



portage
SERVICES PARTAGÉS POUR LES DONNÉES DE RECHERCHE
SHARED STEWARDSHIP OF RESEARCH DATA

Canada at a Crossroad:

RDM and the Broader Digital Research Landscape



IASSIST

May 29, 2019, Sydney

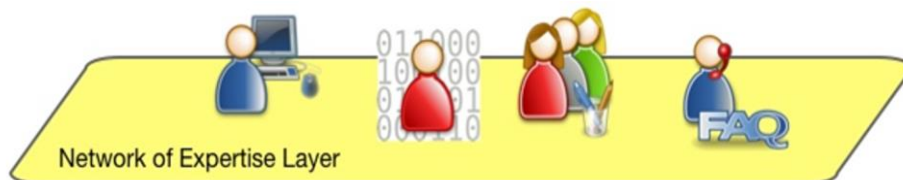
Jeff Moon,
Director, Portage

What we'll cover...

1. **Background – who we are**
2. **Progress – what we've been doing**
3. **Future – where we're going**

The Portage Network is a national initiative of the Canadian Association of Research Libraries (CARL), with the goal of **building research data management (RDM) capacity in Canada** through a **network of experts** in a **growing community of practice**.

Network of Expertise



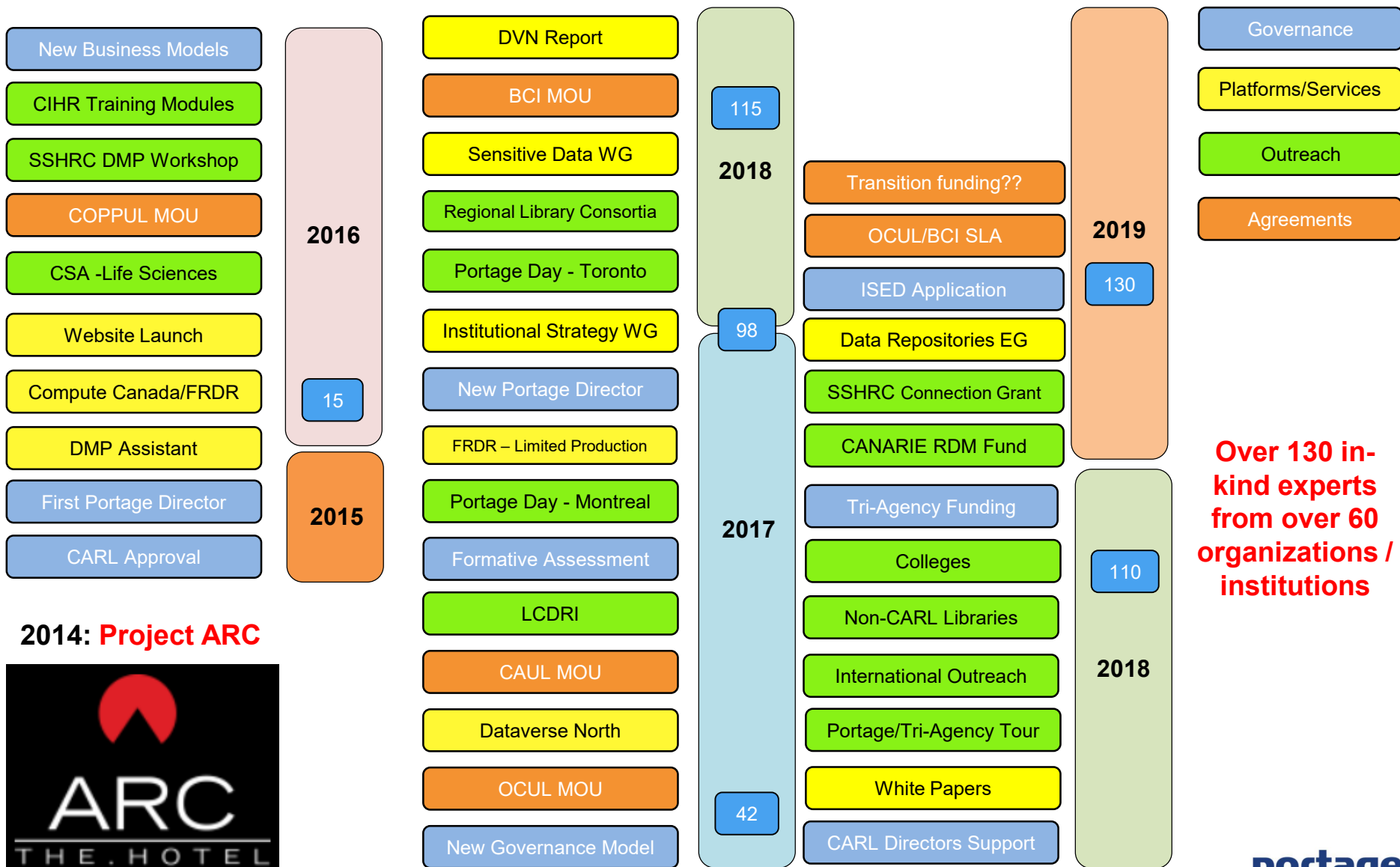
- Pan-Canadian network of RDM expertise
- Contribute to development of RDM resources, tools, training, and policy

Infrastructure Platforms



- Working with library consortia, institutions, and other infrastructure partners to develop & deploy essential RDM infrastructure and service components

Portage origins and progress...



2014: Project ARC



Grounded in partnerships and collaboration



Portage Expert & Working Groups

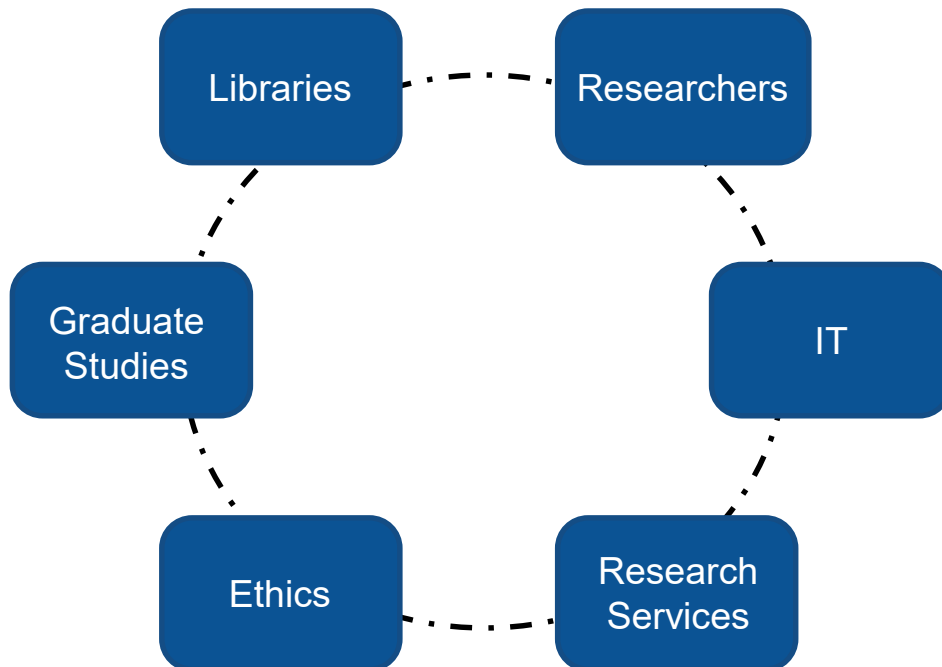
Expert Groups

- Data Management Planning
- Curation
- Data Discovery
- Preservation
- Training
- Research Intelligence
- Data Repositories

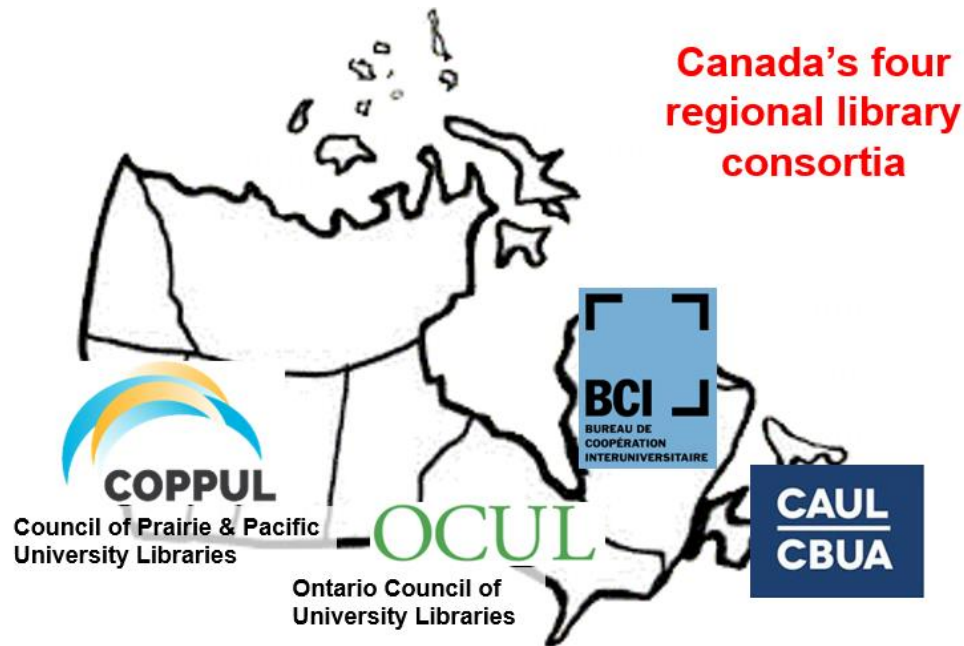
Working Groups

- Dataverse North WG
- Responsible Research Data Management Practices for Sensitive Data
- FRDR Service Model WG
- FRDR Discovery Service WG
- Institutional RDM Strategies

Levels of Stakeholder Engagement



Levels of Stakeholder Engagement

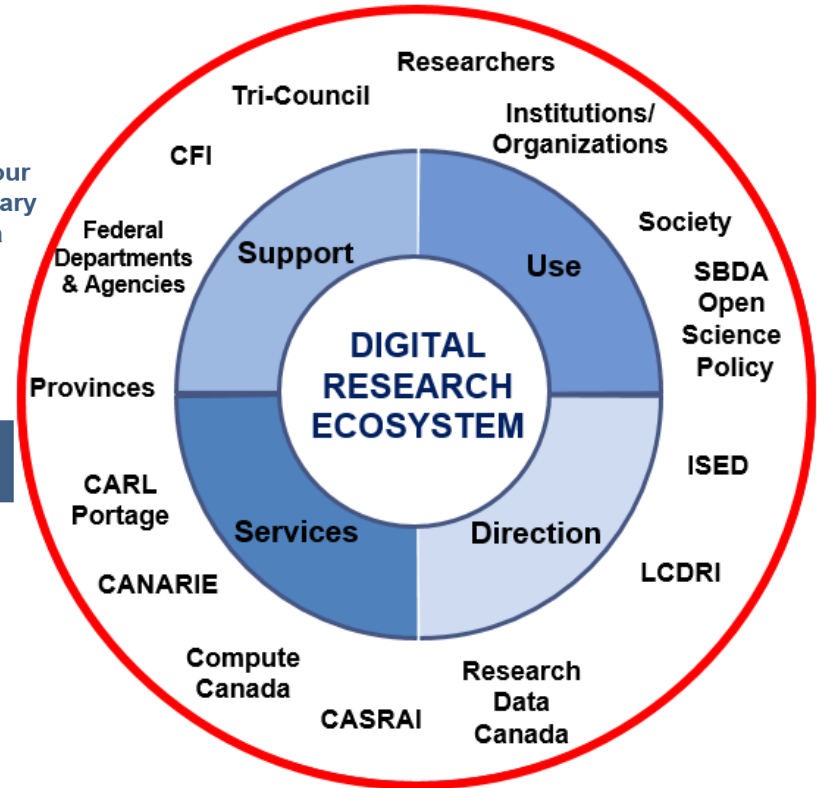
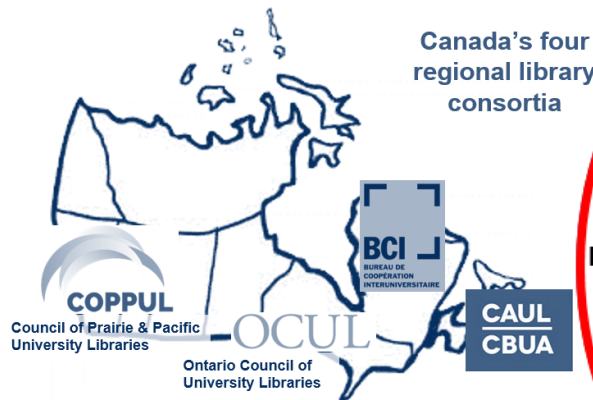
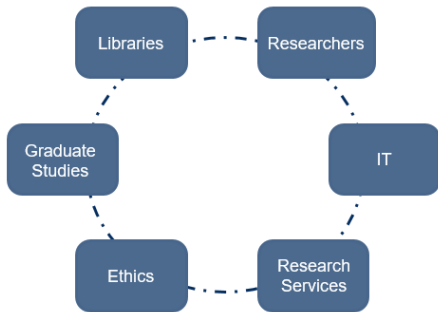


Levels of Stakeholder Engagement

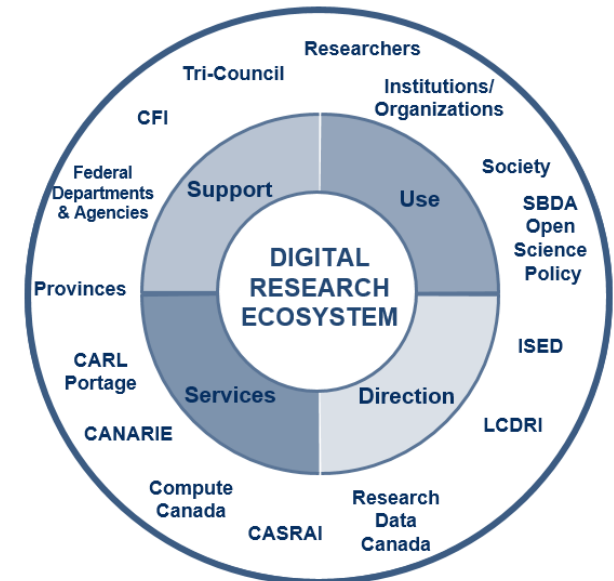
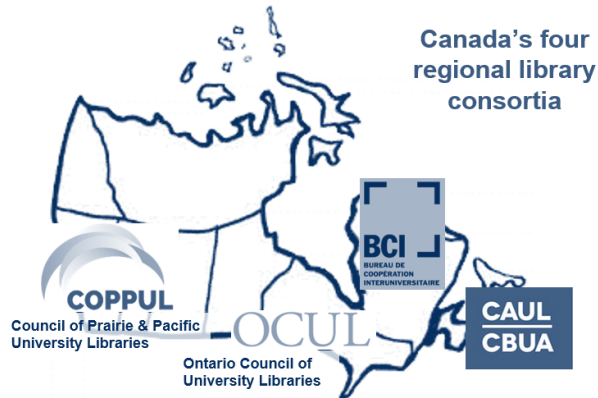
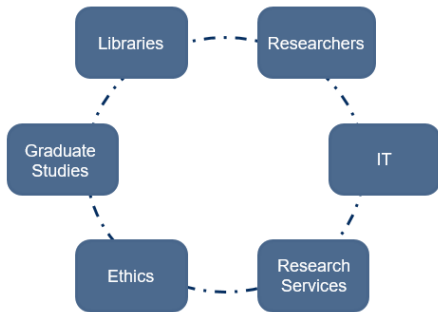
LOCAL

**REGIONAL/
PROVINCIAL**

NATIONAL



Levels of Stakeholder Engagement



Funders as a catalyst for change

Portage RDM Support for Institutions & Researchers

Tri-Agency
Policy

Institutional
Strategy



DMPs



Deposit



Portage

**RDM
Strategy
Template**

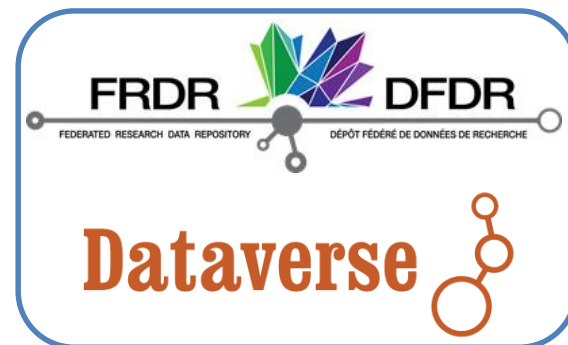


Portage

DMP Assistant
Sign In Sign Up

**National, online,
bilingual, Data
Management
Planning Tool**

Portage



Institutional RDM Strategies

Institutional
Strategy



DMPs



Deposit



RDM Strategy Template



- Institutions stepping up to create RDM strategies
- Teams convened to develop the RDM strategy have been feeding into broader RDM awareness and culture change on campuses
- RDM strategies are setting the stage for future policy development
- Portage Research Intelligence Expert Group is conducting a short, targeted survey to measure institutional readiness for this aspect of the policy

Data Management Planning

Institutional
Strategy



DMPs



Deposit



47 institutional
accounts and
over 5700
registered
users

DMP Assistant

- Facilitates researcher-compliance with the second pillar of the emerging RDM policy
- Migration to DMP 2.0 (DMP Roadmap) promises to improve researcher experience
- Portage provision of discipline-specific exemplars will be helped by ‘opt-in’ to share DMPs
- APIs to facilitate sharing among systems will help reduce administrative burden on researchers

‘enter once – use many’

- DMPs are often our ‘first contact’ with researchers, and are crucial to the culture change we’re advocating for on our campuses

Data Deposit: Canadian Repository Landscape

Institutional
Strategy



DMPs



Deposit



General
Repositories



Government
Repositories

re3data.org



Domain-specific
Repositories

Data Deposit: Canadian Repository Landscape

Institutional
Strategy



DMPs



Deposit



General
Repositories

Government
Repositories

Domain-specific
Repositories



re3data.org

Two National Repository Options



Federated Research Data Repository



National Instance of Dataverse

National Discovery Service

Portage Data Discovery Service Working Group &
Compute Canada FRDR Team



Portage Dataverse North Working
Group and OCUL Scholars Portal
Dataverse Team



Data Deposit

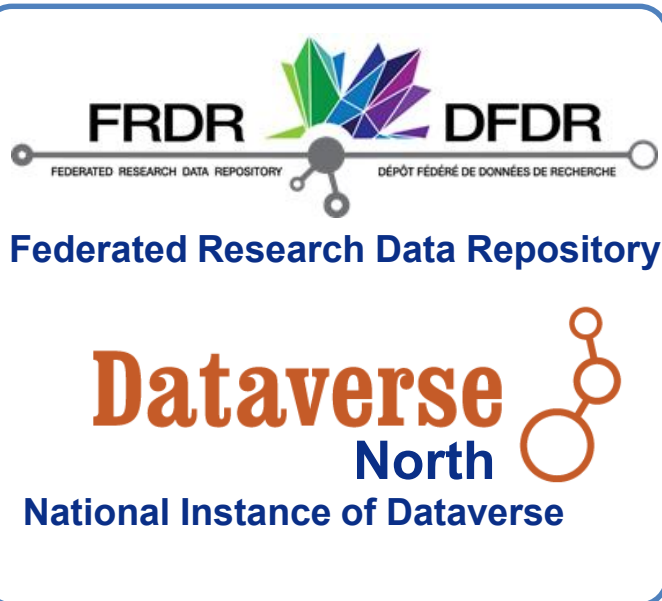
Institutional
Strategy

DMPs

Deposit



National Repository Options



- Progress toward a national instance of Dataverse
- Improved Geospatial visualization & discovery through CANARIE RDM funding
- Developing 'use-case' narratives for Dataverse, FRDR, & Domain repositories
- New Working Group to improve metadata for FRDR discovery layer
- Harvesting more metadata to expand discovery

**New Data
Repositories Expert
Group → DREG**

Data Deposit

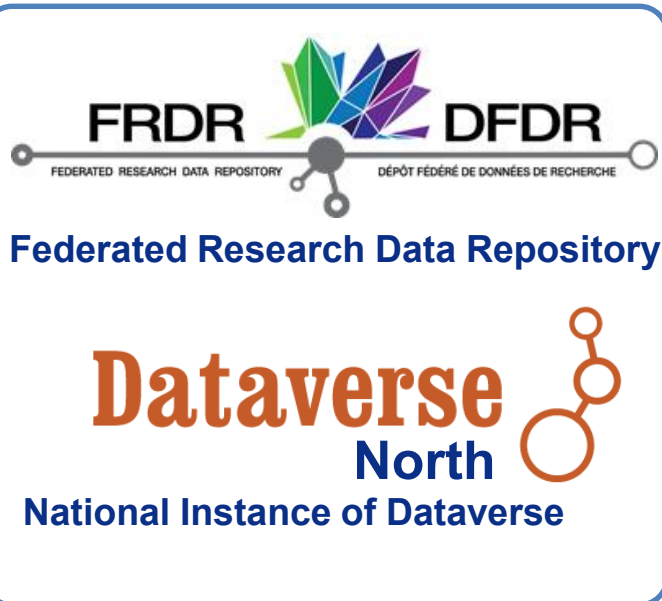
Institutional
Strategy

DMPs

Deposit



National Repository Options



- Progress toward a national instance of Dataverse
- Improved Geospatial visualization & discovery through CANARIE RDM funding
- Developing 'use-case' narratives for Dataverse, FRDR, & Domain repositories
- New Working Group to improve metadata for FRDR discovery layer
- Harvesting more metadata to expand discovery

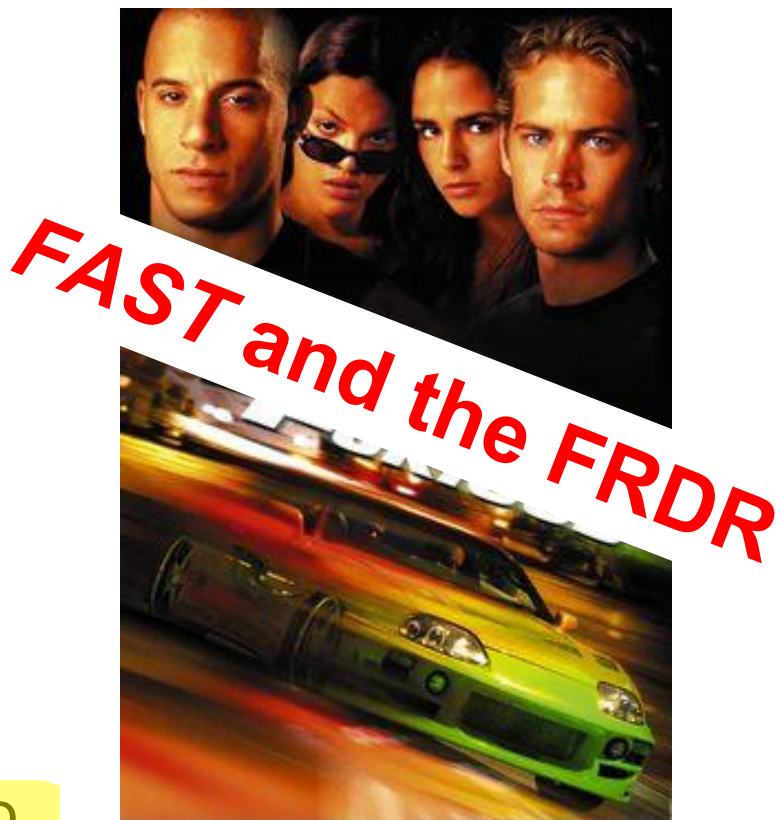
New Data
Repositories Expert
Group → DREG

New FRDR Working Group to improve discovery

Mapping
researcher-supplied
subject keywords to the
FAST schema using
OpenRefine

RVM: Répertoire de vedettes-matière
Developed by l'Université Laval
(French equivalent of LCSH)

→ Have goal of mapping the RVM to
FAST over the next year



New: Data Repository Expert Group

‘DREG’



Unlike other classes of Fallen, Dregs possess only two arms to the usual four. Their lower standing within the Fallen hierarchy results in their resentment by other classes and the Dregs' second set of arms are docked and prevented from developing until they have proven themselves worthy to become Vandals. Otherwise, they are similar to other Fallen classes, albeit seemingly smaller and sporting a large crest of hair.

New: Data Repository Expert Group

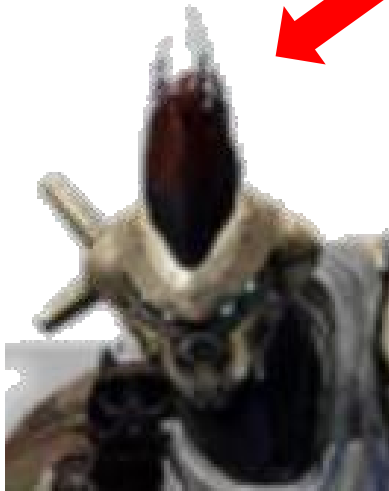
‘DREG’



Unlike other classes of Fallen, Dregs possess only two arms to the usual four. Their lower standing within the Fallen hierarchy results in their resentment by other classes and the Dregs' second set of arms are docked and prevented from developing until they have proven themselves worthy to become Vandals. Otherwise, they are similar to other Fallen classes, albeit seemingly smaller and sporting a large crest of hair.

New: Data Repository Expert Group

‘DREG’

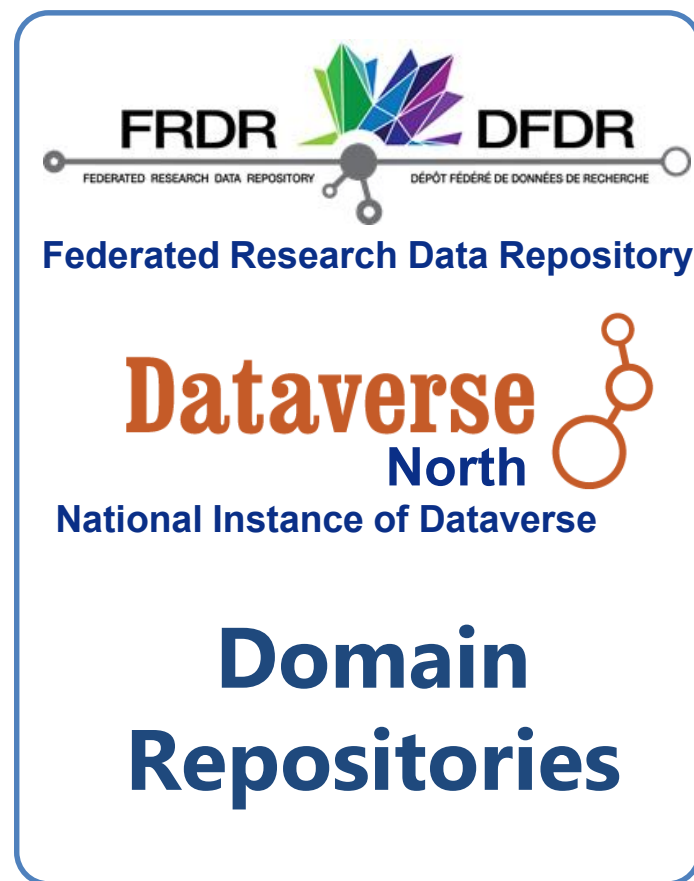


Unlike other classes of Fallen, Dregs possess only two arms to the usual four. Their lower standing within the Fallen hierarchy results in their resentment by other classes and the Dregs' second set of arms are docked and prevented from developing until they have proven themselves worthy to become Vandals. Otherwise, they are similar to other Fallen classes, albeit seemingly smaller and **sporting a large crest of hair.**

New: Data Repository Expert Group

‘DREG’

Coordinating work of current national repository platforms (Dataverse & FRDR) and developing connections/collaborations with domain repositories



New: Data Repository Expert Group



TRAINING



Continuum of Training

Essentials

Essentials and More!

On-line Training Modules



Presenters:

Jane Fry (Carleton U), Carol Perry (U of Guelph), James Doiron (U of Alberta)



Webinars

Coming in the future! Potential webinar topics include: RDM 101; DMPs 101; Institutional Repositories; Dealing with Sensitive Data; Data Curation 101; Data Preservation 101; How to Develop an Institutional Strategy; and others.

On-Demand Training

On-demand assistance is available to those organizing RDM training on Canadian academic campuses who would like help developing and delivering training and guidance materials in all areas of RDM.

Metadata Best Practices Guide

Dataverse North

- Investigates gaps and opportunities
- Nationally coordinated strategies and services
- Training
- Infrastructure development

- Stratégies et services coordonnés au niveau national
- Formation
- Développement des infrastructures

to describe research datasets using the standard metadata fields in Dataverse.
 The first version of the guide provides overall guidance on the Dataverse 4.x citation metadata section, definitions and tips to clarify and distinguish between required, optional and optional metadata fields.

ensembles de données de recherche à l'aide des champs de métadonnées standard de Dataverse.
 La première version du guide fournit des indications générales sur la section de métadonnées de citations de Dataverse 4.x, des définitions et des conseils pour clarifier et distinguer les champs obligatoires, recommandés et facultatifs.

métadonnées

ants à intermédiaires comment décrire les

Dataverse Date Fields (hint: it can be confusing!)

- **Date of collection** - when the data was collected.
- **Time period covered** – time period to which the data refer (span).
- **Production date** - when the dataset was finalized and ready for analysis or distribution.
- **Deposit date** - when the dataset was deposited into the repository. This can be mediated repository.
- **Distribution date** - when the data is available for distribution unless it was distributed.
- **Publication date** - when the dataset is published in Dataverse.

Disciplinary Metadata

Disciplinary metadata to be added: social sciences and humanities, geospatial, life sciences, and astronomy.

Metadata Standards & Interoperability

Metadata Working Group / Groupe de travail sur les métadonnées

Sally Taylor, University of British Columbia (Chair); Alexandra Cooper, Queen's University; Martine Gagnon, Université Laval; Mark Goodwin, University of British Columbia; John Huck, University of Alberta; Amber Leahey, Scholars Portal; Mike Steeleworthy, Wilfrid Laurier University

and best Schema.org codesi> Best

disciplinaires

nces humaines et sociales,

et interopérabilité

mes et meilleures pratiques: rg (google dataset search, FRDR Best Practices.

University Libraries
Ontario University Libraries

Metadata Working Group / Groupe de travail

Sally Taylor, University of British Columbia (Chair); Alexandra Cooper, Queen's University; Martine Gagnon, Université Laval; Mark Goodwin, University of British Columbia; John Huck, University of Alberta; Amber Leahey, Scholars Portal; Mike Steeleworthy, Wilfrid Laurier University

(google dataset search, google search), <codesi> Best Practices, FRDR Best Practices.

google search), <codesi> Best Practices, FRDR Best Practices.

Supporting national integration of Digital Research Infrastructure (DRI)

RDM in transition...



2018 Canadian Budget

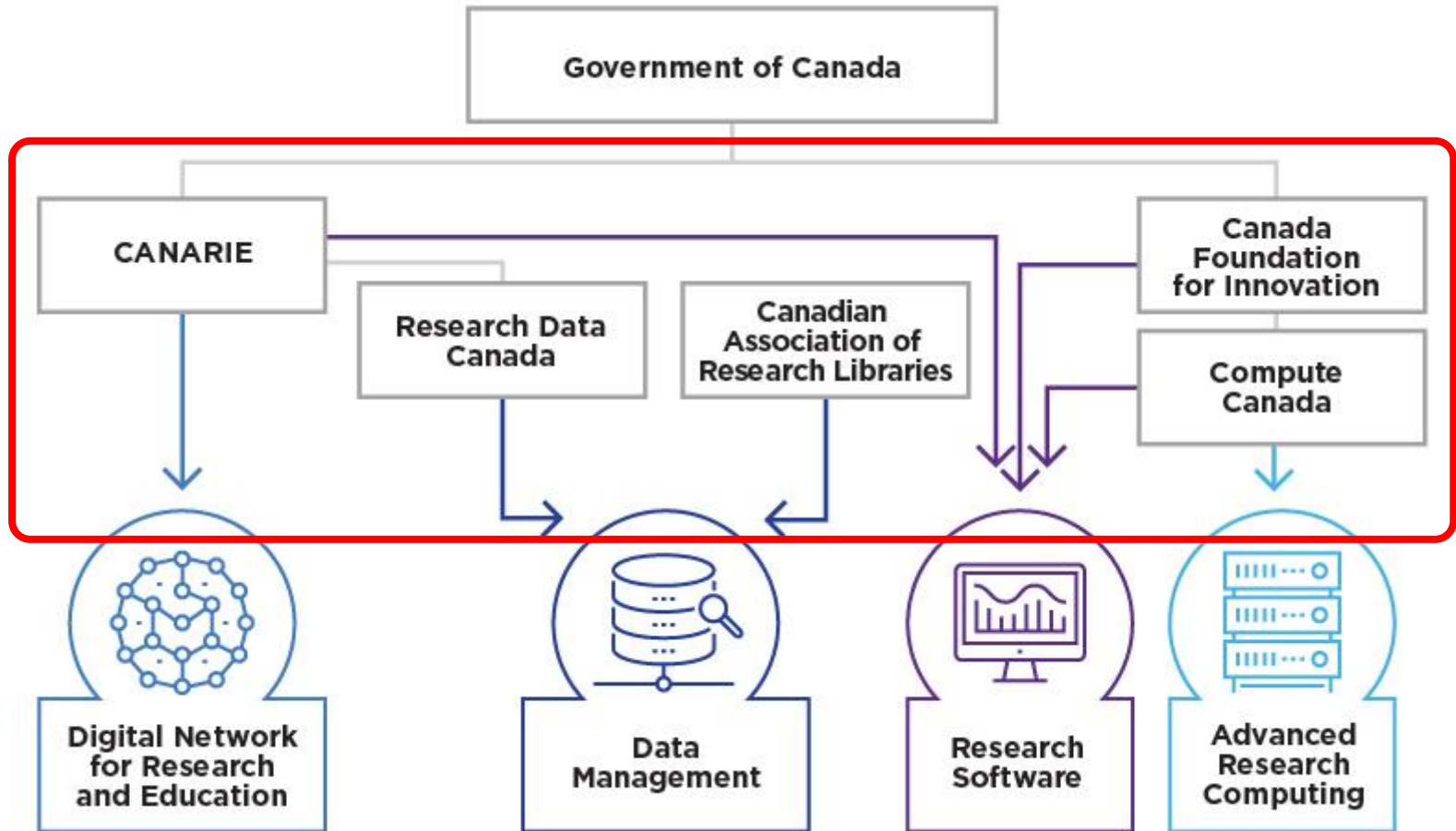
EQUALITY GROWTH

A Strong Middle Class

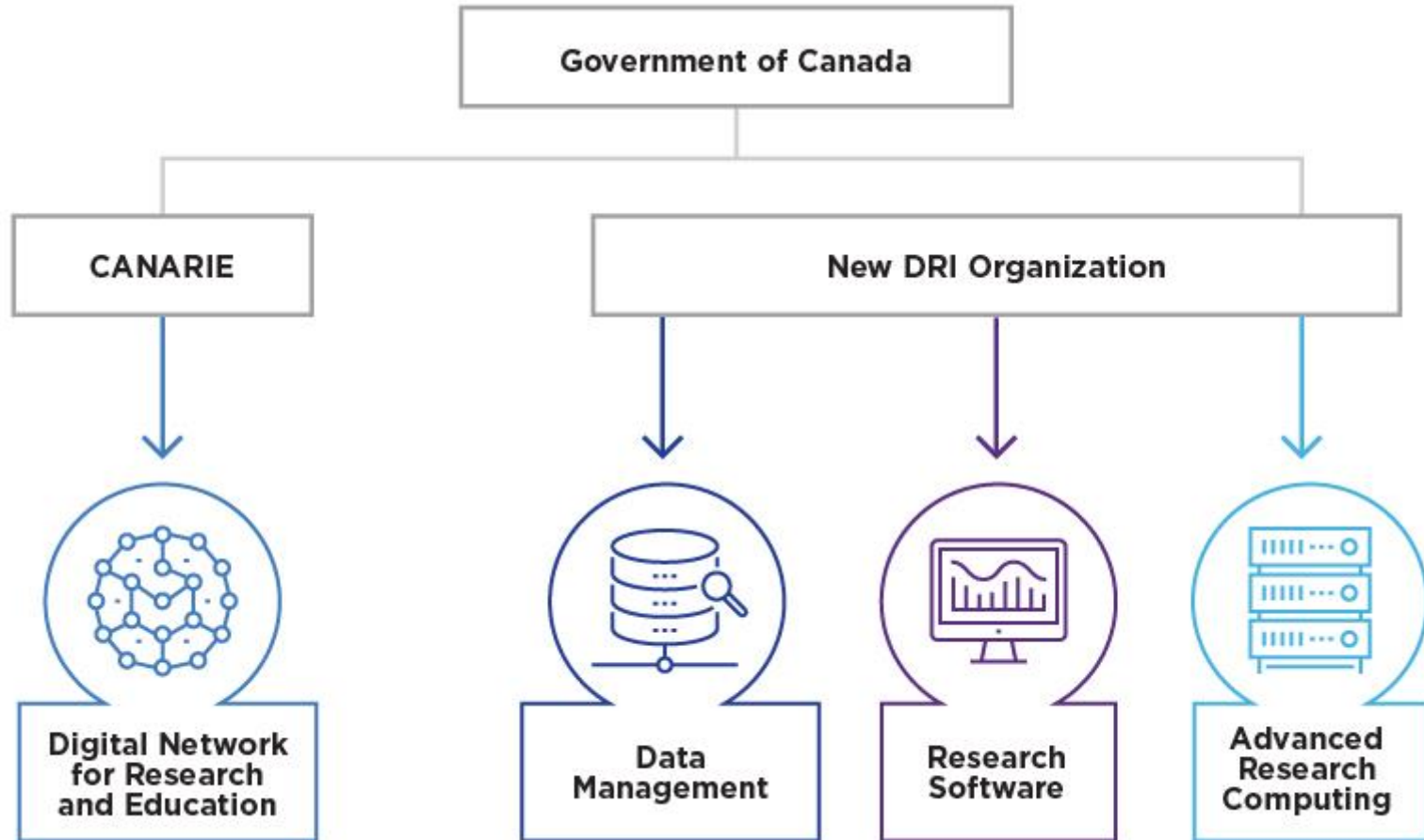
Harnessing Big Data

“The Government proposes to provide **\$572.5 million** over five years, with \$52 million per year ongoing, to implement a **Digital Research Infrastructure Strategy** that will deliver more open and equitable access to advanced computing and big data resources to researchers across Canada.”

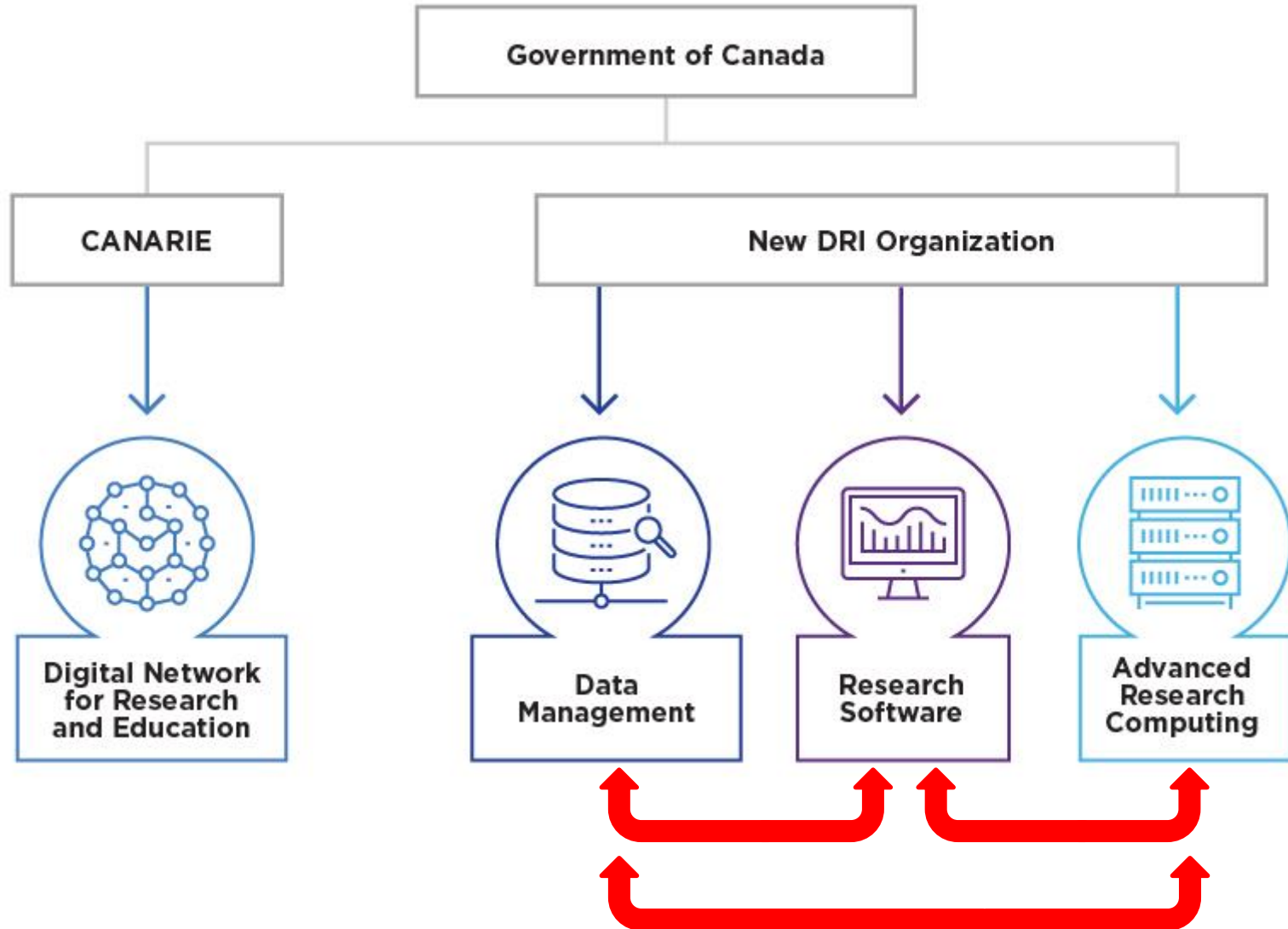
Current DRI Landscape



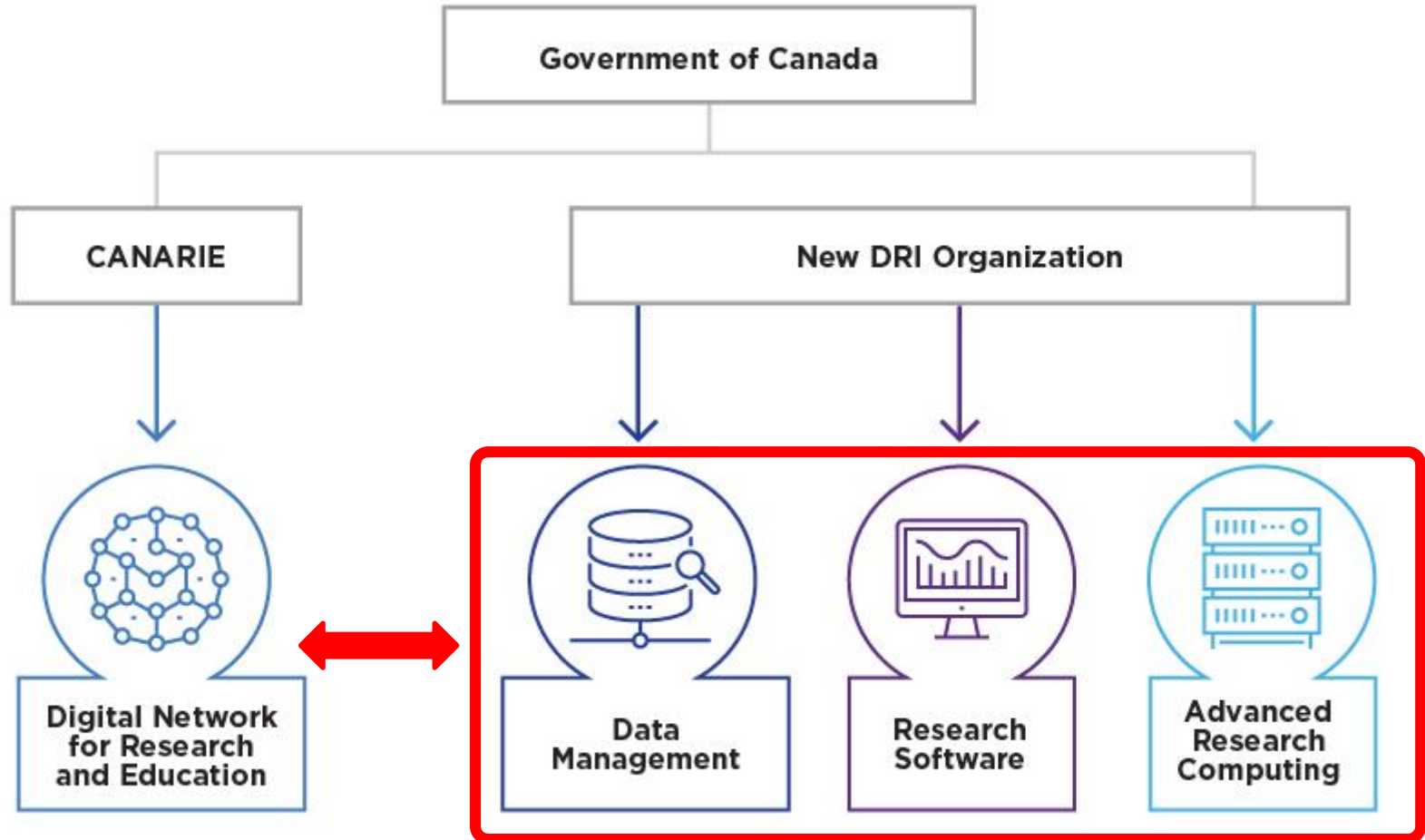
Future-state DRI Landscape



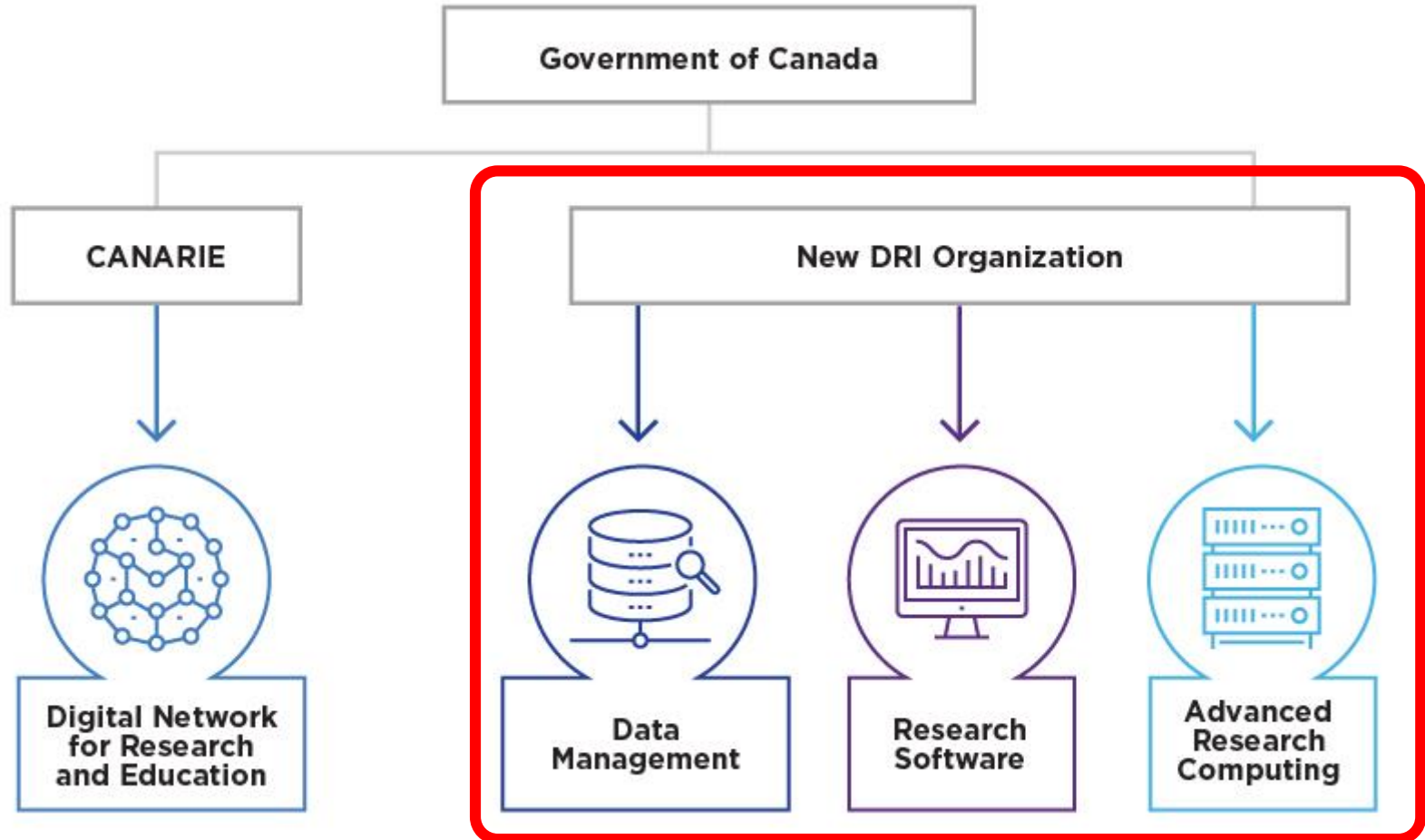
Future-state DRI Landscape



Future-state DRI Landscape



Creating a new not-for-profit organization...



Applicant Guide

All applications must include the following elements:

1. Program Application Form
2. Completed proposal that contains the following sections:
 - a. Executive Summary
 - b. Implementation
 - c. Collaboration and Engagement
 - d. Governance and Management
3. Appendices*
 - a. An outline of engagement activities over the next 2 years
 - b. Organizational chart for the governance structure
 - c. Competency matrix for the planned Board of Directors
 - d. Resumes and biographies for all listed applicants
 - e. Letters of Support

1. [Introduction to the Digital Research Infrastructure \(DRI\) Contribution Program](#)
 - 1.1. [Context](#)
 - 1.2. [Vision, Mission and Objectives of the DRI Contribution Program](#)
 - 1.3. [Timeline](#)
2. [DRI Contribution Program Requirements](#)
 - 2.1. [Who is Eligible to Apply](#)
 - 2.2. [Membership Structure](#)
 - 2.3. [What is the Program Intended to Do](#)
3. [Review and Decision](#)
 - 3.1. [Assessment criteria](#)
 - 3.2. [Assessment process](#)
 - 3.3. [Decision](#)
4. [Oversight and Monitoring](#)
 - 4.1. [Quarterly, Semi-Annual and Annual Data Reports](#)
 - 4.2. [Corporate Plan](#)
 - 4.3. [Annual Report](#)
 - 4.4. [Joint DRI Ecosystem Plan](#)
 - 4.5. [Joint DRI Ecosystem Report](#)
 - 4.6. [Expected Results and Key Performance Indicators](#)
5. [Policies and Considerations](#)
 - 5.1. [Official Languages](#)
 - 5.2. [Gender and Diversity](#)
 - 5.3. [Intellectual Property](#)

Program Guide

Applicant Guide

All applications must include the following elements:

1. Program Application Form
2. Completed proposal that contains the following sections:
 - a. Executive Summary
 - b. Implementation
 - c. Collaboration and Engagement
 - d. Governance and Management
3. Appendices*
 - a. An outline of engagement activities over the next 2 years (until approximately March 2021)
 - b. Organizational chart for the governance structure
 - c. Competency matrix for the planned Board of Directors, if available
 - d. Resumes and biographies for all listed applicants on the Application Form
 - e. Letters of Support

**... and do it all in
18 business days**

Ahead of the looming election call...



A sprint to the starting line



Lightweight outreach to community...

Engage DRI

Feedback from 50+
& 30 letters of support

Collaborating for the future of Canada's Digital Research Infrastructure

C

omments and questions may be directed to the
email address info@engagedri.ca.

Summary of process...

Application Signatories



May 6 deadline

Government Approval in Advance of Writ being dropped

Applicant Board

Advisory Group

Inaugural Board

New Organization

for

Digital Research Infrastructure

All of this can happen in pre-election government 'caretaker' mode



Key transition priorities...

A. National Data Stewardship Support

national coordinator roles for curation, preservation, training, and discovery & metadata, as well as support for communication, administration, and travel

B. RDM Platform Support and Development

help develop and operationalize several national, collaborative RDM platforms and services

FRDR → full production

Dataverse North → augmenting storage

DMP Assistant → migration to DMP Roadmap & RMI

We're at the line... just waiting for the start!



Doubt,
Delay
&
Making do



Success
&
Synergy...
& Something New



More to come from Portage & others!



Questions?



portagenetwork.ca

Jeff Moon, Director, CARL Portage
portagedir@carl-abrc.ca