How to tailor information resources to a target audience – Lessons learned from a Research Data Centre

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Session 2 | Unlocking new targets

Joint Irving Fisher Committee and Banco de Portugal conference on

"Communication on central bank statistics: unlocking the next level"

held at 19 and 20 September 2022, Lisbon

Communicating complex information to a heterogeneous target audience
How to get from this situation …

Complex information

„Thank you but this info is **not relevant** for my case."

„**Perfect**, that's the info I needed!"

„I **don't trust** the info, my facts say otherwise."

„The info is too **difficult** for me to understand."

„This is **obvious** to me. Waste of my precious time."

Communicating complex information to a heterogeneous target audience

… to this situation.

Different information

Complex information

Discussion

Simpler information

Even more complex information

„*Perfect*, that's the info I needed!"

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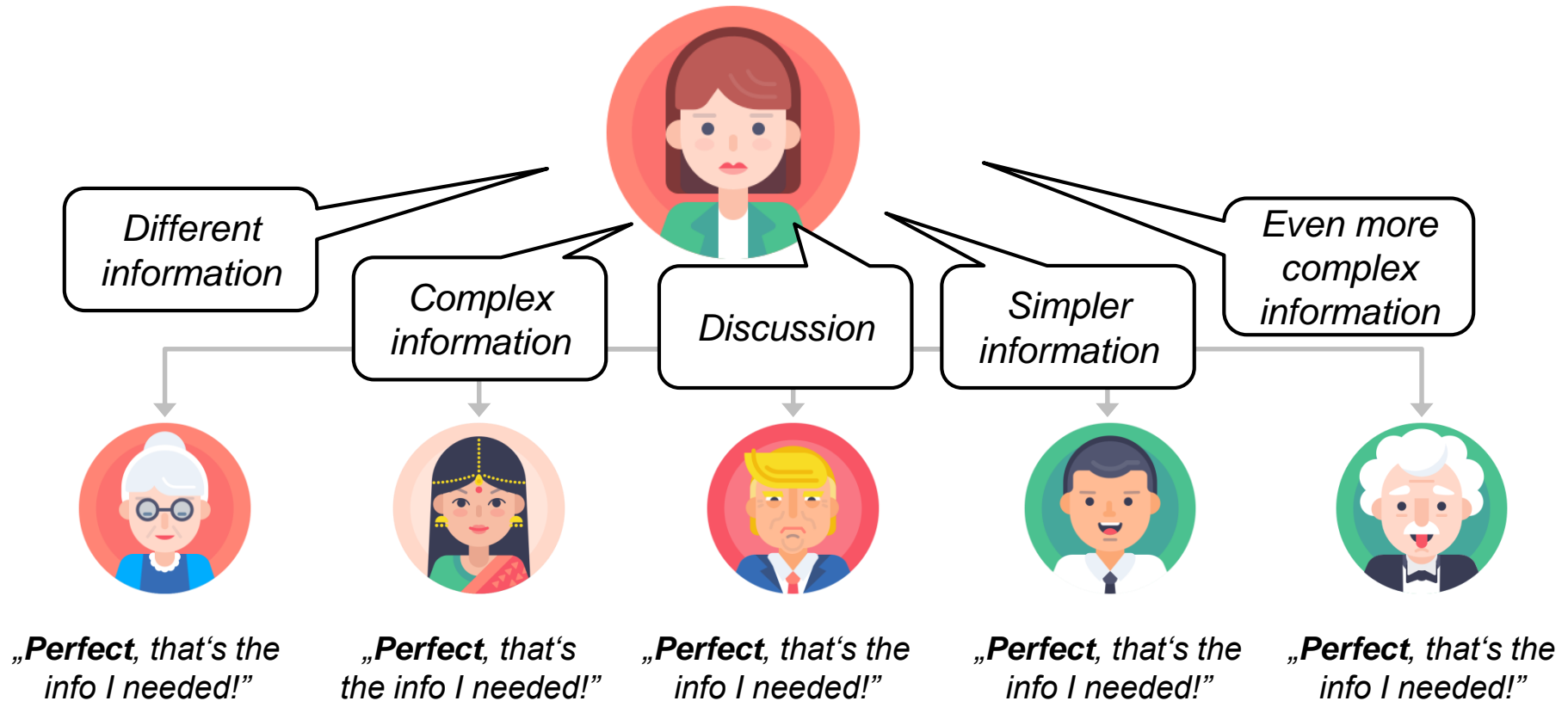
Focus of this presentation: Lessons learned from a Research Data Centre
What's the Research Data and Service Centre? (1|2)

The **Research Data and Service Centre** (RDSC) of the Deutsche Bundesbank offers access for **non-commercial** research to (highly sensitive) **micro data** of the Bundesbank.
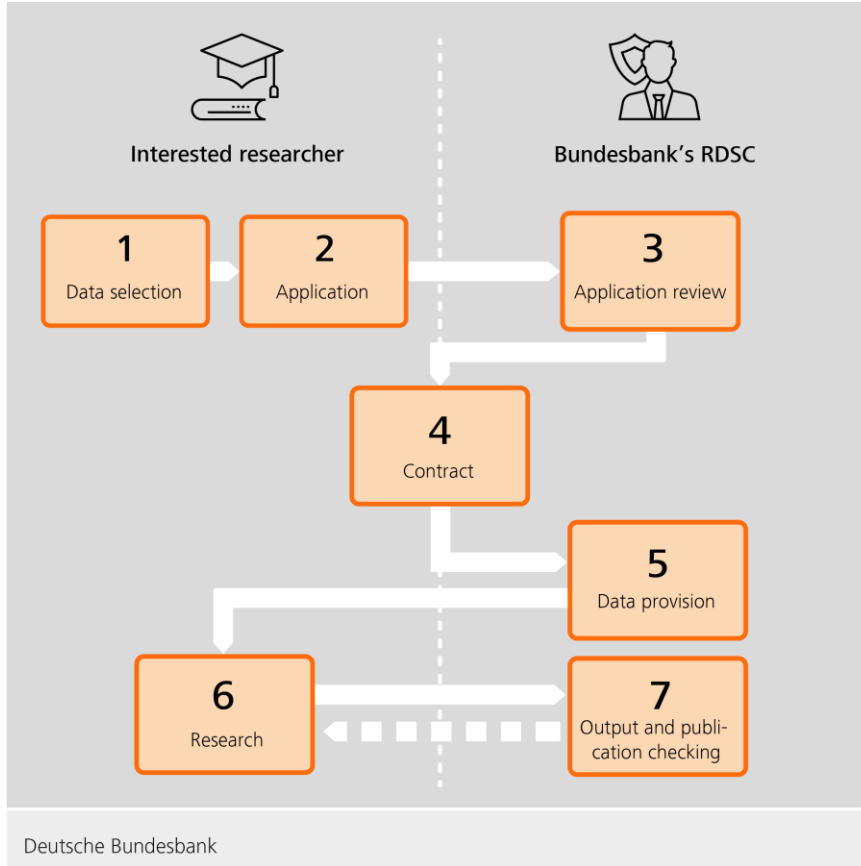
Microdata for banks, companies, securities and households are available:

- Generate (standardized) (linked) micro data
- Offer advisory service on data selection and data access
- Provide data access and data protection
- Document data and methodological aspects of the data
- Work on own research projects
- Organize conferences and workshops

What's the Research Data and Service Centre? (2|2)

Interested researcher — Bundesbank's RDSC

1 Data selection
2 Application
3 Application review
4 Contract
5 Data provision
6 Research
7 Output and publi-cation checking

Deutsche Bundesbank

Data access

Depending on the dataset (degree of anonymization and legal foundation) the RDSC grants **access** via **three modes**:

- Secure-on-site Access

- Scientific use files

- Controlled Remote Execution

Currently, the RDSC counts around 300 active research projects

For more information please see the information on our **website**: https://www.bundesbank.de/en/bundesbank/research/rdsc/your-research-project-at-the-rdsc

Motivation of the RDSC
Status Quo (1|2)

*To **support researchers** in their projects and especially in output control, the RDSC already provides a **variety of materials**:*

Documents
- ✓ Rules for visiting researchers
- ✓ Data reports
- ✓ Technical reports
- ✓ FAQs
- ✓ ….

Software and code
- ✓ SDC* package for R
- ✓ SDC package for STATA
- ✓ Output submitter
- ✓ …

Online resources
- ✓ Website
- ✓ Metadata und persistent dataset identifiers (DOI)
- ✓ …

* Statistical Disclosure Control (SDC) is used synonymously for output control here

Motivation of the RDSC
Status Quo (2|2)

Provision of support materials (e.g. documents, software) can potentially lead to an information overflow. Although all information is potentially relevant.
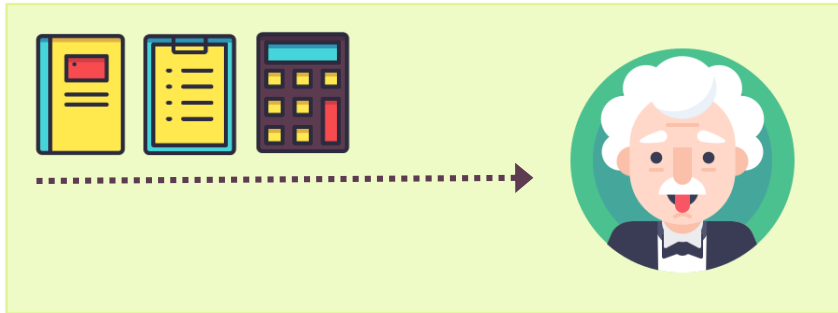
Scenario 1 - Little user support needed

- Small number of datasets
- Easy data structure
- Small dataset size
- Homogeneous legal framework → Similar rules for data access and SDC

Scenario 2 - Much user support needed

- Large number of datasets
- Complex data structure (e.g. multiple IDs, missing IDs)
- Large dataset size
- Heterogeneous legal framework → Dataset-specific rules for data access and SDC
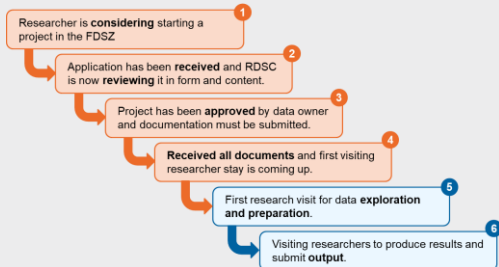
New concept for a streamlined communication at the RDSC
Summary of the RDSC's procedure

Our approach to handle scenario 2:
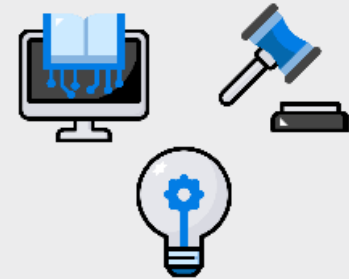We defined a multitude of **use cases** and structured them using **three main questions**:

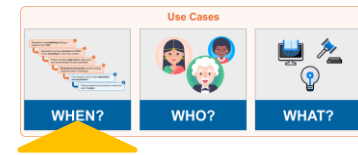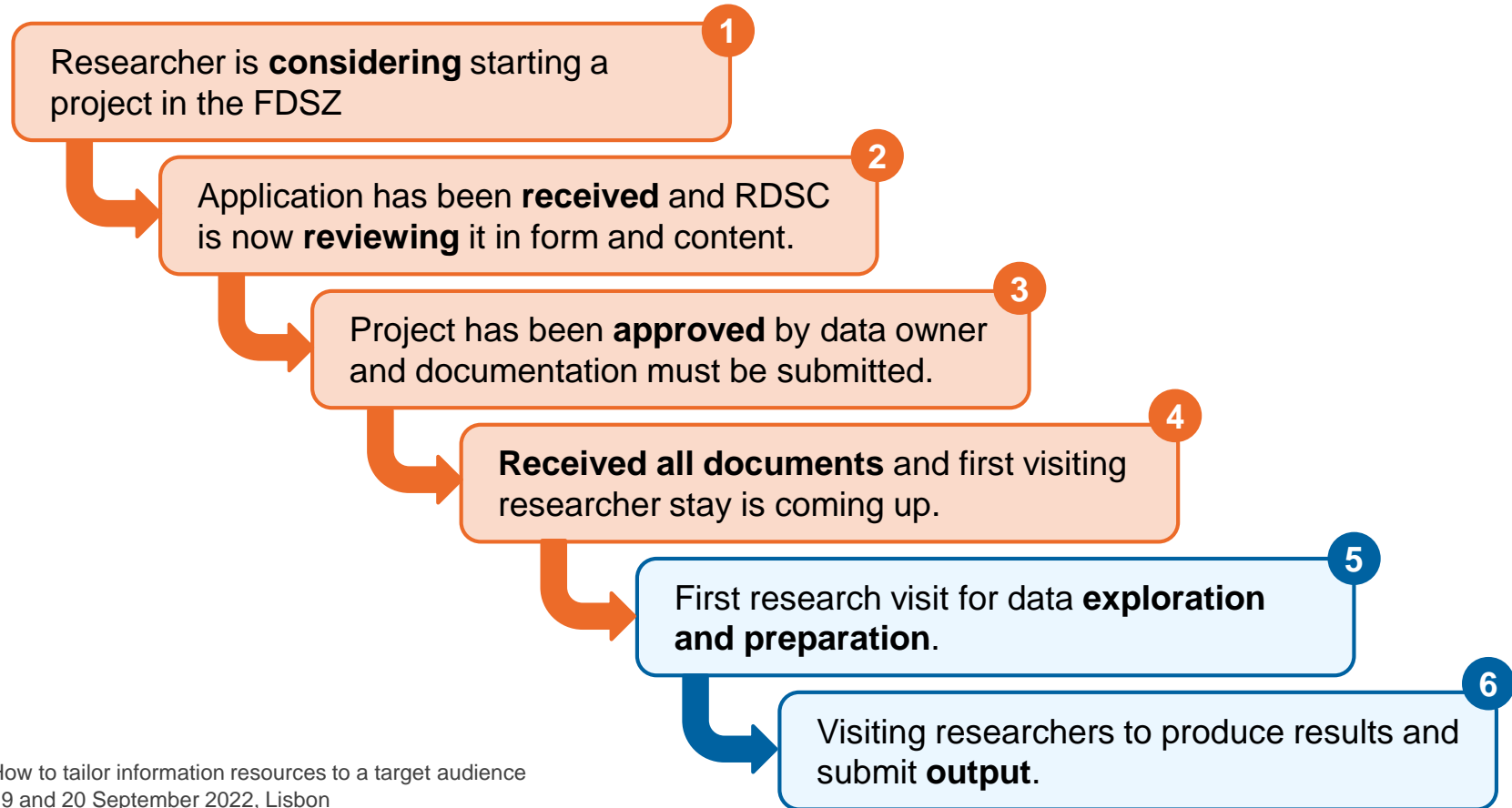# New concept for a streamlined communication at the RDSC
WHEN?: Milestones

*Structuring the research process into **six milestones**.*

1 Researcher is **considering** starting a project in the FDSZ

2 Application has been **received** and RDSC is now **reviewing** it in form and content.

3 Project has been **approved** by data owner and documentation must be submitted.

4 **Received all documents** and first visiting researcher stay is coming up.

5 First research visit for data **exploration and preparation**.

6 Visiting researchers to produce results and submit **output**.

New concept for a streamlined communication at the RDSC
WHO?: Defining the target audience
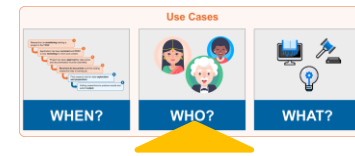
*The RDSC decided to divide its target audience into **three groups**:*

Group A	Group B	Group C
Previous experience …	Previous experience …	Previous experience …
X at the RDSC	✓ at the RDSC	✓ at the RDSC
X with the requested dataset(s)	X with the requested dataset(s)	✓ with the requested dataset(s)

New concept for a streamlined communication at the RDSC
WHAT?: Classification of our existing materials (1|2)
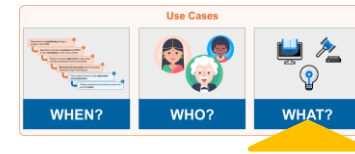
*The RDSC provides many different materials to researchers. However, the **type of information** is different. Here are some examples:*

RDSC Rules
Plain text with list of rules that need to be adhered to.

Tips for data handling
Text with explanations and examples.

User guide for SDC tools
Step-by-step instructions with code examples.

New concept for a streamlined communication at the RDSC
WHAT?: Classification of our existing materials (2|2)

*Existing and planned materials are assigned to a **material type**.*

🔨 Reference*

Information-oriented

- ✓ Visiting researcher rules
- ✓ Contracts
- ✓ Confidentiality agreement briefing
- ✓ Website
- ✓ …

📖 Explanation

Understanding-oriented

- ✓ Data reports
- ✓ Website
- ✓ Technical reports on selected topics
- ✓ RDSC Wiki with FAQ
- ✓ …

💡 Tutorials

Learning-oriented

- ✓ Instructions for using the SDC packages in Stata and R with examples
- ✓ Example project
- ✓ Tool for automatic checks of certain rules
- ✓ …

* This graphic is a simplified version of the Diátaxis framework (https://diataxis.fr/).

New concept for a streamlined communication at the RDSC
Assignment of milestones - Use cases - Researcher type - Material type
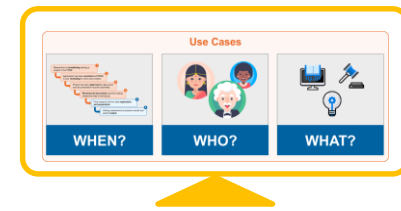
| Use case	Milestone	Researcher type	Material type
Researcher would like to get an overview of all data that can be requested in the RDSC.	❶ Researcher is considering starting a project	All	Reference
…	…	…	…
RDSC wants to ensure that researchers understood the rules at the secure environment.	❺ First research visit for data exploration and preparation	Groups A and B: New / unexperienced researchers	Explanation
…	…	…	…
Researcher would like to use the nobs commands in Stata, following guidance and examples.	❻ Research visits to produce results and submit output	All	Tutorial

New concept for a streamlined communication at the RDSC
Simplified outcome
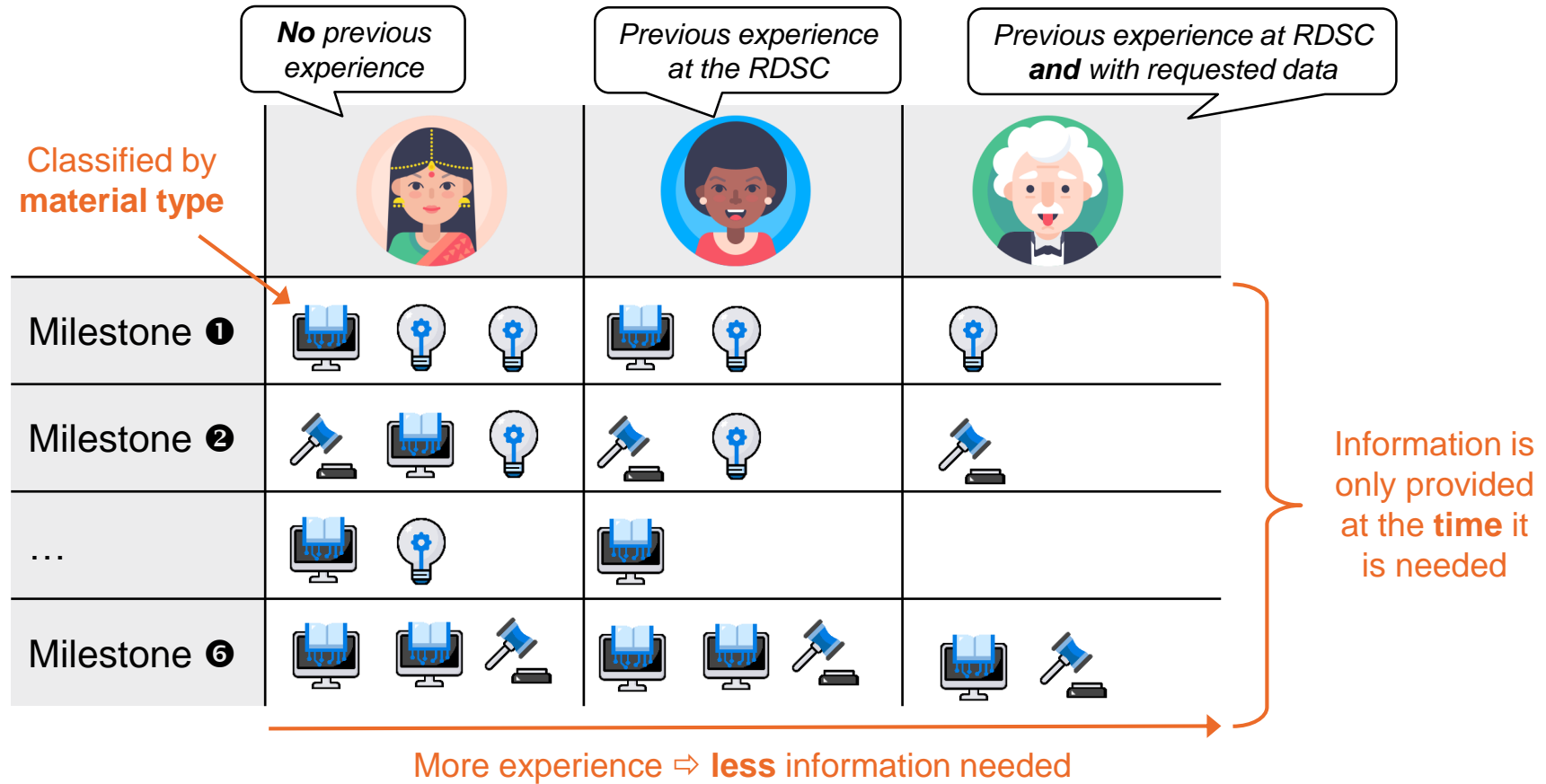
New concept for a streamlined communication at the RDSC
Summary of the three steps procedure
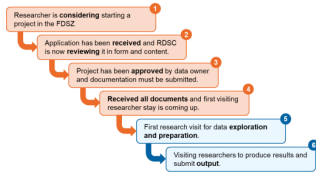
WHEN? Identify **milestones** that mark important stages of a research project to learn when resources are needed.

WHO? **Classify** researchers by their skill set into different buckets to learn about the **target audience** of the resources.

WHAT? Identify the appropriate **type of resources** needed (e.g. formal legal reference vs. user guide with many examples). The RDSC uses a simplified version of the Diátaxis framework (https://diataxis.fr/).

Contact

Thank you!

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