Spreading the knowledge:

Overviewing the U of A Libraries' RDM Services

IASSIST 2017

James Doiron
RDM Services Coordinator
U of A Libraries

Tri-Agency Statement - June 2016

- The Tri-Agencies (SSHRC, CIHR, NSERC) recently released a *Statement of Principles on Digital Data Management*
- The statement aligns with other national endeavours relating to RDM, including the Government of Canada's *Action Plan on Open Government* (2014)

The statement outlines:

1. **The agencies' expectations regarding RDM**→ DMP's, standards, collection/storage, metadata, preservation, retention, and sharing
2. **The responsibilities of all stakeholders** (researchers, research communities, research institutions, and research funders) to meet those expectations

UAL's RDM Services

UAL identifies research data management as an essential priority

A wide range of [RDM services and tools](#) are freely available to the campus community, and beyond

These services & tools span the research lifecycle, from data management planning to open access data

Research Data Management

Organize my data

How to prepare a data management plan & protect your data

Share my data

Why you would share, data sharing tools, metadata & how to get credit

Access existing data

How to locate data and access data tools, terms & citations

Archive my data

How to find a repository, prepare your data & submit your data

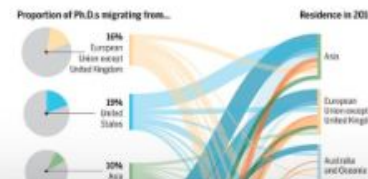DMP Assistant   Dataverse

Get help and contact us

Events & Workshops

Tweets liked by @wyman10

Dryad
@datadryad

Scientists are all over the map! Open data from @ORCID_Org described by Bohannon et al in @sciencemagazine on Dryad: doi.org/10.5061/dryad....

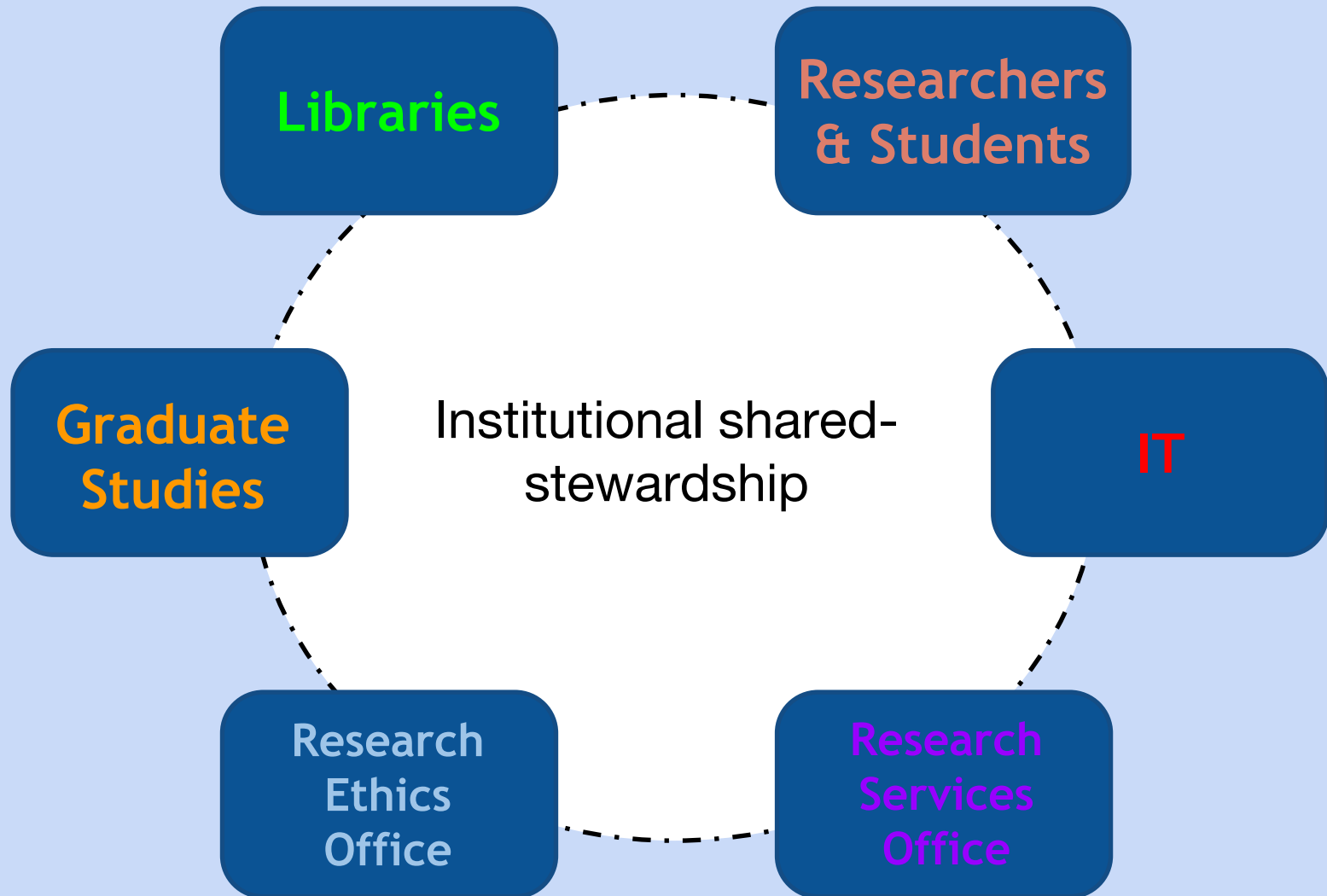Proportion of Ph.D.s migrating from...   Residence in 2016

The Tri-Agency **Statement of Principles on Data Management** notes, "Data management planning is necessary at all stages of the research project lifecycle, from design and inception to completion."

U of A by the numbers:

- **4** campuses
- **18** faculties
- **400** programs
- ~**3,600** academic staff
- ~**31,000** undergraduate students
- ~**8,000** graduate students
- ~**8,000** international students
- ~**15,000** support & trust staff

….and 1 RDM Services coordinator

Where the numbers lie

Libraries

Researchers & Students

Graduate Studies

Institutional shared-stewardship

IT

Research Ethics Office

Research Services Office

Spreading the knowledge (Year 1 approach)

Focus on three broad groups:

1. Liaison Librarians
2. Research support offices
3. Researchers, students, & research staff

1. Liaison Librarians

Challenges:

- LLs are the front line RDM support
- RDM anxiety→ ariant RDM comfort levels and understanding
- Need to be RDM generalists
- Time and capacity

Approach: Work very closely with a liaison librarian RDM working group to plan and deliver tailored RDM training workshops.

Step 1: General information and feedback sessions (Summer 2016)

- Two information sessions for liaison librarians to attend and provide feedback
- RDM landscape, questions, challenges, areas of interest, positive/negative experiences
- Feedback garnered through discussion and a brief survey

Feedback results:

- Applied and practical sessions were wanted!
- Focus on specific things such as DMPs/DMP Assistant, metadata, Dataverse, qualitative RDM, survey design and implementation

1. Liaison Librarians

Step 2: Plan and deliver RDM for librarians workshop series

- Worked with LL working group to plan workshops (Fall 2016)
- Tapping into local expertise to deliver workshops
- Offer sessions on multiple dates to accommodate busy schedules
- Highlight the <u>applied focus</u> of sessions
- Lean and meaningful - 90 min sessions
- Offer take-away resources
- First two workshops in the series offered: 1. Metadata & documentation (SF); 2) Qualitative RDM (JD)

Results so far:

- Excellent attendance
- Extremely positive feedback - most useful RDM sessions so far
- More engagement and relationships with LLs = collaborative consultations & RDM uptake
- *They* are now spreading the knowledge

Next steps: (Summer & Fall 2017): Dataverse, DMP's, & Metadata & documentation part 2

2. **Research support offices (RSO & REO)**

Challenges:

- Not clear on what their role with RDM really is
- Lack of clarity regarding the RDM landscape → national and institutional
- In contact with researchers, but not clear on what their RDM needs are and the supports/services available to them
- Limited time/capacity

Approach: Reach out to the U of A Research Services Office & Research Ethics Office to formalize relationships & offer customized RDM information sessions

Step 1: Sell RDM to the Directors (Fall 2016)

- Met separately with the Directors of Research Support & Research Ethics offices
- Spoke about their offices being 'hubs of information'
- Highlighted the Tri-Agency statement and the national/institutional RDM initiatives underway
- Identified the opportunities that were there for their staff to help promote RDM supports & services to researchers

2. Research support offices (RSO & REO)

Meeting results:

- Very open to the importance of RDM
- Agreed that they are hubs of information sharing
- Recognized that their staff have contact with researchers throughout the research lifecycle = information sharing opportunities
- Agreed to schedule the customized RDM sessions and request that staff attend

Step 2: Deliver the RDM sessions (Dec 2016/Jan2017)

- Drew on RDM colleagues to help deliver the sessions
- Tailored two hour sessions covering: RDM landscape, DMPs/DMP Assistant tool, Dataverse, ERA, data holdings, and data help/consultation
- Refreshments provided (Do not underestimate the power of dessert!)

Results:

- Fantastic attendance → essentially shut these offices down for the sessions
- Bi-directional discussions & knowledge sharing
- Follow-up inquiries with staff, and sending researcher to us for RDM services
- Unexpected: Myself internally reviewing CFI grant proposals for RDM needs

2. **Research support offices**

Next steps (Fall 2017/Winter 2018):

1) Test out joint presentation - UAL/RSO/REO - to research departments and receive feedback

2) Information sessions given to Liaison Librarians by RSO/REO → highlighting RDM roles

3. Researchers, students, & research staff

Challenges:

- Where to start….so many faculties, departments, disciplines…..
- Lots of needs across all RDM related areas
- Lack of clarity around what RDM is
- Lack of clarity on RDM requirements
- Limited time, capacity
- Lack of real interest at times

Approach: Deliver both general & specific RDM information sharing, training & consultation sessions

General = U of A RDM week

Specific = Tailored RDM information & training sessions for faculties/departments

3. Researchers, students, & research staff

General = U of A RDM week = full week of RDM related presentations, freely open to anyone to attend

Approach: Build off of the two previous RDM weeks and (hopefully) improve the ensuing ones

Step 1: Plan RDM week (Nov-May)

- Collaborate with UAL RDMS Working Group to plan
- Previous years were very busy, concurrent session→ reduced overall number of sessions
- Core UAL RDM sessions, but incorporated external presentations as well to help draw in attendees
- Three post RDM week workshops by Compute Canada→ Data & Software carpentry; HPC
- Central location

U of A RDM Week 2017 - May 1-5, 2017
"Tomorrow's Data Today!"

Keynote speaker: Chuck Humphrey, Director, CARL-Portage Network:

"A Federated Research Data Management Model: A Canadian approach"

Panel session will include:

- Chuck Humphrey*, Director, CARL-Portage Network*
- Carole Estabrooks*, Professor, Faculty of Nursing & Canada Research Chair in Knowledge Translation, U of A*
- Geoffrey Rockwell*, Professor, Philosophy & Humanities Computing; Director, KULE Institute for Advanced Studies, U of A*

U of A RDM Week 2017 - May 1-5, 2017
"Tomorrow's Data Today!"

Additional sessions offered include:

- U of A Libraries
- Alberta Open Government
- Women & Children's Health Research Institute
- Indigenous research & data (Kisha Supernant & Sally Rice)
- Edmonton Police Service
- City of Edmonton Analytics Centre of Excellence
- Compute Canada
- PolicyWise/SAGE

Post RDM week workshops offered by Compute Canada (Data & Software Carpentry) & WestGrid (High Performance Computing)

3. Researchers, students, & research staff

RDM week Results:

- Good, but variant, attendance
- Difference in numbers between 'registered' and 'attended'
- Excellent feedback on the content and quality of the sessions
- Follow-up RDM inquiries & uptake → both at faculty/department & individual levels
- Connects researchers/students with each other, as well as with both internal (U of A) and external RDM suppots

Next steps:

- Review the 2017 week RDM week feedback
- Consider what improvements might be made to the event
- Leverage off of Portage RDM TEG activities
- RDM Week 2018!

3. Researchers, students, & research staff

Specific = Tailored RDM sessions for faculties/departments

Approach: Work with RDM and LL colleagues to deliver tailored RDM sessions to faculties/departments

Step 1: Take advantage of every opportunity that presents itself!

- My rule: Never turn down opportunities to connect, engage and educate
- Customize the sessions and sell them as such
- Frame these not as "why should you", but rather as "how can you not?"
- 90-120 minute sessions, depending upon content and size

Some that have been conducted in the past year include:

- Faculty of Nursing
- Department of Women & Gender Studies
- Faculty of Education

3. Researchers, students, & research staff

Tailored sessions results:

- Good attendance
- Very engaged participants→ lots of discussion & questions
- Finding the 'champions'
- Follow-up RM inquiries & uptake
- Relationship building
- Liaison's making connections
- Invites to deliver RDM focused guest lectures→ upper undergrad & graduate courses
- Some discussion now incorporating RDM education into curriculums
- Spreading the word→ other faculties/departments approaching us

In queue: (Summer & Fall 2017)

- Faculty of Physical Education & Recreation
- PolicyWise
- Faculty of Graduate Studies & Research

Lessons learned & next steps

- The value of organizing and delivering education/information sessions is there→ time well spent
- Liaison librarians appreciate being involved in RDM education and have communicated greater RDM comfort levels
- Summer 2017→ stepping back and planning the next year's RDM services approaches & roadmap
- Leverage Portage Network initiatives and resources→ e.g., national RDM training event(s); Dataverse North & community connections, etc
- Include IT groups→ both central & local
- Keep things updated & fresh → RDM landscape is changing, and each year there are new librarians, researchers, students, staff….
- Don't let the developers convince me to migrate Dataverse when I am at IASSIST 2018!

THANK-YOU

Acknowledgements:

- UAL RDMS WGs
- UAL Liaison Librarians
- UAL Digital Initiatives Colleagues
- Chuck Humphrey & Portage Network colleagues