al Gore), five Republicans (Gary Bauer, George Bush, Bob Dole, Steve Forbes, and John McCain), and Green candidate Ralph Nader. The sample was stratified by candidate; each candidate’s sample included approximately 300 donors sampled from public lists of donors maintained by the Federal Election Commission. Strata for Dole, Nader, and Bush were over-sampled for substantive reasons. No data was collected on modest (<$200) donors for the Forbes campaign as his campaign did not participate in public funding. Note that these samples were ALL drawn from individuals who gave before July 31, 2000. The ten-page survey instrument contained items designed to collect data on donor demographics, on political attributes, attitudes, and activities, on how the donors were solicited, and on how much, how often, and to whom they gave. It was sent directly to sampled donors via first class mail. Each envelope was addressed to a specific donor and included a personalized cover letter explaining the project. All letters were
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<td>0</td>
<td>0</td>
<td>109</td>
<td>41</td>
<td>32</td>
<td>24</td>
<td>23</td>
</tr>
</tbody>
</table>

### File Visits

<table>
<thead>
<tr>
<th>Download Path</th>
<th>Views</th>
</tr>
</thead>
<tbody>
<tr>
<td>Presidential Donor Survey Codebook.doc</td>
<td>67</td>
</tr>
<tr>
<td>donors2000to2004.dta</td>
<td>45</td>
</tr>
<tr>
<td>Presidential Donor Survey Codebook.doc.txt</td>
<td>7</td>
</tr>
<tr>
<td>license.txt</td>
<td>1</td>
</tr>
</tbody>
</table>

### Top country views

<table>
<thead>
<tr>
<th>Country</th>
<th>Views</th>
</tr>
</thead>
<tbody>
<tr>
<td>United States of America</td>
<td>174</td>
</tr>
<tr>
<td>China</td>
<td>12</td>
</tr>
<tr>
<td>United Kingdom</td>
<td>5</td>
</tr>
<tr>
<td>Spain</td>
<td>4</td>
</tr>
<tr>
<td>Germany</td>
<td>3</td>
</tr>
</tbody>
</table>
dukespace.lib.duke.edu › ... › Data Sets › Data Sets ▼ Duke University ▼
by J Aldrich - 2013
Oct 1, 2013 - Following the 2000 United States presidential election a team of faculty conducted a mail survey of donors who had contributed to any of eight ... 

[doc] Codebook and Study Information - DukeSpace
dukespace.lib.duke.edu/.../Presidential%20Donor%20Su...
by J Aldrich - 2013
Study Description. 3. Study Design. Following the 2000 United States presidential election a team of faculty conducted a mail survey of donors who had ...
Concerns

• Resource Implications
• Defining library policies for curation
• Timely engagement with projects
Conclusions

- Greater appreciation of ICPSR’s curation role
- Resource implications for “curation as a service”
- Helps clarify our role for consulting for the full data life cycle
Contact

Joel Herndon, askdata@duke.edu
Learning to Curate: Lessons from an ICPSR Pilot RDAP Conference, March 26, 2014

Libbie Stephenson
UCLA Social Science Data Archive
libbie@ucla.edu
Social Science Data Archive

• Established mid-1960’s
• Small domain-specific archive of data for use in quantitative research
  – Surveys, enumerations, public opinion polls, administrative records
• Two full time staff; part time student interns
• Holdings are partly files deposited by faculty
Goals in project

• Learn new skills in curation process
• Compare local workflow with ICPSR Pipeline process
• Focus on legacy files; enhanced processing
• Improve condition of data deposited to ICPSR
• Consider how researchers would benefit
• Advise other local professionals
Current curation practices

- Follow OAIS to appraise and ingest files
- Data Quality Review: Compare codebook with data; compare to system files and/or create; run freqs; minimal disclosure checks
- Metadata from data deposit form
- Data and metadata processed in Colectica
- Carry out media format migration when necessary
- Process for use with SDA
- DataPASS deposit
Operational schematic

- Website tools, info, policies
- Colectica -- Discovery
- Dataverse -- Access
- SDA -- Analysis
- Appraisal, Ingest Metadata
- Curation Preservation
- Data holdings Database
- Data
Los Angeles County Social Survey

• Annual survey of about 1000 respondents; oversample of Blacks and Asian-Americans

• Topics: attitudes and views of living in Los Angeles, neighborhoods, public services, and political views

• Used computer-assisted telephone interview (CATI); Spanish and English with the CASES tools.

• Geography by zip code within county
Thoughts on the project

• Learning curve; since not using the tools daily difficult to remember steps
• ICPSR tools help to quickly improve data quality
  – Disclosure, naming conventions, missing data, etc.
• Following parts of the ICPSR pipeline process would streamline local work flow
• Project demonstrated that data quality review aspects are essential to preservation.
Where we are now

• Explore cooperative arrangement with Library
  – Archive to curate; use of IR for bit-level maintenance

• Re-evaluate acquisitions/collection policies
  – Find better ways to estimate resource needs
  – Increase advisory role; make use of ICPSR

• Redesigned workflow for appraisal and ingest
  – More focus on data quality review
  – Increase use of tools to create metadata
  – Write training manual – shorten learning curve

For more on Data Quality Review: http://www.dcc.ac.uk/sites/default/files/documents/IDCC14/Parallels/Committing%20to%20data%20quality%20review%20parallel%20C1.pdf
Committing to Curation - Conclusions

• Goal is to ensure long term usability of scholarly output
  – It is ALL digital
  – Cannot preserve, store, identify, curate it ALL
  – Have to set priorities, establish policies, develop criteria for what to preserve for long term usability.
  – Bit-level processes are NOT enough
  – DIY tools for self-deposit vs DQR for preservation

• Curation is a NEW aspect of librarianship

• It IS a commitment
  – Develop expertise
  – Acquire, license or build tools
  – Staff – numbers and expertise required
  – Financial impact is not trivial