



FUTURE DIRECTIONS FOR RDA

A Report from a Workshop Held on March 7th 2015

***How do we most effectively harness the power of a
volunteer organization?***

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Introduction

A meeting was convened in San Diego coincident with the Fifth RDA Plenary, on Saturday 7th March for the purposes of **Future Directions for RDA** consultation.

This initiative results from discussions begun at the fourth Plenary in Amsterdam. During the P4 Leadership Coordination meeting, a strategic planning meeting at P5 was agreed. As per the RDA Governance Document, Strategic Planning and the development of the RDA Strategic Plan is the responsibility of Council, but **it is critical that the broader RDA community engage in its discussion, development, and implementation.** It was agreed to hold a one-day Strategic Planning Consultation (SPC) meeting at P5 with a small group of key representatives to frame the broader discussion, which could then be taken into wider consultation. During the workshop it was agreed that what is required is a directions plan for RDA that informs clear, concrete actions.

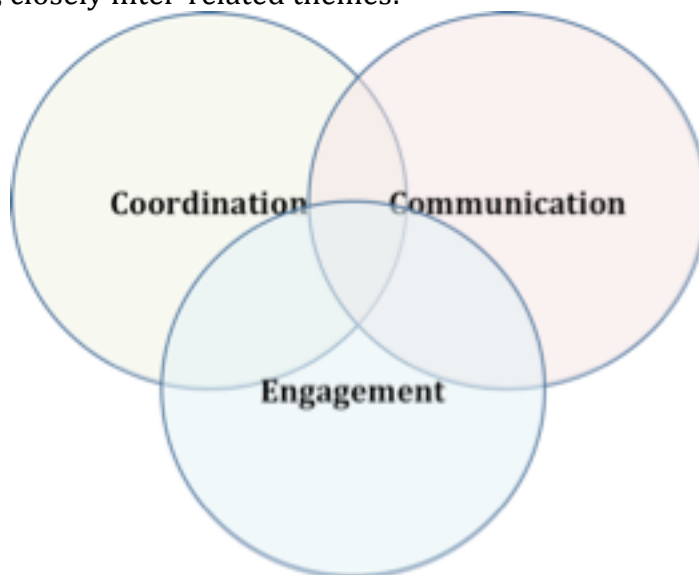
Proposed Directions and Actions

The following proposed directions and actions were developed in consultation among RDA Council and representatives of the Organisational Assembly, the Technical Advisory Board, the RDA Community, Regional Leadership and the Secretariat at a workshop on March 7, 2015. The proposed actions will form the basis of consultation across the RDA community with a view to a **Future Directions** document finalized and presented at P6 in September 2015. No priorities have been set for the proposed actions. The community consultation will include the setting of priorities and defining and refining the proposed actions into very specific tasks.

The proposed directions and actions should be reviewed against initiatives that are already underway to ensure that *Future Directions* are truly future. Nothing in this process of establishing *Future Directions* should be construed as putting work “on-hold” until the planning process is complete. Work goes on.

The proposed directions and actions are expressed as RDA should/must/needs to.... Key to the final *Future Directions* document and integral to community consultation will be recording **who** will accomplish each action. **NO** action will appear in the *Future Directions* document that lacks a “doer”. Every RDA member has a role to play.

The proposed directions and actions developed during the workshop can be grouped in one or more of three key, closely inter-related themes:



The themes are represented as overlapping circles because many of the proposed actions can be rooted in more than one theme; and for many of the proposed actions to achieve maximum results, complementary actions within the other themes are required.

1. Coordination

Considerable attention was paid to co-ordination during the workshop. It was clearly articulated that a volunteer organization with approaching 3000 individual members, a growing cadre of organisational members, and 56 working and interest groups needs to pay special attention to coordination. Constant monitoring of mechanisms for coordination and measuring their effectiveness is required. It is easy for such an organisation to take divergent paths that weaken effectiveness, dissipate energy, confuse members and the wider world. Accordingly the following directions and specific tasks emerged to strengthen RDA coordination internally and in RDA’s dealing with other organisations.

RDA should more effectively coordinate across its components:

- RDA should develop a Mission Map – a map that clearly shows all that must happen for RDA to realize its vision and accomplish its mission. RDA activities should be mapped to show how they contribute. The map should be continually updated as various tasks are completed. The map should clearly outline opportunities and challenges yet to be tackled. The map will enable clear understanding of how the organisation’s multiple efforts are all focused on the mission of building the social and technical bridges that enable open data sharing.
- RDA should review the organisational models of a variety of non-technical organisations to ascertain whether other organisational structures might serve RDA more effectively.

RDA should more effectively coordinate between technical, social and domain efforts:

- RDA should establish a coordination group at P6 for domain champions – (see domain champions under engagement)

RDA should better coordinate its operations:

- RDA should document the roles and responsibilities for the volunteers
- RDA should develop a staffing plan for the required core paid operations staff
- RDA must ensure effective coordination among its national, regional, and global operations.
- RDA should develop a tracking mechanism for its processes and actions to ensure faster, transparent, clearly defined processes & decisions.
- RDA must ensure that the Governance Document is a living document regularly reviewed and updated.

2. Communications

Of equal concern to workshop participants was a need for clear, consistent, and effective communications to multiple audiences. Clarity around the vision was deemed essential. Communication requires improvement within the organisation and in the organisation's approach to the wider world. Communication efforts must be targeted to appropriate audiences while retaining RDA's message. The following are directions and key actions that emerged from the discussion:

RDA should become a global voice for data:

- RDA's communications must be rooted in a wide understanding of the vision and mission of the organisation:

RDA Vision: Researchers and innovators openly sharing data across technologies, disciplines, and countries to address the grand challenges of society.

RDA Mission: The Research Data Alliance (RDA) builds the social and technical bridges that enable open sharing of data.

- RDA needs to communicate actively with domain-based data management organisations. (see domain-based RDA champions note under engagement)
- RDA must become the definitive go-to source for data interoperability information and actively promote that information through the website, webinars, MOOCs, attendance at the meetings and conferences of other organisations.
- RDA needs to tell its stories more effectively to funders, potential adopters, potential members and across the RDA community
- RDA WG / IGs should gather success stories resulting from adoption of RDA results
- RDA should gather feedback on outputs/activities/gaps through targeted Requests for Comment.
- RDA's stories must be focused on case studies of results (e.g. the Data Harvest report).

RDA should more effectively communicate the importance of social infrastructure for data:

- RDA does more than develop technical solutions. From the outset it has recognized that social change is critical to realizing the vision. RDA should develop a 'social bridges' white paper.
- RDA needs to tell its stories more effectively to funders, potential adopters, potential members and across the RDA community.
- RDA WG / IGs should gather success stories resulting from adoption of RDA results.

RDA needs to more effectively tailor its stories to different communities:

- RDA's communications efforts should include reaching out more effectively to different constituencies.

RDA should improve internal communications:

- RDA's communication efforts should be informed by the "Mission Map" proposed under the co-ordination section
- RDA should clarify communications about its own internal processes.

3. Engagement

As an organisation looking to break down barriers for data sharing across jurisdictions, domains, and time, the workshop emphasized the importance of RDA reaching out and engaging other organisations in the work of RDA. RDA can be the convener for multiple organisations with a role in research data to come together and develop real interoperability. To fulfill the role, outreach to drive engagement is required. The directions and actions noted below will build RDA's outward engagement and the engagement of others in RDA.

RDA should more strongly engage with domain-based data initiatives:

- RDA should establish a cohort of RDA Champions within research domain organisations (e.g. GEOSS). These champions are likely already involved with a domain organisation and RDA. RDA should develop materials to support the champions becoming effective spokespeople for RDA within the domains and for the domains within RDA.
- RDA should reach out and engage with major data-driven organisations (e.g. CERN, NASA).
- RDA should engage with the people who are/will be adopting RDA results.

RDA should be a forum for improved engagement between research and industry over data:

- RDA should make a focused effort to engage with industry / start-ups / entrepreneurs
- RDA should engage industry in adopting RDA results but also participation in the activities of RDA

RDA should engage with its own future:

- RDA should establish itself as a resource to funding agencies seeking advice and direction on appropriate research data requirements.
- RDA must engage with next generation leaders.
- RDA should encourage WG / IG into assuming leadership roles in RDA.
- RDA should develop fora for dialogue between RDA and other existing organisations with an interest in data.
- RDA should engage individuals with alternative points of view.
- RDA should engage with new geographies.

The Next Steps on the Process to Community Engagement and the Development of a Widely Agreed set of Future Directions

The workshop on March 7th was tasked not only with coming up with a set of proposed actions for RDA's future directions to stimulate community discussion, but also with coming up with a plan for that community engagement in developing the future directions and setting priorities.

Discussion with the group led to the agreement that it would be suitable to engage the wider community through a structured survey process that would include the development of a survey instrument, testing the instrument with a small group, and then wide distribution of the survey across the community. The first draft of *Future Directions* will be prepared after the survey analysis is complete. A set of webinars to discuss the first draft of the *Future Directions* document will be scheduled in appropriate time zones to enable wide member participation. A briefing on the process is to be presented at the RDA P5 business meeting to inform the wider RDA community that a process is underway and how members of the community will be engaged.

Timeframe for Developing the *Future Directions* Document

This timeline is ambitious and is subject to change. Overall coordination is owned by Mark Parsons.

P5 report-out on the SPC meeting to the community. Short written report of the meeting will be available on the RDA website. [March]

Development, conduct, analysis of community survey about priorities and actions in each of the thematic areas [April / May]

Development and review of draft Directions Document . On-line forums in multiple geographical areas. [May / June]

Development of final Directions Document and "red team" review [July / August]

Council approval [September before P6]

Council presentation to the community. Action officially starts! [P6]

Conclusion

The importance of broad community engagement in the establishment of *Future Directions* was continually emphasized throughout the workshop. The timelines for the development of the document are ambitious. It is clear that while it is worth following these timelines, moving according to the plan must not come at the expense of full engagement of the community. While the proposed actions in this summary report speak to "RDA should", it should be noted that the workshop itself was conducted very much in the spirit of "we should". RDA is a volunteer organisation; it is the volunteers who will establish a final set of *Future Directions*; it is the volunteers who will put those directions into action.

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