

NDRIO

New Digital
Research Infrastructure
Organization

NOIRN

Nouvelle organisation
d'infrastructure de
recherche numérique

**Working Together to Create a Truly
Integrated DRI Ecosystem in Canada**

Update to NDRIO Members

March 31, 2021

Agenda

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Land Acknowledgment

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NDRIO Update

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National Service Delivery Model (Deloitte)

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Next Steps

Land Acknowledgment

NDRIO Update

Overview

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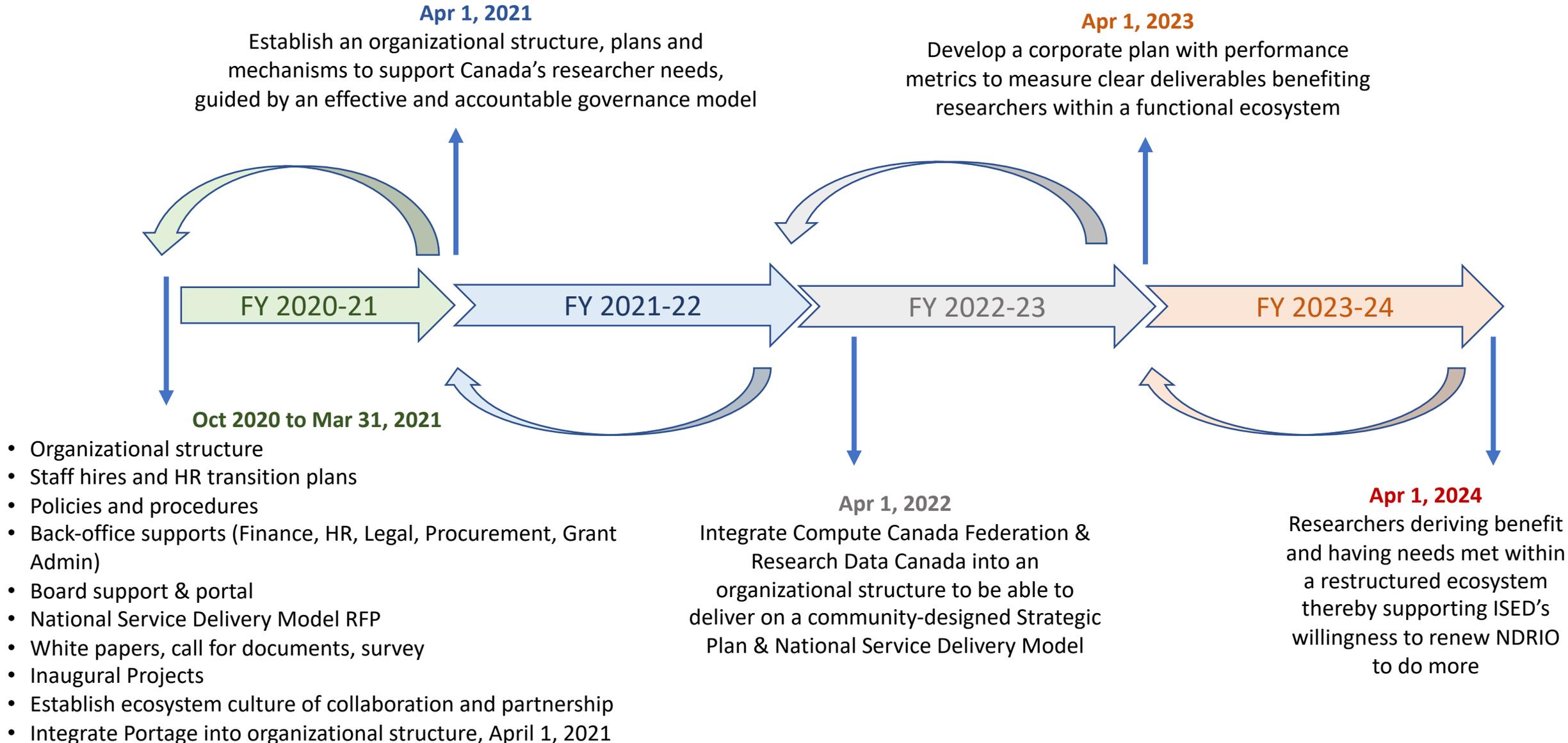
Inaugural Projects Funding Opportunity

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Corporate Plan Highlights

1. Strategic Planning Horizon

4-Year Planning Horizon



Needs Assessment Report

National Service Delivery and Funding Model

DRI Strategic Plan 2022-2026

OCT 2020 - MAY 2021

FEB - JULY 2021

MAY - SEP 2021



Community Driven



Needs Assessment

- White Papers
- Survey
- Current Documentation

Current State Assessment for ARC, RDM & RS



Environmental Scan

Technological Advancements Review

New Service Delivery and Funding Model



Inaugural Call for Projects



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Guiding Principles: Researcher Centric | Service-Oriented | Accountable & Transparent | Striving for Excellence | Collaborative



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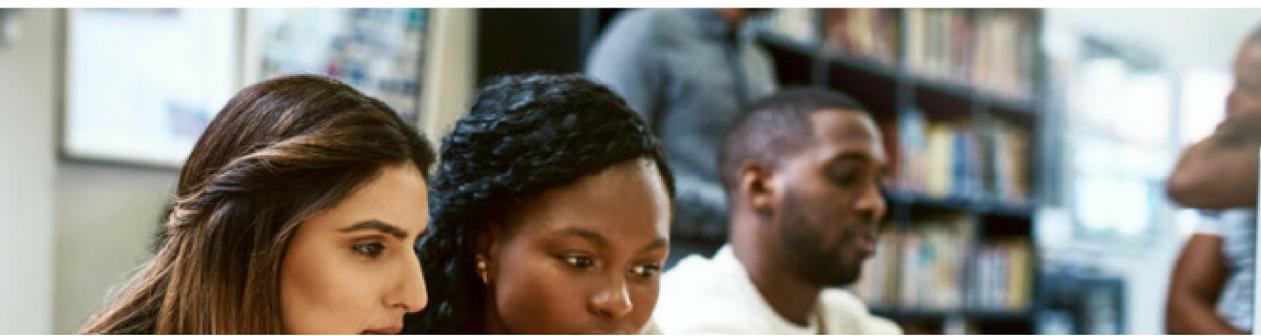
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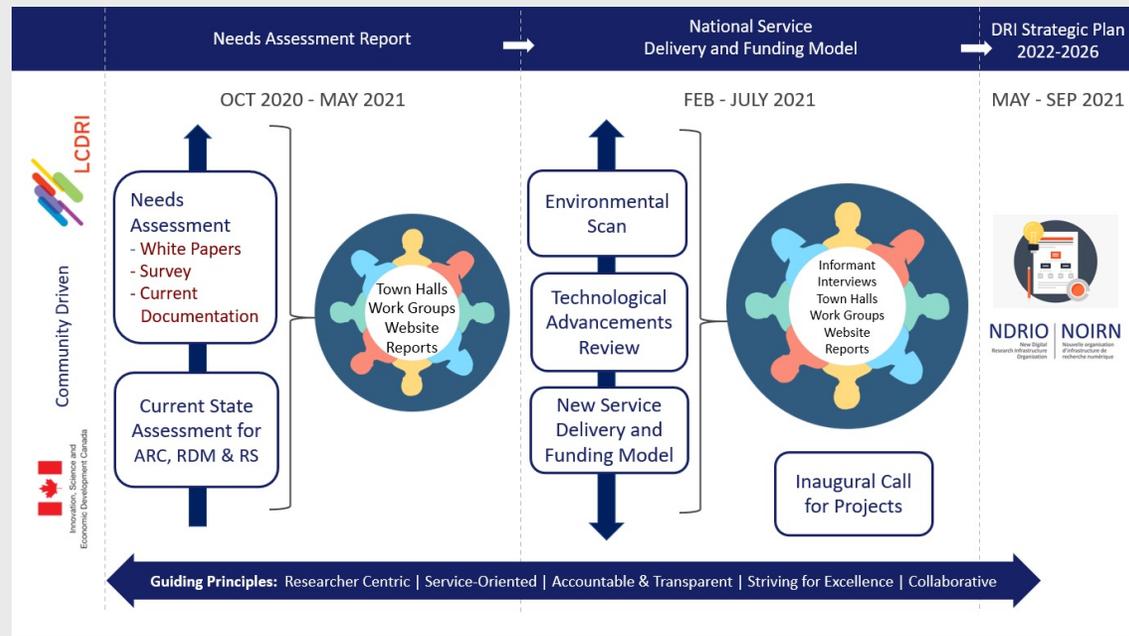
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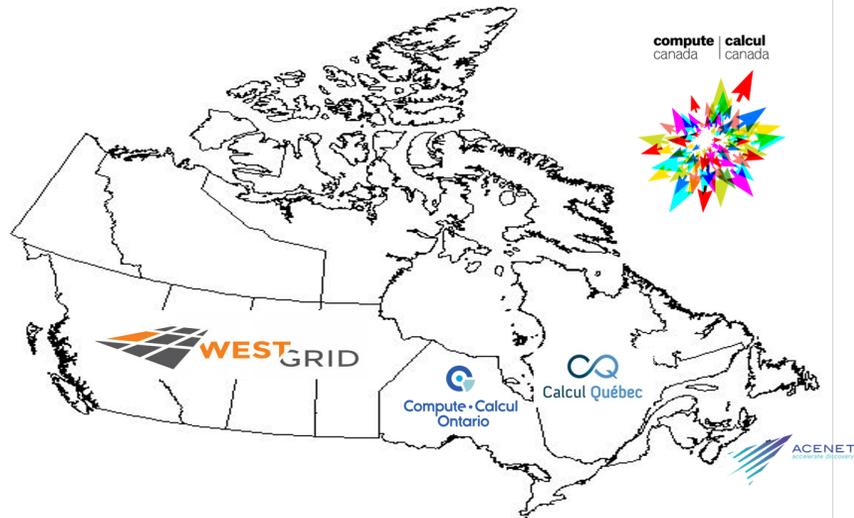
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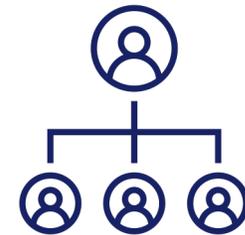


Advanced Research Computing



RDC DRC
Research Data Canada - Données de Recherche Canada

portage
SERVICES PARTAGÉS POUR LES DONNÉES DE RECHERCHE
SHARED STEWARDSHIP OF RESEARCH DATA

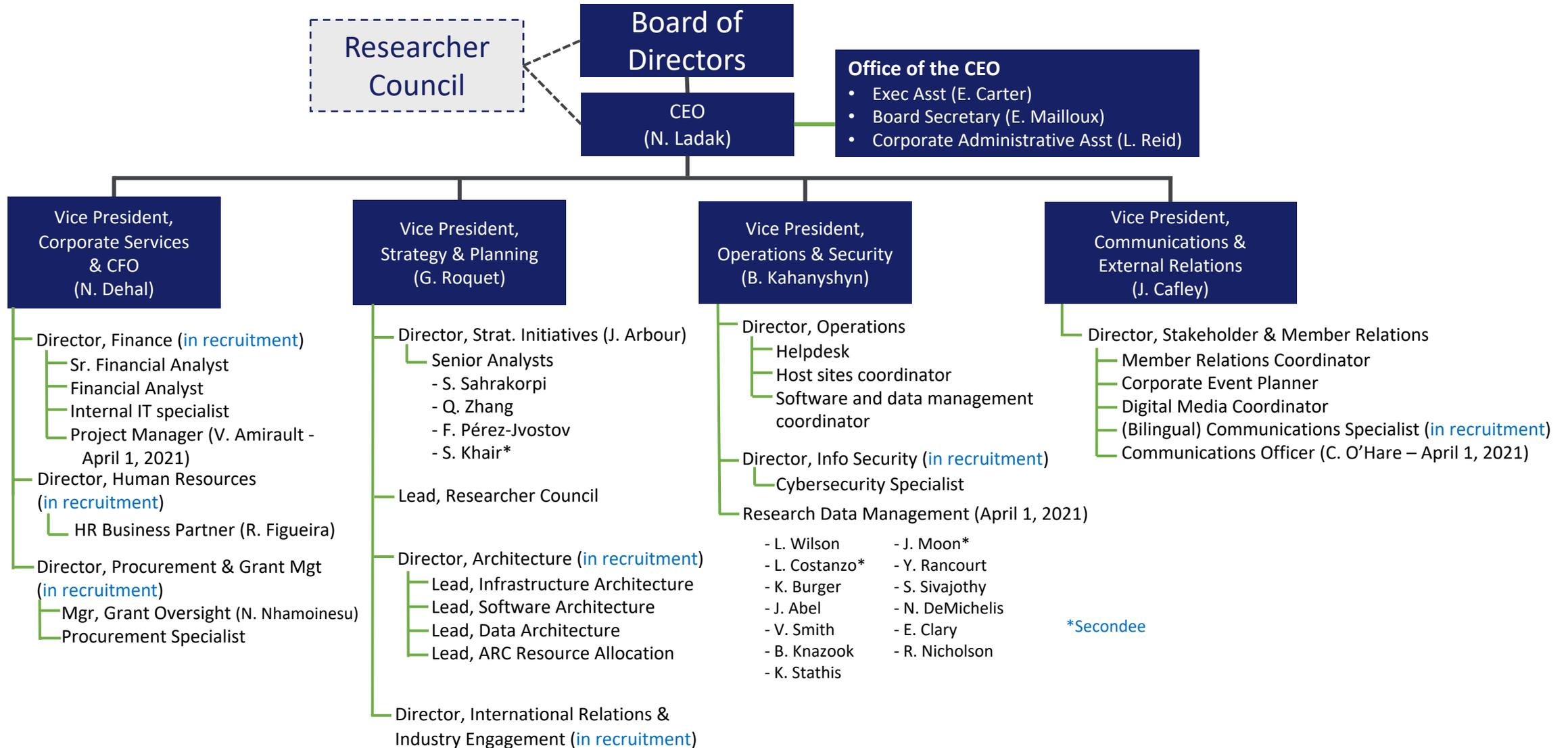


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2. NDRIO's Inaugural Senior Leadership Team

NDRIO Organizational Structure



Narinder Dehal, MBA, CPA-CMA, CHRL

Vice President, Corporate Services & CFO



- 20+ years' experience in managing finance departments
- 14 years as VP Finance in non-profit organizations
- VP Finance, Ontario Centres of Excellence
- VP Finance, Ontario Genomics Institute
- VP Finance, SOS Personal Learning Solutions
- Director Finance, WaveRider Communications, Controller, Infomart Dialog Limited, Research Assistant, Robarts Research Institute
- BA (Hon) in Biology (Western University)
- Post Grad in Genetics (Western University)
- MBA Ivey (Western University)
- Variety of volunteer and Board positions

Brock Kahanyshyn, BEc, CET, ITIL, CGEIT, CISA

Vice President, Operations & Security



- 20+ years' experience
- CIO, University of Calgary
- CIO, Edmonton Police Service
- Director Operations and Strategy Officer, PC Corp
- Senior IT Consultant, Bell (BCE)
- Chief Technology & Strategy Officer, Acrodex Inc
- VP National Hosting, Western Can Bell BCE
- Manager, Data Centre Operations & Info Systems, Telus

Julie Cafley, B.A., B.Ed, M.Ed, Ph.D.

Vice President, Communications & External Relations



- 25+ years' experience in higher education leadership, communications, external partnerships and memberships
- Executive Vice-President, External Relations, Public Policy Forum
- Chief of Staff, Office of the President, University of Ottawa
- Director, Ceremonies & Events (U of O)
- Manager, Liaison & Student Recruitment (U of O)
- Liaison & Communications Officer (U of O)
- Doctor of Philosophy (Ph.D.), Educational leadership (U of O)
- Numerous volunteer and Board roles

Ghilaine Roquet, M.Sc. In Management Info Systems

Vice President, Strategy & Planning



- 20+ years' experience in IT in higher education
- Past President of the Canadian University Council of Chief Information Officers (CUCCIO)
- Former member of the Executive Committee of the Board of Réseau d'informations scientifiques du Québec (RISQ)
- Associate Vice-Principal, Information Technology and CIO at McGill University.
- Associate Vice-Rector and CIO at l'Université de Montréal
- Director, IT Services at HEC-Montréal

Culture Change

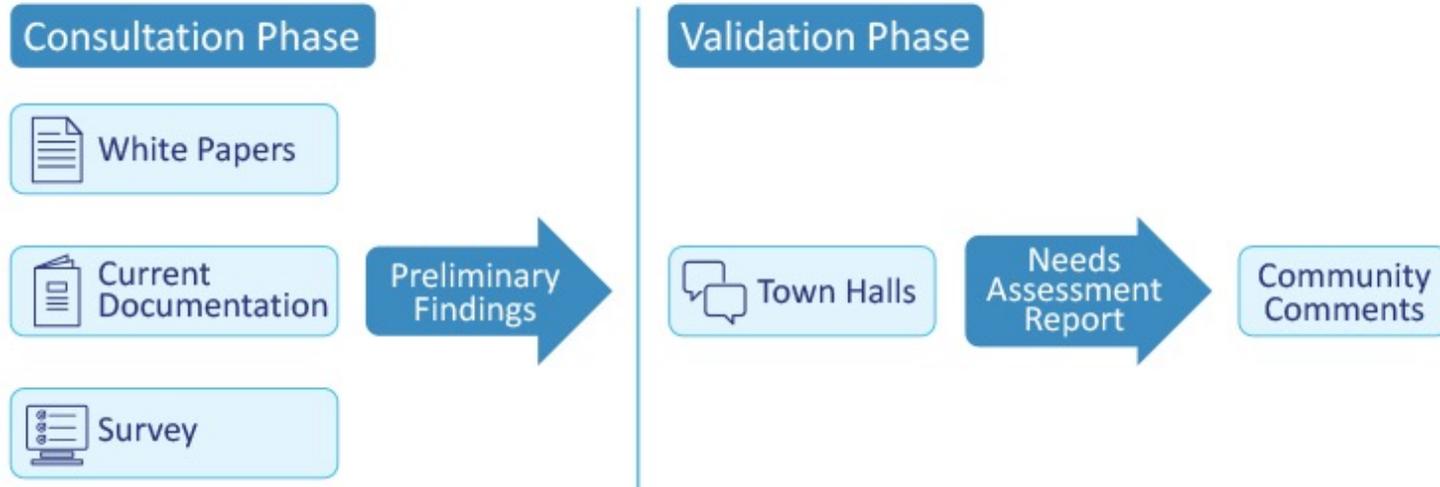
- Trust was broken in some sectors and we must rebuild it.
- We are establishing new structures against decades of history.
- Therapist Shelly Bullard states: “trust isn’t about never feeling another negative emotion again; it’s about having knowledge of a situation to cope and understand.”
- Increased knowledge will help build trust.



3. Consultations Update

Current Consultations: Needs Assessment

Needs Assessment Process



107 **White Papers** Received:
Oct. 21 – Dec. 14, 2020

19 **Existing Documents** Received:
Nov. 3 – Dec. 14, 2020

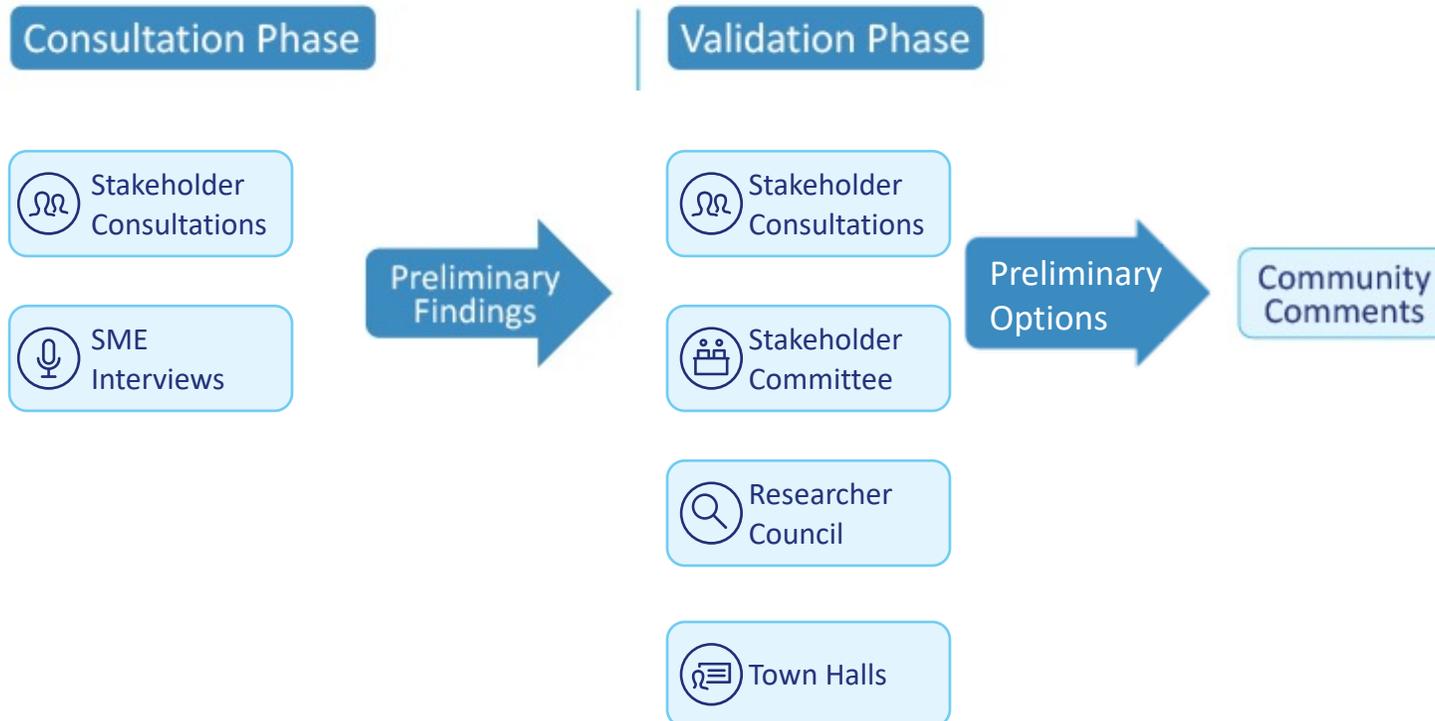
Nation-wide Researcher **Survey**:
Feb. 5 – Mar. 1, 2021 (~1,400 completions)

Upcoming **Virtual Town Halls**:
May 4 – 7, 2021

All input collected will help shape the Needs Assessment Report and Strategic Plan

Current Consultations: National Service Delivery Model

National Service Delivery Model Consultations



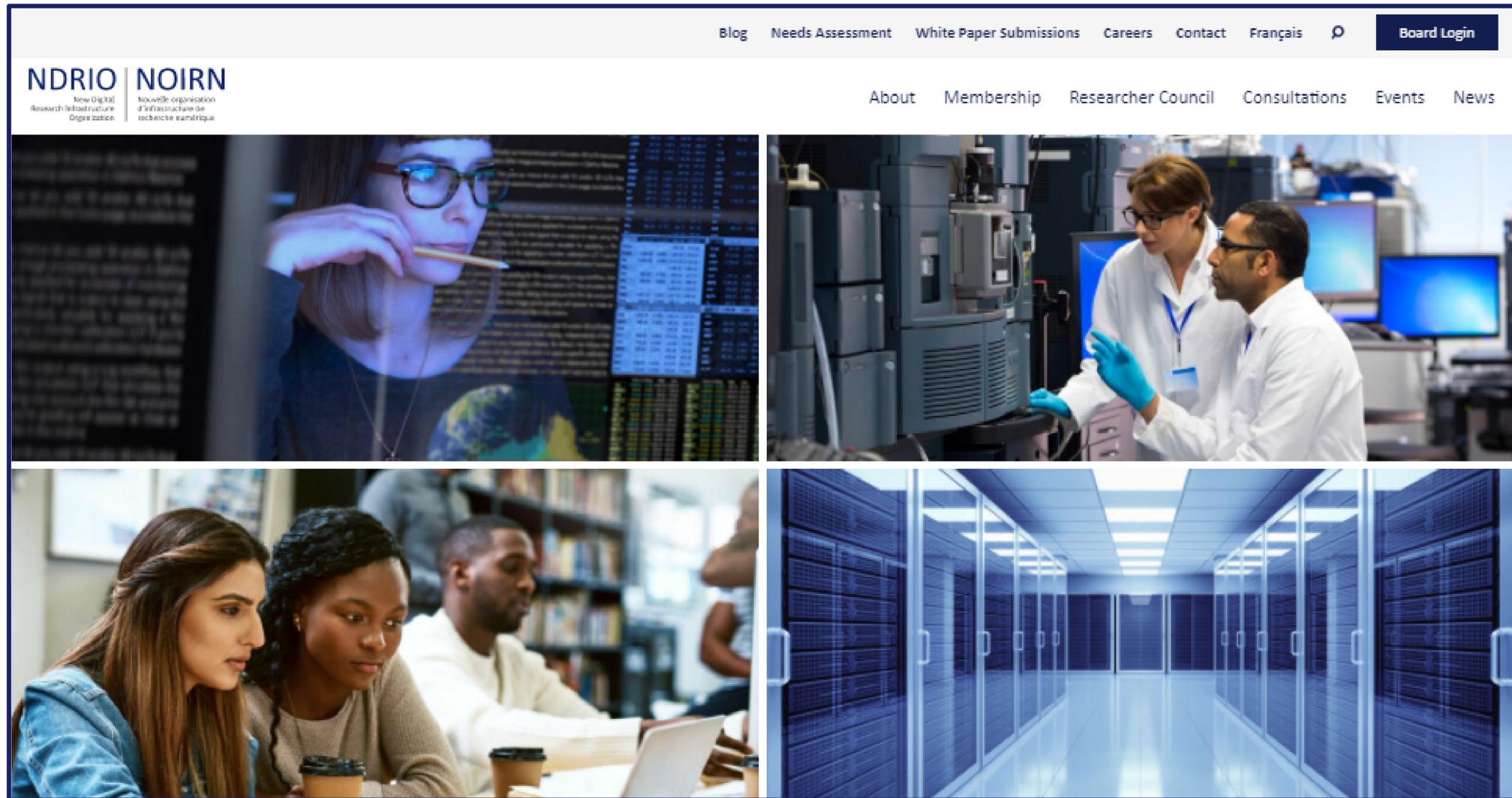
7 Initial Group Consultations:
invitations extended to 50+ stakeholders, March 2021

15 Subject Matter Interviews:
February – March 2021

Upcoming validation sessions with **Stakeholder Committee, Researcher Council,** and community input via **Stakeholder Sessions and Town Halls:**
April-July 2021

The NSDM project team will be providing stakeholders with multiple opportunities to provide input and feedback

Current Consultations: Redesigned NDRIO Website



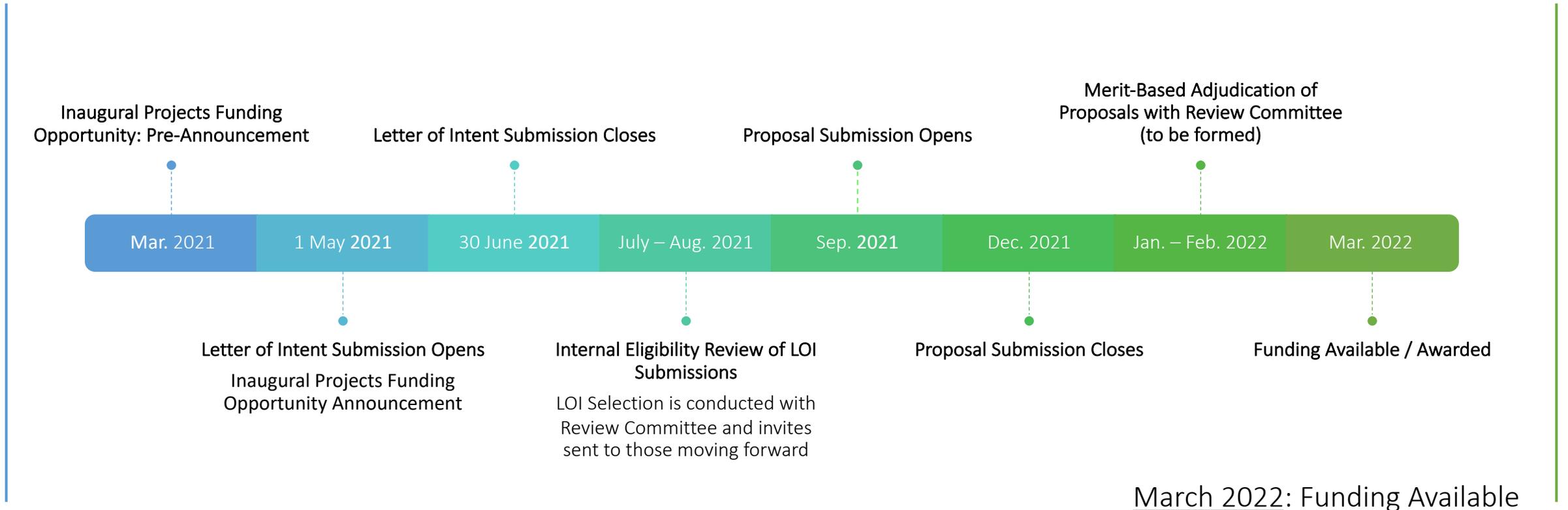
4. Inaugural Projects Funding Opportunity

Inaugural Project Funding Opportunity: Steering Committee

Name	Organization	Affiliation
Bruno Blais	Polytechnique Montreal	NDRIO Researcher Council Member
Phillipe Despres	Laval University	NDRIO Researcher Council Member
Marie-Jean Meurs	UQAM	NDRIO Researcher Council Member
Ghilaine Roquet	NDRIO	NDRIO – VP Strategy & Planning
Mark Leggott	Research Data Canada	Research Data Canada
Gordana Krcevinac	SSHERC	NDRIO Secondment – Policy Advisor
Amol Verma	University of Toronto	NDRIO Researcher Council Member
Eric Rosolowsky	University of Alberta	NDRIO Researcher Council Member
Nomsa Nhamoinesu	NDRIO	NDRIO – Manager, Grants Oversight
Jennifer Arbour	NDRIO	NDRIO – Director, Strategic Initiatives

Funding Opportunity Timeline

March 2021: Funding Opportunity Announced



Inaugural Project Funding Opportunity: Status Update

C - Complete I/P - In Progress N/S - Not Started		
Item	Notes	Status
Pre-Announcement	<ul style="list-style-type: none"> • Pre-announcement released • Multi-channel communications: <ul style="list-style-type: none"> • Website updated to include section on Funding Opportunity & Pre-announcement info • Targeted email announcement to Research Administrators, Institutions • March 31: email announcement to all stakeholders; social media announcement 	I/P
Funding Opportunity Announcement	<ul style="list-style-type: none"> • Version 2 with feedback / comments incorporated from Steering Committee • Updates to document including formatting, organization, and table of contents. 	I/P
Website & Application Platform	<ul style="list-style-type: none"> • Working with IT to create intake form and identify authentication options for submitters. • Evaluation of other IT solutions that could be integrated into website to provide an electronic and automated merit review process. 	I/P
Adjudication Criteria & Weightings	<ul style="list-style-type: none"> • Initial draft of Merit Review Committee Guide created • Criteria & associated weightings have been drafted and in preliminary discussions with Working Group 	I/P

5. Corporate Plan Highlights

Corporate Plan Highlights

2021-2022 Delivery Timeline

Portage Transition Complete	April 2021
Operational Transition Plan (Compute Canada)	April 2021
Development and Delivery of Initial Projects	From January 2021
Draft National Service Delivery and Funding Models	May 2021
Organization Name and Brand Identity	September 2021
Delivery of the 2022-25 Strategic Plan	September 2021
Funding Proposal to ISED	December 2021
Cybersecurity Framework	March 2022
Transition Milestone #2: ISED ARC Expansion Program Funding Ends and NDRIO Funding Leadership Begins	April 2022
Transition Milestone #3: Canadian Foundation for Innovation Major Science Initiative Funding (Operations) Ends and NDRIO assumes full leadership of ARC	April 2022
Transition Milestone #4: Research Data Management (RDM) and Research Software (RS) Funding from CANARIE Ends and NDRIO assumes full leadership of RDM and RS Functions	April 2022



National Service Delivery Model

Needs Assessment Report

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National Service Delivery Model: Overview

Project Goals:

To develop a new integrated service delivery model, funding model and transition guidelines that are informed by the current state, needs assessment and benchmark best practices, NDRIO's Guiding Principles and ISED requirements.

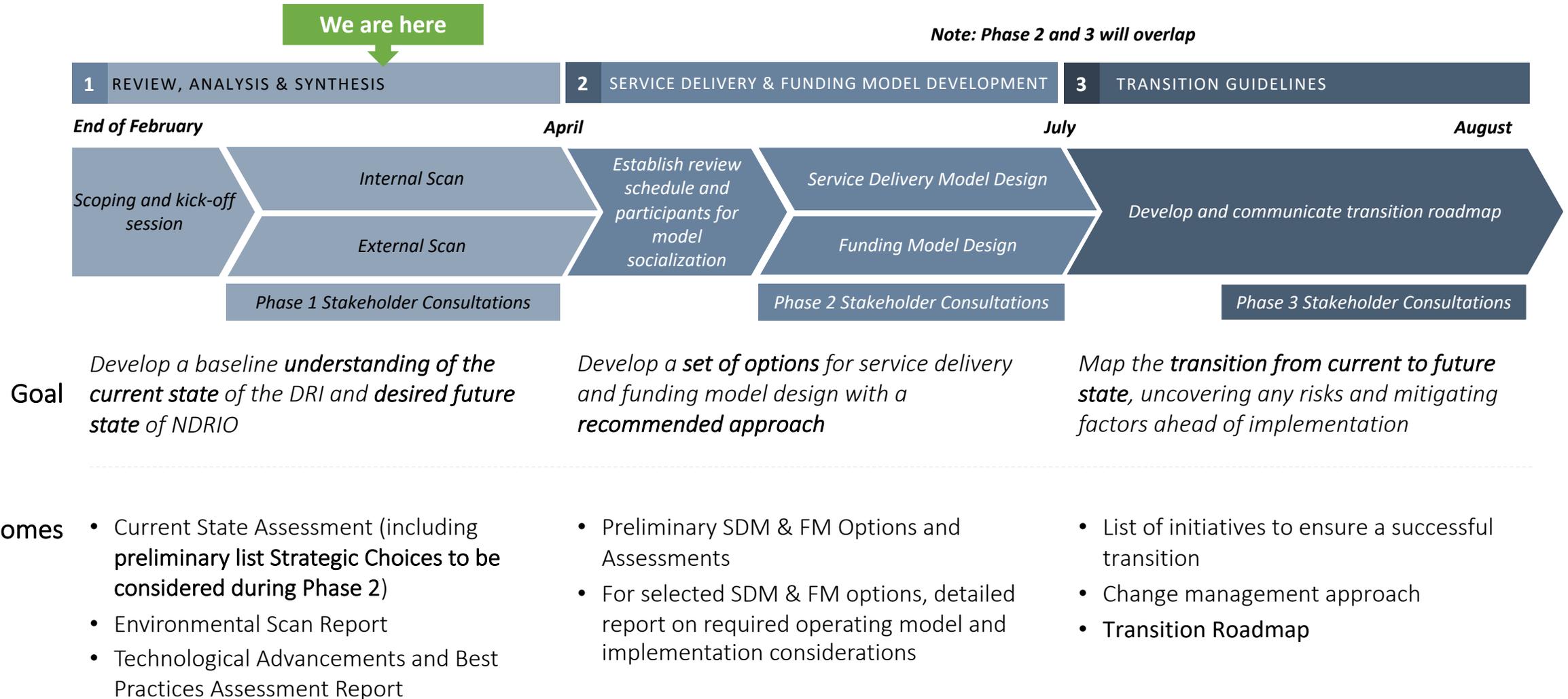
RFP Date: December 20, 2020

Awarded: Deloitte, Montreal

Kick Off: February 23, 2021

Summary of Engagement Approach

The engagement team is currently focused on conducting the internal scan and external scan streams of Phase 1



Notes: Simplified timeline. Phase 2 and 3 meeting dates tentative.

Project Governance and Stakeholder Engagement

Two layers of governance have been established in order to ensure successful steering of the NSDM engagement

Full Name	Title	Organization	Representing Group	Operating Committee	Stakeholder Committee
Nizar Ladak	CEO	NDRIO	NDRIO		
Ghilaine Roquet	VP, Strategy & Planning	NDRIO	NDRIO		
Cynthia Goodwin	Communications Lead	NDRIO	NDRIO		
Caroline Harrison	Procurement and Project Coordinator	NDRIO	NDRIO		
Jennifer Arbour	Director Strategic Initiatives	NDRIO	NDRIO		
Narinder Dehal	VP Corporate Services & CFO (Customer Contract Manager)	NDRIO	NDRIO		
Andrew Barker	Director, Institutional Research	University of Waterloo	National Host Site Lead		
Sylvain Charbonneau	VP, Research	University of Ottawa	U15		
Richard Isnor	AVP Research & Grad Studies	St. Francis Xavier University	Universities Canada		
Susan Blum	AVP Applied Research & Innovation	Saskatchewan Polytechnic	Colleges & Institutes Canada		
Roseann O'Reilly Runte	President & CEO	Canada Foundation for Innovation	President from Tri-Councils & CFI		
Sinead Tuite	Senior Director Digital Research Infrastructure	ISED	ISED		
Reda Tafirout	Head of TRIUMF Scientific Computing Director	TRIUMF	NGO Research		
Jim Ghadbane	CEO	CANARIE	CANARIE / RDC		
John Longbottom	CEO	WestGrid	Advanced Computing Region CEO		
Susan Haigh	Executive Director	CARL	CARL - Portage		
Randal Sobie	Chair Researcher Council	NDRIO	NDRIO Researcher Council		

- **The Operating Committee** liaises with the engagement on a **weekly basis to provide direct feedback** on preliminary results, validate activities and approach and confirm alignment with engagement objectives
- **The Stakeholder Committee** is engaged on a **monthly basis to be informed** of preliminary results, and given the opportunity to provide suggestions on preliminary deliverables

Our Commitment to Stakeholder Engagement

We understand the crucial importance of rigorous and broad stakeholder engagement given NDRIO's context

01 Diversity of Inputs



We plan to engage 50+ organizations that result in hundreds of individuals from across Canada. In addition, through a series of interviews, working sessions, and town halls offered in both official languages, accommodating time zones, we anticipate hundreds of individuals will convey a diversity of inputs.

02 Flexibility



Our approach through this project will be iterative and we will have the opportunity to incorporate feedback along the way.

03 Variety of Channels



We will also set up a mechanism to offer stakeholders a way to provide feedback asynchronously.

04 Continuous Improvement



Wherever we land in terms of service model or funding model choices, we will be humble to admit it may not be perfect. Recommendations will be built so we can learn and continuously improve them.



Next Steps

Closing Remarks