



Canadian Research
Knowledge Network

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ORCID Canada

Request for Proposals National Implementation of Persistent Identifiers: Strategy Consultant

Introduction

On behalf of the Canadian Persistent Identifier Advisory Committee (CPIDAC), the Canadian Research Knowledge Network (CRKN) is inviting proposals for a consultant with expertise in persistent identifiers (PIDs), national PID implementation strategies, and digital research infrastructure. CRKN administers two local PID consortia with significant community uptake: ORCID Canada (ORCID-CA), which supports the use of ORCID iDs and has 41 members, and DataCite Canada (DCAN), which supports the use of DataCite DOIs and has 52 members. These organizations are built on a consortial membership model; DCAN is also supported administratively by NDRIO Portage. Membership in both national consortia includes Canadian universities, government agencies/departments, research centres/networks, journals, and more. PIDs remain a cornerstone of Open Science and the scholarly open infrastructure, which are vital to the sustainability, accessibility, and values of the Canadian research ecosystem.

ORCID-CA and DCAN have a similar and overlapping governance structure. Both have governing committees composed of representatives from member institutions elected by their memberships. Both additionally benefit from a shared advisory committee, the CPIDAC, composed of representatives from key Canadian stakeholders with the aim of supporting the implementation of a national PID strategy. These consortia respond to the current needs and priorities of Canadian institutions, though there exist other PIDs that could be worth adopting and supporting.

For more information, please see the following [White Papers](#) about [PIDs in Canada](#), and a [working document on the Canadian PID landscape](#).

Scope of Work

CRKN seeks a consultant to undertake an analysis of the PID landscape in Canada, identifying obstacles and opportunities, and considering previous national and international reports, white papers, best practices, and stakeholder engagement with the aim of developing an implementation plan for a 3–5-year Canadian National PID strategy. Such a strategy should consider the global context of PIDs, and successes/challenges associated with similar projects in other countries:

- review existing PID initiatives in Canada and identify gaps, obstacles, and opportunities;
- in collaboration with CRKN, NDRIO-Portage, and the CPIDAC, perform an analysis of the Canadian PID landscape and its relationship to global PID organizations, strategies, and best practices;
- based on the landscape analysis and review, recommend and enact a stakeholder engagement plan for gathering perspectives and insights on opportunities and challenges across the Canadian PID ecosystem;
- in collaboration with CRKN, NDRIO-Portage, and the CPIDAC, develop a set of principles that will help guide a Canadian National PID Strategy;
- develop an implementation plan for a 3-5 year Canadian National PID Strategy.

Timeline and Cost

It is anticipated that the selected Consultant would begin work in November 2021 and complete all deliverables by April 30th, 2022. The project has budgeted for a maximum of \$25,000 CAD. A recommended schedule would finalize a review by the end of November 2021, conduct a detailed landscape analysis and stakeholder engagement plan by mid-March 2022, and develop a set of principles and implementation plan to present to the CPIDAC by mid-April 2022.



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Deliverables

1. updated PID landscape analysis from both a national and global perspective;
2. list of roadblocks to Canadian PID adoption and possible opportunities, with a set of prioritized recommendations;
3. set of Principles to guide a Canadian National PID Strategy;
4. an implementation plan for a Canadian National PID Strategy over 3-5 years;
5. a presentation on the findings, recommendations, and outputs for the CPIDAC.

Project Structure and Process

- CRKN is launching the process on behalf of the CPIDAC, which will have oversight for the process.
- CPIDAC has struck an RFP Steering Group made up of six members of the CPIDAC and support staff will evaluate and make a recommendation to the CPIDAC for approval.
- CRKN is the contractor and will manage the procurement/payment process.
- The chosen consultant will work directly with the RFP Steering Group, and will be expected to meet 2-3 times with that Group. There will also be an opportunity for the consultant to present to the CPIDAC at the beginning and end of the process.

Selection and Evaluation Criteria

The successful Consultant will submit a maximum **5-page proposal** to be evaluated on the following criteria

- Approach (40%)
 - outline the recommended approach to deliver an implementation plan for a Canadian National PID Strategy.
- Experience and Knowledge (40%)
 - of the global PID landscape, including effective ways of implementing national PID strategies;
 - experience identifying key stakeholders and objectives/initiatives for effective PID integration in national digital infrastructure;
 - knowledge of the relationship between and importance of PIDs for Open Science;
 - experience in the not-for-profit sector with priority given to consultants familiar with member-driven organizations.
- Cost (20%)

Submitting Your Proposal

To be considered for this opportunity, please submit a proposal that includes:

- a cover letter with a brief description of the Consultant's work experience and expertise as it relates to the opportunity;
- a summary of related past projects with links to the final results (when applicable);
- a list of three references from organizations for which the Consultant has provided similar services;
- a list of key personnel who will be involved in the project and brief descriptions of their experience and expertise;
- a work plan that includes a timeline, description of activities, and estimates of hours to be worked;
- a schedule of costs.

Please submit proposals by email to John Aspler at jaspler@crkn.ca by Tuesday Oct 19th, 2021, at 10 a.m. ET.