SSHRC Partnership Grants Program
Support Session:
Research Data Management

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Background

- RDM Services Coordinator, UofA Libraries
- Educational background in social sciences (Psychology & Criminology)
- Cross disciplinary & multi-institutional applied research data management experience

RDM Initiatives:

- UofA Institutional RDM Strategy Working Group
- CARL Portage Network:
  - Expert Groups: *Data Management Planning* (co-Chair); *RDM Training*
  - Working Groups: *Dataverse North*; *Dataverse Training*
- UofA Health Research Ethics Board
- Statistic Canada Data Liberation Initiative (DLI) External Advisory Committee
What is Research Data Management?

RDM = managing data throughout all phases of the research lifecycle…through active phases and beyond

Tri-Agency Statement - 2016

- In June 2016, The Tri-Agencies (SSHRC, CIHR, NSERC) released a Statement of Principles on Digital Data Management
- 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. **Expectations** → DMP’s, standards, collection/storage, metadata, preservation, retention, and sharing
2. **The responsibilities of all stakeholders** to meet those expectations
In the Spring of 2018, the Tri-Agencies released a draft of the “Tri-Agency Research Data Management Policy”. Incremental implementation of a final policy is expected to begin in later 2019.

The draft policy includes suggested requirements related to three primary areas:

- Institutional Strategy
- DMPs
- Deposit
Institutional Strategy:

“Each institution administering tri-agency funds is required to create an institutional research data management strategy”

Data Management Plans:

“...specific funding opportunities may require DMPs to be submitted to the appropriate agency at time of application

Data Deposit:

“Grant recipients are required to deposit into a recognized digital repository all digital research data, metadata and code that directly support the research conclusions in journal publications, pre-prints, and other research outputs that arise from agency-supported research
UofA:
Institutional shared research data stewardship
Portage Network

Portage is a national RDM network launched by CARL in 2015 which coalesces initiatives to build capacity and coordinate RDM activities in Canada

1. **Networks of Expertise**:
   - Pan-Canadian RDM expertise
   - Provide access to resources, tools, and experts in the area of RDM

2. **Infrastructure Platforms**
   - Working with library consortia, institutions, and other infrastructure partners to assemble essential RDM infrastructure and service components

*Portage provides bi-lingual expertise and resources*
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 data management services and infrastructure.

> Read more
Based on a National Network of Experts

Expert Groups

- Data Management Planning
- Curation
- Data Discovery
- Preservation
- Training
- Research Intelligence

115+ Experts

Working Groups

- Dataverse North WG
- Responsible Research Data Management Practices for Sensitive Data
- FRDR Service Model WG
- FRDR Discovery Service WG
- Institutional RDM Strategies WG

40+ Organizations

A true Network of Experts
UofA Libraries & Portage: Delivering RDM supports and services

Preparing for the Tri-Agency RDM Policy
Responses to Tri-Agency Policy

Institutional RDM Strategies

Data Management Planning

Institutional Data Repository

DMP Assistant: National, online, bilingual, Data Management Planning Tool

RDM Strategy Template

Dataverse
Pillar 1: Institutional RDM Strategies

- Comprised of key stakeholder groups from across campus
- **Co-Chairs:** Alex Clark (Assoc VP Research) & Geoff Harder (AUL, Digital Initiatives)
- Endorsed by the President’s Executive Committee - Operations (PEC-O)
- Focus is on development of a high level institutional RDM strategy
- Immediate goal is to have a reasonable framework of the strategy in place for when the Tri-Agencies release their RDM policis (Q4 2019/Q1 2020)
Pillar 1: Institutional RDM Strategies

1. **Raise awareness**: Policy requirements & RDM best practices
2. **Assess institutional RDM readiness**
4. **Define an RDM roadmap**: to help with capacity-building over the medium term, to ensure research excellence, efficiency, and transparency.

“Portage Institutional RDM Strategy Template”

Strategy Components

+ associated guidance
Pillar 2: Data Management Planning

- The Portage DMP Assistant is a national & freely available ‘gold standard’ platform for supporting researchers in developing data management plans.

- The Tri-Agencies draft RDM policy states:

  “Grant applicants are encouraged to use standardized tools to develop their DMPs, such as the Portage Network’s DMP Assistant.”

University of Alberta Libraries provides all of the necessary infrastructure, development expertise and hosting services for supporting the DMP Assistant nationally
DMP Assistant Key Features

- Supports cross institutional research collaboration
- Freely available to end users
- Web-based, bilingual tool
- Endorsed by the Tri-Agencies
- Guidance & Examples
- Can have multiple DMPs
- Shared access - co-owner, editor, or read-only
- Exportable (e.g., pdf, text, MSWord)
- Living document - modifiable when needed

DMP Assistant

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

Sign Up
New to DMP Assistant? Sign up today.
Pillar 2: Data Management Planning

Portage DMP Expert Group
Co-Chairs:
James Doiron (UofA)
Maggie Neilson (AcadiaU)

Four working groups:
1. Exemplars
2. Policy
3. Training
4. DMP Repository

Objectives:
1. Guide the development and growth of the Portage DMP Assistant platform
2. Provide tools that support best practices in research data stewardship and that promote a strong data culture in Canada;
3. Facilitate the sharing of research administrative information across research organizations and agencies;
4. Improve coordination among local and national research service organizations
5. Reduce administrative burden on researchers.
Pillar 3: Data Deposit

- Institutional RDM Strategies
- Data Management Planning
- Data Repository Options

The Dataverse Project

Welcome to the University of Alberta Libraries' Dataverse network. This service is provided to help researchers publish, analyze, distribute, and preserve their data and datasets.

Metrics: 23,106 Downloads
Pillar 3: Data Deposit

Dataverse Positives:

Open source software
Mature platform
Widely adopted
Community support
User-friendly
Brandable

Portage Training Materials in development

UofA Dataverse by the numbers:
~600 datasets
~6000 files
~28,000 downloads

http://dataverse.org/
Pillar 3: Data Deposit

**Dataverse Features:**
- Digital Object Identifier (DOI) assigned
- User controlled data access
- Many types of data
- Built in data citations
- Usage metrics
- Brandable

*Portage Training Materials in development*

*Persistent identifier assigned when upload data*

Automatically registered with DataCite [https://www.datacite.org/](https://www.datacite.org/)

*From fully open to restricted access*

- Tabular (CSV, SPSS, R, etc)
- Documentation (pdf, doc, text)
- Geospatial data
- Multimedia (audio-visual)

Madueke, Ijeoma Sylvia, 2018, "NIGERIAN LITERATURE IN FRENCH TRANSLATION (NILIFT)",
https://doi.org/10.7939/DVN/CHNOHA

*Including a customizable guestbook*

High level as well as in-depth web based training modules
Pillar 3: Data Deposit

Portage Dataverse North Working Group
Chair: Lisa Goddard (UVic)

Objectives:
- Develop a community of practice that brings together Dataverse providers
- Coordinate and discuss local and national training, support services, outreach strategies, promotions, and infrastructure development and needs.
- Provide Dataverse focused guidance in areas such as data preservation, data discovery, curation, metadata, and training.
Online RDM Training Resources

Portage Training Resources

Dedicated to the shared stewardship of research data in Canada through:

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Events

- DMP Assistant
  - Sign In
  - Sign Up
  - If you have an existing account with DMP Assistant or previous version of DMP Builder.

- FRDR DFDR
  - For Researchers
  - For Librarians & Data Stewards
  - For Service & Infrastructure Providers
  - For Policy Makers & Administrators

News

- Call for Participation: Portage Research Intelligence Expert Group
  - September 6, 2018

- Appointment of Sarah Wilkinson as a CARL Project Officer
  - September 6, 2018

  - September 5, 2018
Continuum of Training Materials

What is Portage?
Portage is a national research data management (RDM) initiative to assist researchers and other stakeholders through a library-based network of expertise. It is also developing national platforms and services for planning, preserving, and discovering research data. Portage is managed by the Canadian Association of Research Libraries.

What is the Training Expert Group (TEG)?
The mandate of the Training Expert Group (TEG) is to produce bilingual (English/French) training materials and resources that are accessible to all. As well, TEG has compiled a library of External Training Resources. TEG is made up of data librarians and RDM professionals from post-secondary institutions across Canada.

Continuum of Training

Essentials → Essentials and More! → On-line Training Modules

Coming in the future! Potential webinar topics include: RDM 101; DMPs 101; Institutional Repositories; Dealing with Sensitive Data; Data Curation 101; Data Preservation 101; How to Develop an Institutional Strategy; and others.

Webinars
On-Demand Training

Presenters:
Jane Fry (Carleton U), Carol Perry (U of Guelph), James Doiron (U of Alberta)

Conference:
IASSIST 2019; Sydney, AU
UofA Libraries RDM & Data Services - Come See Us!

https://www.library.ualberta.ca/research-support/data-management
Thank-you

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