

CAUL
CBUA

**Council of Atlantic
University Libraries**

**Conseil des bibliothèques
universitaires de l'Atlantique**

portage

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

The Portage Network

A Status Report

Chuck Humphrey, Director of Portage
October 17, 2016



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CANADIAN ASSOCIATION OF RESEARCH LIBRARIES
ASSOCIATION DES BIBLIOTHÈQUES DE RECHERCHE DU CANADA

Outline

- Goals and accomplishments
 - Network of Expertise
 - Platforms for RDM
 - Governance
 - Engagement
- Lessons learned in the first year of the Portage Director
- Next steps in CAUL/CBUA - Portage collaboration



[Photograph: Brian Kennedy]

May 2015 Goals[†] for Portage

- Launch a Network of Expertise
- Partner with infrastructure providers to offer research data management (RDM) platforms
- Establish a governance structure
- Appoint an inaugural Portage Director
- Liaise with CANARIE as it established the role of Executive Director, Research Data Canada

[†] CARL Portage Transition Report, May 5, 2015

Collaborators in Research Data Management

RDC  **DRC**

Research Data Canada – Données de Recherche Canada

Directions for Research Data Management (RDM)

- RDM multi-sector stakeholders' forum
- RDM policy & best practices directions
- International RDM voice for Canada
- Strategic & competitive RDM investments

Facilitating the development of a best practices, sustainable national RDM ecosystem.

Supported by:

canarie



portage

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Operations for Research Data Management (RDM)

- RDM community of practice
- RDM services & infrastructure platforms
- National RDM network of expertise
- Coordination of library-based RDM initiatives

Developing and delivering RDM services and resources to Canadian universities and partners.

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Progress to date: Network of Expertise

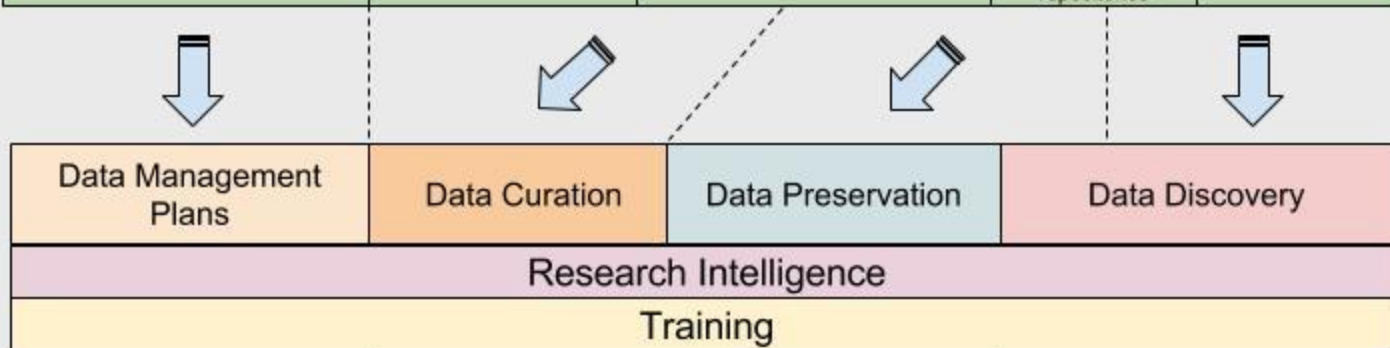
- Launched a Network of Expertise
 - Joy Kirchner, et.al. The Center of Excellence Model for Information Services. Council on Library and Information Resources (2015).
 - Six expert groups are now operational
 - Data Management Plans (DMPEG)
 - Curation (CEG)
 - Preservation (PEG)
 - Discovery (DEG)
 - Training (TEG)
 - Research Intelligence (RIEG)

Portage Network Research Data Management Framework

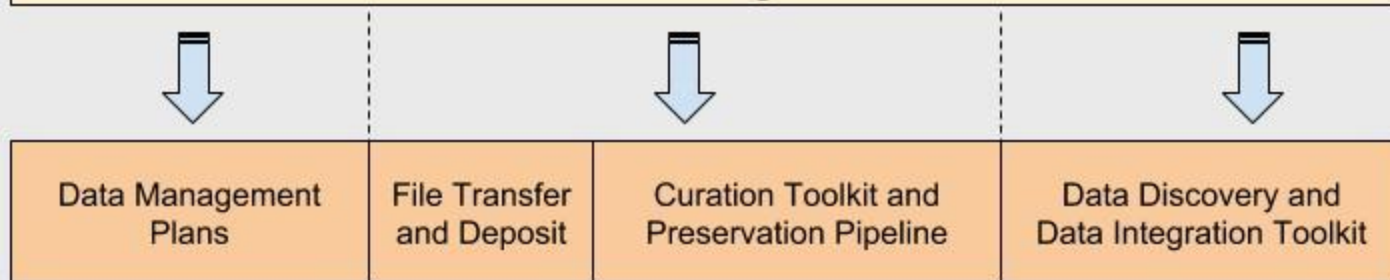
Research
Data
Lifecycle

Data Planning and Production	Data Deposit	Data Curation	Data Preservation	Data Access	Reuse & Integration
DMPs & Project-level research data management	Staging & institutional repositories	Trustworthy data repositories		Institutional and domain repositories	Virtual research environments

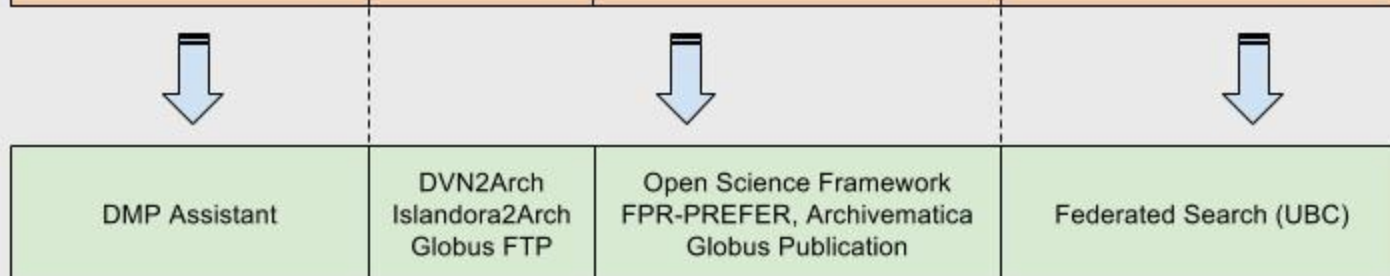
Portage
Network of
Expertise



RDM Tools
& Platforms



Portage
Tools



Network of Expertise

Expert Group	Number of Individuals	Number of Unique Institutions
DMPEG	16	14
CEG	4	4
PEG	4	4
DEG	6	6
TEG	7	6
RIEG	6	6
TOTAL	43 [†]	19

[†] Seven of the members serve on multiple expert groups, including the Portage Director, who is an ex officio member of all groups. Thirty-two individuals are currently serving in the 43 positions.

Progress to date: RDM Platforms

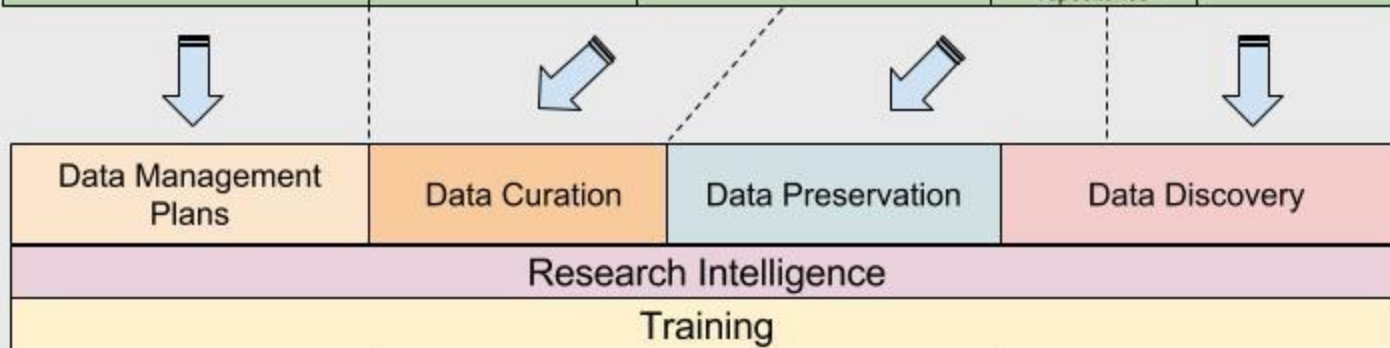
- Partner with infrastructure providers to offer research data management (RDM) platforms
 - Launched DMP Assistant in October 2015
 - Introduced customized spaces for institutions
 - Finalizing a trial for a help desk ticketing service
 - Entered in a partnership with Compute Canada in January 2016 to develop an integrated data repository with preservation processing and discovery services
 - Components of the repository and discovery engine are complete

Portage Network Research Data Management Framework

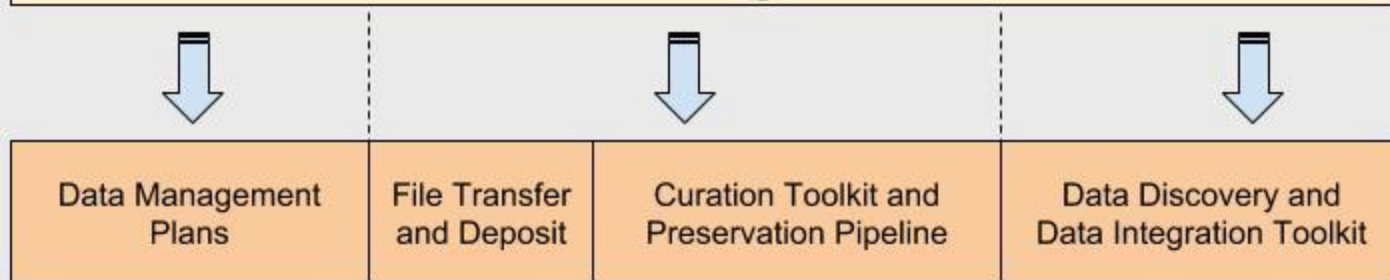
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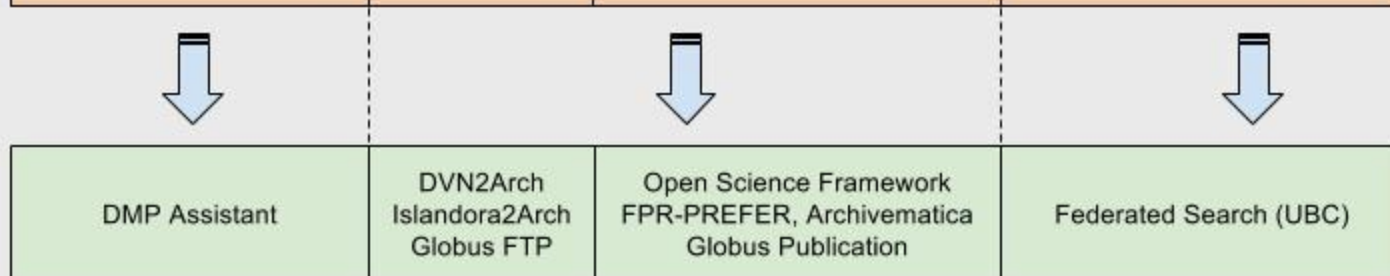
Portage
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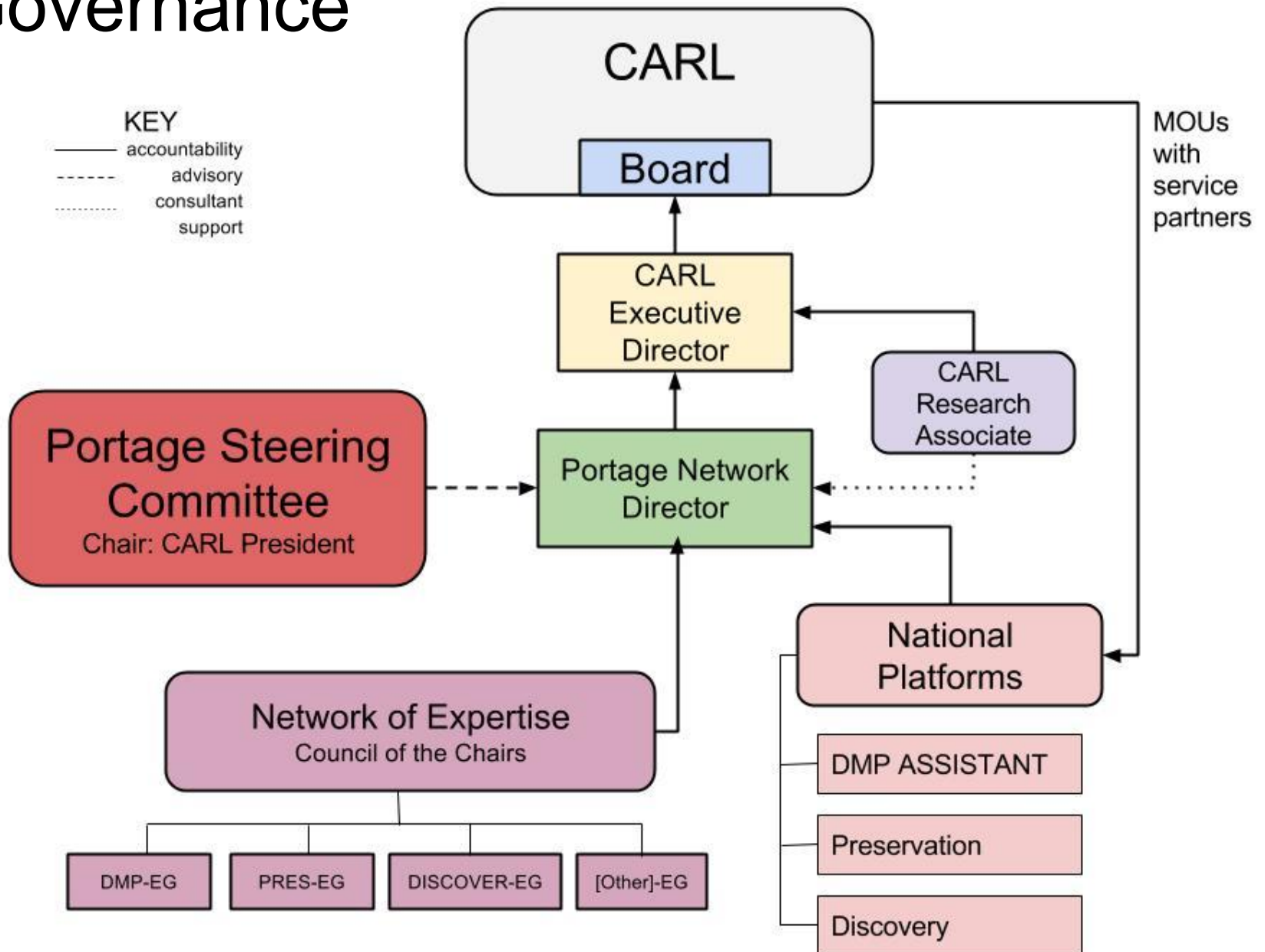
RDM Tools
& Platforms



Portage
Tools



Governance



Progress to date: Governance

- Portage Steering Committee is organized and has met twice (April 25 and October 11, 2016)
 - Composition of the Steering Committee:
 - members from each of the four regional library consortia (Jamie MacKenzie is CAUL/CBUA's member)
 - members from national organizations of campus RDM partners: CARA, CAREB, CUCCIO, U15 VPRs
 - members from national RDM stakeholders: RDC, Leadership Council for Digital Infrastructure, Compute Canada, SSHRC
 - member with an MOU affiliation: UAL
 - an international member: DCC

Progress to date: Governance

- Council of Chairs is organized and met on July 8, 2016
 - Composition of the Council of Chairs:
 - The Chairs of the six expert groups, the Director, CARL ED, and CARL Consultant



RDM Community Engagement

- Meetings with the four regional library consortia and with institutions addressing RDM on their campuses
 - UBC, U Calgary, Concordia, U Sask, Queen's, UT
- Presentations and workshops at conferences
 - CARA, CAREB, the Congress, IDRC, IDCC, CRKN, SSHRC Leaders conference, Cybera Summit, CANHEIT/HPCS, IBM Academy Cloud Conference, IATUL, Acfas
- Exploratory meetings
 - LAC, CFI, TB, SSHRC, CIHR

RDM Community Engagement

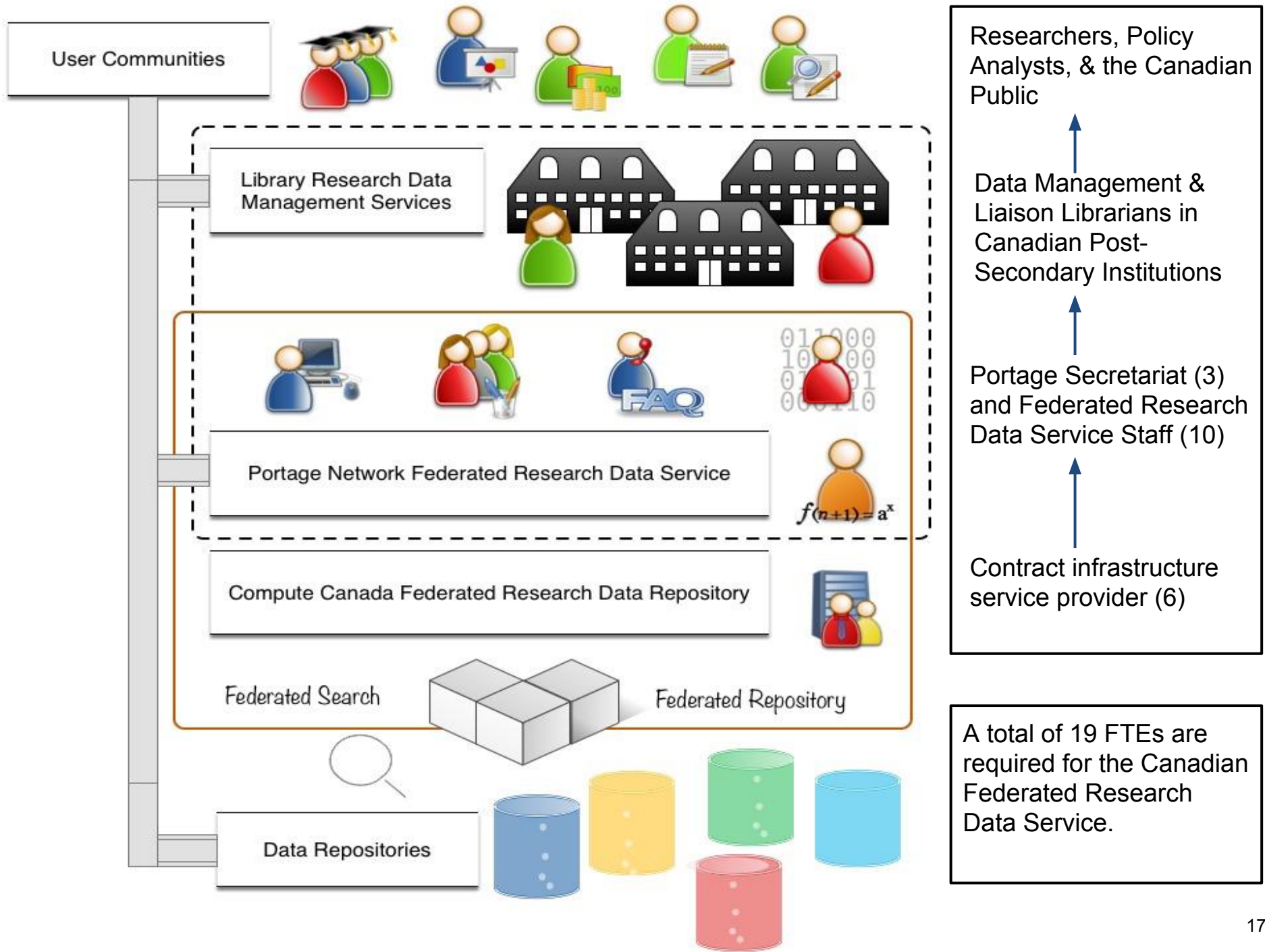
- Contract work
 - CIHR Statement of Work to develop content for RDM tutorials on the CIHR website
 - SSHRC Statement of Work to provide an introduction to DMPs to a sample of recent Insight and Partnership recipients and to assess the outcome
 - Canadian Space Agency Life Sciences Division to prepare a report on archiving research data funded by Life Sciences (subcontracted by Janet Halliwell for the Director's time)

Lessons from Year 1

- The number of stakeholders and amount of RDM activities in Canada can be overwhelming at times.
- Communications is a full time job. Lise Brin is brilliant but only available to Portage part-time.
- There is a need to develop an RDM service model to accompany the Network of Expertise and infrastructure platforms.
- The funding for Portage needs adjustment now that we have a better understanding of the costs of operating the network.

CAUL/CBUA & Portage Collaboration

- List of RDM contacts who may be interested in participating on Portage Expert or Working Groups.
- Institutional visits by the Director organized locally to advance discussions around campus RDM collaborations.
- A CAUL/CBUA-CARL MOU describing working relationship between CAUL/CBUA and Portage (modelled after the COPPUL-CARL MOU).
- Explore RDM platform options that are available and could be regionally operated.
- Define CAUL/CBUA requirements for a Federated Research Data Service.



User Communities

Library Research Data Management Services

Portage Network Federated Research Data Service

Compute Canada Federated Research Data Repository

Federated Search

Federated Repository

Data Repositories

Researchers, Policy Analysts, & the Canadian Public

Data Management & Liaison Librarians in Canadian Post-Secondary Institutions

Portage Secretariat (3) and Federated Research Data Service Staff (10)

Contract infrastructure service provider (6)

A total of 19 FTEs are required for the Canadian Federated Research Data Service.

Thank you

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