

Agree to Connect

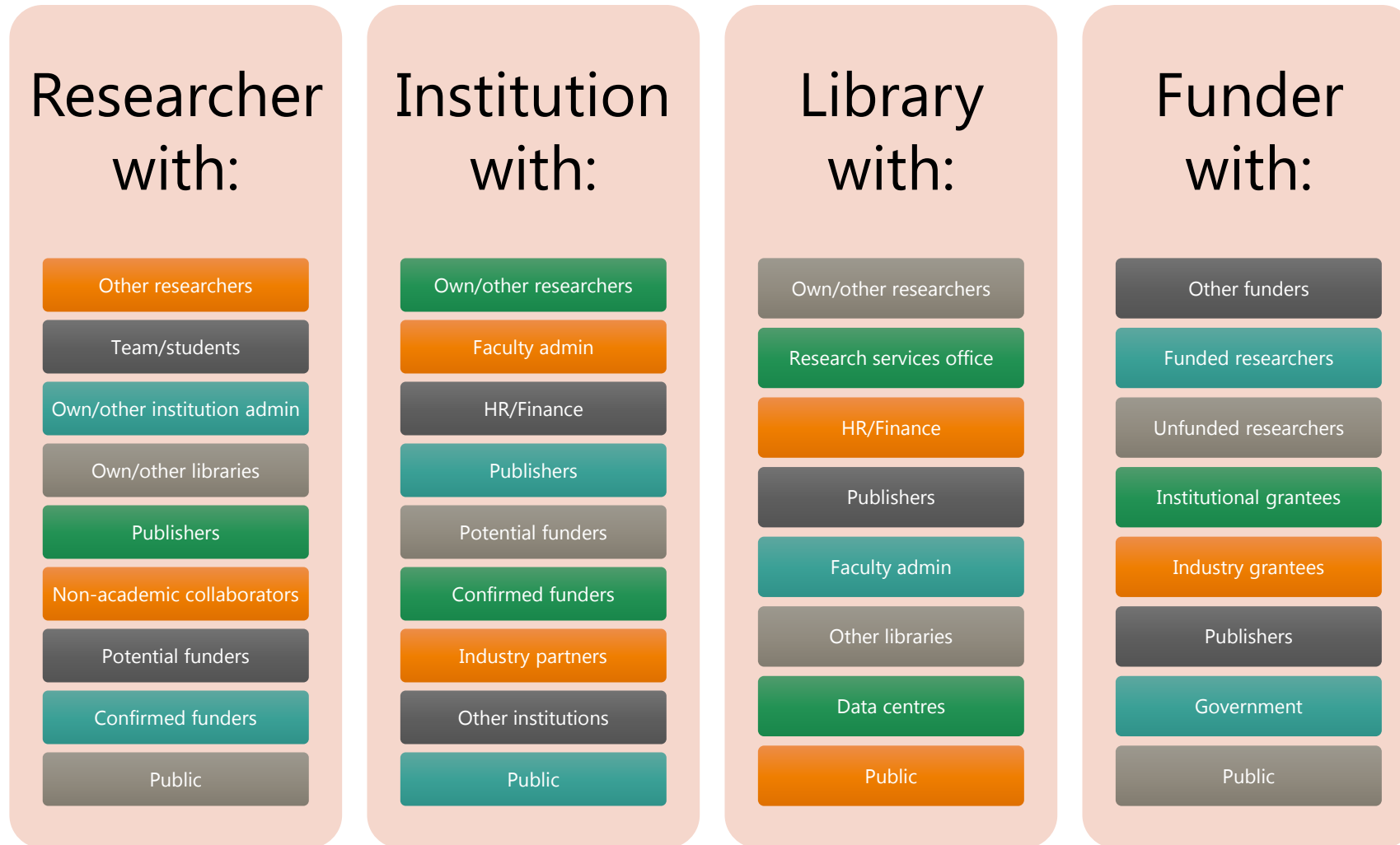
A pluggable, community-driven solution for **reducing admin burden** on researchers, **improving business intelligence** for management & **reducing friction** in data sharing for all



Agenda

- ❖ What is CASRAI?
 - What problem do we solve?
 - Alternate solutions – is there another/better way?
 - The CASRAI solution
 - Who is involved?
- ❖ Where are we now?
 - Status – National Projects
 - Status – Other Projects: National & International
- ❖ Where are we headed?

Information Sharing Landscape



The Problem (1)

1) Information is digital

- text, images, video, audio – **all data**

2) Databases hold everything

- Forget the name: HR, Finance, CRIS, IR, journal, grants or reporting web-forms – **it's a database**

3) Databases are islands

- good default for security and single-purpose – **bad for sharing**

The Problem (2)

1) Mapping is a bad relationship

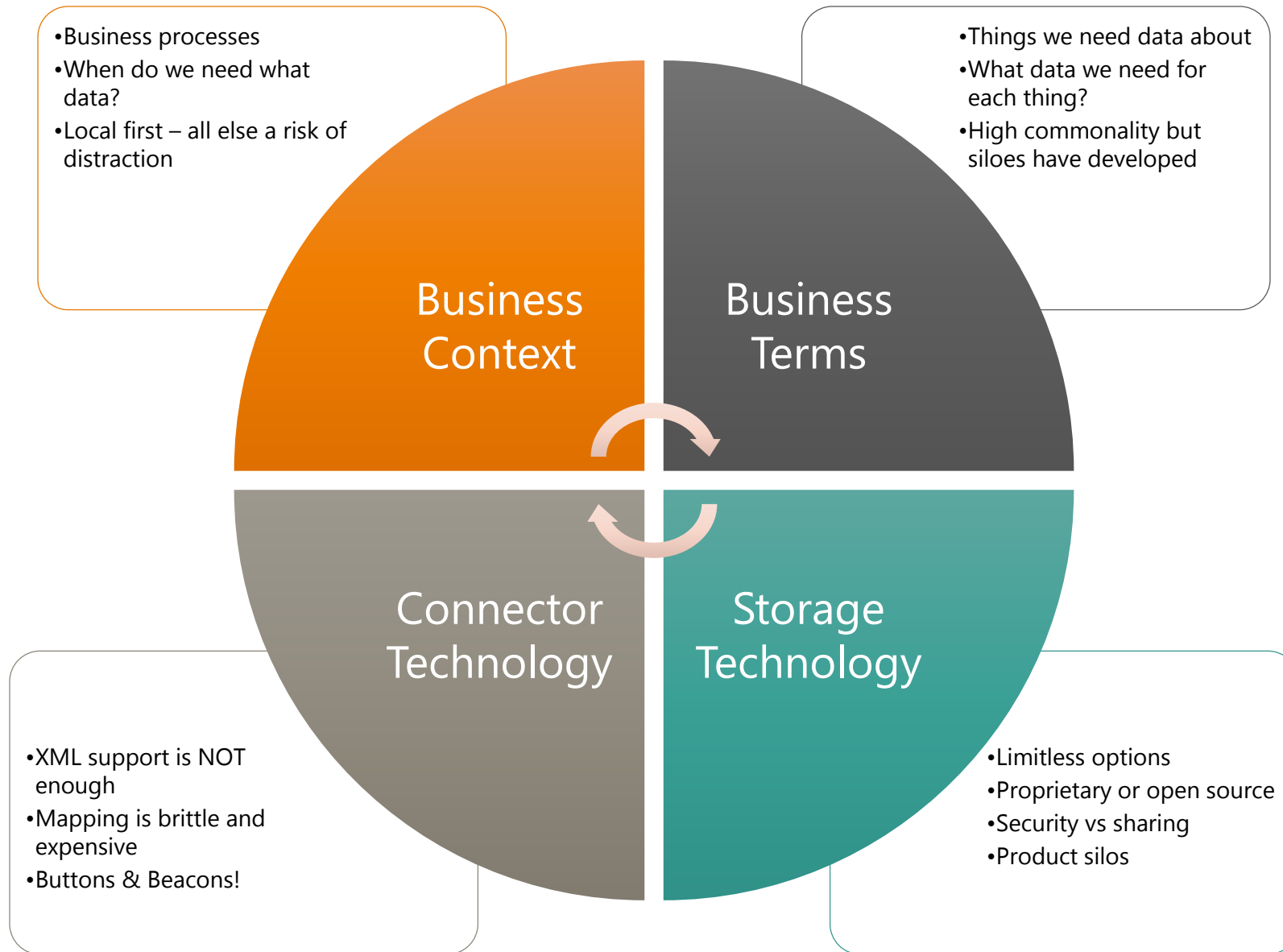
- Brittle, too-late, expensive

2) Policy ownership has atrophied

- Policy has come to think that information is an IT problem – have off-loaded capacity

3) Perfect is the enemy of good enough

- 100% common is not the goal; strive for increments of good while working to best



Obstacles

Software Silos

- Purpose-built Tools (CRIS, IR, HR, Finance, Webforms)
- Same fundamental concepts stored differently
- Build-first, map-later (maps as duct-tape)
- XML support not enough

Tool-centric Thinking

- If we all used 'tool X' we wouldn't have a problem,
- '3rd tool' syndrome – bridge any two by building (and maintaining) a 3rd
- Portal-distraction (3rd tool symptom)

Boundaries

- Legislation/policies
- Processes
- Disciplines
- Organizational Units
- Sectors
- Regions
- Countries

Understanding Information Flow

Humans
Lead

Need agreement on contextual scope

Need agreement on terms and supporting elements

Need agreement on labels, definitions, structures, identifiers

All to **document** the information requirements of policy

Machines
Obey

Need encoded logic and reasoning of above agreements,

Need encoded physical data model for storage

Need encoded physical data model for exchange

All to **implement** the information requirements of policy

Alternative options

- ❖ Find another layer to reduce the 'problem surface'
 - Option: we all agree on a single portal
 - Option: we all agree on a single software product
 - Option: we all agree on a single database design
- ❖ Rely on mapping
 - Expensive: repeat analysis/dev costs for each mapping target
 - Brittle: change on either end breaks the mapping
 - Missed opportunity to agree
- ❖ Do nothing

The CASRAI solution (1)

- ❖ **Model:** Non-profit membership organization
 - founded and head-quartered in Canada
 - growing international participation
- ❖ **Mission:** Improve data flow within/between orgs
 - Reduce admin burden
 - Reduce information friction
 - improve business intelligence
- ❖ **Method:** Convene – Agree – Connect
 - be least 'prescriptive' - reduce the 'agreement' surface
 - 'plug' the CASRAI approach into your projects – don't reinvent
 - maximize 'local' freedom of implementation

The CASRAI Solution (2)

- ❖ Membership structure inclusive of key stakeholders
 - Research Institutions – RSO, Library, Evaluation
 - Research Funders – federal, provincial, foundation
 - Research Solutions Providers – Software vendors, Publishers
 - Research Partners– Scholarly Societies, Professional Associations, Ministries
- ❖ Local-first, Nationally integrated, Globally connected
 - Prioritizes effort appropriately
 - Strategic members set priority, Review members comment/validate
- ❖ Project-driven avoids 'scope-creep' and 'ocean-boiling'

National Projects: Canada

❖ Research Classification

- subject experts evolving a common taxonomy for categorizing research investment and activity
- proof-of-concept project seeking participants

❖ Research Impacts

- Alberta-led on health impacts
- Integrating with global initiatives towards harmonization and best practices

❖ Funding results Announcements

- U15 universities exploring a pilot to reduce admin burden

❖ Admin KPI Capacity

- Interest Group to tackle topics in a safe forum (sensitive subject)

National Projects: UK

- ❖ Data Management Plans
 - common, extensible format for exchanging DMPs
 - developing institutional agreement to help guide/inform funder policy
- ❖ Authority File: Organization
 - developing a common approach to shared governance of 'authority files'
- ❖ Open Access APC Financial Reports
 - standards interoperable OA finance reporting
- ❖ Coming up: Equipment Profiles

Other Projects: National & International

- ❖ Acknowledging Peer Review Services in CVs (ORCID)
- ❖ Standard Taxonomy for Contributor Roles in Research (Wellcome Trust)
- ❖ Snowball Metrics standards (multi-nation)
- ❖ Arts contributions to CVs (Sweden)
- ❖ CVs and Funding Applications (Portugal)

Get involved

- ❖ Join CASRAI
- ❖ Plug it into your projects – how do IR systems fit into this ecosystem?
- ❖ Implement the dictionary you help create

Thank-you

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