

Assessing Institutional Readiness module: Scanning Your Institution's Assets video  
Last Updated February 8, 2021

Welcome to the Assessing Institutional Readiness module of the Portage RDM Institutional Strategies Series. This video, Scanning Your Institution's Existing Assets and Practices, is the second of four videos in this module.

A scan of existing research data management assets and practices will be a piece of your institutional RDM assessment model and will help to inform your answers in the model.

One of the first steps in crafting an institutional strategy is to define an ideal state of RDM at your institution and complete a scan of your existing RDM assets and practices

Whether you are new to RDM or simply assessing your institution's current practices, knowing your ideal RDM state is an excellent way to identify gaps and establish future goals. An ideal state of RDM will vary across institutions and change as your practices evolve.

Knowing which RDM assets and practices are already in place is a necessary part of building or refining an institutional strategy because a good strategy will be based on the unique capacities and needs of your institution.

A scan of the existing RDM assets and practices at your institution helps to establish a baseline. This way, you will have a better sense of what the next steps will be while working towards your institution's ideal state of RDM. This scan should be made up of various forms of consultations, such as surveys or departmental meetings.

A thorough scan is also necessary because your institutional strategy will provide your community with a comprehensive view of the RDM resources and supports that are available at your institution, and of existing practices.

This scan should seek to assess the human, organizational, infrastructure, and fiscal resources currently in place to support RDM.

In doing this scan, you should look for formal as well as informal RDM practices in use. Some of these practices and resources may be hard to find.

For example, researchers in various departments may already be engaging in informal RDM practices which are not currently known about in detail outside of a particular department or lab. Engaging with researchers and finding local champions will help to uncover these practices. See the Recruit Local Champions video in the Raise Awareness module for more information.

A scan of existing RDM practices will include

- Institutional guidelines, policies, and/or procedures,
- Data Management Plan templates, guidelines and/or policies,
- Data repositories and archiving guidelines and/or policies,
- Institutional training and resources, and
- Communities of Practice.

Part of your scan can include surveying your stakeholders. There are some existing resources that you may want to refer to while you are creating a scan of your institution's existing RDM assets and practices. These include:

Assessing Institutional Readiness module: Scanning Your Institution's Assets video  
Last Updated February 8, 2021

- The [Tri-Agency and Portage RDM Capacity survey](#) ,
- Completed national and institutional level RDM Surveys such as those completed by the Canadian RDM Survey Consortium, and
- Other institutional RDM strategies.

You can find more information about these resources on the Portage web site, at [www.portagenetwork.ca](http://www.portagenetwork.ca).

A completed scan of your institution's existing RDM assets and practices should include enough information about both formal and informal RDM practices to help develop a clear and detailed understanding of the steps required to get to an ideal RDM state.

You can find the link to the next video in this module, Costing and Funding, as well as supplementary materials for this module, on the Portage web site: [www.portagenetwork.ca](http://www.portagenetwork.ca).