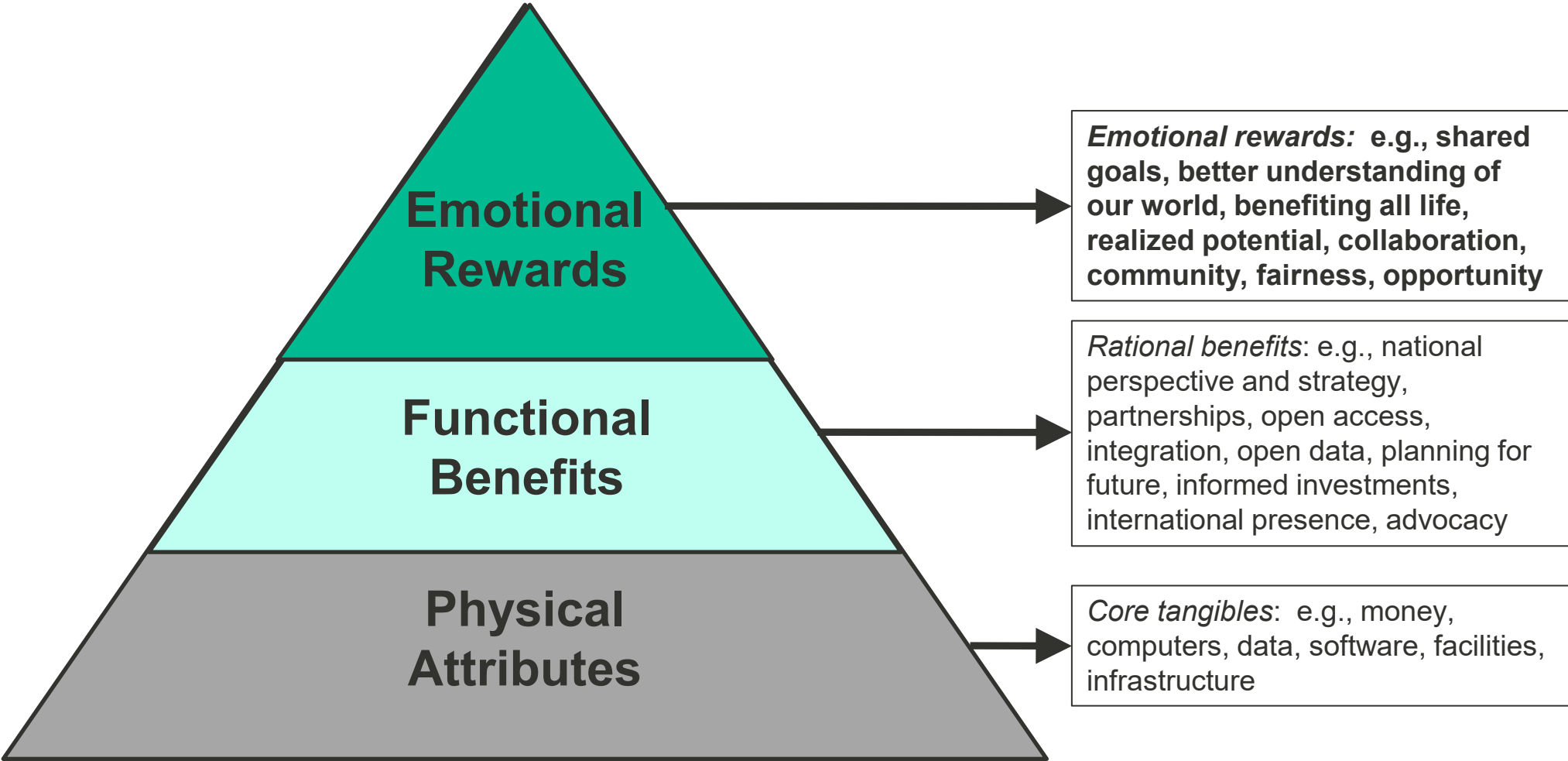


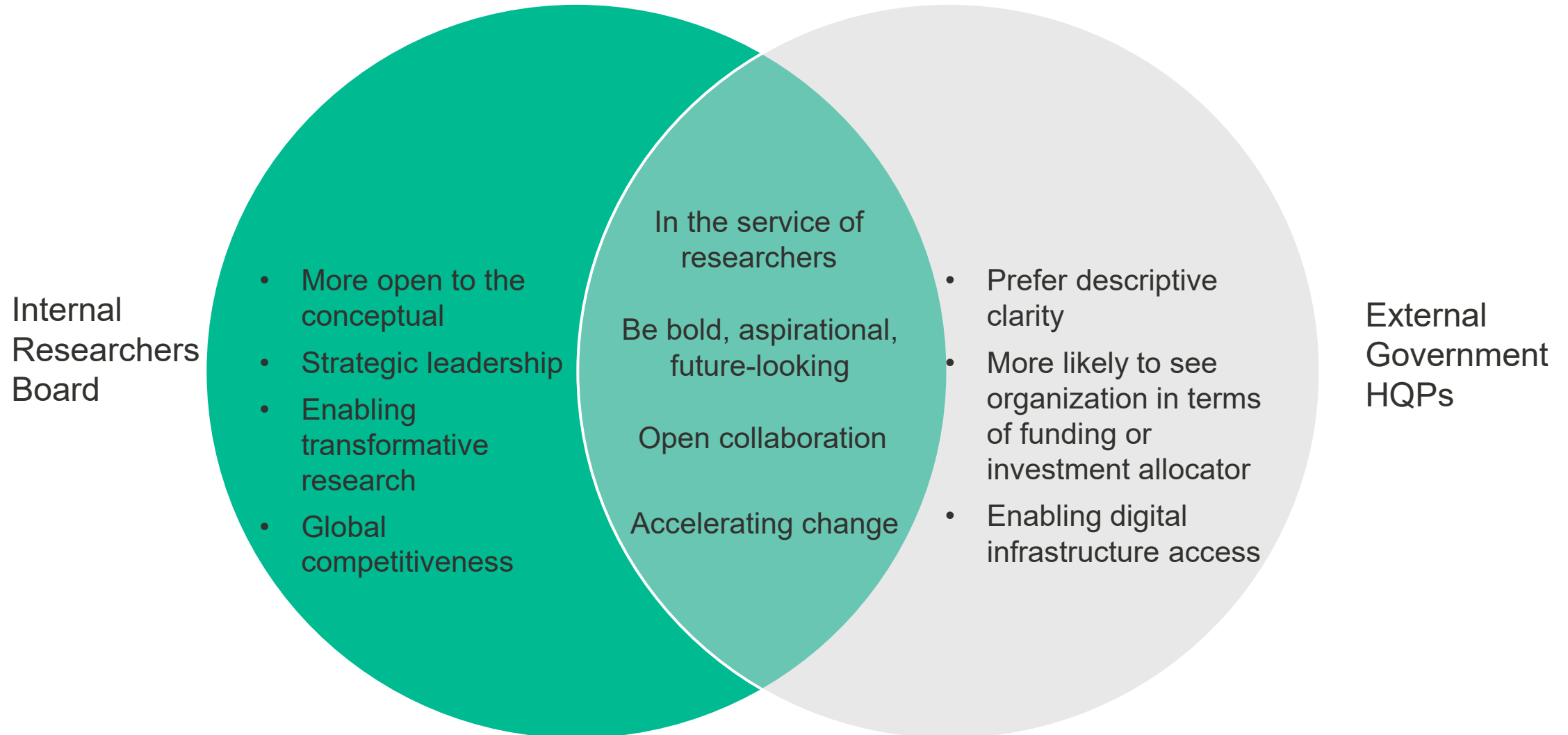
The background features a dark, moody scene with numerous out-of-focus yellow and white light spots (bokeh) scattered across the upper half. Overlaid on this are several semi-transparent, geometric shapes in shades of grey, blue, and yellow, creating a layered, abstract effect. The overall aesthetic is modern and professional.

Branding Update

Brand Connection Occurs at the Top



Alignment and Commonality



What Story Must We Tell

What

Integrated, open,
one-door access
to digital research
resources

to...

Who

All researchers
All disciplines
All discoverers

In the research
community

to....

Why

Accelerate
research and
discovery

by...

How

Transforming
Collaborating
Enabling
Supporting
Sharing
Investing

for...

Where

Canada,
Canadians and
the benefit of our
world

Vision or Core Purpose

To catalyze world-class Canadian research for the benefit of all.

Mission

As a trusted and inclusive partner, the Digital Research Alliance of Canada fosters a pan-Canadian and global collaboration to provide researcher-centric, sustainable and integrated digital research infrastructure.

Brand Role Archetypes

Champion | Networker | Steward | Ambassador | Change agent | Reformer

Brand Attributes

Transformation | Service | Acceleration | Collaboration | Leadership | Opportunity

Brand Personality

Energetic | Clear | Genuine | Confident | Smart | Collegial

Brand Story

From discovering insulin to fighting climate change to examining social inequity and beyond, Canada's researchers have collaboratively tackled some of humanity's biggest challenges. Today, research is increasingly urgent, complex and interconnected, and in response our researchers need better support for data management and better access to specialized software and advanced computing power.

We are accelerating discovery by transforming how digital research infrastructure is designed, managed, sustained and delivered to Canada's researchers and their global collaborators. Investing with vision, planning for the future, improving access to integrated digital research infrastructure and collaborating with a network of partners are all at the heart of what we do.

We both lead and serve, bringing a cohesive pan-Canadian vision for digital research infrastructure and a passion to collaboratively support our brilliant research community as they ask questions, gain understanding, accelerate discovery and transform how we live in our world.

Brand Promise

Accelerating discovery

Accelerating Discovery

From discovering insulin to fighting climate change to examining social inequity and beyond, Canada's researchers have collaboratively tackled some of humanity's biggest challenges. Today, research is increasingly urgent, complex and interconnected, and in response our researchers need better support for data management and better access to specialized software and advanced computing power.

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We both lead and serve, bringing a cohesive pan-Canadian vision for digital research infrastructure and a passion to collaboratively support our brilliant research community as they ask questions, gain understanding, accelerate discovery and transform how we live in our world.

Vision ou objectif principal

Catalyser la recherche canadienne de calibre mondial au profit de tous

Mission

En tant que partenaire de confiance et inclusif, l'Alliance de recherche numérique du Canada favorise une collaboration pancanadienne et mondiale, afin de fournir une infrastructure de recherche numérique durable et intégrée, axée sur les chercheurs et chercheuses.

Archétypes du rôle de la marque

Défenseur | Réseuteur | Coordonnateur | Ambassadeur | Agent de changement | Réformateur

Attributs de la marque

Transformation | Service | Accélération | Collaboration | Leadership | Opportunité

Personnalité de la marque

Énergique | Claire | Authentique | Confiante | Intelligente | Collégiale

Histoire de la marque

De la découverte de l'insuline à la lutte contre les changements climatiques, en passant par l'examen des inégalités sociales et plus encore, les chercheuses et chercheurs canadiens se sont attaqués ensemble à certains des plus grands défis de l'humanité. Aujourd'hui, la recherche est de plus en plus urgente, complexe et interconnectée, et nos chercheurs et chercheuses ont besoin d'un meilleur soutien pour la gestion des données et d'un meilleur accès aux logiciels spécialisés et à la puissance du calcul informatique de pointe.

Nous accélérons la découverte en transformant la façon dont l'infrastructure de recherche numérique est conçue, gérée, maintenue et fournie aux chercheurs et chercheuses canadiens et à leurs collaborateurs internationaux. Investir avec une vision, planifier pour l'avenir, améliorer l'accès à l'infrastructure de recherche numérique intégrée et collaborer avec un réseau de partenaires sont autant de choses qui sont au cœur de ce que nous faisons.

Nous dirigeons et servons à la fois, en apportant une vision pancanadienne cohérente de l'infrastructure de recherche numérique et une passion pour soutenir en collaboration notre brillante communauté de chercheurs et chercheuses qui posent des questions, acquièrent des connaissances, accélèrent les découvertes et transforment la façon dont nous vivons dans notre monde.

Promesse de la marque

Accélérer la découverte

Accélérer la découverte

De la découverte de l'insuline à la lutte contre les changements climatiques, en passant par l'examen des inégalités sociales et plus encore, les chercheuses et chercheurs canadiens se sont attaqués ensemble à certains des plus grands défis de l'humanité. Aujourd'hui, la recherche est de plus en plus urgente, complexe et interconnectée, et nos chercheurs et chercheuses ont besoin d'un meilleur soutien pour la gestion des données et d'un meilleur accès aux logiciels spécialisés et à la puissance du calcul informatique de pointe.

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Digital Research Alliance of Canada

Accelerating Canada's Research Future.

Alliance de recherche numérique du Canada

Accélérer l'avenir de la recherche au Canada.



Researcher Council Report

Randall Sobie, Chair

Introducing the Researcher Council

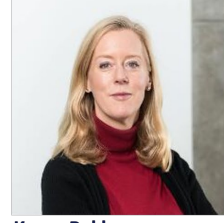
- ▶ Group that provides advice on Researcher DRI requirements to Management and Board
- ▶ Appointed in September 2021
- ▶ Guillaume Bourque, Interim Chair until April 2021
- ▶ RC has general monthly meetings
- ▶ Governance Subcommittee
- ▶ Working groups (ARC, SW, DM, Town Hall, Inaugural Projects, Survey, Service Delivery Model, ...)
- ▶ Increasing number of “drop-in” meetings on selected topics
- ▶ Training opportunities: OCAP (First Nations Information Governance Centre)
- ▶ Researcher Priorities Report



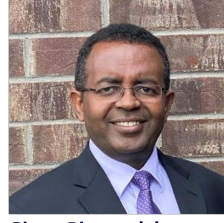
Randall Sobie,
University of Victoria



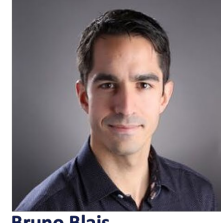
Guillaume Bourque,
McGill University



Karen Bakker,
University of British
Columbia



Girma Bitsuamlak,
Western University



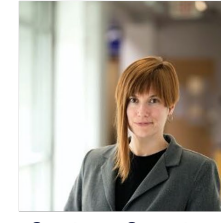
Bruno Blais,
Polytechnique Montréal



Susan Brown,
University of Guelph



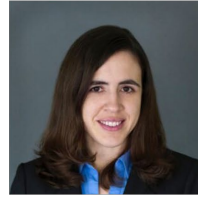
Carolyn Côté-Lussier,
Institut National de la
Recherche Scientifique



Constance Crompton,
University of Ottawa



Carl D'Arcy,
University of
Saskatchewan



Rebecca Davis,
University of Manitoba



Philippe Després,
Université Laval



Erin Dickie,
Centre for Addiction
and Mental Health



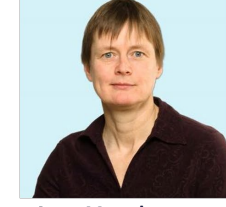
Benoît Dupont,
Université de Montréal



**Laura Estill, St. Francis
Xavier University**



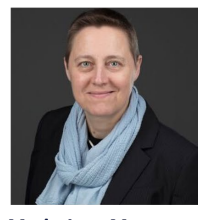
Benjamin Fung,
McGill University



Anne Martel,
Sunnybrook Research
Institute



Erika Merschrod,
Memorial University



Marie-Jean Meurs,
Université du Québec
à Montréal



Rebecca Pillai Riddell,
York University



Erik Rosolowsky,
University of Alberta



Pekka Sinervo,
University of Toronto



Amol Verma,
Unity Health Toronto

Researcher Council Governance

Chair and Vice Chair

- ▶ Chair is a member of the Board of Directors
- ▶ Impacts the RC Terms of Reference and the manner in which the Chair is selected
- ▶ Chair is a one-year renewable appointment (with limits); renewal by the Board
- ▶ Terms of Reference includes a Vice Chair position (not yet filled)

Researcher Council members (22 members)

- ▶ All current members appointed for 3-years starting September 2020 (renewable once)
- ▶ Two members have resigned
- ▶ Plan is to add approximately 6-7 new members per year (each with 3-year terms) starting 2022
- ▶ Current plan is to add a number of new members in targeted areas

Research Priorities Report

“Meeting the Digital Research Infrastructure Needs of the Canadian Research Community”

Its vision of the new DRI system includes a spectrum of accessible services that support the breadth of Canada’s research disciplines and computational approaches, prioritizes Indigenous self-determination and data sovereignty, coordinates a robust national program of DRI education and training, and apportions resources transparently and equitably.

Written by the Researcher Council and submitted to Management/Board

- ▶ Foundational analysis of the input material was provided by the Senior Analysts
- ▶ Editorial and critical review was provided by Karey Iron (General Secretary, Researcher Council)
- ▶ Many workshops focusing on various topics and areas (e.g. TriCouncil research areas)
- ▶ Translation reviewed by Francophone RC members
- ▶ Used as input to the Strategic Planning process

Thematic Areas

The needs of the Canadian research community identified through the consultations are organized here into themes that highlight the key priorities for the Digital Research Alliance of Canada from the perspective of the Researcher Council:

- ▶ **National infrastructure**
- ▶ **Self-determination and data sovereignty for Indigenous Peoples in Canada**
- ▶ **Equity, diversity and inclusion**
- ▶ **Professional support personnel**
- ▶ **Research data management and stewardship practices**
- ▶ **Education and training**
- ▶ **Research software**
- ▶ **National and international engagement**

Thematic Areas I

National Infrastructure

- ▶ Immediately invest in additional traditional and cloud computing, expand storage resources, and develop a sustainable financial plan for its maintenance and continual renewal.
- ▶ Build a national strategy for the use of in-house and commercial computing clouds.
- ▶ Develop and implement a plan for long-term storage, data curation, and data preservation.

Self-determination and data sovereignty for Indigenous Peoples in Canada

- ▶ Provide funding support, expertise, and partnership to Indigenous Peoples in Canada so that they can develop their own sovereign digital research infrastructures and use digital methods in support of cultural revitalization.
- ▶ Facilitate opportunities for respectful collaboration which respond to and support community needs, goals, and aspirations.

Thematic Areas II

Equity, diversity and inclusion

- ▶ Integrate EDI principles into all decisions and activities as a foundational principle.
- ▶ Adopt metrics for EDI that follow national and international standards and best practices, identify areas requiring improvement, address gaps promptly, and engage in continuous monitoring and improvement.
- ▶ Provide services and support to all researchers in French, English and other languages across Canada.
- ▶ Ensure all researchers, including those from marginalized groups, have access to Alliance tools and services, regardless of geography, discipline, or institutional affiliation.

Professional support personnel

- ▶ Ensure that there are sufficient professional personnel to provide the necessary foundational support to meet the diverse needs of the research community.
- ▶ Engage with the regional consortia, host sites, and other organizations to put in place a model for the ongoing support and retention of the professional support personnel and establish a system for the training and education of students and early career staff.

Thematic Areas III

Research data management and stewardship practices

- ▶ Build infrastructure and support for the FAIR management, curation and preservation of research data in collaboration with Canadian universities and laboratories.
- ▶ Develop a strategy and plan for managing sensitive data, and collaborate with other national and regional groups active in this area, including Indigenous communities.

Education and training

- ▶ Develop a DRI training curriculum in partnership with Canadian universities that leverages existing programs and is based on the priorities and expertise of the research community.
- ▶ Ensure that training programs and documentation are kept up-to-date, well-curated and easily accessible and are offered frequently.

Thematic Areas IV

Research software

- ▶ Establish support and ongoing maintenance of critical infrastructure software components.
- ▶ Review the research software needs of the community to determine the key open-source packages that need to be maintained by the Alliance's professional support personnel.
- ▶ Develop a strategy for supporting the development of new and innovative open-source research software.

National and international engagement

- ▶ Establish relationships and partnerships with existing Canadian institutions, laboratories and industries to establish the Alliance's central role in the DRI ecosystem.
- ▶ Build connections with the international community that will help the Alliance develop new partnerships and support projects with a shared infrastructure.

Ongoing Activities and Plans

Interesting first year of the Researcher Council (and six months as Chair)

- ▶ Engaging and committed group
- ▶ Sorting out optimal use of the RC (working groups, drop-in meetings, ...)
- ▶ Good working relationship with the Alliance management and staff

Challenges

- ▶ Improving diversity of the Researcher Council (and our understanding of these issues)
- ▶ Making effective use of the time of the members
- ▶ Governance (e.g. Time demands on Chair, Need for a Vice Chair and strategy for refresh of the members)
- ▶ How to best engage the Research Council with the implementation of the Strategic Plan

Impact

- ▶ Development of the Research Priorities document is a key accomplishment
- ▶ Voice in Board meetings, Stakeholder committee, Needs assessment and state report working groups, ...

Final Reports




Meeting the Digital Research
Infrastructure Needs of the
Canadian Research Community



Répondre aux besoins
de la communauté de recherche
du Canada en matière d'infrastructure
de recherche numérique

Visit <https://engagedri.ca/researcher-council> to read the reports



Strategic Plan

Comprehensive Consultation Process



Vision & Mission

May 2021

9

Interviews

28

Participants

**Interview
Groups
Conducted**

*NDRIO Board of
Directors, Sr. Team,
ISED, CANARIE &
Regional Board Chairs*

3

Workshops with **NDRIO's
Board of Directors & Sr.
Team**



Strategic Questions

May 2021 – June 2021

8

Consultations

78

Participants

NDRIO Sr. Team, Stakeholder
Committee, Researcher Council,
NDRIO Staff, ISED, Regional
CEOs, National Host Site Leads,
CANARIE, Portage, CCF



Strategic Directions

June 2021 – July 2021

8

Consultations

42

Stakeholders

**Consulted
Groups**

**NDRIO Sr. Leadership,
Stakeholder Committee,
Researcher Council, &
NDRIO Sr. Analyst Team**

3

Workshops with **NDRIO's
Board of Directors,
Stakeholder Committee,
and Researcher Council**

Our Vision and Mission



Our Vision and Mission Statement

VISION STATEMENT

To catalyze world-class Canadian research for the greater good

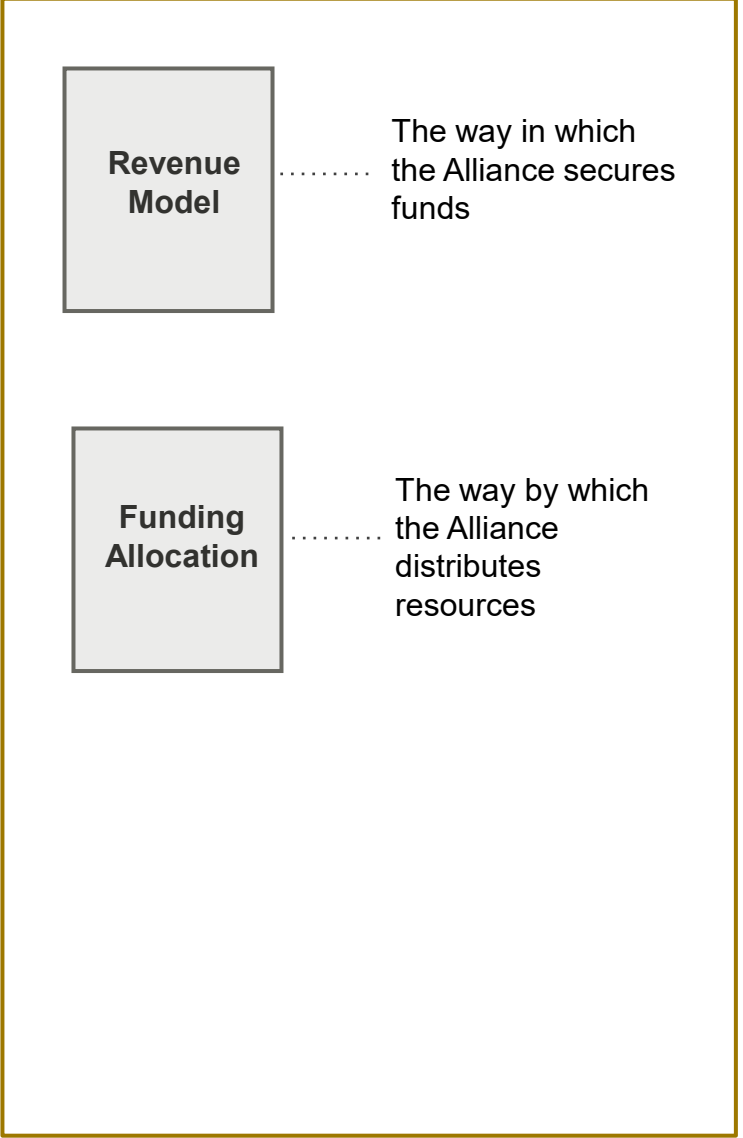
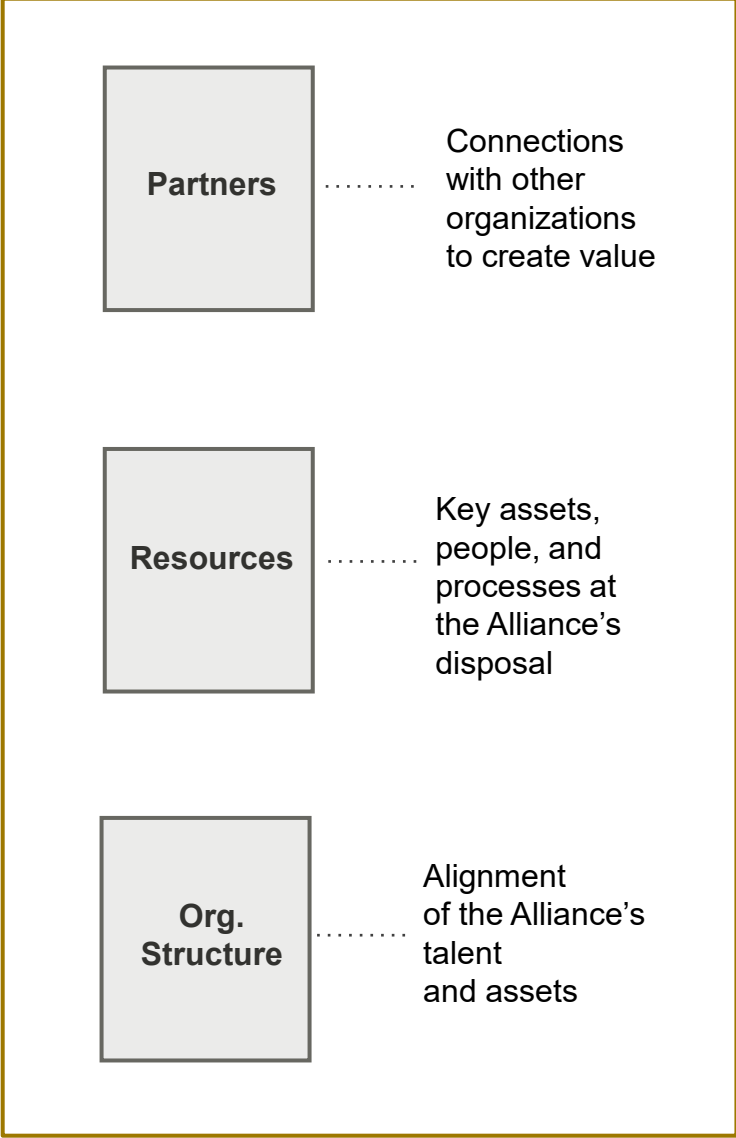
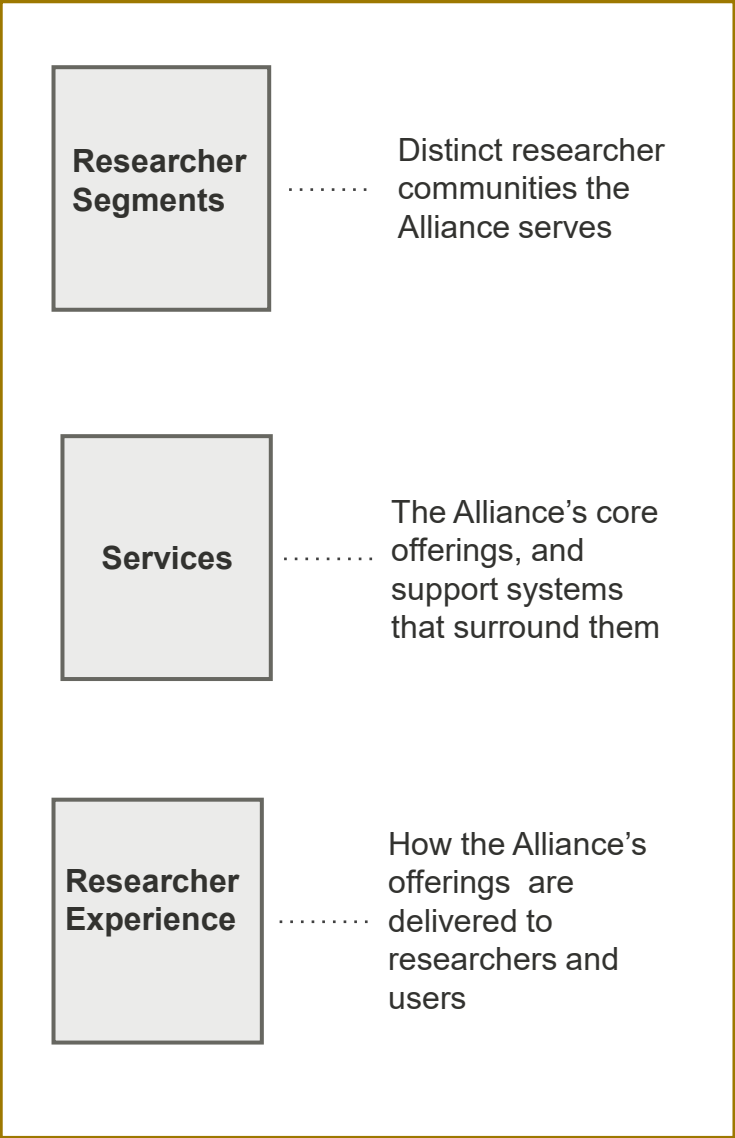
MISSION STATEMENT

As a trusted and inclusive partner, the Digital Research Alliance of Canada fosters national and global collaboration to provide researcher-centric, sustainable and integrated digital research infrastructure

Our Strategic Directions



Strategic Direction: **Overview**



Strategic Direction: **Researcher Segment**

The Digital Research Alliance of Canada will offer a baseline of **consistent, high quality service delivery that is standardized to meet researchers' DRI needs**, and that is inclusive of **underserved communities**. **Further customization will be made possible in the future** to strive to meet the differentiated needs of specific research communities

— **Scope** —

- **Provide standardized service:** To ensure researcher-centric service provision, the Alliance promotes the development, maintenance and adoption of a national set of standardized practical tools and resources
- **Meet the needs of underserved researcher communities:** The Alliance ensures that unique needs of the diverse and varied researcher communities across the DRI are met, in particular those historically underserved

Strategic Direction: **Services**

The Digital Research Alliance of Canada will provide a **focused suite of services with broad applicability at a pan-Canadian scale**, while **working closely with partners** to ensure that the **breadth of DRI needs are addressed**

— Scope —

Core DRI Services*



The scope of services includes the core DRI integrated services of Advanced Research Computing, Research Data Management and Research Software and their enabling capabilities.

- **ARC scope:** Includes traditional and cloud high-performance computing services
- **RDM scope:** Includes all aspects of RDM standards and processes (FAIR principles), discoverability and accessibility of datasets, notably through repositories. Short and long-term is also included in RDM
- **RS scope:** Support researchers in the development, maintenance, and use of research software tools, as well as the procurement of general-purpose research software solutions

Strategic Direction: **Researcher Experience**

The Digital Research Alliance of Canada will enable a **researcher-centric DRI experience** with the goal of researchers knowing **what is available and how to access services efficiently**, while ensuring **cohesiveness between RS, RDM and ARC**

— **Scope** —

- **Researcher journeys:** The Alliance will ensure effective integration, discovery, and accessibility of externally sourced services from national and international partners to improve awareness of and accessibility to its catalog of service pathways for researchers
- **Iterative Service Improvement Based on Consultation:** The Alliance will create mechanisms to continually source feedback from researchers to create an iterative feedback loop that ensures continuous improvement of DRI offerings

Strategic Direction: **Partnerships**

The Digital Research Alliance of Canada will adopt a pro-active approach of **brokering both public and private sector partnerships** focused nationally and internationally in building Canada's DRI ecosystem

— **Scope** —

- **Becoming an ecosystem connector:** Drive partnership-building activities to increase collaboration and cohesion within the DRI ecosystem first and foremost, as well as between Canadian researchers and global partners where appropriate
- **Defining mutually beneficial partnership criteria:** Enact clear guidelines and protocols governing the establishment of partnerships which include a business casing approach, SLAs, proximity of service delivery, and, critically, the preservation of Canadian IP in the context of potential partnerships with private entities
- **Complementing core DRI capabilities:** Drive partnership-building activities to address identified gaps in service offerings. Enhanced integration and the agile coordination of partners will also bolster discoverability of complementary services and enable them to better address researcher needs

Strategic Direction: Revenue model

The Digital Research Alliance of Canada will implement a **mixed-source funding model** that will include **public funding streams** and **additional complementary funding** including innovative partnerships, membership fees, in-kind contributions, private sponsorships, pay-as-you-go tiers and others

— Scope

- **Diversified funding:** To ensure stable, sustainable revenue in the long term, The Alliance will consider the addition of new funding streams (e.g., innovative partnerships, pay-to-play, etc.) to supplement public funding, while also streamlining overly-complex funding layers
- **Partner contributions:** The Alliance will reform the criteria by which partners contribute to revenues, notably creating more equitable contribution agreements among DRI users (provincial governments and other public institutions). Moreover, it will explore new revenue generation models for private partners such as pay-to-play, and cost recovery

Strategic Direction: Organizational Structure

The Digital Research Alliance of Canada will ensure the effective delivery of services to the researcher community by **delivering select capabilities** and **engaging in the coordination of other capabilities** through pan-Canadian, regional and local partners

— Scope

- **Centralized delivery of core capabilities:** The Alliance will implement a consulting-coordination organizational structure to support the effective centralized delivery of core DRI capabilities selected for internal development
- **Coordination of partner-delivered capabilities:** Through this model, The Alliance will also ensure that the full scope of planned DRI capabilities outside of those in-housed is offered through ecosystem partners in an effective, coordinated manner that meets the organization's vision and mission

Strategic Direction: Resources

The Digital Research Alliance of Canada will develop **select capabilities internally** while leveraging partners to **source some ancillary capabilities externally**. NDRIO will provide **equitable access** to DRI resources, ensuring a balance between national research priorities and individual researcher needs

— Scope —

- **Definition of roles:** The Alliance will clearly define the scope of national, regional and local services to ensure coordination and coherence in the development of both in-house and externally sourced resources and their deployment to the benefit of the ecosystem
- **Dependency on revenue allocation:** The Alliance must allocate internal resources and externally sourced capabilities in a manner that is consistent with the provision of funds. Moreover, it should implement mechanisms to ensure alignment with the Tri-Council's grant and resource allocation processes

Strategic Direction: **Funding**

The Digital Research Alliance of Canada will **steward the Federal Government's contribution** based on desired target service levels, prioritizing **full funding of pan-Canadian services** and **cost-sharing** with provinces and territories for **regional services**

— **Scope** —

- **Revisiting the RAC:** The Alliance will overhaul the annual RAC process, notably to ensure it is consistent and coordinated with Tri-Council funding and better suits modern use cases of researchers (e.g., multi-year projects requiring long-term planning, the need for concentrated access to resources for short periods)
- **Simplifying funding allocation:** The Alliance can serve to unify and streamline funding allocation in the long term for DRI operations, allocating resources holistically across all three DRI layers and gaining flexibility between OpEx and CapEx within the pool of funds



What is
next for
the Alliance?

The Road Ahead.....

October to April 2022: Preparation Stage:

- We have built a **high-level strategic roadmap** that outlines key areas that The Alliance will focus efforts on to move us closer towards **achieving our vision and mission** and that aligns with our Strategic Directions.
- In collaboration with RDM, RS and ARC operational teams we will work on **scoping the strategic initiatives into projects** and conduct **prioritization** to ensure we can create a **balanced workload** for year 1.
- The Strategic Plan will be responsive to ensure we can maintain a level of agility and adjust as needed. This will be accomplished by conducting quarterly assessments to monitor performance and identify changes needed.

Sparking Excitement in our Strategy

We are excited to start promoting our new Board-endorsed name, strategy and brand:

- ▶ A multi-channel digital socialization campaign is being developed to be launched this fall to bring our Strategic Plan to life.
- ▶ Re-branding of our website, social presence, communication tools etc.

Closing Remarks & Thank You

