



## D5.2 FIRST EVALUATION OF THE FACILITATION SERVICES

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## Abbreviations and Acronyms

BoF	Birds of a Feather
CoP	Community of Practice
EOSC	European Open Science Cloud
FAIR	Findable, Accessible, Interoperable, Reusable
HEIs	Higher Education Institutions
IG	Interest Group
RDA	Research Data Alliance
TAB	Technical Advisory Board
WG	Working Group
WP	Work Package



## Executive Summary

This deliverable intends to evaluate the overall RDA TIGER Facilitation Service offering at the halfway point of the point of the project. It first provides an update on the RDA Working Groups (WGs) who have received support from the Facilitation Service, giving an overview of the progress each has made and the tasks and activities that have been employed to support each; it does the same for the project's six Pilot Demonstrator WGs.

The deliverable then moves on to examine the service stages laid out in RDA TIGER D5.1 'Definition and handbook of the Facilitation Service', drawing on the experiences of the project's team of facilitators to evaluate the relevance of the service stages' associated tasks and activities, proposing additional tasks and activities to be included in the service offering where necessary. Attention then turns to the feedback that has been received from those who have availed of the service and the updates that have been made as a result.

As this is the second of three deliverables concerned with the Facilitation Service, this deliverable represents a major milestone in the ongoing efforts to appraise the service received by WGs supported by the RDA TIGER project. Towards the end of the deliverable, attention is given to the lessons learned by those delivering the Facilitation Service so far in the project; additional outputs and materials that have been identified as of potential use for supported WGs and the wider RDA community are described.

The updates to the service stage tasks and activities and the additional outputs described all align with the intended outcomes of the Facilitation Service as described in D5.1, in the sense that they are all designed with a view to contributing to the long-term impact of the project beyond its end in December 2025.



## 1. Introduction

This deliverable picks up from D5.1<sup>1</sup>, documenting how the Facilitation Service for the RDA TIGER project has been implemented up to the halfway point of the project. The deliverable outlines how the anticipated stages, tasks and activities described in D5.1 have been realised in practice, and the lessons learned so far from the feedback that has been received and from those Working Groups (WGs) who have availed of the service. Particular attention is paid to the Facilitation Service stages described and detailed in D5.1; whether they have accurately predicted the type of support needed by the selected WGs and whether any additional or amended tasks are required.

Overall, based on the feedback received from supported WGs, the volume of applications for support, and the facilitators own experiences and lessons learned, the service has been a success thus far. Toward the end of this deliverable, attention is given to the intended outcomes for the Facilitation Service for the remainder of the project, with a view to the ways that the service could be extended beyond the close of the project.

## 2. Facilitation Service update

At the time of writing, there are 18 RDA WGs or prospective WGs receiving some form of support from the TIGER project<sup>2</sup>. Of these, 14 are specifically receiving facilitation support (four Pilot Demonstrator WGs and 10 having successfully applied through the Open Call process). Of the WGs that applied for RDA TIGER support services through the Open Call, all indicated that support from the Facilitation Service is required. (It is worth noting here that one of the Pilot Demonstrator WGs, the GORC International Model WG, indicated during a debrief meeting to solicit feedback on their Communication Service support that the group would have also benefited from facilitation support). All this demonstrates the need for this type of support among the RDA community, and the relevance and appeal of the service designed and delivered by the TIGER partners.

There are currently five people providing facilitation support to the TIGER WGs with varying effort allocations (see section on service tracking in section 4.1 below); Ryan O'Connor (Senior Facilitator, RDA Europe), Liise Lehtsalu (Science Officer, RDA Europe), Athina Papadopoulou (Science Officer, RDA Europe), Pablo Rodriguez-Sanchez (Research Software Engineer, Netherlands eScience Centre), and Carlos Martinez-Ortiz (Community Manager, Netherlands eScience Centre).

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<sup>1</sup> Rettberg, N., Delipalta, A., & Asmi, A. (2023). RDA TIGER D5.1 Definition and handbook of the Facilitation Service (Version 1). Zenodo. <https://doi.org/10.5281/zenodo.8096642>

<sup>2</sup> The remaining four WGs received/are receiving support from the Communications service (two WGs) and external third-party funding support (two WGs).

## 2.1. Working Groups supported

Table 1. below contains a list of the 12 WGs receiving support from RDA TIGER who applied for support via the Open Call. For completeness, the table contains WGs who have applied for third-party financial support, but not service support (i.e., support from any of the Facilitation, Communications, Landscape & Engagement, or Output Services). These are marked with an asterisk.

The table gives the date the RDA TIGER service support commenced, the life cycle stage the WG was at at the start of the service, and its current life cycle stage. The WG life cycle stages are taken from those contained in Figure 3: ‘RDA WG lifecycle in relation to the RDA TIGER services’ in D5.1. These WG life cycle stages are:

1. Partner Engagement
2. Workplan Creation
3. Case Statement
4. Approval
5. WG period
6. Output Submission
7. Review and Endorsement
8. Communication and Engagement.

As is clear from Table 1., the majority of WGs who have applied for RDA TIGER support were in the early stages of their life cycles when the support commenced. The corresponding entries for each WG in the ‘Facilitator tasks and activities’ column are an exhaustive collection of the tasks and activities that have been carried out by the lead facilitators for each WG to date. These tasks and activities are drawn from the ‘Description of facilitator tasks and activities’ column in Table 1. in D5.1. Where applicable, the WG’s name contains a hyperlink to the WG page on the RDA website.



Table 1. RDA TIGER-supported Working Groups (WGs) through the Open Call process

WG name	Date of TIGER support commencement	WG life cycle stage of TIGER support commencement	Current WG life cycle stage	Facilitator tasks and activities
<a href="#">Harmonised terminologies and schemas for FAIR data in materials science and related domains WG</a>	June 2023	1. Partner engagement	5. WG period	<ul style="list-style-type: none"> <li>Coordinating group activities to keep them well-defined and in-scope.</li> <li>Providing support for running of meetings.</li> <li>Ensuring that all RDA processes and rules are followed by WG members.</li> <li>Providing advice on upcoming plenaries. (and support/facilitation during the plenary sessions)</li> <li>Highlighting where RDA TIGER services resources may be available and signposting the WG co-chairs to the relevant application processes, providing guidance as necessary.</li> </ul>
<a href="#">Policies in Research Organisations for Research Software (PRO4RS) WG</a>	June 2023	1. Partner engagement	5. WG period	<ul style="list-style-type: none"> <li>Providing support for running of meetings.</li> <li>Providing support in preparation for upcoming plenaries.</li> <li>Providing landscaping service (connecting to relevant initiatives at National level).</li> </ul>
<a href="#">FAIR Data Maturity Model WG*</a>	September 2023	8. Communication and Engagement.	8. Communication and Engagement.	Not applicable

WG name	Date of TIGER support commencement	WG life cycle stage of TIGER support commencement	Current WG life cycle stage	Facilitator tasks and activities
<a href="#">Wind Energy Community Standards WG</a>	October 2023	1. Partner engagement	4. Approval	<ul style="list-style-type: none"> <li>• Making suggestions for the WG membership (new groups), in coordination with the RDA TIGER Landscape service.</li> <li>• Discusses initial ideas for scope and objectives of the WG with co-chairs.</li> <li>• Discusses work plan, timelines, and responsibilities.</li> <li>• Providing clear advice on what support the group can receive from the RDA TIGER Facilitation Service.</li> </ul>
<a href="#">RDA/CODATA Data Systems, Tools, and Services for Crisis Situations WG</a>	October 2023	4. Approval	5. WG period	<ul style="list-style-type: none"> <li>• Coordinating group activities to keep them well-defined and in-scope.</li> <li>• Providing support for running of meetings.</li> <li>• Ensuring that all RDA processes and rules are followed by WG members.</li> <li>• Providing advice on upcoming plenaries. (and support/facilitation during the plenary sessions)</li> <li>• Highlighting where RDA TIGER services resources may be available and signposting the WG co-chairs to the relevant application processes, providing guidance as necessary.</li> </ul>
<a href="#">EOSC-Future/RDA Artificial Intelligence &amp; Data Visitation WG</a>	October 2023	5. WG period	6. Output submission	<ul style="list-style-type: none"> <li>• Providing advice on upcoming plenaries.</li> <li>• Highlighting where RDA TIGER services resources may be available and signposting the WG co-chairs to the</li> </ul>



WG name	Date of TIGER support commencement	WG life cycle stage of TIGER support commencement	Current WG life cycle stage	Facilitator tasks and activities
				<p>relevant application processes, providing guidance as necessary.</p> <ul style="list-style-type: none"> <li>• Providing assistance with finalisation and delivery of Outputs</li> <li>• Connecting RDA TIGER services such as communications and landscape and Output services.</li> </ul>
<a href="#">RDA/WDS TRUST Principles Outreach and Adoption WG</a>	October 2023	5. WG period	5. WG period	<ul style="list-style-type: none"> <li>• Providing landscaping service</li> <li>• Providing support for running of meetings</li> <li>• Providing advice on upcoming plenaries and/or support/facilitation during the plenary sessions)</li> </ul>
<a href="#">Building Immune Digital Twins WG</a>	November 2023	1. Partner engagement	4. Approval	<ul style="list-style-type: none"> <li>• Providing support for running of meetings.</li> <li>• Ensuring that all RDA processes and rules are followed by WG members.</li> <li>• Providing clear advice on what support the group can receive from the RDA TIGER Facilitation Service.</li> <li>• Supporting and coordinating Post-Community/TAB review tasks</li> <li>• Identification of potential WG Co-chairs from underrepresented regions</li> </ul>
FAIR Mappings WG	December 2023	1. Partner Engagement	3. Case Statement	<ul style="list-style-type: none"> <li>• Support to identifying additional co-chairs</li> <li>• Discussing work plan to deliver case statement (timelines and responsibilities)</li> </ul>

WG name	Date of TIGER support commencement	WG life cycle stage of TIGER support commencement	Current WG life cycle stage	Facilitator tasks and activities
				<ul style="list-style-type: none"> <li>• Providing support for scheduling and running of meetings</li> <li>• Providing advice on upcoming plenaries and/or support/facilitation during the plenary sessions)</li> </ul>
<a href="#">Data Granularity WG*</a>	December 2023	6. Output Submission	7. Review and Endorsement	Not applicable
<a href="#">Health Data Commons GORC WG</a>	March 2024	1. Partner Engagement	3. Case Statement	<ul style="list-style-type: none"> <li>• Support to identifying additional co-chairs</li> <li>• Discussing work plan to deliver case statement (timelines and responsibilities)</li> <li>• Providing support for scheduling and running of meetings</li> <li>• Providing advice on upcoming plenaries and/or support/facilitation during the plenary sessions)</li> </ul>
<a href="#">RDA-OfR Creating a Multi-omics Metadata Schema Standard Reporting Matrix WG</a>	June 2024	5. WG period	5. WG period	<ul style="list-style-type: none"> <li>• Creating the RDA TIGER support package following consultations with WG Group co-chairs.</li> <li>• Providing clear advice on what support the group can receive from the RDA TIGER Facilitation Service.</li> </ul>

\*WGs not receiving facilitation support



## 2.2. Pilot Demonstrator Working Groups supported

As described in D5.1 section 4, ‘RDA TIGER Pilot stage: Lessons Learned’<sup>3</sup>, six WGs were selected as Pilot Demonstrator WGs to refine the proposed TIGER services. Of these six, two, GORC International Model WG and National PID Strategies WG, were approaching the end of their life cycles and required support mainly from the TIGER Communications Service<sup>4</sup>. The four remaining WGs selected were at the early stages of their life cycles, with the Facilitation Service providing support from the group initiation stages.

The Pilot Demonstrator WGs receiving facilitation support have been slower to progress through the early WG life cycle stages. The reasons for this include, but are not limited to:

1. The relative inexperience of co-chairs with RDA processes at the commencement of RDA TIGER support and the amount of effort the facilitators dedicated to supporting them getting familiar with the RDA;
2. The complexity of the WGs’ focus areas; and,
3. The ambitions of the WGs.

These factors resulted in a comparatively longer period to produce a draft Case Statement, and longer period of time needed to identify and onboard new co-chairs. In some cases, a greater investment of facilitation time and effort is required to educate co-chairs about the RDA processes and procedures and support groups through different lifecycle stages. This also applies when the WG scope and work plan is broad and/or ambitious, requiring refinement. However, all four WG have leveraged RDA TIGER support to progress and are now underway, having become endorsed RDA Working Groups or currently have their Case Statements in the Community Review process.

Table 2. below contains a list of the six Pilot Demonstrator WGs supported by RDA TIGER, with those not receiving facilitation support indicated by an asterisk. Similar to Table 1. above, the tasks and activities listed here are drawn from D5.1.

<sup>3</sup> Rettberg, N., Delipalta, A., & Asmi, A. (2023). RDA TIGER D5.1 Definition and handbook of the Facilitation Service (Version 1). Zenodo. <https://doi.org/10.5281/zenodo.8096642>

<sup>4</sup> The materials produced by WP2 were made available on the RDA website and are summarised in these news items: <https://archive.rd-alliance.org/global-open-research-commons-international-model-final-output-and-supporting-documentation-available> and <https://archive.rd-alliance.org/rda-national-pid-strategies-guide-and-checklist-final-outputs-and-supporting-materials-available>

Table 2. RDA TIGER-supported Pilot Working Groups

WG name	Date of TIGER support commencement	WG life cycle stage of TIGER support commencement	Current WG life cycle stage	Main facilitator tasks and activities
Pilot 1 - <a href="#">Community-based catalogue of requirements for trustworthy Technical Repository Service Providers WG (TRSPs WG)</a>	June 2023	1. Partner Engagement	3. Case Statement	<ul style="list-style-type: none"> <li>• Discussing work plan to deliver case statement (timelines and responsibilities)</li> <li>• Providing support for scheduling and running of meetings</li> <li>• Providing advice on upcoming plenaries and/or support/facilitation during the plenary sessions)</li> <li>• Highlighting where RDA TIGER services resources may be available and signposting the WG co-chairs to the relevant application processes, providing guidance as necessary</li> </ul>
Pilot 2 - <a href="#">Alignment of multilingual vocabularies in the Social Sciences and Humanities WG</a>	June 2023	1. Partner Engagement	4. Approval	<ul style="list-style-type: none"> <li>• Making suggestions for the WG membership</li> <li>• Promoting WG to potential members</li> </ul>
Pilot 3 - <a href="#">FAIRification of Genomic Annotations WG</a>	June 2023	1. Partner Engagement	5. WG period	<ul style="list-style-type: none"> <li>• Making suggestions for the WG membership (new groups), in coordination with the RDA TIGER Landscape service.</li> <li>• Discusses initial ideas for scope and</li> </ul>

WG name	Date of TIGER support commencement	WG life cycle stage of TIGER support commencement	Current WG life cycle stage	Main facilitator tasks and activities
				<p>objectives of the WG with co-chairs.</p> <ul style="list-style-type: none"> <li>• Discusses work plan, timelines, and responsibilities. Providing support for running of meetings.</li> <li>• Ensuring that all RDA processes and rules are followed by WG members.</li> <li>• Providing advice on upcoming plenaries.</li> <li>• The facilitator should make sure that all relevant RDA processes and rules are followed.</li> </ul>
Pilot 4 - <a href="#">GORC International Model WG</a> *	June 2023	8. Communication and Engagement.	8. Communication and Engagement.	<ul style="list-style-type: none"> <li>• Providing assistance with finalisation and delivery of Outputs</li> <li>• Connecting RDA TIGER services such as communications and landscape and Output services.</li> </ul>
Pilot 5 - <a href="#">National PID Strategies WG</a> *	June 2023	7. Review and Endorsement	8. Communication and Engagement.	<ul style="list-style-type: none"> <li>• Providing assistance with finalisation and delivery of Outputs</li> <li>• Connecting RDA TIGER services such as communications and landscape and Output services.</li> </ul>
Pilot 6 - <a href="#">Small Uncrewed Aircraft</a>	June 2023	1. Partner Engagement	4. Approval	<ul style="list-style-type: none"> <li>• Making suggestions for the WG</li> </ul>



WG name	Date of TIGER support commencement	WG life cycle stage of TIGER support commencement	Current WG life cycle stage	Main facilitator tasks and activities
<a href="#">and Autonomous Platforms Data WG</a>				<p>membership (new groups), in coordination with the RDA TIGER Landscape service.</p> <ul style="list-style-type: none"> <li>• Discusses initial ideas for scope and objectives of the WG with co-chairs.</li> <li>• Discusses work plan, timelines, and responsibilities.</li> <li>• Creating the RDA TIGER support package following consultations with WG Group co-chairs.</li> <li>• Providing support for running of meetings.</li> <li>• Providing advice on upcoming plenaries.</li> </ul>

\*WGs not receiving facilitation support





### 3. Evaluation of Facilitation Service

This evaluation of the Facilitation Service is divided into two parts. In section 3.1, this deliverable compares the facilitation service stages defined in D5.1 and the experience of these in practice with all WGs (i.e., those who have applied via the Open Call and the Pilot Demonstrator WGs). Specifically, this section will address the question of whether these service stages and the associated tasks and activities are a valid representation of the support needed by RDA WGs. In section 3.2, the deliverable evaluates the feedback that has been received so far from those WGs that have been supported by the Facilitation Service, along with the quality indicators listed in D5.1 section 2.2.1., ‘Quality indicators and follow up’.

#### 3.1. Facilitation Service Stages

This section examines the four Facilitation Service stages (i.e., F1: Partner Engagement, F2: WG Work Plan Creation, F3: Facilitation Service Support, F4: WG Finalisation), their intended purposes, and the tasks and activities associated with each stage. In sections 3.1.1 to 3.1.4 below, each Facilitation Service stage is examined in detail, with evaluation of the relevance of the service stage purposes, examination of whether the tasks and activities accurately reflect the tasks and activities undertaken by the facilitators to achieve these purposes, discussion of the extent to which each service stage overlaps with other RDA TIGER services, and suggestions of any additional tasks and activities where necessary.

In the evaluation of the facilitator tasks and activities in Tables 3., 4., 5., and 6. below, each is evaluated as having proceeded “As planned”, with “Minor revision”, with “Major revision” or as “Not applicable”, with colour coding for the entries (i.e., green for “As planned”, yellow for “Minor revision”, orange for “Major revision”, and red for “Not applicable”) and brief explanations for these evaluations accompanying each.

For context, Figure 1. below depicts the planned service stages in the wider RDA TIGER service platform context.

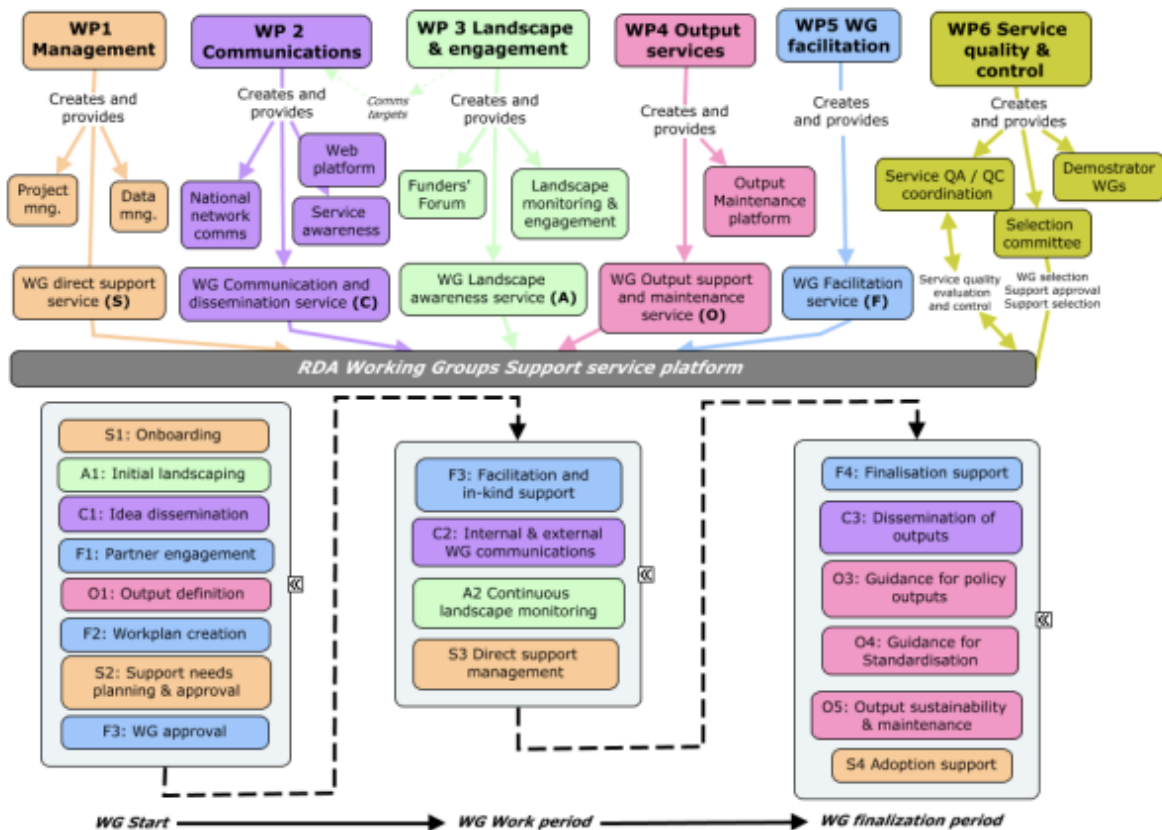


Figure 1. RDA TIGER services

### 3.1.1. F1: Partner Engagement

The two main purposes of this stage are:

- F1.1. Assigning the Facilitator; and,
- F1.2. Inform WG members about the provided services and their limitations.

This service stage is concerned primarily with onboarding new WGs to the RDA TIGER facilitation support service. This stage and the associated tasks and activities are carried out regardless of the WG life cycle stage.

The RDA TIGER Senior Facilitator acts as a liaison between the Selection Committee and those contributing to the project's facilitation work package (i.e., RDA TIGER Work Package 5). Following a successful application via the RDA TIGER Open Call, the applicants are notified of the acceptance of their support for application by the RDA TIGER project coordinator. Based on the content of the RDA TIGER application and Selection Committee feedback, the Senior Facilitator initiates a discussion with WG co-chairs and/or support applicants to better understand what support is needed. Following these initial discussions, the status of the WG is brought to the team of facilitators, with a decision on who will take

the role of lead facilitator for each WG based on the facilitators' current capacity and workload, and their experience (if any) and interest in the WG's focus area(s).

It should be reiterated here that the lead facilitator does not need background knowledge of the subject of the WG. All of the service stages have been designed in such a way that they can be delivered successfully and WGs can benefit from facilitation support regardless of whether the lead facilitator has experience or knowledge of the subject.

Based on the experiences so far, the **F1: Partner Engagement** service stage has worked very well. All WGs have been onboarded efficiently and provided with all the prerequisite material and information about the TIGER facilitation and other support services. As such, no adjustments to the tasks and activities outlined in D5.1 are suggested in Table 3. below, and only one additional activity is to be added.

*Table 3. Evaluation of F1: Partner Engagement tasks and activities*

Description of facilitator tasks and activities	Evaluation of facilitator tasks and activities
Liaising with the RDA TIGER Selection Committee to identify the successful WGs who apply for service support.	<b>As planned:</b> The Senior Facilitator acts as the liaison between the Selection Committee and the team of facilitators, with the team discussing who to take the role of lead facilitator for each WG.
Making suggestions for the WG membership (new groups), in coordination with the RDA TIGER Landscape service.	<b>As planned:</b> New WG members are sought from within the existing RDA community, through related RDA Groups, and/or through TIGER project consortium partners' contacts. Based on discussions with WG co-chairs, the facilitator can engage with different communities outside these ones. This activity is applicable to both new RDA WGs/WGs in planning and existing WGs.
The facilitator will attend the RDA TIGER Selection Committee meetings to identify the successful WGs who apply for service support.	<b>As planned:</b> The Senior Facilitator attends Selection Committee meetings and contributes where required. It should be noted here that the Senior Facilitator plays no role in the evaluation of the applications for support, but is on hand to answer any clarification questions from Selection Committee members about the facilitation service and how it might apply to WGs applying for support.

<p>The facilitator will make suggestions for the WG membership, in coordination with the RDA TIGER Landscape service.</p>	<p><b>As planned:</b> This task relates to WGs already underway at the time of the TIGER support beginning, and is based on any need identified by WG co-chairs or members to engage with specific regions or communities.</p>
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The sole additional task to add to those in Table 3. above is:

- **Engaging with potential/target WGs prior to application:** Thus far in the project, as well as supporting WGs through their initial stages and/or onboarding WGs to the RDA TIGER project, facilitators have directly contacted numerous RDA Working Groups, including ones in the early stages of their life cycle and those who have their activities underway, with a view to encouraging them to apply for TIGER support. This task involves reaching out to and informing WG co-chairs and prospective co-chairs of the availability of RDA TIGER support and setting up provisional discussions on how their specific WG may benefit from support. This task is carried out largely by the team of facilitators, with support the entire project consortium, and has been particularly valuable during Plenary meetings, where personnel attend a wide range of WG, Interest Group (IG) and Birds of a Feather (BoF) meetings aiming to identify potential candidates.

Coordination with **S1: Onboarding** was outlined in D5.1, with the tasks above fulfilling the requirement to onboard the selected WGs to the TIGER project and ensure that the WGs conform to the project's participation requirements.

### 3.1.2. F2: WG Work Plan Creation

There is significant reliance on the Facilitation Service as the WG gets underway. Based on the experience of facilitators so far in the RDA TIGER project, **F2: WG Work Plan Creation** has been the most resource-intensive stage of Facilitation Service provision, with facilitators working alongside co-chairs and/or proposers of WGs to identify co-chairs, to shape the initial plans for the WG into a coherent and practical Case Statement, to generate interest in the WG among its target community/communities, and to build the WG membership.

Consequently, as detailed in D5.1, there are five main purposes of this stage:

- F2.1. Help internal organisation of the WG - selection of chairs, clarifying the mission of the WG;
- F2.2. Help draft case statement and submit it;
- F2.3. Create a work plan for the WG;
- F2.4. Help to submit a support application (if needed) for 3rd party services and other available grants; and,
- F2.5. Create a Service Agreement for Facilitation with the WG chairs.

While the original set of tasks and activities associated with this service stage are appropriate to fulfil the stated purposes, it is necessary to add further tasks and activities to

the set contained in Table 4. below; this is done to give a better representation of the breadth of support that facilitators have provided for TIGER WGs.

*Table 4. Evaluation of F2: WG Work Plan Creation tasks and activities*

Description of facilitator tasks and activities	Evaluation of facilitator tasks and activities
Discusses initial ideas for scope and objectives of the WG with co-chairs.	<b>As planned:</b> The facilitator sets up dedicated meetings with co-chairs to discuss the WG's objective and advises on how to make these achievable within the 18-month WG life cycle, to be detailed in the Case Statement.
Discusses work plan, timelines, and responsibilities.	<b>Minor revision:</b> Given the global nature of RDA membership, the facilitator needs to pay specific attention to the scheduling of regular WG meetings, taking into account time zone differences; every effort should be made to allow as many WG members to join these meetings. Additional WG co-chair meetings are also set up, where necessary.
Creating the RDA TIGER support package following consultations with WG Group co-chairs.	<b>As planned:</b> This task follows on from F1.2, with the facilitator understanding in detail the remit and needs of the WG, and putting in place a plan to periodically reevaluate the services required by the WG.
Providing clear advice on what support the group can receive from the RDA TIGER Facilitation Service.	<b>Minor revision:</b> It is necessary for the facilitator to ensure that co-chairs are aware of the extent of the support they can provide to the WG (as outlined in Appendix A in D5.1, 'Service agreement for Facilitation of RDA TIGER'). In particular, the facilitator reiterates that they are not responsible for the direction of the WG, setting WG meeting agendas, producing deliverables, etc.
The facilitator will take the lead in forming the RDA TIGER support package following consultations with WG co-chairs. WGs are required to present a work plan as part of their Case Statement and there will be	<b>Minor revision:</b> Depending on need, the facilitator can be more "hands-on" here in advising and setting out practical steps for WG to achieve its aims, for example, working with co-chairs to shape aims/objectives around wider community

overlap with the RDA TIGER facilitation workplan.	milestones, (e.g. RDA Plenaries) or producing Gantt chart for WG milestones and deliverables, to be included in the Case Statement.
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Before looking below at the specific tasks and activities to be added to **F2: WG Work Plan Creation** tasks and activities outlined in D5.1, it is worth noting the factors that account for these additions:

- The variation in co-chairs' familiarity with RDA procedures has a knock-on effect on the level of support needed from facilitators; generally, those WGs whose co-chairs are less familiar with the formal processes and procedures of establishing an RDA WG will need more support from a facilitator at this stage;
- The cross-cutting and transversal natures of some WGs has necessitated a large amount of community consultation (in the form of public webinars, dissemination, outreach, etc.), which facilitators have supported. This in turn has consequences for how long the Case Statement development process takes for some WGs;
- In order to satisfy RDA WG requirements for geographical diversity of co-chairs (i.e., having co-chairs from two or more continents), where necessary, facilitators need to work with existing co-chairs to identify potential candidates for co-chair positions or use their contacts from particular initiatives who may be able to recommend potential co-chairs.

The additional tasks to add to those in Table 4. above are:

- **Identifying additional co-chairs:** This is a necessary task to ensure that the WG meets the RDA criteria for establishing a WG<sup>5</sup> and to ensure that the WG has sufficient expertise and geographical diversity; facilitators work with co-chairs to identify potential co-chair candidates and/or utilise the Landscape & Engagement Service to come up with 'leads' for individuals or initiatives to contact in connection with this.
- **Guiding WG co-chairs through criteria for Case Statement writing and submission process:** To achieve the goal of F2.2 to produce and submit a Case Statement, the facilitator works with the co-chairs and other WG members to develop a plan for this, assigning responsibilities for the Case Statement sections and drawing up a timeline for drafts, reviews and submission of the document. It should be noted that ultimately the drafting of the Case Statement content remains a co-chair responsibility, with RDA TIGER providing relevant support to meet the outlined criteria and navigate the RDA process efficiently.
- **Responding to Community Review and/or TAB review feedback:** This is to be factored into F2.2 as addressing any feedback raised in the Community Review of the WG's Case Statement is a necessary step for the WG to be endorsed; for this the facilitator can advise on how to incorporate any feedback received and set up specific 'writing session' meetings for the co-chairs to complete this step.

<sup>5</sup> Creating or Joining an RDA Working Group: <https://www.rd-alliance.org/create-a-working-group/>



- **Promoting WG to potential members:** Promotion of the WG and recruitment of members to the WG is a necessary task at this stage of the Facilitation Service. For this, the facilitator coordinates with the Communications Service, approaching this task from two angles: the first, which the facilitator leads, involves targeted promotion to specific individuals or groups (within and outwith RDA) who are provided with introductory information about the WG and are invited to join; the second, which is led by the Communications Service, concerns the more general promotion and dissemination of the WG through larger mailing lists, social media channels, newsletters, events, and any other appropriate media.

Coordination with other TIGER services (i.e., A1. Initial landscape analysis, C1. Idea dissemination, O1. Output definition, S2. Support Needs and Planning & Approval) is key to achieving the purposes of F2 and carrying out the tasks and activities. The alignment and overlap with these other services is described sufficiently in section 3.3 of D5.1.

### 3.1.3. F3: Facilitation Service Support

Once the WG's Case Statement has been submitted for RDA Community Review and TAB comment, and any feedback from this has been satisfactorily responded to, the WG can officially begin. The facilitator's role at this **F3: Facilitation Service Support** stage is primarily to ensure that has sufficient support to achieve the aims set out in the Case Statement and that co-chairs are supported in any organisational tasks, in order that they can focus on the intellectual content of the WG's operation. Therefore, the purposes, F3.1 to F3.4, and the associated tasks and activities reflect the mainly organisational support required by WGs and their co-chairs.

The four main purposes of this stage are:

- F3.1 Physical meeting organisation;
- F3.2 Virtual meeting organisation, facilitation and documentation;
- F3.3. Facilitating support request preparation; and,
- F3.4. Internal management of the WG within the RDA TIGER.

*Table 5. Evaluation of F3: Facilitation Service Support tasks and activities*

Description of facilitator tasks and activities*	Evaluation of facilitator tasks and activities
Coordinating group activities to keep them well-defined and in-scope.	<b>As planned:</b> This is an ongoing task for the facilitator in coordination with the WG co-chairs, which can benefit from a well-defined work plan set out in the WG's Case Statement.
Providing support for running of meetings.	<b>Major revision:</b> Where necessary, the facilitator can step in to chair WG meetings

	and set meeting agendas; however, it should be reiterated that this is primarily a co-chairs' task. In addition to providing support for regular meetings, the facilitator can, if decided necessary by co-chairs, send meeting reminders and follow-up messages to WG members, summarising meeting decisions and actions.
Ensuring that all RDA processes and rules are followed by WG members.	<b>As planned:</b> This task benefits from the facilitator providing co-chairs and WG members with the requisite information during the F2 service stage, with the facilitator able to address any issues in relation to WG procedures as and when they occur.
Providing advice on upcoming plenaries.	<b>As planned:</b> The facilitator advises the WG of any deadlines associated with RDA Plenary meetings (call for sessions, posters, etc.) and, using a simple template put together as part of WP5 to replicate the RDA Plenary submission form, the co-chairs and WG members can use the regular WG meetings to write their Plenary session application as a group.
Highlighting where RDA TIGER services resources may be available and signposting the WG co-chairs to the relevant application processes, providing guidance as necessary.	<b>As planned:</b> There have been no applications at time of writing from existing WGs for third-party (financial) support from TIGER; however, some WG have indicated an intention to apply at a later date.

\*note that there is repetition in tasks and activities associated with F3 listed in D5.1, omitted from Table 5. here.

The sole additional task to add to those in Table 5. above is:

- **Enabling ongoing engagement and input from WG members:** Due to the global nature of RDA WG community and Groups' membership, not all meeting times will be suitable for each WG member's time zone and working pattern. The facilitator works with the co-chairs of each WG to ensure that members can contribute to WG activity "offline" and asynchronously; the continued engagement of the WG membership can be supported using a number of different approaches, for example, using virtual workspaces to gather members' input (e.g., Miro, Google Jamboard, etc.), holding smaller, ad hoc, 'drop-in' meetings to focus on specific tasks at times that accommodate different time zones to the regular WG meetings, and recording WG



meetings to allow those who cannot attend to catch up on discussions at their convenience.

As with service stage F2 above, coordination of F3 with other TIGER services (i.e., A2. WG Landscape monitoring, C2. Internal and external WG Communications, and S3. Direct Management Support) is described sufficiently in section 3.3 of D5.1 section.

### 3.1.4. F4: WG Finalisation

The majority of WGs supported by the TIGER Facilitation Service have not yet reached the stage where they are producing their final deliverables, with the exception of two Pilot Demonstrator WGs (National PIDs Strategies WG<sup>6</sup>, GORC International Model WG<sup>7</sup>) and one WG which applied for support via the Open Call (Artificial Intelligence and Data Visitation (AIDV) WG<sup>8</sup>). As such, the evaluations below are based on more limited experience than for stages F1, F2 and F3. The two main purposes for this service stage - F4.1 and F4.2 - are still appropriate for supporting WGs' operations, though F4.2 is dependent on the ongoing work to develop the RDA Maintenance Facility, which at the time of writing is still under development (see RDA TIGER D4.2 'Description of Output Support Services and Maintenance Platform', in draft at time of writing).

The two main purposes of this stage of the Facilitation Service concern:

- F4.1 Last mile support and facilitation; and,
- F4.2 Facilitating output maintenance activities.

As with Tables 3., 4., and 5. above, Table 6. evaluates the tasks and activities associated with this **F4: WG Finalisation** service stage.

*Table 6. Evaluation of F4: WG Finalisation tasks and activities*

Description of facilitator tasks and activities	Evaluation of facilitator tasks and activities
Providing assistance with finalisation and delivery of Outputs	<b>Minor revision:</b> WG co-chairs and WG Output/Recommendation authors have required more practical support and guidance through the Recommendations development process, particularly around metadata for any Outputs produced and discussion around the precise requirements for Output/Recommendation adopters.

<sup>6</sup> <https://www.rd-alliance.org/groups/national-pid-strategies-wg/>

<sup>7</sup> <https://www.rd-alliance.org/groups/gorc-international-model-wg/>

<sup>8</sup> <https://www.rd-alliance.org/groups/artificial-intelligence-and-data-visitation-aidv-wg/>

Connecting RDA TIGER services such as communications and landscape and Output services.	<b>Minor revision:</b> As outlined in the tasks and activities in previous service stages, this takes place throughout WG lifecycle rather than at stage F4 specifically, with facilitator team coordinating with different services and WGs availing of other services on an ongoing basis.
In addition to the points in F3, the facilitator will ensure co-chairs are aware of resources available to them (for example the Communications Service and the Outputs Service), as well as all processes for finalising and delivering the planned Outputs or Recommendations.	<b>As planned:</b> Contingent on from the minor revisions to the other tasks and activities in F4 noted above, this task has progressed as expected for WGs in the last stages of their life cycle.

To reiterate what has been noted above, there are few TIGER-supported WGs at the F4 stage at present. Further evaluation and analysis on the tasks and activities associated with this will be included in D5.3 ‘Final evaluation of the Facilitation Services based on feedback and QA/QC actions’, with the possibility of more tasks and activities to elaborate in connection with this service stage.

## 3.2. Service feedback and quality indicators

As well as reflecting on the relevance of the purposes, tasks and activities of each of the Facilitation Service stages, feedback from those receiving support is necessary to determine the impact and success of the support and how facilitators and the wider RDA TIGER project team can adapt the service to meet WG needs. This section will examine the feedback received so far from those WGs - from co-chairs and WG members - receiving RDA TIGER support, the various methods the project has for gathering feedback, and will then look briefly at the ‘hard’ quality indicators and the performance of the Facilitation Service against these (see section 3.1 ‘Hard vs. Soft measures’ of RDA TIGER D6.2 ‘Initial Quality Control Processes’<sup>9</sup>).

### 3.2.1. RDA TIGER Facilitation Service feedback

The RDA TIGER project three mechanisms to gather feedback on the Facilitation Service from those receiving support:

1. RDA TIGER service feedback form;
2. RDA TIGER service feedback email address; and,
3. Via direct discussions between WG co-chairs, members and facilitators.

<sup>9</sup> Asmi, A. (2023). RDA TIGER D6.2 Initial Quality Control Processes (Version 1). Zenodo. <https://doi.org/10.5281/zenodo.8096659>

**RDA TIGER service feedback form**<sup>10</sup>: As detailed in section 4.2 of D6.2 RDA TIGER Initial Quality Control Processes<sup>11</sup>, the TIGER Service feedback form was designed to gauge the impact of RDA TIGER support services and provide “soft measures” of service quality based on the experiences of those receiving support. The facilitator for each WG is tasked with inviting co-chairs and WG members to access this form and provide feedback at their discretion, informing them that responses are welcome on a rolling basis, can be submitted by anyone from the WG, and that individuals and WGs are free to submit multiple responses.

At the time of writing, there have been 12 responses to the form, nine of which are concerned with the Facilitation Service and support provided. In response to the question, “Overall, how satisfied are you with the RDA TIGER service you have received/are receiving?”, seven respondents indicated that they were “very satisfied” with the service, one “satisfied” and one declining to answer this as they were at the outset of the service. See Figure 2. below.

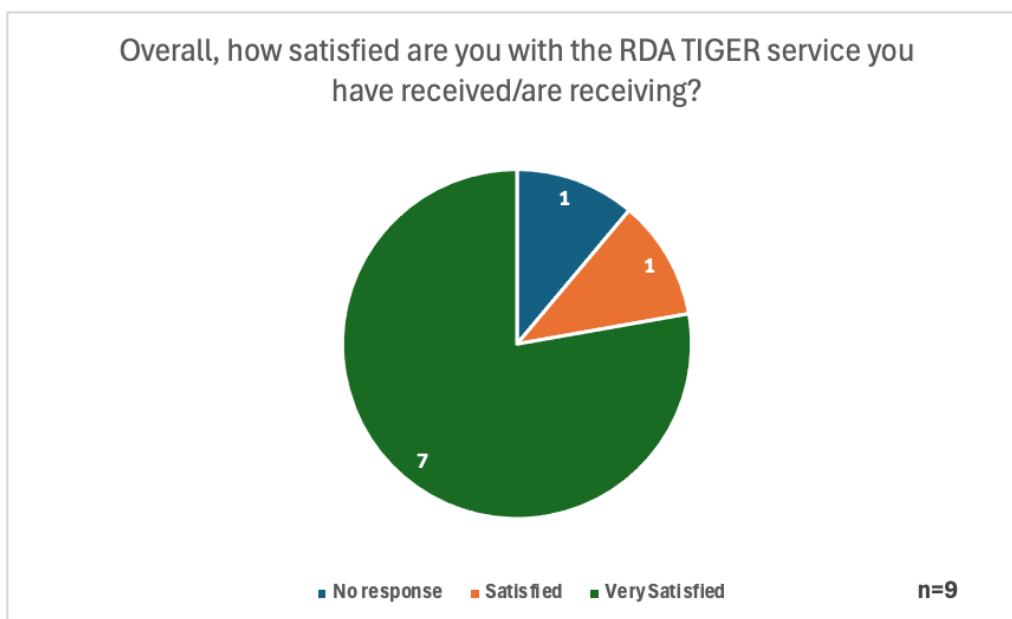


Figure 2. Feedback form responses to ‘Overall, how satisfied are you with the RDA TIGER service you have received/are receiving?’

Eight of the nine respondents also indicated that the service delivered reflected what was communicated to them in initial discussions (i.e., in response to the question “Does the service you received/are receiving accurately reflect the description?”), and the same eight of the nine respondents, replying to the question “Do you think this service is needed?”,

<sup>10</sup> Feedback form:

<https://docs.google.com/forms/d/e/1FAIpQLSfOVdsxSh7Gjvx3OltthDGREQHqTlztJxaSpcOxbEJHIHpDVQ/vi ewform>

<sup>11</sup> Asmi, A., & Saldner, S. (Ed.) (2023). RDA TIGER D6.2 Initial Quality Control Processes. Zenodo. <https://doi.org/10.5281/ZENODO.8096659>

selected “Yes, it is valuable for RDA WGs”. The remaining respondent availed of the free text option to indicate that, though the support for their WG was in its very early stages, the support available in principle should be helpful (see Figure 3. below).

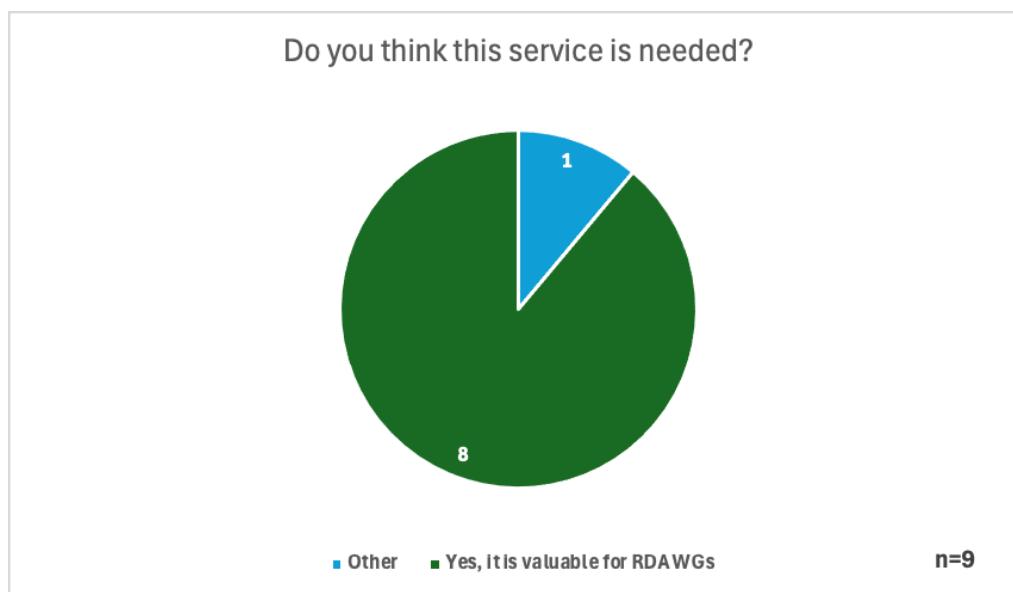


Figure 3. Feedback form responses to ‘Do you think this service is needed?’

There was relative uniformity in responses to the form’s close-ended questions; however, in the open-ended questions inviting free text responses, further feedback was provided which has helped to evaluate and develop the Facilitation Service.

In response to the question, “Please let us know about your experience with RDA TIGER service delivery providing concrete examples, suggestions for improvement and any other feedback you deem relevant”, respondents expressed satisfaction with various aspects of the Facilitation Service. Five responses indicated appreciation for the support provided by facilitators for meeting organisation, both regular Working Group and co-chairs meetings, and additional workshops and conference sessions. This support for meeting organisation (and related tasks concerning agenda-setting and note-taking) was also linked by one respondent to being key to keeping up the momentum to WG activity. There were also four references to services provided by facilitators in connection with the Landscape & Engagement Service with respect to engagement with stakeholder communities and building WG membership, and how these have been of benefit to the WGs’ operations.

Finally, one response which highlighted the positive impact the facilitator made to help resolve a conflict which arose from a WG-internal review of its Case Statement prior to its submission for Community Review; the response indicated that the facilitator’s advice was key to resolving the issue in a way that was satisfactory to all parties.

The question, “Do you have any other general comments or suggestions for improvement of the RDA TIGER services?”, gives respondents space to provide suggestions on how the existing service could be adapted or additional tasks or activities that could be provided. The

suggestions that fall within the remit of RDA TIGER and which will be considered as the project progresses and its services develop are:

- Examples of concrete outcomes of supported WGs;
- Extending RDA TIGER support for more WGs, and possibly to RDA Interest Groups and Communities of Practice;
- Further coordination at RDA Global level between facilitation support available from RDA TIGER, TIGRUS from RDA US, and any other facilitation support available (for example, as part of the RDA and Oracle for Research partnership; see section 4.3 below for details);
- Availability of travel funding for supported WGs to enable direct contact with target communities, supporting adoption of WG outputs.

See RDA TIGER D6.4 'Report on feedback of the Services and corrective actions' (currently in draft) for how this feedback is being used on an ongoing basis to improve the value of TIGER services.

**RDA TIGER service feedback email address:** There have been no responses to this email address at the time of writing. Despite this, the email address will remain open for the remainder of the project, with facilitators and other contact points for RDA TIGER offering it as medium for WGs to provide their feedback. Originally, having a feedback-specific email address was set up as a lower barrier way for WGs to provide feedback; however, it is possible that the existing form and/or direct discussions with facilitators are sufficient for WGs to provide their feedback. Also, as the feedback form can be filled out anonymously, respondents may feel more comfortable using the form than their own email addresses to provide feedback.

**Direct discussions:** As well as the form and dedicated email address, WG co-chairs and members are free to discuss with facilitators their views of the services and any changes or improvements that could be made. These discussions have focused not only on specific RDA TIGER services and their associated tasks and activities, but also on more general RDA processes and any changes that could be made to these. The feedback and suggestions from these discussions are divided below along these lines.

- The **RDA TIGER-related service provision** discussions focused on:
  - A request by WG co-chairs from two different WGs on the possibility of RDA TIGER producing **co-chair-specific guidance or good practice advice** based on facilitators' experiences of providing support to other WGs. This suggestion came from one WG whose co-chairs have extensive RDA experience, and from another whose co-chairs are new to RDA, indicating that co-chairs are keen to learn about the approaches to WG management from others. As part of RDA TIGER WP5 activity, the Senior Facilitator and other facilitators will aim to produce a co-chair good practice guide or similar before the end of 2024. This will draw on the experiences of RDA TIGER facilitators and supported WGs, but will be relevant to all RDA WGs and beyond the end of the TIGER project;

- As part of the onboarding for new WGs to RDA TIGER, the WP5 is currently developing a **Welcome Pack** which contains information and other materials that can assist in WG management. For example, at the outset of RDA TIGER-supported WGs, upon request facilitators have to this point set up documents, folders or other workspaces for WG co-chairs and members. As part of this Welcome Pack, new WGs will be provided with information on the TIGER project and the support available, some background information on RDA, communications materials (e.g., presentation templates, branding logos, poster templates, etc.); in addition, WGs will be offered the chance to use a template folder structure for the WG's activity, which includes an agenda template for WG and co-chairs' meetings. This Welcome Pack will be updated throughout the project; a copy of the current version is below in Appendix A.
- Discussions related to RDA activities more generally included:
  - The issue of **accessibility** with respect to WG activities and RDA activities more generally was raised in discussions during the recent RDA Plenary 22, which took place virtually in May 2024. This prompted several follow-on actions:
    - i. Guidance on improving accessibility for WG meetings, presentations and other materials to be developed by RDA TIGER's WP5 and included in the RDA TIGER Welcome Pack discussed above, with existing WGs and co-chairs to be updated on these;
    - ii. The issue was raised with the RDA Secretariat, who will investigate updating the RDA Group co-chairs' roles and responsibilities to include a responsibility regarding supporting those with accessibility issues to participate in the Groups' activity.<sup>12</sup>
    - iii. RDA TIGER plans to submit a Birds of a Feather session for RDA Plenary 23<sup>13</sup>, taking place in November 2024, to gather community input on the topic and learn from the work of other initiatives.
  - A discussion concerning the existing guidance on RDA endorsed Recommendation development process<sup>14</sup> was initiated by one supported WG as it began the process of finalising its outputs. Specifically, the requirements for WG's to produce an Adoption Report as part of the Recommendation Development process was questioned as the term 'adoption' may inhibit some who may wish to indicate their intention to make use of the WG's Outputs or Recommendations. Based on this, RDA TIGER will initiate discussions with other supported WGs to gauge whether these guidelines should be updated, perhaps suggesting additional or more representative term(s) than 'adoption' for this aspect of the endorsement process.

<sup>12</sup> Group Chairs Roles and Responsibilities: <https://www.rd-alliance.org/group-chair-responsibilities/>

<sup>13</sup> RDA 23rd Plenary Meeting – San José, Costa Rica: <https://www.rd-alliance.org/event/rda-23rd-plenary-meeting-san-jose-costa-rica/>

<sup>14</sup> Recommendations & Supporting Outputs – related processes and submission guidelines: <https://www.rd-alliance.org/recommendations-amp-supporting-outputs-related-processes-and-submission-guidelines/>

WP2 (i.e., the WP responsible for the RDA TIGER Communications Service) has organised service debrief meetings after its service offering was concluded for the WGs it supported, where feedback could be discussed with the RDA TIGER project coordinator and WP lead. This approach will be considered for Facilitation as well towards the end of the project (as Groups are currently active and are still receiving Facilitation Services).

### 3.2.2. Quality indicators

In section 2.2.1 of D5.1, several hard quality indicators were set out, to be gathered by WP5 and the facilitators, and reported to WP6. See Table 7. below for the list of quality indicators and the corresponding totals at the time of writing.

*Table 7. Quality indicators and totals*

Quality Indicator	Total (with explanation)
Number of WGs supported by WP5	<b>14</b> (10 via Open Call application; 4 TIGER Pilot WGs)
Number of virtual meetings organised	<b>30</b> (20 at P22, 10 outside RDA Plenary)
Number of physical meetings organised	<b>5</b> (at RDA Plenary 21, in Salzburg, Austria)
Number of WG outputs finalised	<b>0</b> (no supported WGs have yet completed this stage of their life cycle)
Number of WG case statements supported	<b>11</b> (5 endorsed, 3 in approval process, 3 in draft prior to submission)

One quality indicator from those originally set out in D5.1 is omitted from the table above, i.e., ‘Number of people participating in the WG sessions’. This has not been tracked as the WP5 and WP6 leads decided that without the figures from other RDA WGs on the numbers of people attending WG meetings to compare, there was little value in tracking this for RDA TIGER WGs.

At this halfway stage in the RDA TIGER project, WP5 will initiate a discussion with WP6 to determine whether additional quality indicators are necessary.

## 4. The Role of the Facilitator: Lessons Learned so far

At this halfway point in the RDA TIGER project, facilitators have spent in some cases up to a year in providing support for TIGER Working Groups. Collectively, in this time facilitators have learned lessons about their own roles, how the Facilitation Service can be improved and, if necessary, implemented in initiatives outwith the RDA TIGER project. The lessons





learned thus far are grouped below into three categories, related to Service delivery, Working Group operations, and Coordination with other initiatives.

#### 4.1. Service delivery

- **Importance of onboarding:** In order to improve the experience of WGs being onboarded to the RDA TIGER project, WGs will be provided with a Welcome Pack (see Appendix 1), the ‘Service agreement for Facilitation of RDA TIGER supported working group’ document contained in D5.1 Appendix 1, and offered the use of the template Google Drive folder structure set up by the TIGER project. These will be provided in addition to the initial meetings with the facilitator to discuss what type of facilitation and other support services are needed.
- **Overlap with other services:** As set out in D5.1, the facilitator was prefigured as the main contact point for TIGER-supported WGs with other services, but in practice the facilitator carries out many of the tasks that would in theory be carried out by those leading other services. This is not a negative; instead, the discussions between facilitators and those leading other services, in particular the Landscape & Engagement and Communications Services, have been productive and have led to a clearer definition of where these overlaps occur in practice and who should take responsibility for their execution.
- **Service tracking:** Initially, the service tracking for RDA TIGER was intended to be carried out using the Asana work management platform. While project management was indeed done through this tool, Asana was mostly used to track the Communications service by WP2. In this first Pilot stage of the project, service tracking for facilitation was done via WP5 meetings between the facilitators. In the second half of the project and as the facilitators carry out a comprehensive update of the services, the focus will be on professionalising the services, and tracking closely the effort required for each service stage and task; therefore Asana in combination with detailed timesheets will be used going forward.

#### 4.2. Working Group operations

- **Experience of WG co-chairs:** The experience of co-chairs and their familiarity with WG and/or RDA processes can have an impact on how much the facilitator is relied on to organise WG operations and guide co-chairs through WG life cycle stages (especially the initial stages concerned with WG co-chair and member recruitment and Case Statement development). Facilitators need to communicate clearly to the co-chairs the various WG requirements, explain the intention of these where necessary, and develop a clear RDA TIGER service work plan to guide those co-chairs new to RDA processes through these.
- **Engagement and input from WG members:** Depending on the overall aims of the WG and on the specific tasks it may be focusing on at any one time,



engagement from WG members (apart from co-chairs) can vary. In order to share the workload of the WG and to ensure there is as much input as possible from WG members, the facilitator can use a number of approaches (noted in section 3.1.3 above), namely, using virtual workspaces to gather members' input (e.g., Miro, Google Jamboard, etc.), holding smaller, ad hoc, 'drop-in' meetings to focus on specific tasks at times that accommodate different time zones to the regular WG meetings, and recording WG meetings to allow those who cannot attend to catch up on discussions at their convenience. Additionally, upon agreement with co-chairs, facilitators will send brief summaries of actions and main decisions made during meetings so those who cannot attend any regular meetings can continue to engage.

- **Accessibility:** A significant aspect of enabling WG members to contribute to WG activities is in connection with accessibility. As outlined above in section 3.2.1, RDA TIGER facilitators and other project partners will be taking steps to improve the accessibility of WG meetings, presentations and materials, produce guidance on this, and raise the issue with the relevant RDA governance bodies (i.e., RDA TAB, RDA Secretariat) when necessary. This will be an ongoing task for facilitators throughout the life cycle of each WG, with facilitators working with WG co-chairs and members to identify any potential impediments to participation and any adjustments where necessary.

#### 4.3. Coordination with other activities

- **RDA Foundation:** The RDA TIGER project, particularly the team of facilitators, have benefited from coordination with two related initiatives taking place within the wider RDA organisation. Firstly, a partnership between the RDA and Oracle for Research (OfR) saw RDA's Community Development Manager for the RDA Foundation, Connie Clare, provide facilitation and other support services to two OfR-supported RDA WGs, guiding both WGs through their initial start-up phases (at the time of writing, one WG, RDA-OfR Mapping the landscape of digital research tools WG<sup>15</sup>, has completed its life cycle, while the other, RDA-OfR Creating a Multi-omics Metadata Schema Standard Reporting Matrix WG, is currently in the WG Period phase; with this partnership recently having ended, this latter WG has successfully applied for TIGER support in the latest Open Call). The feedback provided by these two WGs on the support they have received has been shared with the relevant RDA TIGER work package (i.e., WP5). As there is a lot of similarity in the support provided to these OfR WGS, this feedback has been valuable in learning how specific tasks and support were received by WGs outside TIGER.

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<sup>15</sup> <https://www.rd-alliance.org/groups/rda-ofr-creating-multi-omics-metadata-schema-standard-reporting-matrix-wg/>

- **RDA TIGRUS program:** The Targeted International Working Groups - US Program (TIGRUS) program<sup>16</sup> is an initiative which looks to leverage RDA Working Group activity to address data management and sharing issues specific to the United States. This program, currently in its pilot phase, has drawn from the overall structure of TIGER services to develop its own service offering. Representatives from the TIGRUS program contribute to the regular RDA TIGER WP5 meetings, where feedback and suggestions on WG support are discussed; this forum offers both RDA TIGER and TIGRUS to avail of their respective networks of contacts, which has so far proved valuable when identifying prospective co-chairs and members for supported WGs. This initiative is a good example of the RDA TIGER project creating reusable and sustainable services that can be adopted by other RDA regions to support their respective communities.

## 5. Intended outcomes for final service update

At the halfway point in the RDA TIGER Facilitation Service, it is a valuable exercise to outline some of the possible outcomes that have materialised in the first half of the project, some of which were not considered at the outset, but all of which demonstrate the potential impact the project will have behind its endpoint in December 2025. These will serve as guides for the continued development of the service; the final report for the facilitation work package (D5.3 'Final evaluation of the Facilitation Services based on feedback and QA/QC actions') will contain an evaluation of how successful the project was in delivering these outcomes. Some of these have already been detailed in earlier parts of the deliverable, but are summarised and collated below for reference.

- **WG life cycle completion:** This is a key focus for the RDA TIGER project in general, but is worth noting here the volume of WGs supported by RDA TIGER at present. Supporting these WGs to complete their life cycles and produce their final deliverables and Recommendations before the end of the RDA TIGER project will be of huge benefit to the RDA community and to the respective WGs' target communities. This in turn will ideally stimulate greater community willingness to actively participate in WGs, with the RDA TIGER project helping WGs to demonstrate the potential impacts they can have in their domains.
- **Additional guidance materials:** As detailed in the sections above, there are a number of additional, supplementary materials to be produced by the RDA TIGER project in the coming months that will be of use to anyone who is tasked with supporting groups, task forces, project work packages, or any similar initiatives. These include: Welcome Pack; Facilitation Best Practice Handbook; good practice advice document for co-chairs; and guidelines for improving accessibility for WGs.
- **Service stage update:** In time for D5.3 'Final evaluation of the Facilitation Services based on feedback and QA/QC actions', the RDA TIGER WP5 team will complete a

<sup>16</sup> RDA-US launches TIGRUS facilitation program: <https://rdaus.org/rda-us-launches-tigrus-facilitation-program/>

comprehensive update of the service stages and the associated tasks and activities outlined above. This will provide a basis for any other initiatives wishing to implement a facilitation service (or similar) within or outwith RDA and will represent a major milestone in terms of how RDA as an organisation can provide support to WGs (and potentially to IGs and CoPs also).

- **Professionalisation of services:** Given the uptake and interest in the RDA TIGER services, and the overall value of initiatives such as RDA TIGER to the community, the services in their final stages at the end of the project, having undergone a pilot stage and various refinements throughout the project lifetime, will be marketable products that can be offered in the portfolio of RDA AISBL (and beyond) as ‘Facilitation as a service’. This can be achieved either through other streams of funding like Horizon Europe, or as services against payment. The latter has been shown to be of interest to the RDA’s industry networks through the Oracle for Research WGs mentioned above. Additionally, further services will encompass other parts of the RDA community like CoPs and IGs.

## 6. Conclusion

This deliverable demonstrates how the theoretical outline of the Facilitation Service - the service stages, purposes, tasks and activities - described in D5.1 ‘Definition and handbook of the Facilitation Service’ has been implemented in practice. Based on the positive feedback from WGs and the experience of facilitators, the service to this point has been successful in its implementation, adjusting steps where necessary and identifying new tasks and activities as required by WGs, adding these to the overall service offering.

As well as the ongoing support for RDA TIGER WGs, the next steps for the Facilitation Service will focus on the continuing refinement of the service stages, especially those concerned with supporting WGs to produce their final outputs and Recommendations. Looking ahead to D5.3 ‘Final evaluation of the Facilitation Services based on feedback and QA/QC actions’, further success for the service will consist of supported WGs finalising their work, the production of the additional materials and outputs described above, and a comprehensive update of services, with a view to allowing these to be extended beyond RDA TIGER to future WGs and similar initiatives in other domains.

## 7. Appendix A - RDA TIGER Welcome Pack working draft

Below is the working draft of the RDA TIGER Welcome Pack for newly supported Working Groups. At the time of writing, the outline for this is complete, with additional resources and links to be added (indicated by an asterisk).



Working Draft

### Welcome pack An onboarding guide for RDA Working Groups

The welcome pack for newly supported RDA TIGER WGs aims to offer a comprehensive and user-friendly guide. It includes essential RDA information, important templates, and key documents needed for all RDA-related activities throughout the WG's lifespan.

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Working Draft

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### Feedback

The RDA TIGER project pioneered professional support services to empower and assist RDA WGs in finalising their recommendations and outputs for the global community. We are committed to continuously refining our services to better meet the changing needs of these groups, and we value your input through ongoing evaluation.

Share your experience and feedback via filling in the feedback [form](#).

### Contact us

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