



This guide is designed to help guide your efforts to coordinate with other departments and groups at your institution that are stakeholders in data management. Examples of these groups include IT departments, grants offices, researchers, and deans. While this is written primarily for librarians seeking to expand their data services, it is generally applicable for coordinating data management efforts across your institution.

In general, a **talking points document** is designed to help you stay on track during meetings with those outside of your department. It ensures that your major points are at hand and helps you make progress towards the goals of the meeting. This document will help you assemble your own talking points document in preparation for a meeting with institutional stakeholders in data management.

## Self Assessment & Goals - Determine Who You Should Approach

- Where are you starting?
  - *What Services do you currently provide? Where could you improve?*
- What are your goals?
  - *Consider institutional and funder mandates, as well as the needs of researchers.*
- What can you contribute to reaching the goals?
  - *This is mostly to clarify where to put your efforts. Interdepartmental coordination can take time.*
- What tasks need to be accomplished to reach your goals?

## Hone your Elevator Pitch: Make It Short and to the Point

Your elevator pitch should address the questions below:

- What is the problem?
- Who are you?
- How do you plan to address the problem? (including how your audience can help)

Example elevator pitch to a dean, requesting funds:

- "Researchers need specialized data management support.
- I work with the library's data services group...
- ...we provide one-on-one help to make sure our institution's researchers know how to manage, archive, and share their data. We need financial support for personnel time to have these one-on-one meetings."

## Preparation for Initiating Contact with a Potential Partner

- Do they have a stake in data services or research support? How does your pitch align with their goals?
- Do you know anyone who could help you set up the first meeting?
- What are your goals for this meeting? Are there deadlines?
  - *Example goals: obtaining server space for a data repository, gathering information about who can help with other parts of the project, or getting help to set up a brown bag lunch discussion with the grant office about data management planning.*

## Preparation for Initiating Contact with a Potential Partner (Cont'd.)

- Why is it important that you meet your goals? What will happen if you succeed? What will happen if you don't?
  - *Tailor this to your audience - For example, your grants office will be more interested in meeting NSF funding requirements than your IT department; your IT department will be more concerned with server space and data security.*
- Assemble these into a talking points document. This should be less than a page in length, ideally composed of bullet points with simple statements. This is your playbook for the meeting - don't expect to use everything on here, but be familiar with the document so you can find information at a moment's notice.
- Using your elevator pitch as a starting point, initiate the meeting.
  - *Depending on your relationship with the potential partner, you may want to send a formal email, contact an administrative assistant, or just drop by.*

## Example Talking Points: Educating the Grants Office about Data Services

### Goals

- The Data Services group needs to take a more active role in the grant writing process
- Set up collaboration with grants office to improve DMPs, highlight data services roles for researchers
- Set up brown bag meeting with grant office staff to introduce DS group

### Major Points

- Funders paying more and more attention to DMPs
  - Example: Johns Hopkins issuing reviewer's worksheet for DMPs
  - Example: White House open data initiatives
- The DS group has expertise in this area
  - Our mandate is to support researchers data practices, DMP is part of that
  - We have best practices guides, up-to-date requirements, one-on-one appointments
  - Over the next year we will have a customized DMPTool, example plan series
- We're looking for ways to reach out to researcher community
  - Supporting the grants office with data expertise is one way to do that

### Questions for the meeting:

- What's the best way to guide researchers between our offices?
- Would there be interest in doing a data management brown bag meeting?
- How often do you meet directly with researchers? Do you find it effective?
- Do you know anyone from IT who could help us set up a data repository server?