

## Research Data Management (RDM) Institutional Strategy


### 1. Background

The Tri-Agency (SSHRC, CIHR, and NSERC) launched a [Research Data Management \(RDM\) Policy](#) in March 2021 with the objective of promoting research data management (RDM). The Tri-Agency RDM Policy is being launched in a phased approach:

- **Institutional strategies:** By **March 1<sup>st</sup>, 2023**, each post-secondary institution and research hospital eligible to administer Tri-Agency funds is required to create an institutional RDM strategy, publicly post the strategy and notify the agencies when completed.
- **Data management plans:** By **spring 2022**, the agencies will identify an initial set of funding opportunities where researchers will be required to submit a data management plan with their grant proposal.
- **Data deposit:** After reviewing the institutional RDM strategies, and in line with the readiness of the Canadian research community, the agencies will phase in the data deposit requirement.

As an eligible institution to administer CIHR, NSERC or SSHRC funds, Mount Saint Vincent University (MSVU) will publicly make available contact information for any inquiries about the strategy on the MSVU website. ( [Research Data Management \(RDM\) – Mount Saint Vincent University \(msvu.ca\)](#) )

### 2. Definitions

<p><i>Research Data Lifecycle</i></p>	<p>The points throughout the research process where data are conceived, created, collected, manipulated, stored, shared, archived, and destroyed, and where research data management practices must be considered and implemented.</p>	
<p><i>Data Management Plan</i></p>	<p>A ‘data management plan’ (DMP) is a living document, typically associated with an individual research project or program that consists of the practices, processes and strategies that pertain to a set of specified topics related to data management and curation. DMPs guide researchers in articulating their plans for managing data; they do not necessarily compel researchers to manage data differently.</p>	
<p><i>FAIR Principles</i></p>	<p>The <i>FAIR Guiding Principles for Scientific Data Management and Stewardship</i> was released in 2016 and outlines the best practices and guidelines to improve the <b>F</b>indability, <b>A</b>ccessibility, <b>I</b>nteroperability, and <b>R</b>euse of digital assets. These principles have since been adopted globally by research institutions, granting/ funding agencies, and journals. For more information: <a href="#">FAIR Principles - GO FAIR (go-fair.org)</a></p>	
<p><i>Metadata</i></p>	<p>‘Metadata’ is data about data and is the information needed to make a dataset discoverable, citable, and usable by others.</p>	

<b><i>Research</i></b>	'Research' is defined in this policy as a systematic investigation for purposes of developing perspectives, creating knowledge, gaining insights, developing generalizations, informing policy or practice, or otherwise making a positive difference in the lives of individuals and/or communities. For the purpose of this document, research includes all forms of funded and unfunded research and creative scholarly work, representing a diversity of theoretical and methodological perspectives and approaches, conducted by and within the MSVU community and by people who use the Mount facilities for the creation, representation, and publication of scholarly work.
<b><i>Research Data</i></b>	'Research data' are data that are used as primary sources to support technical or scientific inquiry, research, scholarship, or creative practice, and that are used as evidence in the research process and/or are commonly accepted in the research community as necessary to validate research findings and results. Research data may be experimental data, observational data, operational data, third party data, public sector data, monitoring data, computational data, processed data, or repurposed data. What is considered relevant research data is often highly contextual and determining what counts as such should be guided by disciplinary norms.
<b><i>Research Data Management (RDM)</i></b>	'Research data management' is the storage of, access to, and preservation of data produced from one or more investigations, or from a program of research. RDM practices cover the entire lifecycle of the data, from planning the investigation to conducting it, and from backing up data as it is created and used to preserving data for the long term after the research has concluded. It also includes data-sharing and reuse, where applicable.
<b><i>Sensitive Data</i></b>	<p>Sensitive data must be safeguarded against unwarranted access or disclosure. From a legal/administrative perspective, this can include:</p> <ul style="list-style-type: none"> <li>• Personal information</li> <li>• Personal health information</li> <li>• Research data about humans (i.e., data that are subject to TCPS2)</li> <li>• Educational records</li> <li>• Customer records</li> <li>• Financial information</li> <li>• Criminal information</li> <li>• Confidential personnel information</li> <li>• Information that is deemed to be confidential</li> <li>• Information entrusted to a person, organization, or entity with the intent that it be kept private and access be controlled or restricted</li> <li>• Information that is protected by institutional policy from unauthorized access</li> </ul> <p>Sensitive data may also include Indigenous data and/or Traditional Knowledge, and certain types of geographic information (e.g., detailed locations of endangered ecosystems or species).</p>

\*Additional definitions and information can be located here: [Research Data Management Terminology - CODATA, The Committee on Data for Science and Technology](#)

### 3. Scope

This is a living document and will be reviewed periodically as resources and priorities evolve. This strategy applies to all MSVU Researchers as defined in the University's [Policy on Responsible Conduct of Research](#).

The purpose of this RDM strategy is to assist MSVU and its research community to further build upon, and integrate, best practices in data management throughout the data lifecycle. Research data management is a part of good research practice and responsible conduct of research. This strategy reflects the circumstances of our research community (e.g., size, research intensity, and existing RDM

capacity), and outlines how MSVU will provide its researchers with an environment which both enables and supports research data management.

**4. Oversight**

The RDM Strategy comes jointly under the purview of Associate Vice-President Research and the University Librarian. A working group with initial key stakeholders was formed in late 2017 to begin work on the MSVU RDM Strategy.

<p><b>RDM Working Group (RDM-WG) - 2017-2023</b></p> <p><b>Research Office (RESO)</b></p> <ul style="list-style-type: none"> <li>• Jacqueline Gahagan, Associate Vice President Research (Chair)</li> <li>• Brenda Gagné, Research Ethics Coordinator</li> <li>• Marlene Ramos, Research Grants Coordinator</li> </ul> <p><b>MSVU Library and Archives (Library)</b></p> <ul style="list-style-type: none"> <li>• Tanja Harrison, University Librarian</li> <li>• Sandra Sawchuk, Data Services Librarian; Liaison for Education &amp; Child and Youth Study</li> </ul> <p><b>MSVU Information and Technology Services (IT&amp;S)</b></p> <ul style="list-style-type: none"> <li>• Karen Smyth, Director, IT&amp;S</li> <li>• Christine McNeille, Acting Director Information Technology &amp; Services</li> <li>• Ken Munro, Security Compliance and Training Specialist</li> </ul> <p><b>Past Contributing Members:</b></p> <ul style="list-style-type: none"> <li>• Gayle MacDonald, Associate Vice President Research (Chair) (2017 to June 2020)</li> <li>• Derek Fisher, Interim Associate Vice President Research (Chair) (July 2020 to August 2021)</li> <li>• Veronica Bacher, Research Grants Coordinator (2017 to Sept 30, 2022)</li> </ul>	<p><b>Affiliated/Advising Standing Committees of Senate:</b></p> <ul style="list-style-type: none"> <li>• Committee on Research &amp; Publications (CRP)</li> <li>• University Research Ethics Board (UREB)</li> <li>• Senate Committee on Library and Archives (SCOLA) – formerly Senate Library Committee (SLC)</li> <li>• Senate Committee on Information Technology and Services (SCOITS)</li> </ul>
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**5. Strategy and Goals**

RDM enables MSVU and our researchers to meet varying requirements of granting agencies, such as the Tri-Agency. Additionally, it ensures that data are stored securely, preserved, and available to access as required. This RDM strategy will support MSVU researchers in the management of their research data and adherence to the [Tri-Agency RDM Policy](#) requirements. The strategy will also align with and support the goals and objectives of MSVU’s Strategic Plan: [Strength Through Community](#).

There are four main components of MSVU’s institutional strategy:

**5.1. Raise Awareness**

**5.1.1. Identify Stakeholder communities on campus**

<b>Assessments</b>	<ul style="list-style-type: none"> <li>• RDM Working Group (RDM-WG) formed in 2017, with stakeholders from across the university to ensure representation including Research Office (RESO), Library, Information Technology and Services (IT&amp;S), Research Ethics Board (REB)</li> </ul>
<b>Gaps</b>	<ul style="list-style-type: none"> <li>• The RDM Implementation Committee (RDM-IC) should include faculty representatives - one faculty member from each of the three faculties.</li> <li>• Consider addition of a member from Facilities Management – some data may require physical storage in a secure location.</li> </ul>

<b>Goals</b>	<ul style="list-style-type: none"> <li>Develop a network of MSVU RDM Champions to promote the importance of RDM to their colleagues and provide collegial mentorship</li> <li>Establish an RDM communication strategy that is cohesive and consistent</li> <li>Establish a website that provides RDM information for the MSVU Research Community</li> <li>Promote and recognize data as an important research output and encourage excellence in data management</li> </ul>
<a href="#">Related MSVU Strategic Plan Theme(s)</a>	<ul style="list-style-type: none"> <li><b>Transformative teaching and learning</b> (Theme 1)</li> <li><b>Research, scholarly work, and professional activity</b> (Theme 2)</li> <li><b>Operational excellence and sustainability</b> (Theme 7)</li> </ul>

### 5.1.2. Recruit local champions to help promote the value of RDM and engage with various communities

<b>Assessments</b>	<ul style="list-style-type: none"> <li>The RDM-WG has various representatives from offices (RESO, Library, IT&amp;S, REB), who are RDM champions and sit on the RDM-WG.</li> </ul>
<b>Gaps</b>	<ul style="list-style-type: none"> <li>Require additional researcher representation from the various faculties</li> <li>Require RDM Champions from the faculty component to assist with outreach, best practices</li> </ul>
<b>Goals</b>	<ul style="list-style-type: none"> <li>Develop a network of RDM Champions to promote the importance of RDM to their colleagues and provide collegial mentorship</li> <li>Establish an RDM communication strategy that is cohesive and consistent</li> <li>Establish a cohesive RDM site that provides RDM information to the MSVU Research Community</li> <li>Promote and recognize data as an important research output and encourage excellence in data management</li> <li>Promote research excellence within the university and research community through the adoption of good data management practices</li> </ul>
<a href="#">Related MSVU Strategic Plan Theme(s)</a>	<ul style="list-style-type: none"> <li><b>Transformative teaching and learning</b> (Theme 1)</li> <li><b>Research, scholarly work, and professional activity</b> (Theme 2)</li> <li><b>Operational excellence and sustainability</b> (Theme 7)</li> </ul>

### 5.1.3. Develop Awareness materials and resources for different communities

<b>Assessments</b>	<ul style="list-style-type: none"> <li>RDM website is currently available <a href="#">Research Data Management (RDM) – Mount Saint Vincent University (msvu.ca)</a>;</li> <li>The Committee on Research &amp; Publications submitted to Senate for information, the formal institutional <a href="#">Statement on Research Data Management</a> (October 2020)</li> <li>The Library does a variety of outreach including individual consultations;</li> </ul>
<b>Gaps</b>	<ul style="list-style-type: none"> <li>Resources to develop, review and maintain materials.</li> <li>Website additions required: links to Portage resources, video for the DMP Assistant, Dataverse resources</li> <li>RESO will provide links updates and information via the Research Bulletin</li> </ul>
<b>Goals</b>	<ul style="list-style-type: none"> <li>Collaborate with other local, regional, and federal institutions regarding best practices, training, and information</li> <li>Ensure necessary software licenses and service subscriptions are acquired and/or maintained</li> </ul>

	<ul style="list-style-type: none"> <li>• Ensure that RDM-related technology, infrastructure is appropriately resourced, in terms of both funding and personnel</li> <li>• Provide MSVU researchers with an environment and training opportunities that will promote the importance of data management and enable the adoption of best practices in RDM and data stewardship</li> <li>• Promote best practices and guidance for RDM to the MSVU research community</li> <li>• Provide researchers with guidance to properly manage their data in accordance RDM best practices, including the development of data management plan</li> <li>• Provide support and/or options to researchers creating data management plans</li> <li>• Support researcher access to data repositories or other platforms that securely preserve, curate, and provide continued access to research data</li> </ul>
<a href="#">Related MSVU Strategic Plan Theme(s)</a>	<ul style="list-style-type: none"> <li>• <b>Research, scholarly work, and professional activity</b> (Theme 2)</li> <li>• <b>Truth and Reconciliation</b> (Theme 4)</li> <li>• <b>Community engagement</b> (Theme 5)</li> <li>• <b>Operational excellence and sustainability</b> (Theme 7)</li> </ul>

#### 5.1.4. Determine and apply the appropriate delivery mechanisms for outreach

Assessments	<ul style="list-style-type: none"> <li>• Currently provide outreach when requested and during regular events held by the RESO. Incorporate online options and recording of sessions to extend reach as much as possible</li> </ul>
Gaps	<ul style="list-style-type: none"> <li>• No formal outreach/communications plan or awareness of outreach preferences</li> <li>• Human resources needed to develop communications plan</li> </ul>
Goals	<ul style="list-style-type: none"> <li>• Develop a network of RDM Champions to promote the importance of RDM to their colleagues and provide collegial mentorship</li> <li>• Establish an RDM communication strategy that is cohesive and consistent</li> <li>• Establish a cohesive RDM website that provides RDM information to the MSVU Research Community</li> <li>• Provide MSVU researchers with an environment and training opportunities that will promote the importance of data management and enable the adoption of best practices in RDM and data stewardship</li> </ul>
<a href="#">Related MSVU Strategic Plan Theme(s)</a>	<ul style="list-style-type: none"> <li>• <b>Transformative teaching and learning</b> (Theme 1)</li> <li>• <b>Research, scholarly work, and professional activity</b> (Theme 2)</li> <li>• <b>Equity, diversity, inclusion, and accessibility</b> (Theme 3)</li> </ul>

#### 5.1.5. Participate in the Tri-Agency consultations around RDM

Assessments	<ul style="list-style-type: none"> <li>• Several members of the RDM-WG participated in Tri-Agency consultations</li> <li>• The University submitted a response to the draft policy</li> </ul>
Gaps	<ul style="list-style-type: none"> <li>• None identified</li> </ul>
Goals	<ul style="list-style-type: none"> <li>• Continued participation where appropriate</li> </ul>
<a href="#">Related MSVU Strategic Plan Theme(s)</a>	<ul style="list-style-type: none"> <li>• <b>Community engagement</b> (Theme 5)</li> <li>• <b>Operational excellence and sustainability</b> (Theme 7)</li> </ul>

### 5.1.6. Participate in national RDM consultations and events

<b>Assessments</b>	<ul style="list-style-type: none"> <li>Members of RESO, Library and REB attended numerous consultations and RDM events</li> </ul>
<b>Gaps</b>	<ul style="list-style-type: none"> <li>None identified</li> </ul>
<b>Goals</b>	<ul style="list-style-type: none"> <li>Continued participation where appropriate</li> </ul>
<b><a href="#">Related MSVU Strategic Plan Theme(s)</a></b>	<ul style="list-style-type: none"> <li><b>Community engagement</b> (Theme 5)</li> <li><b>Operational excellence and sustainability</b> (Theme 7)</li> </ul>

## 5.2. Assess Institutional Readiness and Ideal State for RDM

### 5.2.1. Undertake a survey of institutional data assets and data management practices on campus

<b>Assessments</b>	<ul style="list-style-type: none"> <li>Data management assets and practices vary widely across campus but are not clearly documented</li> </ul>
<b>Gaps</b>	<ul style="list-style-type: none"> <li>Additional resources required to document/research</li> <li>Survey and/or focus groups/targeted interviews with faculty/researchers</li> </ul>
<b>Goals</b>	<ul style="list-style-type: none"> <li>Review current RDM-related policies, procedures, and systems to ensure they adequately address RDM concerns</li> <li>Ensure that all RDM-related policies, practices, and procedures are supportive and respectful of Indigenous ways of knowing, doing, connecting and being, including respecting and supporting Indigenous data sovereignty, governance, and management</li> <li>Ensure the development and maintenance of RDM-related technology and infrastructure to ensure compliance with RDM policies and requirements (funders, publishers, legislative bodies, etc.)</li> </ul>
<b><a href="#">Related MSVU Strategic Plan Theme(s)</a></b>	<ul style="list-style-type: none"> <li><b>Research, scholarly work, and professional activity</b> (Theme 2)</li> <li><b>Equity, diversity, inclusion, and accessibility</b> (Theme 3)</li> <li><b>Truth and Reconciliation</b> (Theme 4)</li> <li><b>Community engagement</b> (Theme 5)</li> <li><b>Operational excellence and sustainability</b> (Theme 7)</li> </ul>

### 5.2.2. Evaluate existing RDM services

<b>Assessments</b>	<ul style="list-style-type: none"> <li>Data management assets and practices vary widely across campus but are not clearly documented</li> </ul>
<b>Gaps</b>	<ul style="list-style-type: none"> <li>Additional resources may be required to document/research</li> <li>More resources are required to develop incentives and policy</li> <li>Requires procedures to encourage RDM</li> <li>Requires development of MSVU-specific DMP</li> <li>Resources are required to develop custom guidance on DMP and DMP Assistant</li> <li>MSVU will need to conduct regular training sessions on RDM &amp; DMPs</li> </ul>
<b>Goals</b>	<ul style="list-style-type: none"> <li>Review current RDM-related policies, procedures, and systems to ensure they adequately address RDM concerns</li> <li>Ensure that all RDM-related policies, practices, and procedures are supportive and respectful of Indigenous ways of knowing, doing, connecting and being, including respecting and supporting Indigenous data sovereignty, governance, and management</li> </ul>

	<ul style="list-style-type: none"> <li>Ensure that the development and maintenance of RDM-related technology and infrastructure to ensure compliance with RDM policies and requirements (funders, publishers, legislative bodies, etc.)</li> </ul>
<a href="#">Related MSVU Strategic Plan Theme(s)</a>	<ul style="list-style-type: none"> <li><b>Research, scholarly work, and professional activity</b> (Theme 2)</li> <li><b>Equity, diversity, inclusion, and accessibility</b> (Theme 3)</li> <li><b>Truth and Reconciliation</b> (Theme 4)</li> <li><b>Community engagement</b> (Theme 5)</li> <li><b>Operational excellence and sustainability</b> (Theme 7)</li> </ul>

### 5.2.3. Institutional Support and Training

<b>Assessments</b>	<ul style="list-style-type: none"> <li>MSVU is a member of numerous regional and national groups and involved with RDA, DRAC and Portage, which develop resources and opportunities for training</li> <li>The Library provides training upon request and during information sessions and special events</li> <li>MSVU has expertise in the areas of copyright, scholarly communications, data, and academic technology</li> <li>The University also has expertise in research ethics and intellectual property</li> </ul>
<b>Gaps</b>	<ul style="list-style-type: none"> <li>More resources are required to continue to develop and/or deliver training materials and participate in regional and national organizations</li> </ul>
<b>Goals</b>	<ul style="list-style-type: none"> <li>Collaborate with other local, regional, and federal institutions regarding best practices, training, and information</li> <li>Ensure necessary software licenses and service subscriptions are acquired and/or maintained</li> <li>Ensure that RDM-related technology, infrastructure is appropriately resourced, in terms of both funding and personnel</li> <li>Ensure the development and maintenance of RDM-related technology and infrastructure to ensure compliance with RDM policies and requirements (funders, publishers, legislative bodies, etc.)</li> <li>Provide MSVU researchers with an environment and training opportunities that will promote the importance of data management and enable the adoption of best practices in RDM and data stewardship</li> <li>Promote best practices and guidance for RDM to the MSVU research community</li> <li>Provide researchers with guidance to properly manage their data in accordance RDM best practices, including the development of data management plan</li> <li>Provide support and/or options to researchers creating data management plans</li> <li>Support researcher access to data repositories or other platforms that securely preserve, curate, and provide continued access to research data</li> </ul>
<a href="#">Related MSVU Strategic Plan Theme(s)</a>	<ul style="list-style-type: none"> <li><b>Research, scholarly work, and professional activity</b> (Theme 2)</li> <li><b>Equity, diversity, inclusion, and accessibility</b> (Theme 3)</li> <li><b>Truth and Reconciliation</b> (Theme 4)</li> <li><b>Community engagement</b> (Theme 5)</li> <li><b>Operational excellence and sustainability</b> (Theme 7)</li> </ul>

### 5.2.4. Data Repositories and Archiving

<b>Assessments</b>	<ul style="list-style-type: none"> <li>A national data repository (<a href="#">Borealis</a>) is under development with the Digital Research Alliance of Canada.</li> </ul>
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<b>Gaps</b>	<ul style="list-style-type: none"> <li>• More resources are required to continue to develop training materials on access and use</li> </ul>
<b>Goals</b>	<ul style="list-style-type: none"> <li>• Develop a network of RDM Champions to promote the importance of RDM to their colleagues and provide collegial mentorship</li> <li>• Establish an RDM communication strategy that is cohesive and consistent</li> <li>• Establish a cohesive RDM website that provides RDM information to the MSVU Research Community</li> <li>• Collaborate with other local, regional, and federal institutions regarding best practices, training, and information</li> <li>• Ensure necessary software licenses and service subscriptions are acquired and/or maintained</li> <li>• Ensure that RDM-related technology, infrastructure is appropriately resourced, in terms of both funding and personnel</li> <li>• Ensure the development and maintenance of RDM-related technology and infrastructure to ensure compliance with RDM policies and requirements (funders, publishers, legislative bodies, etc.)</li> <li>• Provide MSVU researchers with an environment and training opportunities that will promote the importance of data management and enable the adoption of best practices in RDM and data stewardship</li> <li>• Provide researchers with guidance to properly manage their data in accordance RDM best practices, including the development of data management plan</li> <li>• Support researcher access to data repositories or other platforms that securely preserve, curate, and provide continued access to research data</li> </ul>
<b><a href="#">Related MSVU Strategic Plan Theme(s)</a></b>	<ul style="list-style-type: none"> <li>• <b>Research, scholarly work, and professional activity</b> (Theme 2)</li> <li>• <b>Equity, diversity, inclusion, and accessibility</b> (Theme 3)</li> <li>• <b>Truth and Reconciliation</b> (Theme 4)</li> <li>• <b>Operational excellence and sustainability</b> (Theme 7)</li> </ul>

### 5.2.5. Institutional Policies, Guidelines and/or Procedures

<b>Assessments</b>	<ul style="list-style-type: none"> <li>• MSVU currently has policies and procedures related to RDM, but not specific to RDM</li> </ul>
<b>Gaps</b>	<ul style="list-style-type: none"> <li>• More resources are required to continue to collaborate and/or develop policies, procedures, and guidelines</li> </ul>
<b>Goals</b>	<ul style="list-style-type: none"> <li>• Development of RDM policies, procedures and practices that are consistent with ethical, legal, and commercial obligations, as well as tri-agency requirements, and other relevant policies</li> <li>• Ensure that all RDM-related policies, practices, and procedures are supportive and respectful of Indigenous ways of knowing, doing, connecting and being, including respecting and supporting Indigenous data sovereignty, governance, and management</li> <li>• Ensure the development and maintenance of RDM-related technology and infrastructure to ensure compliance with RDM policies and requirements (funders, publishers, legislative bodies, etc.)</li> <li>• Review current RDM-related policies, procedures, and systems to ensure they adequately address RDM concerns</li> <li>• Ensure that MSVU researchers have access to long-term data preservation and secure storage for sensitive data throughout the data lifecycle</li> <li>• Form an RDM Strategy committee to review this strategy, prioritize areas and establish an implementation plan</li> </ul>



	<ul style="list-style-type: none"> <li>• Liaise with the MSVU Digital Strategy Committee to ensure continuity and university-wide continuity and compliance</li> <li>• Periodically review existing policies, procedures, standards, infrastructure, and systems to determine if revisions are required</li> </ul>
<a href="#">Related MSVU Strategic Plan Theme(s)</a>	<ul style="list-style-type: none"> <li>• <b>Research, scholarly work, and professional activity</b> (Theme 2)</li> <li>• <b>Equity, diversity, inclusion, and accessibility</b> (Theme 3)</li> <li>• <b>Truth and Reconciliation</b> (Theme 4)</li> <li>• <b>Community engagement</b> (Theme 5)</li> <li>• <b>Operational excellence and sustainability</b> (Theme 7)</li> </ul>

### 5.3. Formalize RDM practices

The RDM-WG recognizes that MSVU requires formal policies, procedures and guidelines to advance RDM best practices on the ethical, legal, contractual, and cultural issues and is committed to working with the various stakeholders to ensure their development. We consider this endeavour to be part of the governance aspect of the RDM roadmap noted below in Section 5.4. The MSVU Library is best situated to provide guidance and information on RDM best practices. Work will continue over the next few years, and will reflect MSVU’s size, capacity, and resource levels and assess the institution’s capacity to support current and future RDM requirements.

### 5.4. Define a roadmap

Based on the *Gaps to Goals* deficits noted above in Section 5.2, the RDM-WG has compiled the RDM roadmap noted below, and will work with the various MSVU areas of expertise and responsibility and with university researchers in order to bring the MSVU community to the RDM destination.



Roadmap Checkpoint	Item	Participating Units (see code below)
Awareness and Outreach	AVPR and LIBR to contact the MSVU Faculty Association for volunteers from each faculty to join the RDM Implementation Committee (RDM-IC) as a faculty representative, or to serve as a Faculty Champion.	AVPR; LIBR;
	AVPR to contact TLC for collaborative efforts and outreach	AVPR;
	Communication/calls for RDM Champions and users	AVPR; LIBR;
	Creation of RDM Committee to implement the RDM Roadmap projects and tasks	AVPR; LIBR; IT&S; FM; OT
	Conduct a survey of current researchers to determine knowledge, need, next steps	LIBR;
	Create and maintain a static RDM Section in the Research Bulletin, providing news, updates and tips each month	RESO; LIBR; OT
	Empower researchers to adopt robust RDM practices by leveraging existing institutional resources	AVPR; CRP; FM; LIBR; IT&S; REB; RESO; OT
	Encourage the development of skills and knowledge of research data management practices and tools among staff who support and conduct research	AVPR; CRP; LIBR; IT&S; OT; REB; RESO
	Ensure that researchers can easily locate and access usable RDM resources and skill-building opportunities	LIBR; IT&S; RESO;

	Establish a cohesive RDM website that provides RDM information to the MSVU Research Community	LIBR; IT&S; RESO; OT
	Establish a robust RDM communication strategy that is cohesive and consistent	AVPR; LIBR; IT&S; OT;
	Foster adoption of RDM best practices symposia, workshops, targeted outreach, and partnerships	AVPR; CRP; LIBR; IT&S; REB; RESO; TLC; OT
	LIBR to reach out to librarians for expertise and collaborative efforts	LIBR;
	Maintain and expand our existing networks of research support professionals to expand frontline RDM capacity	AVPR; LIBR; IT&S; OT
	Outreach to Facilities Management for collaboration	AVPR; LIBR; OT
	Promote the institutional RDM Strategy to research community	AVPR; CRP; LIBR; IT&S; REB; RESO; TLC; OT
<b>Resources, Tools &amp; Training</b>	Develop and deliver in-person and online training and awareness sessions (such as <i>Researcher Bootcamp</i> )	LIBR; IT&S; RESO; TLC; OT
	Develop RDM training and awareness materials and programs that utilize different formats and media	AVPR; CRP; LIBR; IT&S; OT; REB; RESO; TLC
	Establish a robust RDM communication strategy that is cohesive and consistent	AVPR; LIBR; IT&S; REB; RESO; TLC
	Expand and improve support and training services using evidence-based evaluations and reviews	LIBR; RESO;
	Explore human resources capacity to ensure MSVU can provide timely, accurate and detailed RDM-related services, support, and training	AVPR; LIBR; IT&S;
	Explore integrated interoperable systems for research-related records (e.g., DMPs, REB protocols, and institutional grant management)	AVPR; LIBR; IT&S;
	Foster an environment of learning about RDM including processes, practices, and documentation, especially to support the proactive integration of Indigenous data protocols and other sensitive data considerations into RDM	AVPR; LIBR; REB; RESO
	Increase numbers of staff with expertise to provide RDM-related support and services to advise researchers in RDM best practices	AVPR; LIBR; IT&S; RESO
	Increase RDM skills and competencies training across the academic curriculum	AVPR; LIBR; IT&S; OT; RESO
	Increase the number and range of RDM-related training and capacity-building opportunities	LIBR; IT&S; OT; RESO; TLC
	Populate Research Resources SharePoint site with RDM educational resources and tools	CRP; FM; LIBR; IT&S; OT; REB; RESO
	Provide RDM training programs for researchers and students aligning with collaborative efforts both nationally and internationally	AVPR; CRP; LIBR; IT&S; OT; REB; RESO
	Support researchers in working appropriately with Indigenous partners and communities in terms of Indigenous data sovereignty and research data management	AVPR; LIBR; OT; RESO
	Work with the research community and key stakeholders to improve core RDM service domains: data management plans and data sharing, deposit, and preservation	AVPR; FM; LIBR; IT&S; OT; RESO
	<b>Governance</b>	Develop governance documentation that supports good RDM Practices
Ensure that the development and maintenance of our RDM-related support services keep up with the implementation of RDM policies and requirements by funders, publishers, and legislative bodies		AVPR; FM; LIBR; IT&S; OT; REB; RESO;

	Establish roles and responsibilities for compliance with the Tri- Agency RDM policy	AVPR; LIBR; IT&S; IT; REB; OT
	Partner with provincial and national RDM infrastructure providers and existing research community platforms to address gaps in repository technologies for managing, sharing, depositing, and archiving sensitive data and large data	AVPR; CRP; FM; LIBR; IT&S; OT;
	Propose revisions to, and updates of, existing research data-related policies	AVPR; CRP; FM; LIBR; REB; RESO;
	Revise internal grant applications and research ethics applications to incorporate DMPs and reduce administrative burden on researchers	CRP; REB;
<b>Assessment and Evaluation</b>	Complete an analysis of relevant policies to ensure our institutional RDM framework is both coherent and in compliance with applicable laws and regulations	AVPR; LIBR; IT&S; OT; REB; RESO;
	Continue to support and promote access to existing national resources	AVPR; CRP; FM; LIBR; IT&S; OT; REB; RESO
	Continued representation on the Digital Strategy Task force	AVPR; LIBR; IT&S;
	In keeping with the federal government requirements for RDM, advocate for appropriate staffing and resources for centralized research data management services such as data management plans, data security services, and research data repositories	AVPR; LIBR; IT&S; OT;
	Explore MSVU requirements for commitments and investments to ensure the long-term sustainability of institutional RDM support	AVPR; LIBR; IT&S; OT;
	Explore the creation of a research data privacy officer to oversee institutional capacity in accordance with applicable privacy laws and regulations	AVPR; LIBR; IT&S; OT
	Form RDM Review committee comprised primarily of faculty members for future adjudication requirement of DMPs	AVPR; LIBR; OT;
	Increase institutional capacity for repositories' data curation and metadata practices and provide enhanced discovery and reuse for research datasets.	LIBR; OT;

**Responsibility Code:**

AVPR	Associate Vice-President Research	LIBR	Library	REB	Research Ethic Board
CRP	Committee on Research and Publications	IT&S	Information Technology & Services	RESO	Research Office
FM	Facilities Management	OT	Other/RDM-IC/Senior Admin	TLC	Teaching and Learning Centre

**6. Contact MSVU Experts**

<b>Research Office</b>	<ul style="list-style-type: none"> <li>• General DMP and RDM requirements and guidance</li> <li>• Data licensing and/or sharing agreements</li> <li>• Intellectual Property</li> <li>• Liaising with researchers and communities to ensure indigenous data sovereignty.</li> <li>• Compliance</li> </ul>	AVPR; Research Grants Coordinator
<b>Library &amp; Archives</b>	<ul style="list-style-type: none"> <li>• General RDM guidance</li> <li>• DMP Training</li> <li>• Curation Training</li> <li>• Data Deposit Resources and Support</li> <li>• Repository access</li> </ul>	Research Data Librarian
<b>Information Technology &amp; Services</b>	<ul style="list-style-type: none"> <li>• Digital data storage, backup; security, and transmission</li> <li>• Cybersecurity</li> <li>• Secure platforms</li> </ul>	IT&S Security Specialist; HelpDesk

<b>Research Ethics Board</b>	<ul style="list-style-type: none"> <li>• Sensitive Data and Ethics</li> <li>• DMPS using personal identifying information</li> <li>• DMP and Ethics Application guidance</li> </ul>	Research Ethics Coordinator
<b>RDM Champions</b>	<ul style="list-style-type: none"> <li>• Participate in the development of RDM tools, and promotion</li> <li>• Sharing of best practices and other related training</li> <li>• Advise and mentor researchers on RDM best practices</li> <li>• Collaboration with researchers</li> </ul>	<b>TBD</b> (e.g., members of the new RDM -IC)

## 7. Acknowledgements

The development of this document has benefited directly from similar documents made public such as the Tri-Agency, Portage Network, Digital Research Alliance of Canada, and other Canadian universities. In some instances, specific formulations drawn from these sources have been incorporated into this document. Specific iterations have been drawn from the following:

- Brandon University - [Research-Data-Strategy](#) – retrieved November 2022
- Cape Breton University - [Research Data Management](#) – retrieved September 2022
- Dalhousie University - [Dalhousie Institutional RDM Strategy](#) – Retrieved May 2022
- Digital Research Alliance - [Digital Research Alliance of Canada](#) – retrieved March 2022
- McGill University - [McGill Institutional RDM Strategy](#) – retrieved September 2022
- McMaster University - [Research Data Management Institutional Strategy](#) – retrieved September 2022
- Portage Network - [Institutional Research Data Management Strategy](#) – retrieved August 2021
- Queen’s University - [Research Data Management Institutional Strategy](#) – retrieved May 2022
- Sheridan College - [RDM Institutional Strategy](#) – retrieved October 2022
- Simon Fraser University - [Draft Principles for Research Data Management](#) – Retrieved October 2022
- Tri-Agency Research Data Management Policy - [Research Data Management Policy](#) – Retrieved February 2022
- University of Lethbridge - [Introduction - Research Data Management](#) – Retrieved October 2022
- University of British Columbia – [UBC-RDM-Strategy-DRAFT](#) – retrieved October 2022
- University of Calgary – [UCalgary Draft RDM Strategy.pdf](#) – retrieved October 2022
- University of Victoria - [Research Data Management Strategy DRAFT](#) retrieved October 2022
- University of Windsor - [UWindsor Institutional RDM Strategy](#) – retrieved September 2022

## 8. Version History

Key Changes	Effective Date
Original version	February 9, 2023