

RDA Organisational Membership Processes

Version: 8 February 2022

DOI: [10.15497/2921feb4-b68b-452d-ac5a-6b90b22e4c91](https://doi.org/10.15497/2921feb4-b68b-452d-ac5a-6b90b22e4c91)

Authors: Research Data Alliance

Published: 8 February 2022

Abstract: This document describes the Organisational Membership of the RDA. It also covers Organisational Affiliates.

Language: English

License: Attribution 4.0 International (CC BY 4.0)

Citation and Download: Research Data Alliance (2022): Organisational Membership Processes, Version 8 Feb 2022. DOI: [10.15497/2921feb4-b68b-452d-ac5a-6b90b22e4c91](https://doi.org/10.15497/2921feb4-b68b-452d-ac5a-6b90b22e4c91).

RDA Organisational Membership Processes

| | |
|------------|---|
| V0.01 | First version - I have tried to bring together material about Organisational Membership from the Governance doc and elections derived from the TAB election process to provide a concrete proposal to focus the discussion. All points are open for discussion. |
| V-07-01-14 | With comments from JS/LH/ALN/FK/JB, for discussion at the meeting on 8 Jan 2014. |
| V-10-01-14 | Integrating comments after the IOAB meeting of 8 Jan 2014 |
| V-28-01-14 | Cleaned up for discussion at meeting on 5 Feb |
| V-05-03-14 | After meeting on the 5 Feb |
| V-07-03-14 | Quality check |
| V-28-03-14 | Final approved version with some small edits from Council |
| V-04-03-14 | Updated criteria for Affiliate members as agreed at the Council |
| V-03-08-18 | Review by secretariat to align with RDA Governance document and make it up-to-date |
| V-05-12-18 | Updated version after SG, OAB Co-Chairs-Secretariat call |
| V-09-09-20 | Updated after Governance document revision |
| V-08-02-22 | Updated with new Organisation benefits and fees from 2022 |

Abstract: This document describes Organisational membership of the RDA. It also covers Organisational Affiliates.

Contents

| | |
|--|----|
| RDA Organisational Members | 4 |
| RDA Organisational Members (OMs) | 5 |
| Organisational Affiliates | 6 |
| The Organisational Assembly | 6 |
| Organisational Assembly Membership | 6 |
| The Organisational Advisory Board | 8 |
| RDA Organisational Advisory Board | 8 |
| OAB Membership | 9 |
| Additional OAB Participants | 9 |
| OAB Membership Constraints | 10 |
| OAB Elections | 10 |
| Aim | 10 |
| Process | 10 |
| Election of the OAB Co-Chairs | 11 |
| OAB Balancing | 11 |
| Process for Organisations to Become Members of the RDA | 11 |
| Organisational Membership Fees | 11 |
| Invoices Prorated and Currency | 12 |
| Membership Fees in different currencies | 12 |

RDA Organisational Members

Organisational membership is critical to the success of the Research Data Alliance (RDA), because organisations are instrumental in implementing the global data exchange systems that RDA enables. Organisational Members of the RDA (OMs) exercise considerable influence in the development of standards for data exchange and are seen as pioneers in realising the full value from research data. Unlocking value from research data is a key competitive advantage in the 21st century, and RDA and its members are at the heart of building this new economic model from exchanging research and scholarship data.

OMs help to guide and support the RDA and provide an important route for adoption of RDA Outputs to promote data sharing. Benefits of Organisational membership include:

- Attending Organisational Assembly meetings and electing the Organisational Advisory Board and its co-Chairs
- Exclusive visibility and speaking opportunities at RDA bi-annual plenary meetings (both Birds of a Feather (BoF) sessions and panel discussions)
- Receiving regular updates on the work of the RDA, including special presentations on outputs and adoption of RDA outputs during monthly meetings
- Providing advice to the RDA Council through the Organisational Advisory Board
- Being recognised on the RDA website and at RDA Meetings as a supporter of global data sharing and interoperability
- Influencing the RDA work and directions on data sharing and interoperability in their sectors, markets and geographies
- Communicating open job positions in your organisation to the entire RDA community (Exclusive to Organisational Members - [Use this form](#))
- Early-bird reduced RDA Plenary registration fee for all Organisational Members extended through to the start of the Plenary (Exclusive to Organisational Members)
- Having the opportunity to act as early adopters of RDA Recommendations and other outputs
- Exchanging news, strategies and policies across organisations and geographical jurisdictions.

OMs can be R&D agencies, for-profit companies and non-profit foundations, community organisations, institutions, or any other organisation which has an interest in furthering the goals of the RDA. RDA Organisational members' responsibilities are described in the table below.

It is desirable that RDA OMs:

- work to accelerate international data-driven innovation and discovery by facilitating research data sharing and exchange, use and re-use, standards harmonisation, and discoverability; and
- nominate an RDA Individual Member as representative to attend and vote in the Organisational Assembly (OA) meetings.

RDA Organisational Members (OMs)

| | |
|-------------------------|---|
| Function | To provide an organisational perspective on the work of the RDA, to provide perspective on current and future technical requirements and to enhance adoption of the outputs of RDA Working and Interest Groups. Organisational Members and Affiliates designate Individual Members as representatives to the Organisational Assembly. |
| Membership | Membership is open to any organisation that subscribes to the RDA Guiding Principles ¹ , adheres to the Code of Conduct ² and submits the required fees. |
| Joining | OMs apply to join through the RDA website ³ . |
| Leaving | Organisational Membership is annual, and is renewed upon payment of an annual fee. The Council approves and removes Organisational Affiliates and delegates the decision on OM expiration (e.g. non-payment of annual fee) and revocation (e.g. non-compliance with the RDA guiding principles) to the OAB. In the event of an appeal, the Council makes the final decision. |
| Duration | There is no term limit on membership. |
| Rights | <ul style="list-style-type: none"> • Attending Organisational Assembly meetings and electing the Organisational Advisory Board and its co-Chairs • Exclusive visibility and speaking opportunities at RDA bi-annual plenary meetings (both Birds of a Feather (BoF) sessions and panel discussions) • Receiving regular updates on the work of the RDA, including special presentations on outputs and adoption of RDA outputs during monthly meetings • Providing advice to the RDA Council through the Organisational Advisory Board • Being recognised on the RDA website and at RDA Meetings as a supporter of global data sharing and interoperability • Influencing the RDA work and directions on data sharing and interoperability in their sectors, markets and geographies • Communicating open job positions in your organisation to the entire RDA community (Exclusive to Organisational Members - Use this form) • Early-bird reduced RDA Plenary registration fee for all Organisational Members extended through to the start of the Plenary (Exclusive to Organisational Members) • Having the opportunity to act as early adopters of RDA Recommendations and other outputs • Exchanging news, strategies and policies across organisations and geographical jurisdictions. |
| Responsibilities | <ul style="list-style-type: none"> • Work towards the aims of the RDA and subscribe to the RDA Guiding Principles. • Contribute financial support to the RDA at a level defined in the published fee structure for the term of their membership. • Participate in the OA. |

¹ <https://www.rd-alliance.org/about-rda>

² <https://doi.org/10.15497/rda00055>

³ <https://www.rd-alliance.org/get-involved/organisational-membership/rda-organisational-membership-application>

- Generally, adhere to the Norms for Contributing to and Using RDA Products⁴ when contributing to the development, review, and implementation of formal RDA Recommendations.

Organisational Affiliates

The RDA wishes to work with like-minded organisations in order to coordinate efforts in mutual areas of interest and to avoid unnecessary duplication and conflict. Each Organisational Affiliate will be considered on its own merit, and the particular circumstances will determine the approach to collaboration in each case.

There are no financial considerations on either side, but there should be demonstrable mutual benefit from the affiliation. For example, Affiliates are expected to participate actively in RDA activities and to present a summary of their relevant organisational activities to the RDA. They will be invited to attend the OM session(s), to vote in OAB elections, and can run for and be elected to the OAB. Affiliates will in turn reciprocate the affiliation status to the RDA where appropriate.

An exchange of Memorandum of Understanding (MOU) letters will formalise the relationship, which can be terminated on request by either party.

The criteria for an organisation to become an Affiliate are the following:

- have a related mission to the RDA and directly or indirectly contribute to data sharing and interoperability;
- work globally;
- define and implement explicit points of collaboration with the RDA in an MoU such as joint WG/IGs, adoption agreements, shared services, etc. which would deliver mutual benefits;
- provide an equivalent affiliate role for RDA in their organisation (preferably with voting rights).

The Organisational Assembly

The OA is the body of representatives from the OMs and Organisational Affiliates. The OA meets during RDA Plenaries. The OA meeting enables OA members to help set priorities, hear about progress, and draw up recommendations from the OMs. It provides a forum for discussion on how RDA Outputs are to be implemented and deployed.

The OA elects the OAB, with its membership drawn from representatives of the OMs and Affiliates.

Organisational Assembly Membership

Each OM nominates an individual to become their representative on the OA. OA members represent their organisation rather than their personal view.

⁴ <https://rd-alliance.org/groups/rda-outputs-and-ip-task-force/wiki/norms-contributing-and-using-rda-products.html>

- The OA meets periodically, including at each RDA Plenary, to discuss its members' roles and plans in taking forward RDA Outputs, and to develop a collective view about how the work of the RDA is progressing.
- The OA will decide on whether to invite other individuals to participate in their activities, for example individuals from organisations which are considering joining as OMs, or group members to present outputs and recommendations.
- The OA elects the OAB by the process described in the next subsections.

| | |
|-------------------------|--|
| Function | <ul style="list-style-type: none"> • Inform and steer the RDA on organisational and affiliate members issues. • Give a voice in the business and strategy of the RDA. The Organisational Assembly will elect members to serve on the OAB. • Align Organisational and Affiliate Member activities with the RDA vision, mission and principles. |
| Membership | <p>The Organisational Assembly will consist of one representative from each Organisational and Affiliate Member who must also be a member of the RDA.</p> <p>Organisational and Affiliate Members may also choose to designate alternative representatives. Only one representative from each Organisation and Affiliate Member can vote at any particular OA meeting. RDA Organisations and Affiliate Members may replace their representatives or alternative representatives (i.e., a designated person who can replace the representative) at their discretion.</p> |
| Duration | There is no term limit on membership. |
| Rights | <ul style="list-style-type: none"> • Directly inputs to the OAB and the Council. • Helps to shape the activities of the RDA via the Formal Agreements (Organisational Membership / Subscription Agreement) or MoUs (Organisational Affiliates) and contributions to Secretariat. |
| Responsibilities | <ul style="list-style-type: none"> • Organise and host Organisational Assembly meetings to provide an opportunity for Organisational and Affiliate Members to gather and share information. • Vote on proposed policies for consideration by the RDA Council and for members of the Organisational Advisory Board (OAB), with one vote per Organisational and Affiliate Member. • Coordinate related activities, interests and initiatives. • Represent the interests of the Organisational and Affiliate Members to the RDA. • Maintain the Organisational Membership document (this document) to ensure it remains fit-for-purpose. • Elect the OAB. |

The Organisational Advisory Board

The OAB is constituted from members of the OA selected by the election process described below. The OAB advises the Council on adoption of RDA Outputs, and on RDA organisational and process issues, overarching strategy, etc. At least one Co-Chair of the OAB serves as a non-voting consensus-forming member of the Council. Upon termination of their term on Council, a Co-Chair may continue to engage for a limited time, with the approval of Council members, to ensure a smooth, efficient and timely handover to the new Co-Chair.

RDA Organisational Advisory Board

| | |
|-------------------------|---|
| Function | The OAB is constituted from representatives of RDA OMs and Affiliates and provides advice to the Council on RDA organisational and process issues, overarching strategy, etc. |
| Membership | <p>OMs nominate an Individual Member of the RDA as representative of the organisation to be a member of the OA, which in turn elects the OAB. The election process is described below. Member organisations may also designate alternate representatives. Only one representative from each organisation can vote at any particular OA meeting. Member organisations may replace their organisational representatives or alternate representatives at their discretion.</p> <p>The OAB chooses one Co-Chair annually for a term of two years. The two Co-Chairs coordinate the work of the OAB.</p> <p>OAB Co-Chairs are elected by the OAB members, through a simple majority voting with one vote for each OAB member. OAB Co-Chairs are elected for 2 years at a time with a maximum of one consecutive re-election (i.e. maximum 4 years). The Co-Chair elections are staggered so that one Co-Chair is elected each year. After their time as Co-Chair, regardless of whether they were elected a Co-Chair for one or two consecutive two-year periods, an OAB member is ineligible to be re-elected as an OAB Co-Chair until 2 years have passed.</p> |
| Duration | Representatives of Organisational Members may serve on the OAB as long as their organisations are approved Organisational Members of the RDA. The Council approves and removes Organisational Affiliates and delegates the decision on Organisational Member expiration (e.g. non-payment of annual fee) and revocation (e.g. non-compliance with the RDA guiding principles) to the OAB. In the event of an appeal, the Council makes the final decision. |
| Rights | <ul style="list-style-type: none"> • The OAB is supported by the Secretariat in executing its activities. • At least one of the Co-Chairs of the OAB participates as a non-voting consensus-forming member of the RDA Council. |
| Responsibilities | <ul style="list-style-type: none"> • The OAB provides input to the Council on any aspect of RDA's work, with a particular remit to consider the organisational processes, structure, strategic direction, and sustainability of the RDA and the adoptability of RDA outputs. • OAB members are expected to subscribe to the RDA Guiding Principles, adhere to the Code of Conduct and attend the OAB meetings and the bi-annual Plenaries. • OAB members are expected to act as conduits between their organisations and the RDA. |

OAB scope is both organisational and technical;



OAB discussion will be via two channels – one open to all OA members, one open to OAB members only. Unless there is a specific reason not to do so, all communications should be made via the open list.

OAB meetings The OAB will decide on the frequency and mechanisms for its meetings. The quorum for a meeting should be half of the OAB voting members. OAB meetings will be supported by a member of the Secretariat. Notes will be made available through the open OA list.

OAB reports to Council at least twice a year.

OAB decision-making – The OAB will make decisions by consensus where possible, or by vote if necessary. It will define its own procedures for operating and reaching consensus under the guidance of the Co-Chairs whose role includes encouraging and detecting that consensus. The decision and outputs of the OAB are openly discussed using the RDA web platform.

OAB Membership

The OAB consists of up to 12 elected members including 2 Co-Chairs, and some additional participants as described below.

Term of elected OAB members:

- OAB members are elected for two years. Until there is an OAB with 12 members, there are no restrictions on re-election. Once there is a full OAB, there will be a limit of at most one consecutive re-election, and a person can only be on OAB for a maximum of 4 out of 6 consecutive years.
- Each year, the terms of half of the elected OAB members expire.

Additional OAB Participants

The role of the additional, non-voting consensus-forming OAB participants is to ensure coordination of the OAB with other RDA bodies. These participants include:

- a representative from the Secretariat, specifically the Secretary General or their delegate;
- a representative from the Technical Advisory Board (TAB), specifically one or both TAB Co-Chairs or their delegate;
- a representative from the Regional Advisory Board (RAB), specifically one or both RAB Co-Chairs or their delegate;
- a secretary to OAB, from the Secretariat.

The OAB will decide on whether to invite other individuals to participate in their activities, for example individuals brought in for specific tasks if and when needed and agreed by the OAB. The OAB can revoke these invitations at any time.

Terms of non-voting consensus-forming OAB participants:

- Non-voting consensus-forming OAB participants are appointed for the duration of their office. There is no term limit on their appointment.

OAB Membership Constraints

Overlaps Between OAB and Other RDA Bodies

- OAB members should be members of the RDA.
- OAB members should be associated with an organisation in the OA.
- An individual can only serve on one of the RDA governing and supporting bodies, as listed in the [RDA Governance Document](#), at a time. Note that neither the Regional Assembly (RA) nor the OA are such bodies.

OAB Resignation

- OAB members can resign at any time during their term. If a place on the OAB is vacated during a person's term, it can be filled by co-option from the OA at the OAB's discretion or left open and one extra member elected at the next OAB election.
- OAB members will stand down from their position on OAB if they cease to fulfil the criteria of membership described above.

OAB Elections

Aim

OA members self-nominate to become an elected member of the OAB. Considerations for selection may include operations experience, subject matter expertise, and willingness to serve. Membership should reflect the diversity of RDA members, in terms of region, organisation type, and organisation focus.

Process

The election process is run on a fixed 12-month cycle, with a fixed schedule for each stage. However, the timing of new Board Member elections may vary to provide flexibility when the OAB is not at full membership. The cycle may be synchronised with or around a Plenary so as to make best use of face-to-face discussions.

Any member of the OA can put themselves forward as a candidate for election to the OAB. OA members can discuss qualifications with the candidates.

When needed (i.e. there are more candidates than open seats), voting will take place in time for the OA meeting at a Plenary, so that newly elected members take office at the start of the Plenary. Each Organisational Member and each Organisational Affiliate has one vote. In the unlikely event of a draw the election will be held again, and, if that does not resolve the tie, a decision will be made by lottery.

Election of the OAB Co-Chairs

At any given time, there are two Co-Chairs of the OAB.

The OAB Co-Chairs are elected from the OAB members by the OAB members.

The OAB Co-Chairs are elected for 2 years at a time with a maximum of one consecutive re-election (i.e. maximum 4 years). The Co-Chair elections are staggered so that one Co-Chair is elected each year. If there is more than one candidate, each OAB Co-Chair is elected by simple majority voting with one vote for each OAB member.

The OAB Co-Chair elections can be held immediately after the OAB elections, to include voting by the new OAB members. However, the timing Co-Chair elections may vary to provide flexibility when the OAB is not at full membership.

OAB Balancing

The OAB should ideally reflect the breadth of types of organisation in the OA. There is no formal process by which this is enforced but the OA will encourage candidates to stand so that this can be achieved.

Process for Organisations to Become Members of the RDA

The process for joining the RDA as an Organisational Member comprises 3 stages:

1. The organisation completes and submits the on-line Organisational Member Application form which is received by the RDA Secretariat⁵. Note there are two ways by which an Organisation can become an OM: either the subscription application to the RDA (for Libraries or other organisations for which it is easier to pay subscriptions) or the (default) membership application form. The relevant agreements are published on the RDA Organisational Membership Application page⁶. The organisation then becomes a candidate for membership.
2. The candidate enters into a consideration process (validation check).
3. After a validation check by the RDA Secretariat and RDA OAB Co-Chairs, it is confirmed whether the application is valid. If valid, the new OA member is announced to the RDA Organisational Assembly and a related news item is prepared. New members are invited to make a short presentation of their organisation at the first appropriate OA meeting after their membership begins.

Organisational Membership Fees

The organisational membership fee of the RDA depends on the size of the organisation, based on number of full time employees (FTE), the type of organisation and the income region, as detailed in the table below, subject to periodic review.

⁵ The Organisational Membership application form is available at the address: <<https://www.rd-alliance.org/get-involved/organisational-membership/rda-organisational-membership-application>>. Note you need to become an RDA member first (subscribe to RDA at <https://rd-alliance.org/user/register>)>

⁶ <https://www.rd-alliance.org/get-involved/organisational-membership/rda-organisational-membership-application>

| No. of employees (FTE) | HIC NFP | HIC FP | LMIC NF | LMIC FP |
|------------------------|----------|----------|---------|---------|
| <50 | \$1,250 | \$2,000 | \$250 | \$400 |
| 51-50 | \$2,500 | \$4,000 | \$500 | \$800 |
| 151-250 | \$5,000 | \$8,000 | \$1,000 | \$1,600 |
| >250 | \$12,500 | \$20,000 | \$2,500 | \$4,000 |

Legend: FTE – Full Time Employees
HIC – High & Upper Middle income Countries | LMIC – Low and Lower Middle Income Countries – as defined by [World Bank](#)
FP - For profit | NFP Not for-profit

Invoices Prorated and Currency

The invoicing period matches the calendar year. If members join later than the first quarter of the calendar year, the invoice will be based on a pro-rata amount for the quarter in which they sign the organisational membership agreement. The annual fee will be invoiced, as for all OMs, in January of the following calendar year. Ideally organisations will pay according to the following matrix (to avoid excessive exchange rate and bank commission fees):

| Membership Location | Invoice Currency | Bank Account for Payment | VAT |
|----------------------------|------------------|--------------------------|----------------------------------|
| United Kingdom | GBP | Natwest GBP | Yes (unless expressly stated) |
| Europe | EUR | Natwest EUR | NO |
| US, Canada & rest of world | USD | Natwest USD | NO |

Membership Fees in different currencies

Membership fee invoices to be issued in GBP or EUR will be calculated according to the X-Rates Exchange Rate⁷ on 1st of January and rounded up to the closest decimal. Pro-rated invoices will be calculated based on the reference exchange rate of the 1st day of the corresponding Quarter.

⁷ <https://www.x-rates.com/table/?from=USD&amount=1>