



RESEARCH DATA ALLIANCE (RDA)

FUNDERS FORUM OVERVIEW

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TABLE OF CONTENTS

Contents

1	RDA FUNDERS FORUM	1
1.1	FUNDERS FORUM BENEFITS AND OPPORTUNITIES:.....	1
1.2	FUNDERS RDA BIRDS OF A FEATHER (BOF) / INTEREST GROUP:	2
1.3	FUNDERS FORUM STRUCTURE:.....	2
1.3.1	STRUCTURE	2
1.3.2	MEMBERSHIP	3
1.4	FUNDERS FORUM MEETINGS:.....	4
1.5	RDA FUNDERS FORUM TOPICS 2022 - 2023	4
1.6	RDA FUNDERS FORUM SECRETARIAT SUPPORT, RESOURCES AND EFFORT	5
1.6.1	AREAS OF INVESTMENT	5
1.6.2	RDA EFFORT TABLE	6

1 RDA FUNDERS FORUM

1.1 FUNDERS FORUM BENEFITS AND OPPORTUNITIES:

Research funders have been important allies for RDA since the beginning and use each Plenary as a venue to both interact with RDA and each other. This group initiated an open Interest Group -- the Research Funders and Stakeholders on Open Research and Data Management Policies and Practices Interest Group, whose charter is to create “... a forum for research funders to initiate or further data-related discussions could result in lasting benefits for the research community (increased coordination, standardization and support) and the funders themselves in terms of avoiding duplication of efforts and building on existing expertise and resources.” Both the Funder’s Forum and the related Interest Group are great examples of how groups use RDA’s organizational structure to increase both engagement and effectiveness.

The RDA Funders Forum, initiated around the launch of RDA in 2013, is a group of funding organisations / representatives with an interest in research data and related data policies. The Funders Forum, typically meet the day before the start of RDA plenary meetings, taking place in different regions around the world.

For Funders:

- International, neutral, private forum for funder-to-funder discussions and information exchange
- Networking & bi- or multi- lateral opportunities between funders



- Insights from RDA governance & community including presentation of Outputs & Recommendations
- Discussions and examples of work in progress and solutions around areas of interest for Funders
- Insights to both lessons learnt as well as new policies being implemented by funders
- Candid closed-door funder only conversations on operationalization of specific recommendations

For RDA:

- Organisation & community visibility with international group of funders
- Financial and implementation support for Business & Work of RDA

1.2 FUNDERS RDA BIRDS OF A FEATHER (BOF) / INTEREST GROUP:

There are currently few forums for research funders engaged in the open research and data management space to discuss their unique challenges, perspectives and opportunities. Creating a forum for research funders to initiate or further data-related discussions could result in lasting benefits for the research community (increased coordination, standardization and support) and the funders themselves in terms of avoiding duplication of efforts and building on existing expertise and resources. For this reason, the RDA Funders Forum decided to substantiate their engagement with RDA and be fully aligned with the RDA principles of openness, harmonization and being community-driven. The creation of a dedicated Interest Group (IG) is a significant value-added contribution to the RDA community as a vehicle for open discussion of policy-driven topics.

The Interest Group, entitled Research Funders and Stakeholders on Open Research and Data Management Policies and Practices IG¹, aims to interact with the RDA community and dialogue with data professionals on various different topics of relevance to them and RDA. The objective of the IG and meetings are to allow funders from around the globe to put forward subjects that they wish to discuss publicly among themselves and on which they want to gather input from the RDA community.

1.3 FUNDERS FORUM STRUCTURE:

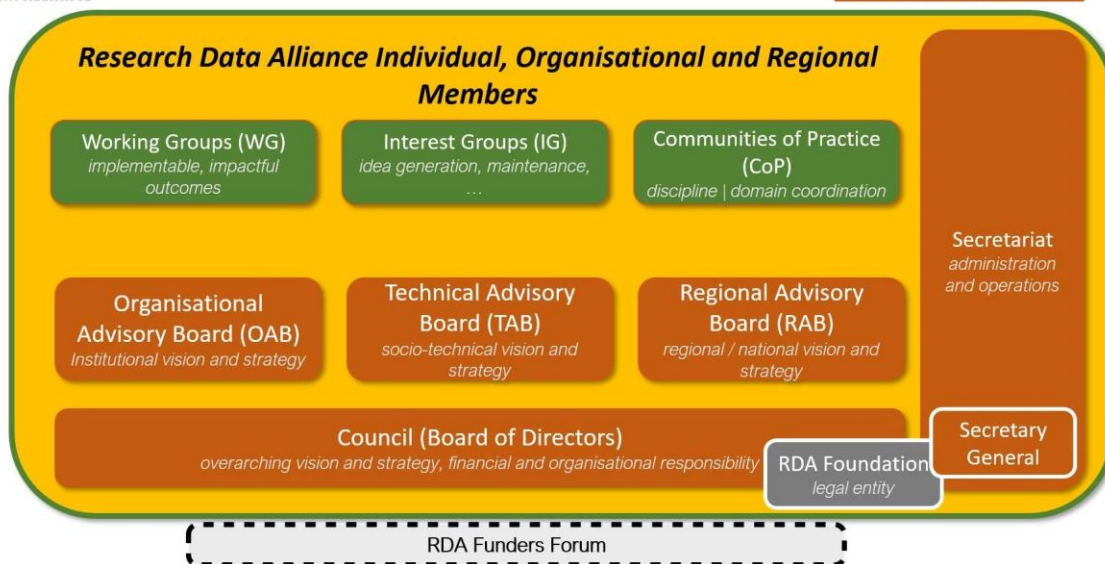
1.3.1 STRUCTURE

RDA distinguishes the organisational and community activities in terms of the **Work of RDA** performed by the global volunteer community of data practitioners enables representation of all geographies, research domains, and professional cultures, and the **Business of RDA** is a lean and agile managerial layer, supporting governance and operations, and vital to securing the organisation's sustainability. Governance is agile and lightweight. These two dimensions are in support of the **Community of RDA**. A global community of individuals (over 12,500), organisations (over 70) and regions / nations (over 35).

The image below outlines the "Work of RDA" mechanisms to support the community and the Business of RDA governance and support groups. The RDA **Funders Forum**, since its conception in 2014, has specifically made the choice to not be a direct part of the governance (or business) boards of RDA. As a true bottom up, community driven organisation, a formal role of Funders within the governance model could lead to perceptions of top-down agenda setting. However, the funders choose to collaborate closely with the RDA governance (through Funders Forum) and the community (both through elements of the Forum but mainly through the dedicated Interest Group).

¹ <https://www.rd-alliance.org/groups/research-funders-and-stakeholders-open-research-and-data-management-policies-and-practices-ig>

The Structure



1.3.2 MEMBERSHIP

Participation in the Funders Forum is open to all and not limited to current funders of RDA but includes all funding agencies and organisations, both public and private, with an interest to attend and actively contribute. Interested funders are invited to sign up and join a mailing list, exclusive to them, to receive the updates, meeting links, event invitations, newsletters, etc.

The Funders Forum has at least two co-chairs, representing funding organisations that preferably contribute financially to RDA. These co-chairs take responsibility for the co-organisation of the meetings, helping to define the agenda, structure, and topics for discussion.

FUNDERS FORUM CO-CHAIR ROLE, RESPONSIBILITIES & TERMS

The Funders Forum members choose one Co-Chair annually for a term of two years. The two Co-Chairs coordinate the work of the Funders Forum with support from the RDA Secretariat.

Funders Forum Co-Chairs are elected by the members, through a simple majority voting with one vote for each member. Co-Chairs are elected for 2 years at a time with a maximum of one consecutive re-election (i.e., maximum of 4 years). The Co-Chair elections are staggered so that one Co-Chair is elected each year. After their time as Co-Chair, regardless of whether they were elected a Co-Chair for one or two consecutive two-year periods, a member is ineligible to be re-elected as a Co-Chair for 2 years.

The Co-Chair elections are held during the first semester of the year. If there is more than one candidate, each Co-Chair is elected by simple majority voting with one vote for each member. There is an exception for the first year of the new Funders Forum Co-chair election process. The members will agree on a process to ensure staggered terms for the Co-Chairs.

In the event that no candidates stand for election, existing co-chairs will take advice from Council to identify an appropriate solution.

1.4 FUNDERS FORUM MEETINGS:

In addition to meeting at RDA plenaries, the Funders Forum will organize additional meetings between plenaries on topics / areas of interest to funders.

Two formats are proposed:

1. Bi-annual In person and Virtual (Hybrid) meetings

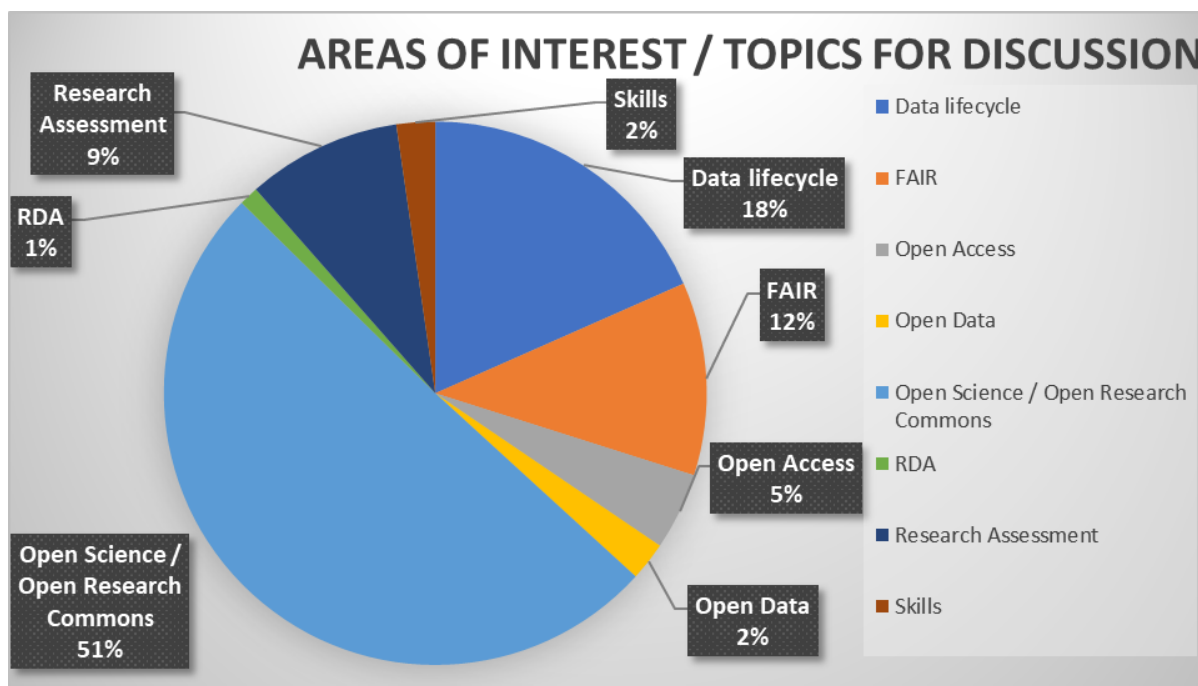
- a. These 120-180 minute meetings take place in conjunction with RDA Plenary Meetings and are organised in the plenary meeting time zone.
- b. Biannual update on RDA Business (including Strategy, Financial Sustainability, Staff, etc.)
- c. Closed meeting between funders focusing on different topics and information exchanges, the focus of which is determined by the funders themselves and the co-chairs. For example, the specific topics can be chosen from those expressed by Funders Forum members through the 2022 survey responses (see Section 1.5 for 2022-2023 topics)
- d. Generating ideas on how the **RDA Organisational Assembly** and the FF can work together as a larger body to consider steps of operationalising RDA WG Recommendations if needed.
- e. Presentation of specific RDA activities and / or outputs aligned with the agenda topics, offering RDA community an opportunity to interact with funders on aspects of specific funder - community interest.
- f. Post meeting social / networking occasion with RDA governance board representatives and funders during physical meetings. Funders Forum member-organised informal dinners in conjunction with FF meetings.

2. Semestrial Virtual meetings

- a. These 60 minute meetings take place on-line between plenaries in different time zones to accommodate funders (maximum 2-3 per annum in addition to 2 biannual hybrid meetings)
- b. Meetings would focus on specific topics of interest to members - e.g., repository infrastructure, open science, data privacy etc..
- c. Funder representatives would be invited to share written updates with links to strategies, policies, areas of interest to other FF colleagues in a collaborative document to be shared with all participants before the meeting. This offers an opportunity to give an update to all but in written rather than verbal format and further details can be obtained by direct contact between interested parties.

1.5 RDA FUNDERS FORUM TOPICS 2022 - 2023

In 2022, the RDA Funders Forum members were invited to provide insights to areas and topics of interest to be tabled for discussion in 2022 and 2023. In addition, the RDA Secretariat is working on mapping the active RDA Working and Interest groups and Communities of Practice, as well as RDA Outputs, to these topics. A summary of the areas of interest for Funders include:



Further details on the topics and RDA activity mapping will be circulated to the members of the Funders Forum.

1.6 RDA FUNDERS FORUM SECRETARIAT SUPPORT, RESOURCES AND EFFORT

The RDA Secretariat will support the organisation of the RDA Funders Forum as outlined below. Resources will be sought to enable continuous support.

1.6.1 AREAS OF INVESTMENT

The RDA Secretariat will invest effort to:

- Contacts: update and enrich the global database / mailing list of funders to be invited to join the RDA Funders Forum. *Effort required: Una tantum 0.2 FTE for 2 months (Total 4 days)*
- Meetings: continuous dedicated liaison from RDA Foundation – the Office Manager –to support the FF to communicate updates, collect material, provide pre, during and post meeting support (for example, generate agenda, manage timings and logistics, take notes, etc.) *Effort required: 0.1 FTE (Total 2 days per month)*
- RDA4Funders Newsletter: generate a quarterly update for Funders with updates on RDA activities / outputs and topics of interest and any updates the members would like to share. *Effort required: 0.05 FTE (Total 1 day per month)*
- Funders4RDA News: offer special section in monthly RDA community newsletter to funders to highlight policies, opportunities, surveys, consultations, etc, *Effort required: 0.05 FTE (Total 1 day per month)*
- Areas of Interest: create and manage surveys with the RDA community and the funders to identify topics of interest and generate focus meetings / or slots during the funders forum meetings. *Effort required: 0.2 FTE (Total 2 days per month)*



1.6.2 RDA EFFORT TABLE

Activity	Effort - Days per month	FTE
Contact Database	2	10%
Meetings	2	10%
RDA4Funders Newsletter	1	5%
Funders4RDA News	1	5%
Areas of Interest	1	5%
Total	7	33%