Outline

• CARL’s engagement in research data management in recent years
• Where the CARL Portage Network fits within the research data ecosystem in Canada
• The organization of Portage and its start-up accomplishments
1. CARL’s engagement in RDM
Timeline of engagement

- 2009 (Nov): Workshop introducing research data management to librarians
- 2010-2011: Research Data Management Infrastructure funding application
- 2013 (Jan): Workshop on planning research data management services
- 2013 (Dec): ARC pilot
- 2014 (Sep): Progress review of Federated Pilot projects
- 2015 (Apr-May): Framework and transition plan from pilot to operating network
2. Canada’s RDM ecosystem
Portage Principles

• Research data are a public good
• Intelligent access: openness, with respect for privacy
• Collaborative approaches: cost savings and shared expertise
• Inclusiveness: aim to serve all researchers and create a more level playing field
• Commitment to standards and interoperability
• International relationships: liaise internationally and ensure Portage keeps pace with international practices
• Respect for differences: flexibility to meet the needs of different regions, institutions, and disciplines
• Open source: Tools will be contributed back to the community
• Stewardship: a sense of responsibility for managing research data over the long term

December 2013
Other RDM principles

Tri-agency Statement of Principles on Digital Data Management

- Canadian Institutes of Health Research
- Natural Sciences and Engineering Research Council of Canada
- Social Sciences and Humanities Research Council of Canada
- January 2016

Research Data Management in Canadian Universities: A statement of principles

- Research Data Canada and Vice-presidents of Research from the U15
- March 2016
Bottom-up approach

- Mandated institutions working collaboratively
- Information professionals
- Researchers, societies and their domain projects

- Granting council and federal agency digital data management principles
- Academic research data management principles
Is there a best level to collaborate?

Portage aims to provide infrastructure and services at the levels of the research project, the institution, and the network.

By network, we mean collaborating in regional and national partnerships.
Shared stewardship at the institutional level
3. Portage Network RDM Framework
Portage Network Research Data Management Framework

RDM Framework

- Data Planning and Production
- Data Deposit
- Data Curation
- Data Preservation
- Data Access
- Reuse & Integration

Portage Network of Experts

- Data Management Plans
- Data Curation
- Data Preservation
- Data Discovery

Training

RDM Tools & Platforms

- Data Management Plans
- File Transfer and Deposit
- Curation Toolkit and Preservation Pipeline
- Data Discovery and Data Integration Toolkit

Portage Tools

- DMP Assistant
- DVN2Arch Islandora2Arch
- Globus FTP
- Open Science Framework FPR-PREFER, Archivematica
- Globus Publication
- Federated Search (UBC)
Network of Expertise

Kirchner, Diaz, Henry, Fliss, Culshaw, Gendron, and Cawthorne (2015) examined the use of the centre of excellence model to provide digital information services to multiple institutions. They introduced a new model that they call “networks of expertise.”

This approach applies a community-building strategy and brings together experts with complementary skills for a limited time to address a particular issue. Furthermore, it keeps experts at local institutions by relying on an active network to address issues across a spectrum of institutions.

Portage adopted this approach for its operations.
Portage Network of Expertise

Capitalize on the research data management expertise and services in libraries.

● Expert Groups currently operational
  ○ Data Management Plan Expert Group
  ○ Data Preservation Expert Group
  ○ Data Discovery Expert Group
  ○ RDM Learning Expert Group

● Expert Groups forthcoming
  ○ Data Curation Expert Group
  ○ Ethics and Data Expert Group
Infrastructure platforms and tools

Develop RDM platforms and tools through partnerships and memoranda of understanding.

● Current partnerships in place or nearly signed
  ○ DMP Assistant (UAL-CARL)
  ○ National Research Data Repository Prototype (CC-CARL)
  ○ Preservation Pipeline (CC-OCUL/SP-CARL)
  ○ Dataverse-to-Archivematica middleware (OCUL/SP-CARL)

● Forthcoming
  ○ PREFER: Policy Format Register
  ○ Federated data discovery system
  ○ Data curators toolkit

Common ground with ARL SHARE
Stakeholder engagement

Build a community of practice for research data management through well established working relationships among stakeholders across research sectors.

- Regional library consortia
- Individual academic libraries
- Academic RDM stakeholders, e.g., VPR’s, REBs, Scholarly Associations, Networks of Centres of Excellence
- Other RDM stakeholders, e.g., Research Data Canada, Leadership Council for Digital Infrastructure
Portage communications and operations

Provide operational support for Portage.

○ CARL staff: Director, Consultant, Project Officer

○ Governance Steering Committee
  ○ Fifteen member committee: four regional library consortia + eight key stakeholders + two MOU partners
  ○ First meeting was held April 25, 2016

○ Communications
  ○ Portage website launched April 15, 2016
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 2014 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,
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Thank you