



RESEARCH **DATA ALLIANCE**

***FUTURE DIRECTIONS FOR THE  
RESEARCH DATA ALLIANCE***

**A REPORT FROM THE MEMBERSHIP CONSULTATION PROCESS**

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## Summary

The Research Data Alliance (RDA) is an international community of more than 3000 people and multiple organisations dedicated to building research data sharing without barriers. The work of RDA – removing barriers and enabling sharing – is accomplished by Working Groups, Interest Groups, the Technical Advisory and Organisational Advisory boards, and the RDA Council all of which are composed of volunteers. The volunteer workers of RDA are supported by a secretariat rich in talent and low in numbers.

Council has the responsibility for the future direction of RDA. Based on feedback at a joint meeting of the leadership of RDA constituent groups held shortly after the Amsterdam Plenary, consensus was that this is a useful time to consider future directions for RDA (after its first 18 months of activity). Subsequently, Council appointed a small group to take the next steps.

The future directions consultation quickly identified that RDA must focus its efforts to ensure that volunteer efforts are maximally effective and efficiently supported. The consultation process also quickly recognised that the organisation's efforts to chart future directions had to focus on the practicable – on what could be achieved by a volunteer organisation with limited staff support. A document that focused on nice-to-haves if only resources were unconstrained would ill-serve RDA as it moves forward. Instead a future directions document should be highly focused, highly doable, include a specific set of actions, clearly outline objectives for those actions, expressly state who is responsible.

The process of consultation in the development of Future Directions for RDA began at Plenary 4 in Amsterdam, continued with a workshop prior to Plenary 5 in San Diego, the publication of a working document and a survey of the membership, a series of webinars to test interpretations of the results of the survey, a presentation on results at Plenary 6, and finally the development of this report. At the beginning, three themes quickly emerged: enhanced communication, wider engagement, and improved coordination. At each subsequent stage, the three themes were tested as to whether they really were appropriate for a set of RDA Future Directions. At each stage the three themes were endorsed as the foci for RDA Future Directions.

While the Planning Group are the nominal authors of this report, it has been really written by the RDA membership who have completely determined its content throughout the consultation process. This report documents Future Directions developed and refined by a community. It is that very community that must now execute on the actions that make directions real.

# Communications

## GOALS

**The goal of enhanced communication is to increase RDA's impact with communities, to help promote volunteer and organizational sustainability, and to improve information dissemination and organisational efficiency. Enhanced communication will also ensure RDA remains open and welcoming to new members.**

## COMMUNICATIONS ACTION PLAN

**Develop an integrated communications approach that includes communication to external groups, internal groups, and support for enhanced communications efforts.**

## SPECIFIC ACTIONS

**Action 1:** Identify and recruit a cohort of members who are skilled communicators, who can communicate about RDA to wider audiences as 'RDA Ambassadors'.

**Action 2:** Develop and offer appropriate support material and training for both RDA domain experts and RDA ambassadors. Regularly revisit the communications material and update and supplement with fresh information.

**Action 3:** Send updates from Council, TAB, OAB and Secretariat to the membership quarterly to ensure the membership receives up-to-date information and feels informed and invested in the various actions, decisions and outputs of the groups.

**Action 4:** Develop clear statements of value and compelling targeted messaging to existing and new communities, stakeholders and the membership, and share these messages broadly. Target messaging to the institutions who have a critical mass of individual members actively working on RDA products (align incentives that reward individual volunteer activity.)

**Action 5:** Recruit individuals/organisations to write stories/create content (specifically regional RDAs) that highlight novel individual (longevity, persistence, disruptive) and organizational contributions. Make the content creation and communication process as efficient and low-barrier as possible.

**Action 6:** Create and publish an RDA Annual Report targeted to internal and potential external stakeholders. Improve RDA website for better internal communication, transparency, and co-ordination and better external navigation and visibility.

**Overall Intended Impact:** *After 3 years effort with these actions, the research communities will have a clear understanding of the role it can play in their data sharing activities. The benefits of this engagement will be clear to RDA and its stakeholders.*

Communications actions/responsibilities	Membership	TAB	OAB	Secretariat	Council	Regional	Milestones	Metrics of success
<b>Action 1 – RDA Ambassadors</b>	<p>Volunteer and suggest excellent communicators as potential RDA Ambassadors.</p> <p>With support of secretariat establish new group to support ambassadors.</p>	Suggest excellent communicators as potential RDA Ambassadors.	Suggest excellent communicators as potential RDA Ambassadors.	<p>Identify and register interest of members to act as RDA Ambassadors.</p> <p>Select first cohort and work with these volunteer RDA Ambassadors.</p> <p>Prepare subsequent cohorts.</p>		Suggest excellent communicators as potential RDA Ambassadors	<p>Years 1, 2 &amp; 3: Meet group of Ambassadors at Plenaries, exchange information, experience, and communications materials.</p> <p>Year 2: Use experience of first cohort to build second cohort of RDA Ambassadors.</p> <p>Year 3: Review effectiveness of programme against metrics, and decide if a third cohort should be developed.</p>	<p>Increase in RDA membership.</p> <p>Positive feedback from enhanced communications ('we get it').</p> <p>Target 15 RDA Ambassadors per annum – however the goal should be excellence in communications skill rather than quantity of Ambassadors.</p>
<b>Action 2 – Communications materials and training</b>	Provide feedback on effectiveness of communications and training material to Secretariat.			Coordinate activity and consistency of messages		Develop communications material including slides, video, leaflets, booklets etc. for RDA Ambassadors, and for Domain Experts, to effectively communicate RDA.	<p>Year 1: Develop a pack of communications material and training for communicators.</p> <p>Years 2 and 3: Meet RDA Ambassadors and Domain Experts at plenary meetings and solicit feedback on effectiveness of communications material. Use feedback to improve and refresh the communications material.</p>	<p>Increase in RDA membership.</p> <p>Positive feedback from enhanced communications ('we get it').</p>

Communications actions/responsibilities	Membership	TAB	OAB	Secretariat	Council	Regional	Milestones	Metrics of success
<b>Action 3 – Quarterly updates</b>		Consider a suitable format for the quarterly updates (e.g. email / web page etc.), and nominate a member of this group to write and send out the updates.	Consider a suitable format for the quarterly updates (e.g. email / web page etc.), and nominate a member of this group to write and send out the updates.	Consider a suitable format for the quarterly updates (e.g. email / web page etc.), and nominate a member of this group to write and send out the updates.	Consider a suitable format for the quarterly updates (e.g. email / web page etc.), and nominate a member of this group to write and send out the updates.	Provide material for update.	Year 1: Secretariat track that updates are sent regularly as part of the groups' workflow.  Years 2 & 3: Solicit informal feedback regarding effectiveness of quarterly updates and improve as appropriate.	Track that updates are sent regularly by all groups (OAB, TAB, Council, Secretariat).  Positive feedback from membership for increased communications – solicited informally during business session at RDA plenaries (raise of hands).
<b>Action 4 – Statements of Value</b>					Council to develop clear value statements, targeted to national, regional, funder, industry, multiple stakeholders. Council to use these value statements in communicating with key stakeholders.	Regional adapts messaging; targets organizations who have important individual contributors	Years 1: Council to develop initial suite of 10 value statements for a range of stakeholders and test them for effectiveness.  Years 2 & 3: increase and improve value statements.	Increased core funding for RDA, improving RDA sustainability. Increased member satisfaction, retention
<b>Action 5 – Stories of Member contributions</b>	Volunteer stories and content. Feature regional efforts, sectoral efforts, discipline-specific efforts. Feature volunteer contributions that are long lived, particularly effective,			Secretariat to provide supports for content creation and to harvest and solicit content.		Regions to provide supports for content creation and to harvest and solicit content.	Years 1, 2 & 3: Encourage community efforts in developing success stories, and promote widely.  Review which story formats generate optimal engagement in which communities,	Increased membership in RDA. Increased member satisfaction, retention.  Increased funding for RDA, contributing to RDA sustainability.

<b>Communications actions/responsibilities</b>	<b>Membership</b>	<b>TAB</b>	<b>OAB</b>	<b>Secretariat</b>	<b>Council</b>	<b>Regional</b>	<b>Milestones</b>	<b>Metrics of success</b>
	sustained, or disruptive						and promote accordingly.	
<b>Action 6 – Annual Report and improved website</b>	Generate content for report and website			Develop template for RDA Annual Report, and gather and write content for report.  Review website and consult website users, to optimise design and features.		Provide input to Annual Report.	Year 1: develop Annual Report. Consult and optimise website.  Year 2 & 3: review format of annual report and publish annually.	Website metrics: Positive feedback regarding website improvement. Reduced overhead on member usage of website, and increased process traceability. Annual report metrics: reduced time on regional funding reporting, and increased membership as a result of promotion via the report.

## Engagement

**GOALS:** The goal of increased and improved engagement within the RDA community is to drive community cohesion, organisational health, and sustainability. The goal of increased and improved engagement between RDA and the broader community is to drive member satisfaction and community impact. The goal of improved engagement within RDA responds to the recognition that RDA depends on sustained, high quality volunteer activity for its success.

### ENGAGEMENT ACTION PLAN

**Develop a systemic engagement approach that enhances internal member satisfaction, and targets engagement with external stakeholders and strategic groups, and next generation leadership.**

#### Specific actions

**Action 1:** Create an annual targeted list of strategic organisations, communities, professional societies, and countries that expand the engagement and impact of RDA. Devise and implement strategies to carry out these deeper engagements.

**Action 2:** Identify and recruit 50 members who are credible domain experts to serve as conduits between RDA and specific organisations. Empower and support these experts to facilitate joint events and activities with these organisations and RDA. These domain experts may include some who become communications ambassadors, but it is a distinct group with a distinct function.

**Action 3:** Continue to utilise and focus RDA Plenaries as a primary tool to increase engagement of RDA membership. Work with a broader set of communities and organisations (including industry, start-ups, and entrepreneurs) to co-locate meetings and activities that increase the impact of RDA. Work with RDA regions to develop, fund and administer travel funds for broader participation in the Plenaries.

**Action 4:** Recruit new generations of leadership to RDA constituent organisational groups. Develop a set of leadership development and succession plans for all constituent groups within RDA and RDA regional organisations.

**Action 5:** Provide a platform for technical discussions and the development of white papers on key data-related issues within the RDA community on the RDA website. Allows new ideas to emerge. Further allows communities of practice form that intrinsically reward the off-hours member contributions.

**Overall intended impact:** *After 3 years' effort with these actions, RDA will have established much stronger partnerships with 10 organisations, wider discipline engagement, and more countries involved. RDA will be a stronger organisation.*

Engagement actions/responsibilities	Membership	TAB	OAB	Secretariat	Council	Regional	Milestones	Metrics of success
<b>Action 1 – Targeted Engagement</b>	<p>Contribute to annual list of engagement targets.</p> <p>Serve on ad-hoc Engagement Target Task Force.</p>	Contribute to annual list of engagement targets.	Contribute to annual list of engagement targets.	<p>Coordinate development and approval of engagement targets.</p> <p>Work with Engagement Task Force to track quarterly effort and progress towards engagement goals.</p>	<p>Convene ad-hoc task force of new leadership to develop list of engagement targets for that year.</p> <p>Contribute to and approve an annual list of engagement targets.</p>	<p>Contribute to annual list of engagement targets.</p> <p>Help establish and populate Engagement Task Force.</p>	<p>Years 1, 2 &amp; 3:</p> <p>Task force convened month before March Plenaries. Meet at Plenaries.</p> <p>Task force target and strategy approved in first 3 months after Plenary.</p> <p>Task Force efforts assessed by next March Plenary.</p>	<p>Additional OAB members and Affiliate members.</p> <p>Increase in RDA membership from targeted groups.</p>
<b>Action 2 – Recruit 50 engagement ambassadors</b>	Volunteer and serve as domain engagement ambassadors	Work with OAB to recruit and vet ambassadors	<p>Work with TAB to recruit and vet ambassadors.</p> <p>Work with ambassadors to link to strategic organisations and recruit them as partners or affiliates as appropriate for RDA</p>	<p>Coordinate ambassadors and their engagement efforts.</p> <p>Publicise engagement efforts involving engagement ambassadors.</p>			<p>Year 1: Identify 25 engagement ambassadors and get experience with the best way to recruit and coordinate ambassadors and their activities</p> <p>Years 2 and 3: Improve engagement recruitment and coordination procedures. Build to 50 ambassadors.</p>	<p>Increase engagement with greater number of domain communities: greater membership from ambassador efforts, greater number of Organisational and Affiliate Partners.</p>

<b>Engagement actions/responsibilities</b>	<b>Membership</b>	<b>TAB</b>	<b>OAB</b>	<b>Secretariat</b>	<b>Council</b>	<b>Regional</b>	<b>Milestones</b>	<b>Metrics of success</b>
<b>Action 3 – Plenary focus</b>	Continue to engage and participate in RDA Plenaries. Work with broader set of communities, constituencies and domains to increase the impact and usefulness of Plenaries.	Continue to engage and participate in RDA Plenaries. Work with broader set of communities, constituencies and domains to increase the impact and usefulness of Plenaries.	Continue to engage and participate in RDA Plenaries. Work with broader set of communities, constituencies and domains to increase the impact and usefulness of Plenaries.	Work with local regions to make each Plenary unique, broadly relevant and a vehicle to accelerate the success of RDA and the RDA community.  Gather data that helps Council assess the trajectory of Plenaries and their success.	Select Plenary hosts that help broaden the RDA community and contribute to RDA success.  Convene a council subcommittee or task force to determine metrics of success for RDA Plenaries.	Host appropriate plenaries	Year 1: Establish metrics of success for RDA Plenaries  Years 2 & 3: Track success of Plenaries.	Identify appropriate metrics and track meetings to ensure that RDA Plenaries continue to be important community gathering places and successful working meetings.
<b>Action 4 – Next generation leadership</b>	Step up and communicate interest in leadership to RDA international and regional communities. Take a pro-active role in RDA efforts.	Help identify, encourage, and involve new RDA leadership within RDA and TAB efforts.	Help identify, encourage, and involve new RDA leadership within RDA and OA efforts.	Help identify, encourage, and involve new RDA leadership and share information with Council.	Help identify, encourage, and involve new RDA leadership within RDA efforts. Focus on inclusion and engagement of next generation leadership heading up and on task forces.		Years 1, 2 & 3: Include next-generation leadership in Engagement Task Force and new task forces ad hoc groups.	RDA leadership in all constituent organisational groups and WGs and IGs “turns over” with new individuals taking greater leadership roles.
<b>Action 5 – Platform for Technical Discussions</b>	Develop platform for white papers for RDA community to describe and discuss emerging trends and opportunities. Allows CoPs to emerge that intrinsically reward off-hours member contributions.	Keep abreast of emerging trends and use them to identify new opportunities for WGs and IGs.	Keep abreast of emerging trends and use them to identify new opportunities for Organisational members and Affiliates.	Disseminate white papers on RDA website.	Keep abreast of emerging trends and use them as strategic feedback in assessing interests of RDA community.	Encourage community efforts	Years 1, 2 & 3: Encourage community efforts in developing white papers that capture emerging interests for RDA community.	White papers on website for RDA community. New WGs, IGs, Organisational partners and affiliates in these areas. Survey effectiveness in rewarding volunteer activity.

# Coordination

## GOALS

The goal of improved coordination between RDA constituent organisational groups is to help the organisation run more effectively and help maximise the impact of volunteer efforts.

## COORDINATION ACTION PLAN

Develop robust coordination mechanisms that improve organisational effectiveness and integration.

### Specific actions

**Action 1:** Develop an approach and appropriate groups or mechanisms to maintain/expand adoption of the outputs of Working Groups.

**Action 2:** Develop and implement an effective process to track and expedite RDA processes, actions, and outputs.

**Action 3:** Develop an organisational map to articulate and improve missions, outcomes and interactions between constituent organisational groups. Realise the map in RDA processes and mechanisms to improve coordination, engagement and communication.

**Action 4:** Develop an RDA approach and mechanisms for better coordination and communication among RDA Regions.

### Overall intended impact

*After 3 years effort with these actions, RDA will be a more efficiently and effectively organisation*

Coordination actions/responsibilities	Membership	TAB	OAB	Secretariat	Council	Regional	Milestones	Metrics of success
<b>Action 1 – Output adoption</b>	Contribute to the development of RDA outputs and work to increase their adoption by individuals, projects and organisations.	Work with Working Groups to support the development of RDA outputs with high potential impact.	Pro-actively work with RDA organisations to increase adoption of RDA outputs. Work with Council to convene and populate RDA outputs task force to develop approach for maintaining RDA outputs over time.	Pro-actively work with RDA organisations to increase adoption of RDA outputs.	Work with OAB to convene RDA outputs task force to develop approach for maintaining RDA outputs over time.  Support and engage with RDA regions to develop funding vehicles to support RDA output adoption.	Establish groups in each region to drive local adoption, in partnership with the OAB.	Year 1: Convene Outputs task force to develop plan for stewardship and maintaining RDA outputs over time. Secretariat and/or membership implement output vehicles.  Years 2 & 3: Develop new regional funding resources to increase output adoption.	Stable environment for stewardship and maintenance of RDA outputs.  Increased adoption and evolution of RDA outputs by individuals, projects and organisations.
<b>Action 2 – Process tracking</b>	Contribute input to the development of process tracking mechanisms that impact WG, IG and other efforts.	Contribute input to the development of process tracking mechanisms that impact TAB and other efforts.	Contribute input to the development of process tracking mechanisms that impact TAB and other efforts.  Review process tracking mechanisms annually and help iteratively improve them over time.	Lead development and implementation of tracking mechanisms for RDA processes and procedures. Provide status of RDA processes via the RDA website.	Contribute input to the development of process tracking mechanisms that impact Council and other efforts.		Year 1: Develop, implement and deploy tracking mechanisms for highest priority processes.  Years 2 & 3: Develop, implement and deploy tracking mechanisms for next highest priority mechanisms. Iteratively improve existing tracking mechanisms based on review.	Improved and transparent mechanisms for tracking RDA processes.  More efficient operation based on utilisation of these mechanisms.

Coordination actions/responsibilities	Membership	TAB	OAB	Secretariat	Council	Regional	Milestones	Metrics of success
<b>Action 3 – Organisational map</b>	Provide input to organisational task force.	Contribute to organisational task force.	Collaborate with Council on organisational task force.	Collaborate with Council on organisational task force.  Implement and incorporate Task Force mechanisms within Secretariat processes and procedures to improve coordination and efficient communication.	In collaboration with the Secretariat and OAB, convene a task force that develops an organisational map and a responsibility accountability (RACI) matrix that clearly articulates the roles and responsibilities of RDA constituent groups. Recommend mechanisms that address gaps and overlaps in the map and matrix via appropriate organisational mechanisms.		Year 1: Convene organisational task force to develop organisational map and responsibility accountability matrix. Implement mechanism from Task Force that address gaps and inefficiency based on recommendations  Years 2 & 3: Evolve organisational map and RACI matrix to reflect current status of organisation. Develop additional organisational efficiency mechanisms as needed.	More efficient and transparent organisation.  Clearer understanding of constituent groups' roles, responsibilities and communication hand-offs.
<b>Action 4 – Enhance regional coordination</b>	Contribute regionally and internationally. Participate in vehicles for regional coordination.		Contribute to meetings and vehicles for regional coordination.  Contribute to enhance the coordination of RDA regional efforts through multi-national organisational partners.	Develop and support vehicles for regional coordination.  Secretary General coordinate with regional leadership and RDA.	Work with RDA regional leadership to develop viable approach for regional coordination that includes synergistic approach to RDA-related projects, funding and international collaboration.	Work with Council and Secretariat to enhance regional coordination.	Year 1: Develop informal coordination mechanisms and identify synergistic areas for RDA regions. Years 2 & 3: Increase inter-region collaboration and activities.	RDA regional activities build RDA membership and support base.  RDA regional activities increasingly useful and aligned with RDA international and one another.

## Proposed next steps

RDA Council will consider this report for adoption at a meeting in November or December 2015.

Presuming Council adoption, the Secretariat will develop a framework for implementation in consultation with the newly established Directions Group that will engage the component sub-organisations of RDA in taking the actions noted in the tables above.

An implementation report could become part of the business meetings of RDA sub-organisations – Council, TAB, OAB, and the Secretariat as well as a standard agenda item during the RDA business meeting at each Plenary. The Secretary General will meet bi-annually with the Directions Group to monitor progress. Council will appoint members to the Directions Group as becomes necessary or appropriate.

A report on progress in realising the Future Directions together with RDA outputs and adoption should be the major features of the annual report recommended in Communications – Action 6.