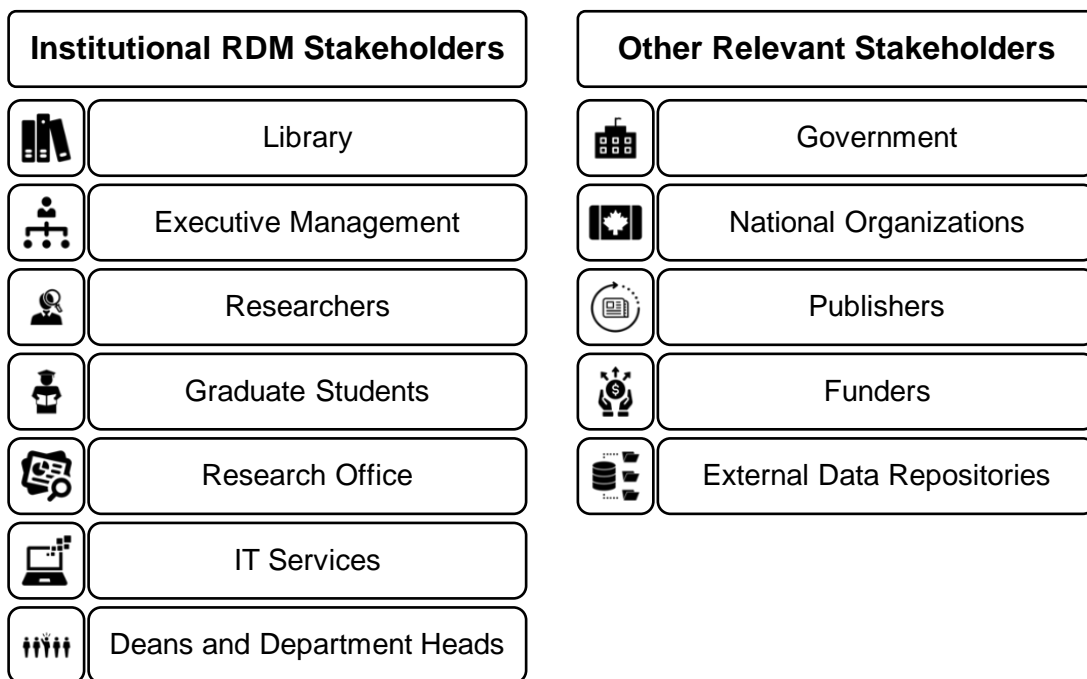# RESEARCH DATA MANAGEMENT (RDM) INSTITUTIONAL STRATEGIES

Don't go it alone! Reach out to stakeholders.

Institutional RDM Stakeholders	Other Relevant Stakeholders
Library	Government
Executive Management	National Organizations
Researchers	Publishers
Graduate Students	Funders
Research Office	External Data Repositories
IT Services	
Deans and Department Heads	

An institutional strategy is:

- A concise and directive document, not a formal policy
- An outline for how an institution will increase its capacity for effective RDM
- A collaboration between various internal and external stakeholders

Institutional strategies:

- Provide sustainable support and solutions by documenting existing supports and policies, formalizing responsibilities, and expressing best practices in RDM
- Act as a first step towards informing future RDM policies
- Promote existing RDM policies and support researchers in establishing and implementing data management practices consistent with ethical, legal, and commercial obligations

- Assist the broader research community in understanding the institution's current and planned RDM capacity, challenges, and needs
- Facilitate ongoing dialogue and collaboration on the advancement of RDM in Canada
- May be required in order to be eligible for grant funding (e.g.: Tri-Agency funding)

A strategy should:

- Promote research excellence through the adoption of good RDM practices at local institutions
- Define a roadmap to articulate institutional capacity and future goals for RDM at an institution
- Identify changes and investments necessary to comply with Tri-Agency and other granting agency requirements
- Define an ideal state for appropriate storage, retention, and availability of research data

Raise institutional awareness of research data stewardship

At your institution:

- Identify stakeholder communities
- Promote data policies to all relevant communities
  - Develop and adapt awareness materials and resources
  - Provide guidance on how to apply relevant policies
- Recruit local advocates to promote the value of RDM best practices

Create buy-in from researchers:

- Seek high level guidance and support from central services
- Solicit guidance and support at a department or research group level
- Provide access to and support of RDM tools throughout the data life cycle

Formalize RDM practices by adopting policies, guidelines, and/or procedures

Consider the following:

Data Quality Standards, Access, Sharing, Retention, Preservation

Data Management Plans

Privacy, Security, Ethical Issues, Intellectual Property

Principles, Scope, Monitoring, Rewarding Compliance

Assess Institutional Readiness

At your institution:

Define ideal state for RDM
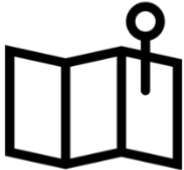
Conduct survey of data assets and management practices

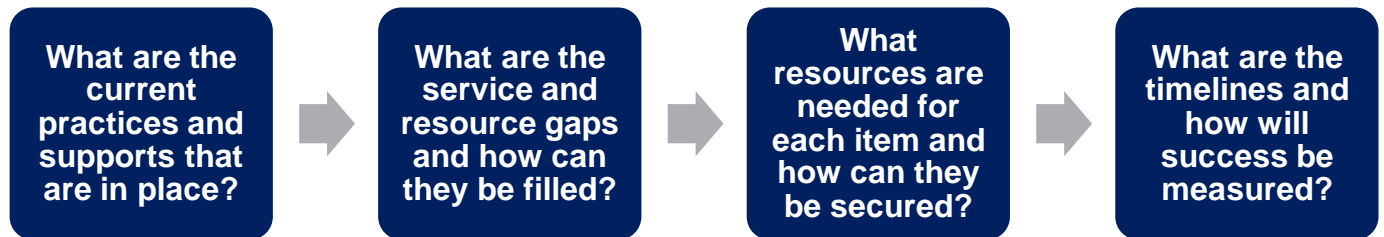Use survey data to evaluate existing RDM service using maturity model (see Resources section)

Identify gaps in your RDM environment

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

PRIMER

Create a Roadmap

A roadmap should answer the following questions:

| What are the current practices and supports that are in place? | → | What are the service and resource gaps and how can they be filled? | → | What resources are needed for each item and how can they be secured? | → | What are the timelines and how will success be measured? |

Consult Available Resources

- Review the Institutional Research Data Management Strategy Guidance Document
- Use the Institutional Research Data Management Strategy Template as a guide
- Review the Tri-Agency Statement of Principles on Digital Data Management
- DCC RISE Maturity Assessment Model

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CONTACT AT YOUR INSTITUTION: