NSF Arctic Data Center

Data Management Planning

Amber Budden

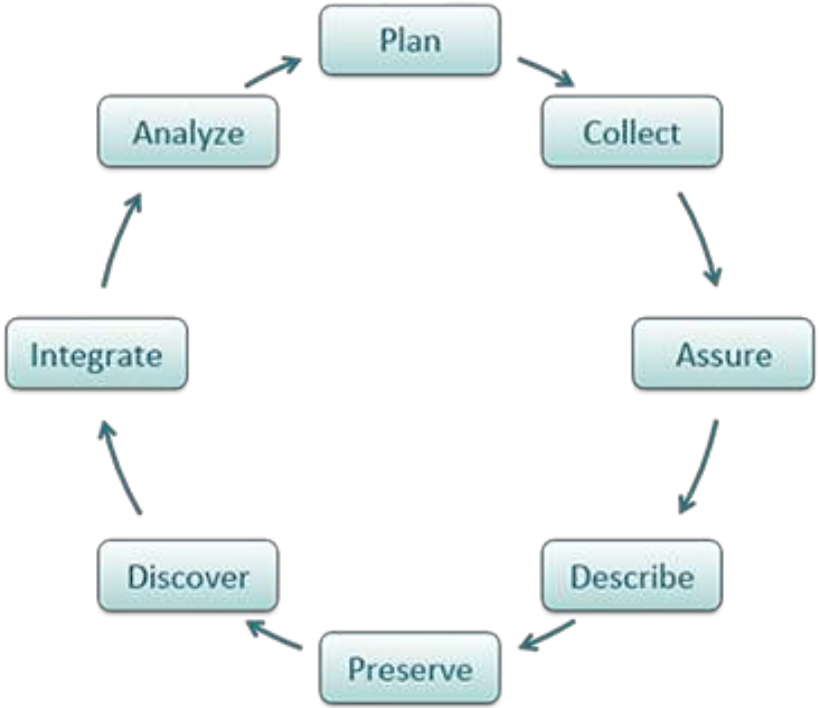
0000-0003-2885-3980

NSF Award #1546024

NCEAS

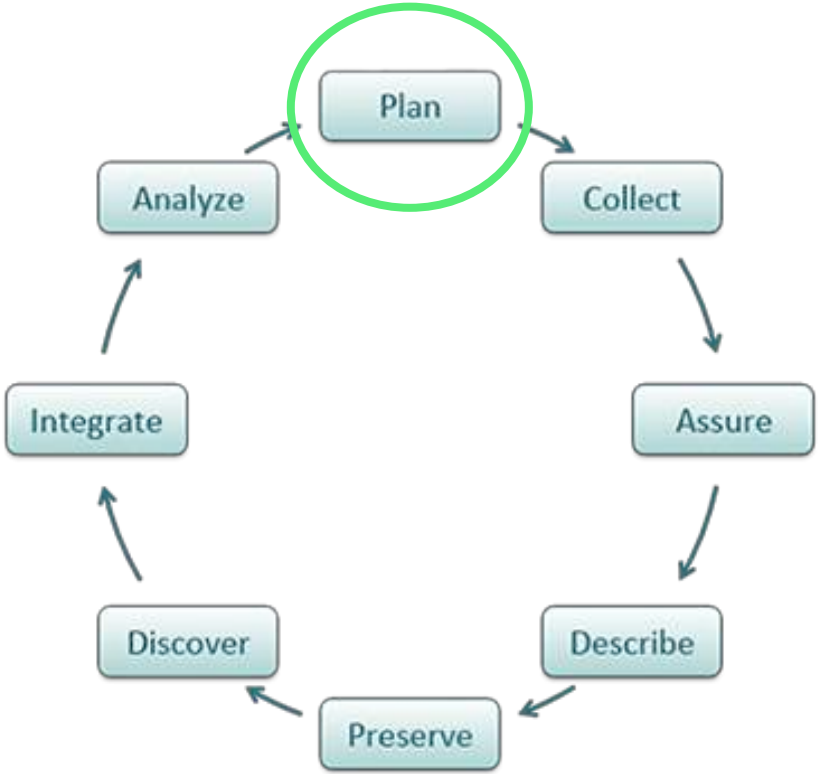
DataONE

The Data Life Cycle



https://www.dataone.org/best-practices

The Data Life Cycle



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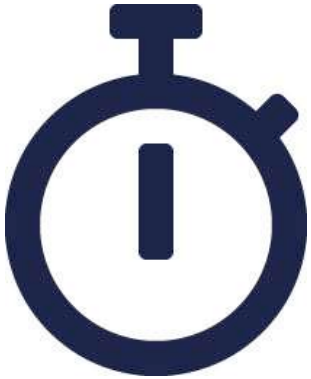
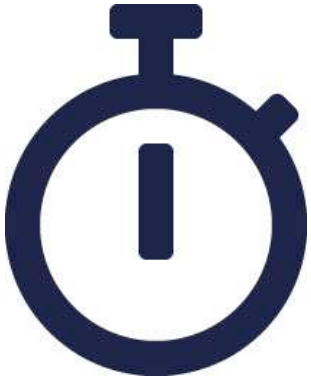
Why Plan?



Efficiency

Why Plan?



Efficiency

Engagement

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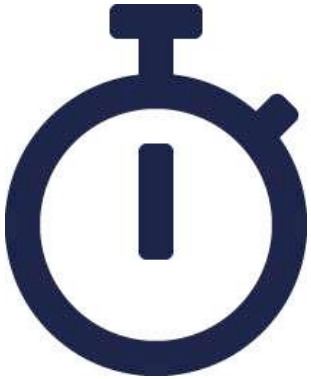

Efficiency

Engagement

Stay Organized

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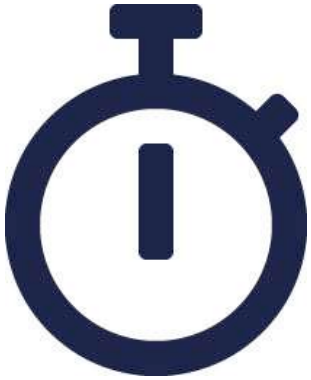


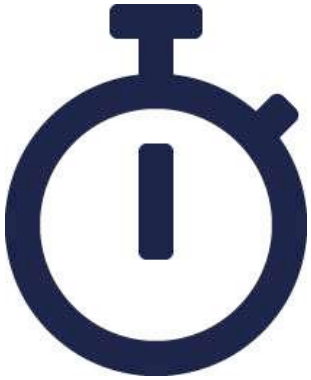
Efficiency

Engagement

Stay Organized

Funder Requirement

Why Plan?



Efficiency

Engagement

Stay Organized

Funder Requirement

Share data

What's in a Data Management Plan?

- Study design
- Data (including format)
- Metadata
- Policies for access, sharing & reuse
- Long-term storage & data management
- Budget

Writing a Data Management Plan (DMP)

1. Engage your team

Writing a Data Management Plan (DMP)

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2. Plan from the start

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3. Follow good advice
    - Arctic Data Center
    - Institutional Libraries
    - DataONE

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4. Use good tools
    - DMPTool
    - DMPOnline

Writing a Data Management Plan (DMP)

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4. Use good tools
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    - DMPOnline
5. Review and Revise

10 Simple Rules for Writing a Good DMP

PLOS | COMPUTATIONAL BIOLOGY

Browse Publish About Search

advanced search

OPEN ACCESS

PERSPECTIVE

Ten Simple Rules for Creating a Good Data Management Plan

William K. Michener

Published: October 22, 2015 • https://doi.org/10.1371/journal.pcbi.1004525

329 Save | 9 Citation | 29,398 View | 307 Share

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Introduction

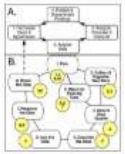
Rule 1: Determine the Research Sponsor Requirements

Rule 2: Identify the Data to Be Collected

Rule 3: Define How the Data Will Be Organized

Rule 4: Explain How the

Figures



Included in the Following Collections

Ten Simple Rules

Open Data

10 Simple Rules for Writing a Good DMP

1. Determine the research sponsor requirements
2. Identify the data to be collected
3. Define how the data will be organized
4. Explain how the data will be documented
5. Describe how quality data will be assured
6. Present a sound storage & preservation strategy
7. Define the project's data policies
8. Describe how the data will be disseminated
9. Assign roles & responsibilities
10. Prepare a realistic budget

Michener WK (2015) Ten Simple Rules for Creating a Good Data Management Plan. PLoS Comput Biol 11(10): e1004525. http://doi.org/10.1371/journal/pcbi.1004525

Determine the research sponsor requirements

GORDON AND BETTY MOORE FOUNDATION

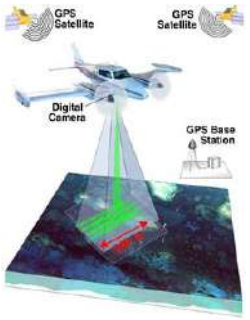
USGS science for a changing world

NSF

NATIONAL INSTITUTES OF HEALTH

NOAA NATIONAL OCEANIC AND ATMOSPHERIC ADMINISTRATION U.S. DEPARTMENT OF COMMERCE

Identify the data to be collected: types; sources; volume; and data and file formats



Define how the data will be organized

FileMaker

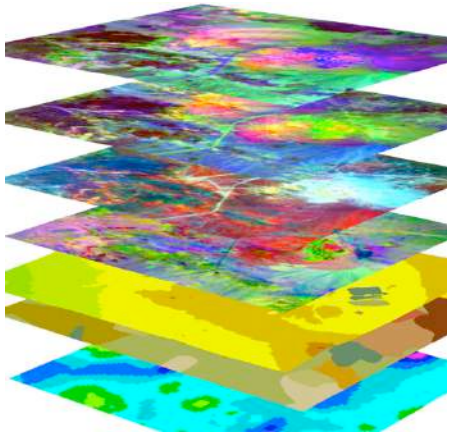
ESRI ArcGIS

ORACLE

data.xls

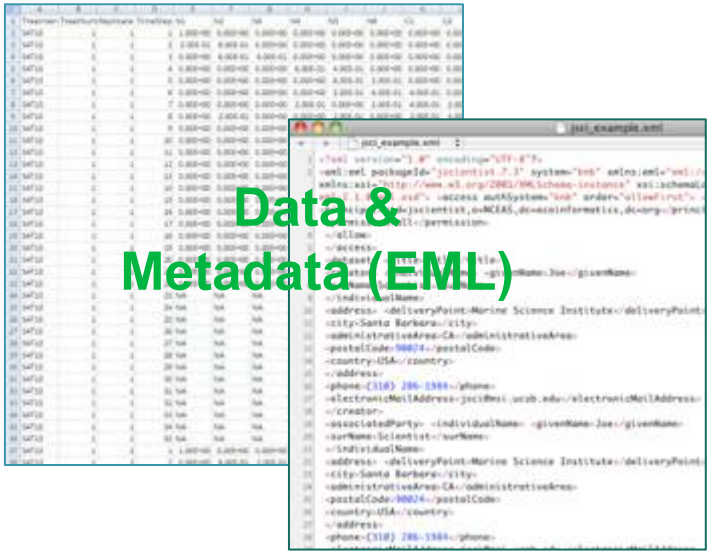
	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	Site	Date	Plot	Species	Weight	Acult		Rodent Trapping 3/15/2010						
2	DeepWell	2/13/2010	1	DIPO	12.1	j		Site	Plot	Adult	RodentSp	Weight		
3	Deep Well	Feb-10	2	Pero	13.22	j		DW	1	y	Pero	12		
4	rioSalado	2/13/2010	1a	pero	16	N		RS	2	j	PERO	escaped <15		
5	rioSladu	"	1"	CleGap	16.92	gut away		RS	3	n	Clegap	91		
6				Mean1	15.06									
7														
8														
9														
10														
11														
12	Rodent Trapping		MJK & ALN	10-Apr-10										
13	Site	Plot	Adult	Species	grams	Comments								
14	deep well	1	y	woodrat	13									
15	riosalado	2	y	PERO	24.5									
16	riosalado	3	y	Clegap	91									
17														
18														
19														

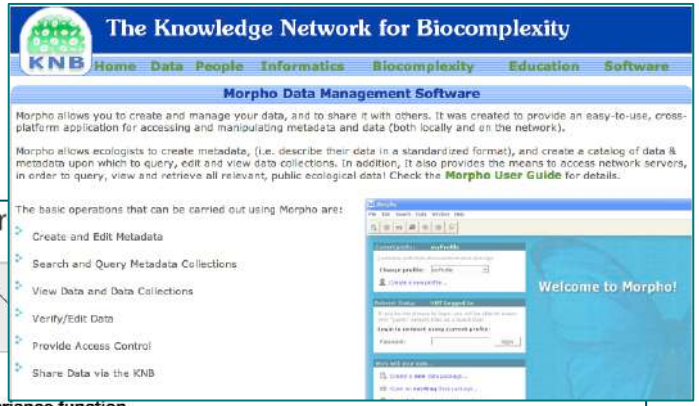
Sheet1

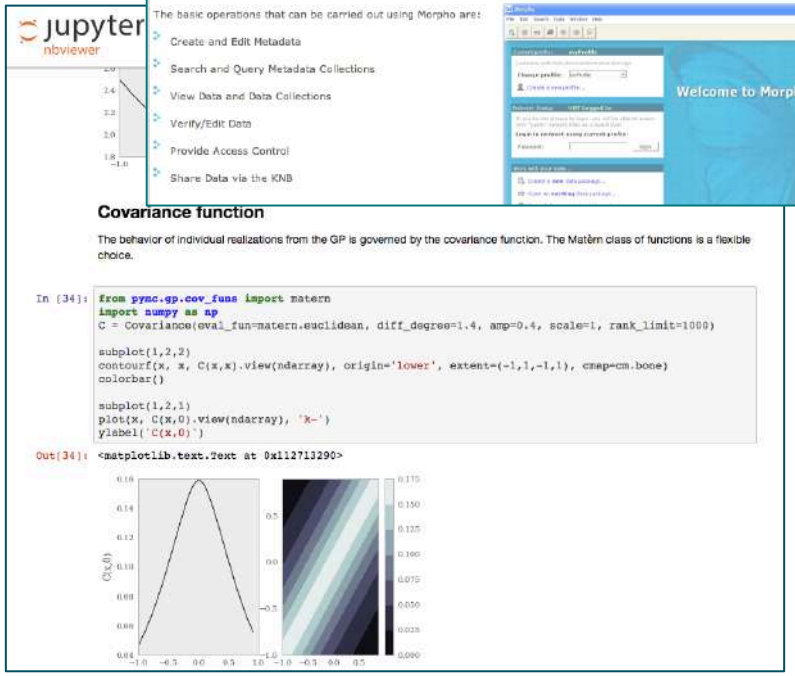


Explain how the data will be documented

- Dublin Core, ISO 19115, EML
- Morpho, metavist, readme.txt
- Electronic notebooks

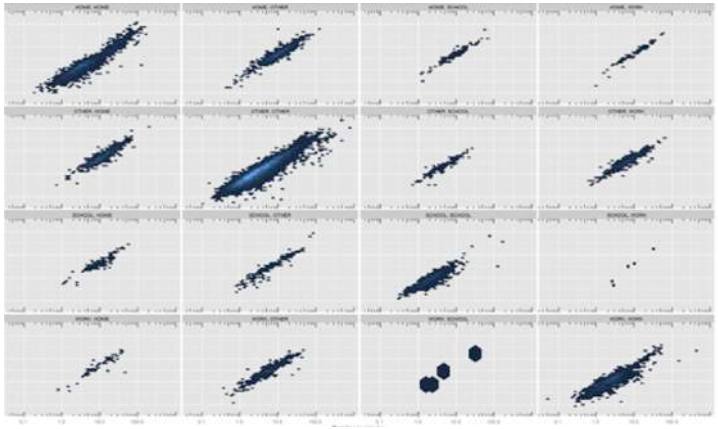






Describe how data quality will be assured

Training activities, instrument calibration and verification tests, double-blind data entry, and statistical and visualization approaches to error detection



Present a sound data storage and preservation strategy

- How long will the data be accessible?
- How will data be stored and protected during the project?
- How will data be preserved and made available for future use?

re3data.org
REGISTRY OF RESEARCH DATA REPOSITORIES

NSF
ARCTIC DATA CENTER

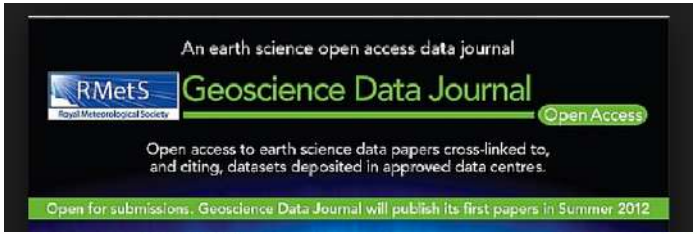
GitHub

Define the project's data policies

- Licensing and data sharing arrangements
- Human subject and other sensitive data

Describe how the data will be disseminated

- More active, robust and preferred approaches include: (1) publishing the data in an open repository or archive; (2) submitting the data as appendices or supplements to journal articles; and (3) publishing the data, metadata, and relevant code as a “data paper”.



Assign roles and responsibilities

- Roles may include data collection, data entry, QA/QC, metadata creation and management, backup, data preparation and submission to an archive, and systems administration.

Prepare a realistic budget

- Review your plan and make sure that there are lines in the budget to support the people that manage the data as well as pay for the requisite hardware, software

Find Research Funder Requirements

- NSF
  - NSF 14-1, Grantee Standards, Section j (https://www.nsf.gov/pubs/policydocs/pappguide/nsf14001/gpg_2.jsp#IIC2j)
- NSF GEO
  - Directorate for Geosciences--Data Policies (https://www.nsf.gov/geo/geo-data-policies/)
- NSF Polar Programs
  - NSF 16-055 Dear Colleague Letter (https://www.nsf.gov/pubs/2016/nsf16055/nsf16055.jsp)
- Check your funder for specific requirements

NSF Division of Polar Programs

- NSF requires submission to the Arctic Data Center within 2 years
  - AON program requires submission within 6 months
- Need to document your data well enough for reuse
- There are exceptions for sensitive data
  - Social sciences, endangered species

NSF DMP Requirements: 5 Sections

- Products of research
  - *Types of data, samples, physical collections, software, curriculum materials, other materials produced during project*

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- Archiving of data
  - *Plans for archiving data, samples, research products and for preservation of access*

DMP Tools & Resources Online

DMPTool

https://dmptool.org/

DMP ONLINE

https://dmponline.dcc.ac.uk/

Learn | Sign in

DMPTool

Build your Data Management Plan

Welcome

Create data management plans that meet institutional and funder requirements.

Get started

DMPTool by the Numbers

29,887
Users

26,353
Plans
More

234
Participating institutions
More

Top 5 templates

Digital Curation Centre
NSF-SBE: Social, Behavioral, Economic Sciences
NIH-GDS: Genomic Data Sharing
NIH-GEN: Generic
NEH-ODH: Office of Digital Humanities

More

Hands-On: Create a DMP

- Login or create a DMPTool account (https://dmptool.org/)

- Draft your own Data Management Plan

Learn | Sign in

DMPTool

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DMPTool
Build your Data Management Plan

Sign in options

Option 1: If your institution is affiliated with DMPTool.

Your institution

- or -

Option 2: If your institution is not affiliated with DMPTool.

Email address

- or -

Option 3: If not affiliated and you need an account.

Create account with email address

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DMPTool

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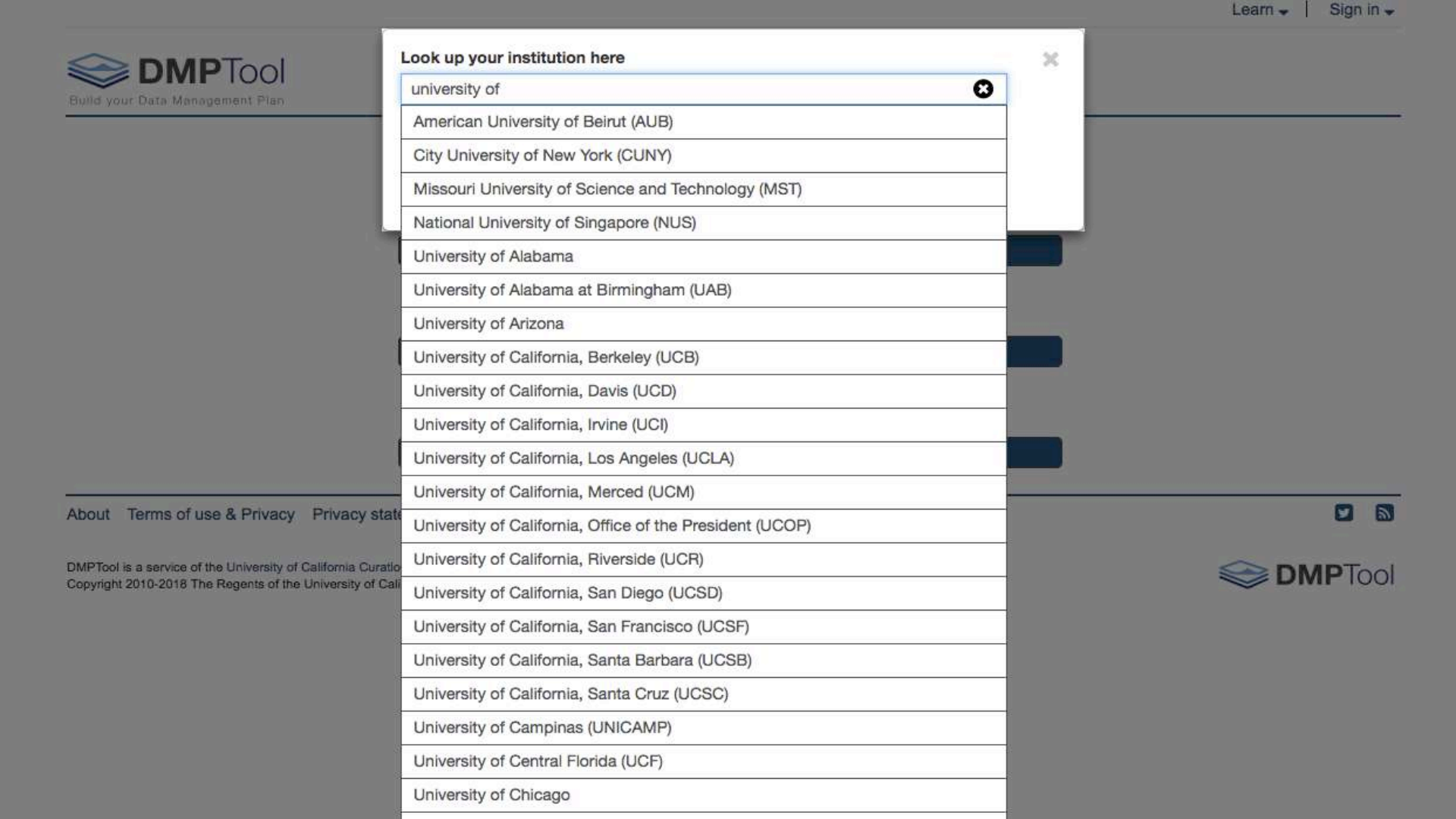
Learn
Sign in
DMPTool
Build your Data Management Plan
Look up your institution here
university of
American University of Beirut (AUB)
City University of New York (CUNY)
Missouri University of Science and Technology (MST)
National University of Singapore (NUS)
University of Alabama
University of Alabama at Birmingham (UAB)
University of Arizona
University of California, Berkeley (UCB)
University of California, Davis (UCD)
University of California, Irvine (UCI)
University of California, Los Angeles (UCLA)
University of California, Merced (UCM)
University of California, Office of the President (UCOP)
University of California, Riverside (UCR)
University of California, San Diego (UCSD)
University of California, San Francisco (UCSF)
University of California, Santa Barbara (UCSB)
University of California, Santa Cruz (UCSC)
University of Campinas (UNICAMP)
University of Central Florida (UCF)
University of Chicago
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Terms of use & Privacy
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DMPTool

DMPTool
Build your Data Management Plan

Look up your institution here

Finland

Natural Resources Institute Finland (LUKE)

University of Helsinki, Finland

Institution not in the list? Create an account with any email address

Your institution

- or -

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DMPTool

Learn | Sign in

Sign in | Create account

* First name

* Last name

* Email

* Password

Show password

* I accept the terms and conditions

Create account

Create account with email address

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Notice: Welcome! You have signed up successfully.

My dashboard

Create plan

Welcome
You are now ready to create your first data management plan.
Click the 'Create plan' button to begin.

There are no records associated

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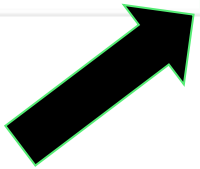

Learn Kathryn Meyer

DMPTool
Build your Data Management Plan

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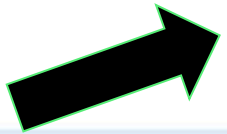

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DMPTool

Create a new plan

Before you get started, we need some information about your research project to set you up with the best DMP template for your needs.

What research project are you planning?

Mock project for testing, practice, or educational purposes

Select the primary research organization

Begin typing to see a filtered list

- or -

My research organisation is not on the list *or* no research organisation is associated with this plan

Select the primary funding organization

Begin typing to see a filtered list

- or -

No funder associated with this plan

Create plan Cancel

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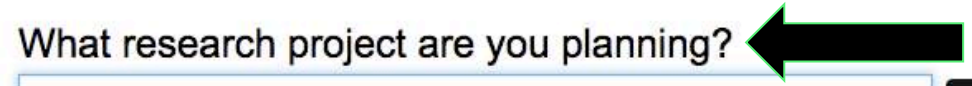

If applying for funding, state the project title exactly as in the proposal.

educational purposes

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Begin typing to see a filtered list

- or - ☐ My research organisation is not on the list *or* no research organisation is associated with this plan

Select the primary funding organization

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- or - ☐ No funder associated with this plan

Create plan Cancel

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Arctic Data Center DMP Demo

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Select the primary funding organization

National Science Foundation (NSF) ⊗

- or -

☐ No funder associated with this plan

Which template would you like to use?

Arctic Data Center: NSF Polar Programs [DRAFT]

We found multiple templates corresponding to your funder.

Create plan Cancel

Learn | Kathryn Meyer

Project details | Plan overview | Write plan | Share | Download

* **Project title**

Arctic Data Center DMP Demo

mock project for testing, practice, or educational purposes

Funder

National Science Foundation (NSF)

Grant number

Project abstract

B I

Principal Investigator

Name

Kathryn Meyer

ORCID iD

Email

meyer@nceas.ucsb.edu

Data contact person

Same as Principal Investigator

Submit | Cancel

Plan guidance configuration

To help you write your plan, DMPTool can show you guidance from a variety of organizations.

Select up to 6 organizations to see their guidance.

DMPTool

Find guidance from additional organizations below

See the full list

Submit

Learn | Kathryn Meyer

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* **Project title**

Arctic Data Center DMP Demo

mock project for testing, practice, or educational purposes

Funder

National Science Foundation (NSF)

Grant number

Project abstract

B I

Principal Investigator

Name

Kathryn Meyer

ORCID iD

Email

meyer@nceas.ucsb.edu

Data contact person

Same as Principal Investigator

Submit | Cancel

Plan guidance configuration

To help you write your plan, DMPTool can show you guidance from a variety of organizations.

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Briefly summarize your research project to help others understand the purposes for which the data are being collected or created.

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Arctic Data Center DMP Demo

Project details | Plan overview | Write plan | Share | Download

Arctic Data Center: NSF Polar Programs [DRAFT]

This plan is based on the "Arctic Data Center: NSF Polar Programs [DRAFT]" template provided by National Science Foundation (NSF).

Instructions

Write plan

Types of data produced

- What types of data, samples, collections, software, materials, etc. will be produced during your project?
- What will be the approximate number and size of data files that will be produced during your project?
- What type of metadata (information others might need to use your data) will be collected during your project?

  Note: if you plan to submit data to the Arctic Data Center please refer to the guidance in the panel on the right.

Data and metadata formats

- What format(s) will data and metadata be collected, processed, and stored in?

  Note: if you plan to submit data to the Arctic Data Center please refer to the guidance in the panel on the right.

Roles and responsibilities

- 1. What parties and individuals will be involved with data management in this project?
  2. What will be the roles and responsibilities of each party and or individual with respect to management of the data
  3. Who will be the lead or primary person responsible for ultimately ensuring compliance with the Data Management Plan?

  Note: if you plan to submit data to the Arctic Data Center please refer to the guidance in the panel on the right.

Policies for access and sharing

- Will any of the data and/or related materials produced need provisions for appropriate protection of privacy, confidentiality, security, intellectual property, or other rights or requirements? If so describe them and detail any requested exceptions from the archiving requirements set for Arctic Sciences research.
- How will data be accessed and shared during the course of the project?

Arctic Data Center DMP Demo

Project details | Plan overview | Write plan | Share | Download

Arctic Data Center: NSF Po[illegible] Programs [DRAFT]

This plan is based on the "Arctic Data Center: NSF [illegible] Programs [DRAFT]" template provided by National Science Foundation (NSF).

Instructions

Write plan

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DMPTool

Build your Data Management Plan

My dashboard Create plan

Arctic Data Center DMP Demo

Project details | Plan overview | Write plan | Share | Download

expand all | collapse all

0/12 answered

+ Types of data produced (0 / 3)

+ Data and metadata formats (0 / 1)

+ Roles and responsibilities (0 / 1)

+ Policies for access and sharing (0 / 4)

+ Policies for re-use and re-distribution (0 / 2)

+ Plans for archiving and preservation (0 / 1)

DMPTool

Build your Data Management Plan

My dashboard Create plan

Arctic Data Center DMP Demo

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0/12 answered

+ Types of data produced (0 / 3)

+ Data and metadata formats (0 / 1)

+ Roles and responsibilities (0 / 1)

+ Policies for access and sharing (0 / 4)

+ Policies for re-use and re-distribution (0 / 2)

+ Plans for archiving and preservation (0 / 1)

− Types of data produced (0 / 3)

What types of data, samples, collections, software, materials, etc. will be produced during your project?

Guidance | Comments

NSF | DMPTool

Guidance

Save

NSF example answer

The researchers will collect and record _____. (Enter data types here. Examples are conductivity, temperature, and depth (CTD) data, gas flux data, aerial photos, modeled atmospheric data, etc.)

These data will include the variables _____. (Enter data variables here. Examples are water temperature, water salinity, photosynthetically active radiation, methane flux, soil albedo, etc.)

Additional data products that will be made available include _____. (Enter additional products here. Examples are atmospheric model codes, educational materials, etc.)

What will be the approximate number and size of data files that will be produced during your project?

Guidance | Comments

− Types of data produced (0 / 3)

What types of data, samples, collections, software, materials, etc. will be produced during your project?

Guidance | Comments

NSF | DMPTool

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What will be the approximate number and size of data files that will be produced during your project?

Guidance | Comments

− Data and metadata formats (0 / 1)

What format(s) will data and metadata be collected, processed, and stored in?

Note: if you plan to submit data to the Arctic Data Center please refer to the guidance in the panel on the right.

Save

NSF example answer

_____ data will be collected in _____ . (Examples are handwritten lab notebooks, Microsoft Excel files, CSV files, R scripts, etc. Make sure to specify the collection format for each type of data detailed in your description of data.)

All data will be transferred into the following formats for processing and storage: _____ . (Examples are CSV files, NetCDF files, etc.)

Metadata will be collected in _____ . (Examples are handwritten lab notebooks, Microsoft Word files, etc.)

All metadata will be transformed from text into EML files by the Arctic Data Center online submission tool when submitting to the Arctic Data Center.

Guidance | Comments

NSF | DMPTool

Guidance

Arctic Data Center Data Format Policy: The Arctic Data Center primarily supports the upload of open-source, ubiquitous, and easy-to-read data formats. Examples of such formats are Comma Separated Values (CSV) files, text (TXT) files, PNG, JPEG or TIFF image files, and NetCDF files among many others. If you plan to submit to the Arctic Data Center, include your planned methods to create open-source, ubiquitous, and easy-to-read data. If you plan to work with any proprietary data formats such as Excel workbooks or MATLAB files, please include a plan to transform all data stored in these formats into an open-source format before submission to the Arctic Data Center. If you anticipate any data will not be able to be transformed into an open-source format, please provide your reasoning.

− Data and metadata formats (0 / 1)

What format(s) will data and metadata be collected, processed, and stored in?

Note: if you plan to submit data to the Arctic Data Center please refer to the guidance in the panel on the right.

Save

NSF example answer

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− Roles and responsibilities (0 / 1)

1. What parties and individuals will be involved with data management in this project?
2. What will be the roles and responsibilities of each party and or individual with respect to management of the data
3. Who will be the lead or primary person responsible for ultimately ensuring compliance with the Data Management Plan?

Note: if you plan to submit data to the Arctic Data Center please refer to the guidance in the panel on the right.

Save

NSF example answer

The following organizations and individuals will be involved with data management in this project: _____.

_____ will be responsible for _____. (Examples are collecting data, maintaining data storage and backup systems, interfacing with data repository personnel, etc. Make sure to specify the responsibilities for each organization/individual detailed above.)

The NSF Arctic Data Center will provide data archival, preservation, access and metadata authoring services for the project.

Guidance | **Comments**

NSF | **DMPTool**

Guidance

Arctic Data Center Identification Policy: The Arctic Data Center utilizes ORCiDs (https://orcid.org/) to identify individuals associated with each dataset. An ORCiD will be required for the primary contact of each dataset. ORCiDs are not required for all associated parties but are encouraged so that proper identification and attribution can be given. Please plan on creating (when necessary) and recording ORCiDs for each individual involved with your project before submitting to the Arctic Data Center.

− Policies for access and sharing (0 / 4)

Will any of the data and/or related materials produced need provisions for appropriate protection of privacy, confidentiality, security, intellectual property, or other rights or requirements? If so describe them and detail any requested exceptions from the archiving requirements set for Arctic Sciences research.

Save

NSF example answer

_____ data are expected to need provisions for _____. (Examples are appropriate protection of privacy, confidentiality, security, intellectual property, or other rights or requirements. Make sure to specify all the types of data that are expected to need provisions.)

_____ data are expected to need provisions due to _____. (Examples are ethical restrictions, release of indigenous knowledge, etc. Make sure to specify explanations for all expected provisions detailed above.)

Because of these expected provisions, it is expected that _____ data will need to be exempted from the archiving requirements set for Arctic Sciences research.

Guidance | Comments

NSF | DMPTool

Guidance

- NSF Office of Polar Programs Guidelines
- Arctic Data Center Guidelines on who must submit

− Policies for re-use and re-distribution (0 / 2)

How do you anticipate the data for this project will be used? Consider the following:

1. Which bodies/groups are likely to be interested in the data?
2. What and who are the intended or foreseeable uses/users of the data?

Guidance | Comments

NSF | DMPTool

Guidance

Save

NSF example answer

_____ data are expected to be used by _____. (Examples are academic researchers, government agencies, non-profit organizations, etc. Make sure to specify usage expectations for each type of data detailed in your description of data.)

Other groups that may be interested in _____ data are _____. (Examples are academic researchers, government agencies, non-profit organizations, etc. Make sure to specify interest expectations for each type of data detailed in your description of data.)

Will any permission restrictions need to be placed on the data? Consider the following:

− Plans for archiving and preservation (0 / 1)

What is the long-term strategy for maintaining, curating, and archiving the data?

Note: The Office of Polar Programs policy requires that metadata files, full data sets, and derived data products be deposited in a long-lived and publicly accessible archive.
Note: if you plan to submit data to the Arctic Data Center please refer to the guidance in the panel on the right.

Save

NSF example answer

The data manager will follow the NSF Arctic Data Center guidelines to provide accurate and complete documentation for data preservation. The NSF Arctic Data Center will ensure that the data are curated in a relevant long-term archive and ensure data will be available after project funding has ended.

Guidance | Comments

NSF | DMPTool

Guidance

Arctic Data Center Data Preservation Policy: The Arctic Data Center ensures the long-term preservation of the data entrusted to the repository. The guiding principles for the preservation plan follow:

1. Preserve the bits
2. Open science, open standards
3. Replicate data and metadata
4. Strong versioning
5. Frequent auditing
6. A wind down plan

Arctic Data Center DMP Demo

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Set plan visibility

Public or organizational visibility is intended for finished plans. You must answer at least 50% of the questions to enable these options. Note: test plans are set to private visibility by default.

- (•) Private: visible to me, specified collaborators and administrators at my organization
- ( ) Organizational: anyone at my organization can view
- ( ) Public: anyone can view

Manage collaborators

Invite specific people to read, edit, or administer your plan. Invitees will receive an email notification that they have access to this plan.

Email address	Permissions
meyer@nceas.ucsb.edu	Owner

Invite collaborators

* Email

* Permissions

- ( ) Co-owner: can edit project details, change visibility, and add collaborators
- ( ) Editor: can comment and make changes
- ( ) Read only: can view and comment, but not make changes

Send invitation

Arctic Data Center DMP Demo

Project details | Plan overview | Write plan | Share | Download

Download settings

Optional plan components

- [ ] project details coversheet
- [x] question text and section headings
- [x] unanswered questions

Format

pdf

PDF formatting

Font

Face

Arial, Helvetica, Sans-Serif

Size (pt)

10

Margin (mm)

Top	Bottom	Left	Right
25	20	12	12

Download plan

DMPTool

Build your Data Management Plan

Public Plans

Public plans are plans created using the DMPTool service and shared publicly by their owners. They are not vetted for quality, completeness, or adherence to funder guidelines.

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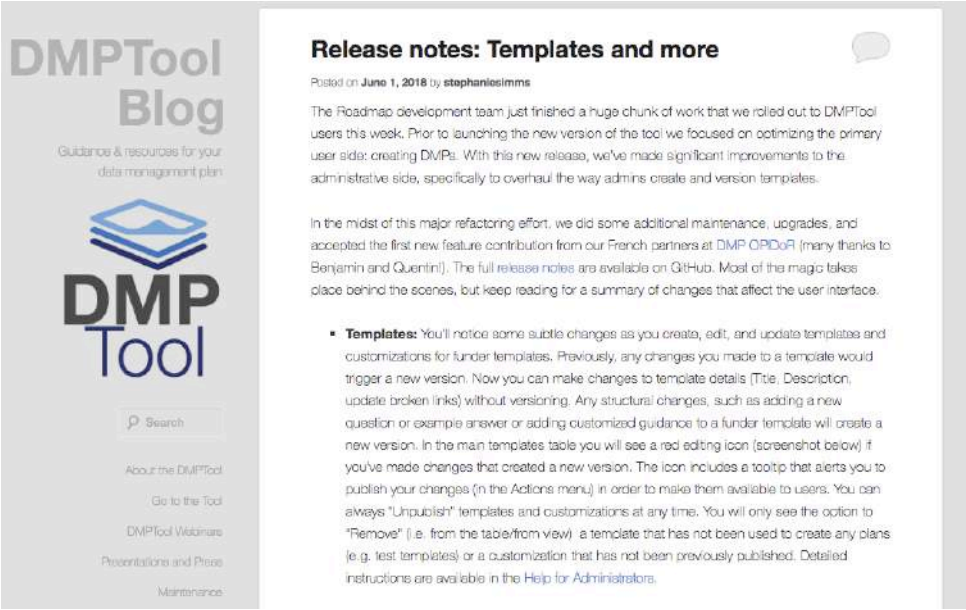
Project title	Template	Organization	Owner	Download
UNDERSTANDING THE ROLE OF PHYSICIAN INTEGRATION WITHIN NURSING HOMES IN POST-ACUTE CARE OUTCOMES	NIH-GEN: Generic	University of Pennsylvania (UPenn)	Kira Ryskina	PDF
"A Microgravity-Themed Collaborative Intervention Promoting Student Selection of a STEM Career Pathway"	NSF-EHR: Education and Human Resources	Baylor University	Stacey Smith	PDF
A Framework for Adaptive Sampling of Social Science Research Data Using the Twitter API: Understanding Social Media Communication During Crisis Events	NSF-SBE: Social, Behavioral, Economic Sciences	University of California, Davis (UCD)	Carl Stahmer	PDF
A Political Ecology of Value: A Cohort-Based Ethnography of the Environmental Turn in Nicaraguan Urban Social Policy	NSF-SBE: Social, Behavioral, Economic Sciences	Non Partner Institution	Josh Fisher	PDF
A unified approach to preserving cultural software objects and their development histories	NEH-ODH: Office of Digital Humanities	University of California, Office of the President (UCOP)	DMP dmpcurator	PDF
A unified approach to preserving cultural software objects and their development histories	NEH-ODH: Office of Digital Humanities	University of California, Los Angeles (UCLA)	Christopher Cabrera Thompson	PDF
Additive Manufacturing for Spare Parts Supply Chain	NSF-ENG: Engineering	University of Tennessee, Knoxville	Nawei Liu	PDF
analysis of Brazilian financial investment funds CVM - Escola Politécnica - PPGEE - PCS	Department of Energy (DOE): Generic	Non Partner Institution	Antonio Newton Licciardi Jr	PDF
AR or HAI Data Management Plan	NSF-EAR: Earth Sciences	Emory University	Scott Fridkin	PDF
Arthropod responses to grassland nutrient limitation	NSF-GEN: Generic	University of California, Office of the President (UCOP)	DMP dmpcurator	PDF

View all

1 2 3 4 5 ... Next Last

DMPTool Community Resources



DMPTool Blog

Guidance & resources for your data management plan

DMP Tool

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Maintenance

Release notes: Templates and more

Posted on **June 1, 2018** by **stephaniesimms**

The Roadmap development team just finished a huge chunk of work that we rolled out to DMPTool users this week. Prior to launching the new version of the tool we focused on optimizing the primary user side: creating DMPs. With this new release, we've made significant improvements to the administrative side, specifically to overhaul the way admins create and version templates.

In the midst of this major refactoring effort, we did some additional maintenance, upgrades, and accepted the first new feature contribution from our French partners at DMP OPIDoR (many thanks to Benjamin and Quentin!). The full release notes are available on GitHub. Most of the magic takes place behind the scenes, but keep reading for a summary of changes that affect the user interface.

- **Templates:** You'll notice some subtle changes as you create, edit, and update templates and customizations for funder templates. Previously, any changes you made to a template would trigger a new version. Now you can make changes to template details (Title, Description, update broken links) without versioning. Any structural changes, such as adding a new question or example answer or adding customized guidance to a funder template will create a new version. In the main templates table you will see a red editing icon (screenshot below) if you've made changes that created a new version. The icon includes a tooltip that alerts you to publish your changes (in the Actions menu) in order to make them available to users. You can always "Unpublish" templates and customizations at any time. You will only see the option to "Remove" (i.e. from the table/from view) a template that has not been used to create any plans (e.g. test templates) or a customization that has not been previously published. Detailed instructions are available in the Help for Administrators.

Summary

- Good data management plans will save you time and effort overall
- Data management plans are not static - revise as you do your research project

- Take advantage of DMP resources to create your plan
- The Arctic Data Center is available to assist with your DMP development