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Automating Survey Processes: Metadata Based Improvements to the NEPS Survey Life Cycle

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Beyond documentation, machine-actionable survey metadata offer a wide range of possibilities for more efficient and less error-prone survey management.

We want to illustrate how the German National Educational Panel Study (NEPS) made use of metadata throughout the survey life cycle in its newly recruited Starting Cohort 8, a panel sample of 5th graders which started in 2022. With this new cohort, the NEPS consortium decided to implement a new technical backbone to its survey infrastructure, enabling us to take advantage of the centralized metadata storage at the Leibniz Institute for Educational Trajectories (LifBi). We developed a fully automated process of generating survey instruments based on their reference metadata, eliminating the need for (manually produced) programming templates as well as the manual programming of the instruments itself. Putting survey's metadata in the center of that infrastructure, it furthermore accelerates the survey testing procedures and ensures the coherence of the stored metadata with the content of the instruments and, ultimately, the disseminated data products. Future developments aim to extend these workflows beyond the scope of in-house software environments, so that NEPS' metadata can be exchanged by a DDI compliant transfer format that can be used e. g. by contracted field institutes.

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