Terms of Reference

Dataverse North Expert Group

Last revised on 2023-06-16

The Dataverse North Expert Group (Dataverse North) is part of the Digital Research Alliance of Canada (the Alliance) Research Data Management (RDM) Network of Experts (NoE).

Goals

The establishment of a national Dataverse service *(Borealis, the Canadian Dataverse Repository)* has seen an increase in the number of post-secondary institutions using the Dataverse data repository platform in Canada. The primary goal of Dataverse North is to foster and sustain a community of practice for administrators and institutional practitioners who support Dataverse repositories, collections and services in Canada, and to help coordinate activities of interest to that community.

> *"A community of practice is a group of people who share a concern or a passion for something they do, and learn how to do it better as they interact regularly" (Wenger-Trayner and Wenger-Trayner 2015)[1].*

Additional Dataverse North goals are:
- to promote the use of the Dataverse platform and Borealis service in Canada and to advocate for their ongoing support and development;
- to encourage the development and promotion of best practices relevant to the platform and its use;
- and to contribute to the ongoing development of the application through involvements with the Dataverse Project and the Global Dataverse Community Consortium.

Responsibilities

In pursuit of its primary goal, Dataverse North:
- provides spaces and organizational structures for the Borealis Dataverse Community;
- works with the Borealis service team to facilitate discussions and collaborations within the community;
- undertakes assessments to identify gaps and opportunities related to specific community needs, such as learning or training; and
- works in collaboration with others to address identified community needs.

In pursuit of its secondary goals, Dataverse North:
- promotes the Dataverse platform and the Borealis service to key stakeholder audiences, including libraries, funding bodies, and researchers;
- advocates for the support and development of the Borealis service;

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[1] https://wenger-trayner.com/introduction-to-communities-of-practice/

- develops and promotes best practices related to the Dataverse application on its own or, when appropriate, in collaboration with others; and
- identifies areas for technical development of the Dataverse platform and the Borealis service.

In pursuit of all of its goals, Dataverse North communicates, collaborates and coordinates with:
- the Borealis Dataverse service;
- the Borealis Dataverse Community;
- other expert groups within the Alliance's Network of Experts;
- other groups within the Alliance;
- the Dataverse Project at Harvard's Institute for Quantitative Social Science;
- the Global Dataverse Community Consortium; and
- other groups relevant to data repositories and research data management.

Term

Members serve a 2-year term, which may be renewed.

Membership

- Dataverse North has an interest in ensuring that its membership includes members from institutions of different sizes and from different regions of the country.
- Dataverse North members have an interest in the Dataverse platform and in helping Dataverse North achieve its goals, and may hold expertise in related areas, such as research data management, data curation, data preservation, data discovery, or metadata, or be drawn from the broader research community.
- Members are expected to attend meetings, participate in activities, and contribute to the group's efforts to achieve its goals and objectives. They are not required to belong to a working group.
- Members may have the opportunity to serve as liaisons with other groups.
- New members are selected by the chairs, in consultation with the group, from expressions of interest submitted through the Alliance's online form or made in response to a call for new members.
- Dataverse North makes every effort to ensure the group includes at least one member of the Borealis Service team.
- The Alliance's *Data Curation Officer - Dataverse* is automatically a member and provides support for the group's activities.
- There is no maximum or minimum number of members.

Chairs

- Dataverse North has two co-chairs.

- One co-chair is appointed to a 2-year renewable term, according to the process outlined in the *Digital Research Alliance of Canada Research Data Management (RDM) Network of Experts Partnership Charter (2023)* [2].
- The other co-chair is a member of the Borealis service team and appointed by Scholars Portal to a 2-year renewable term.
- Responsibilities of the chairs are outlined in the NoE Partnership Charter, which says that a chair is "to be responsible for consulting with the EG members and others, including the Alliance / Alliance RDM Team, before affirming significant decisions. Following this consultative process, the Chair(s) has authority to make decisions" (p.8).

Meeting frequency

Quarterly or when needed.

Record of meetings

Meeting agendas and notes are kept in the group's Google Drive space.

Method of operation

- Dataverse North is subject to the provisions of the *Digital Research Alliance of Canada Research Data Management (RDM) Network of Experts Partnership Charter (2023)* [3].
- Dataverse North will develop an annual plan of activities and review progress of these activities throughout the year.
- Members are encouraged to identify issues and propose them as meeting agenda items for review and discussion.
- Members are expected to express opinions respectfully, strive to be inclusive, and recognize diverse voices.
- Working documents are kept in Dataverse North's Google Drive space.
- A listserv is used for group communication (DATAVERSE-NORTH@lists.ubc.ca)
- Meetings are conducted virtually.

Working groups

Formation

- Working groups are formed to achieve specific objectives, and may be proposed by Dataverse North members or by members of the Borealis Dataverse Community.
- New working groups are approved by the Dataverse North chairs, in consultation with Dataverse North members.

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[2] [Version 1.0 (English)](#) | [Version 1.0 (French)](#)
[3] [Version 1.0 (English)](#) | [Version 1.0 (French)](#)

- The Dataverse North chairs are responsible for creating a proposal that describes a working group's charge and deliverables and for seeking feedback on it from Dataverse North members.
- Terms of reference are either created by the Dataverse North chairs or created by the working group chair(s) and approved by the Dataverse North chairs.

Membership and chairs

- A working group must include at least one Dataverse North member.
- Membership and chairing arrangements are determined by the Dataverse North chairs.
- If members are recruited through an open call for members, it is suggested that the chair or chairs be selected by the working group members.
- A working group chair does not have to be a member of Dataverse North.
- Working group members do not automatically become members of Dataverse North.

Method of operation

- The primary line of communication between a working group and Dataverse North is between the respective chairs of the groups.
- At least one chair of the working group is required to attend Dataverse North meetings to provide updates.
- Working groups will ensure that their working materials are uploaded to Dataverse North's Google Drive space.
- When a working group determines that it has accomplished its objectives, it should hold a vote to disband and inform the Dataverse North chairs.
- A working group may be designated a standing group by the Dataverse North chairs if its objective is ongoing in nature.

Outputs

- Deliverables produced by a working group must be submitted to Dataverse North for approval before they are shared publicly or published.
- When a working group is dissolved, Dataverse North will assume custodianship of its deliverables and working materials. This does not include outputs like conference presentations or journal articles.
- In the event that Dataverse North ceases to exist, the Alliance's RDM team will assume custodianship of its records.
- Custodianship of data collected by a working group is determined according to the terms and conditions under which its collection was authorized.
- Working groups are encouraged to make their outputs available publicly, following open-access principles wherever possible.

Standing working groups

- The Borealis Community Facilitation Team is a standing working group. [Terms of Reference](.).

Document History

The first Terms of Reference for Dataverse North were created in 2017 when the Network of Experts was part of the Portage Network and the group was called the Dataverse North Working Group. The document included a preamble, a Goals section, and a list of Specific Responsibilities (10 in number), and indicated that the group would begin in April 2017. The document was not revised before the creation of the present Terms of Reference.