



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

Portaging the landscape:

Developing and delivering a national RDM training infrastructure in Canada

IASSIST 2017

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Outline

- Portage
 - The past
 - The present
 - The future

The past

- Need for a national centre of RDM expertise in Canada
 - Expertise was distributed across the country
 - Pockets developed independent of each other
 - No common thread for collaboration or sharing
- Several examples internationally

The past (cont'd)

- National Data Summit in September 2011
 - Conclusion
 - Canada does have a base-line capacity for RDM
 - Suggestions on how to deliver RDM training in Canada to increase capacity



Portage

- Dedicated to the shared stewardship of research data in Canada
- Launched in 2015
- Under CARL
 - Canadian Association of Research Libraries
- Inaugural Director
 - Chuck Humphrey



Mandate

- To develop a national research data culture and infrastructure
- How
 - By developing a robust pan-Canadian network of Research Data Management (RDM) expertise
 - By connecting essential infrastructure and service components needed for RDM, and a national preservation and discovery network



THE PORTAGE NETWORK is dedicated to the shared stewardship of research data in Canada through:

- Developing a national research data culture
- Fostering a community of practice for research data
- Building national research data services and infrastructure

Launched in 2015 by the [Canadian Association of Research Libraries](#), Portage works within the library community to coordinate expertise, services, and technology in research data management, seeking to collaborate with other research data management stakeholders.

Research data culture represents widely shared values and principles for digital data management.

A community of practice for research data consists of stakeholders working collaboratively to ensure data are accessible to address complex research issues.

Research data management activities span sectors, domains, and jurisdictions, necessitating nationally coordinated research

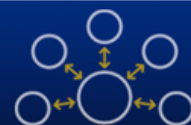
RDM PRIMER



For RESEARCHERS



For LIBRARIANS &
DATA STEWARDS



For SERVICE &
INFRASTRUCTURE PROVIDERS



For POLICY MAKERS &
ADMINISTRATORS

DMP Assistant

[Sign In](#)

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If you have an existing account with DMP Assistant or previous version of DMP Builder.

New to DMP Assistant? Sign up today.

NEWS

Portage Training Expert Group Releases RDM Primer -
MAY 12, 2017

CARL and OCUL Work Together to Enhance Canada's Data Management and Digital Preservation Landscape -
MAY 4, 2017

Tweets by @portageCARLABRC

Portage Retweeted



Jessica Thorlakson
@JThorlakson14

#researchdata and lasagna-who knew the connection. It's about working together to

[Embed](#)





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DMP Assistant



Shared stewardship of research data

DMP Assistant is a bilingual tool for preparing data management plans (DMPs). The tool follows best practices in data stewardship and walks researchers step-by-step through key questions about data management.

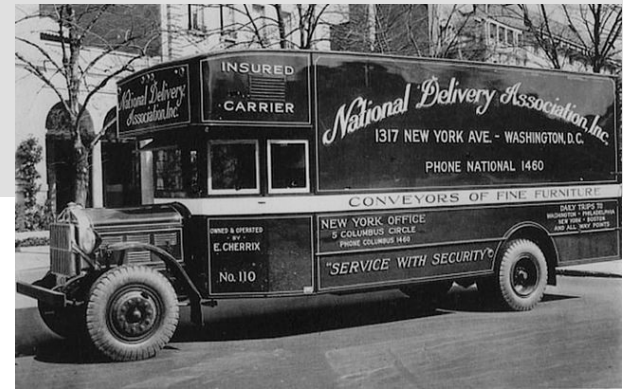
-  **Step 1** Sign up with DMP Assistant
-  **Step 2** Sign in and select a template under Organizations. The Portage template is the default.
-  **Step 3** Answer the questions that are relevant to your work. Guidance and examples are provided.
-  **Step 4** Revisit the tool throughout your research to review or revise your answers.



Expert Groups

- Data Management Planning Expert Group
- Preservation Expert Group
- Data Discovery Expert Group
- RDM Training Expert Group
- Research Intelligence Expert Group
- Curation Expert Group
- *Coming soon:*
 - Research Data and Ethics Expert Group
 - Peer Certification of Data Repositories Expert Group

RDM Training Expert Group



3 Key Deliverables

- 1) Conduct environmental scan to identify existing RDM resources and tools
- 2) Create White Paper
 - 1) identify international training activities
 - 2) identify gaps in RDM training in Canada
 - 3) create high-level view of a national RDM training program for stakeholders
- 3) Develop and deliver a national RDM training program.

Environmental scan



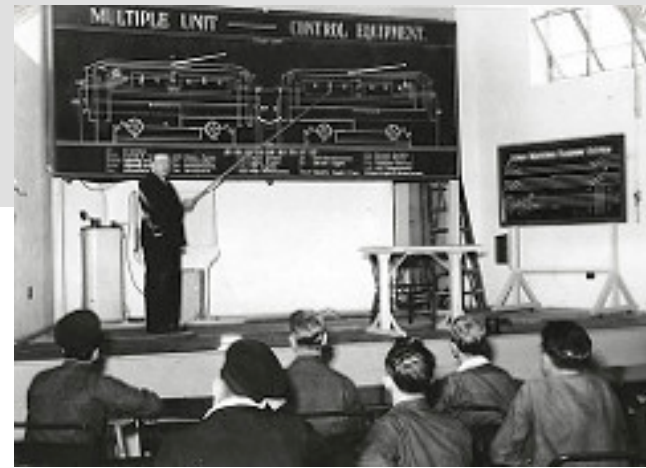
- Reviewed web-based training materials internationally
- Created directory of resources (release Summer 2017)
- Created online mechanism for public contributions to training resources directory (release Summer 2017)

White paper

- 5 Recommendations on Actions
 - Prepare set of RDM training principles
 - Document current gaps and devise and deliver RDM training
 - Design delivery framework to guide training activities
 - Identify specific audiences
 - Prepare MOU model for collaborative training development

National training program

- Multi-faceted
 - Online support
 - Web-based tutorials
 - Online resources and materials
 - Custom training
 - Webinars
 - Workshops



Deliverables



- Environmental scan completed
- White paper published
- Training program development underway
 - Developed training principles document
 - Developed online training request form
 - 2 working groups underway
 - RDM101 Training modules
 - DMP Assistant Training modules

Lessons learned

- We are still young
- Learning as we go
- Communication!



RDM Primer

RESEARCH DATA MANAGEMENT PRIMER

Research Data Management (RDM)

- RDM refers to the processes applied throughout the lifecycle of a research project to guide the collection, documentation, storage, sharing, and preservation of research data.
- RDM practices are integral to conducting responsible research and can help researchers save resources by ensuring their data is complete, understandable, and secure.
- RDM practices also follow institutional and funding agency guidelines that protect their investments.
- The broader research community can derive maximum value from research data that can be accessed, shared, reused and repurposed.

The Research Data Lifecycle



Plan

Create

Process

Analyze

Disseminate

Preserve

Reuse

*Life cycle model developed by the Leadership Council for Digital Initiatives. For more information visit <http://ldg.leadership.ca>

Defining Research Data

- Primary sources supporting research, scholarship or artistic endeavours
- Can be used as evidence to validate findings and results
- May take the form of experimental data, observational data, operational data, third party data, public sector data, monitoring data, processed data, or repurposed data
- All other digital and non-digital content have the potential to become research data


*Research data. In OJ. In CASPAR's Dictionary. Retrieved from dictionary.oxford.org/Research_data



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RESEARCH DATA MANAGEMENT PRIMER

Canadian and International RDM Resources



Portage Network
www.portagenetwork.ca

Research Data Canada
www.rdc-bd.ca

UK Data Archive
www.data-archive.ac.uk

Digital Curation Centre
www.dcc.ac.uk

DataONE
www.dataone.org

Delve
www.delve.org


IFADN
www.ifadn-hdm.eu

Research Data Alliance
www.rd-alliance.org

Australian National Data Service
www.ands.org.au

Canadian Policies Surrounding RDM

- Canada's "Action Plan on Open Government" outlines the development and adoption of policies, guidelines and tools to support the effective stewardship of scientific data.
- Canada's Tri-Council granting agencies (CIHR, NSERC, SSHRC) have adopted a "Statement of Principles on Digital Data Management", which identifies expectations and responsibilities for the management of data produced with public funding. Completing data management plans can help to meet these expectations and responsibilities.



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<https://portagenetwork.ca/>

What's next

- Expert groups to continue fulfilling their mandates
- Council of the Chairs Mtg
- Training budget
 - What national training do we want to do?
 - Train the trainers?
 - Webinars?
 - MOOC?
 - YouTube short videos?
 - Annual conference?
 - ...

In sum ...

- We all know about Portage
 - Its past
 - Its present
 - Its future
- Check out the website
 - Much more information!

Reference

- Portage Network.
<https://portagenetwork.ca/>

Thank you!

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