

https://arcticdata.io @arcticdatactr

Writing Good Data Management Plans

Kathryn Meyer 0000-0003-0200-0787

NSF Award #1546024





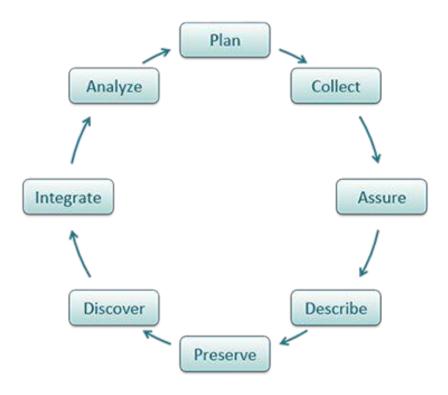






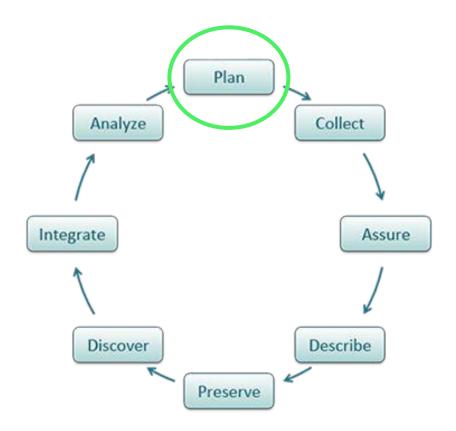


The Data Life Cycle





The Data Life Cycle







Efficiency















Engagement

Stay Organized









Efficiency

Engagement

Stay Organized



Funder Requirement









Efficiency



Funder Requirement

Engagement



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

9





1. Engage your team





- 1. Engage your team
- 2. Plan from the start





- 1. Engage your team
- 2. Plan from the start
- 3. Follow good advice
 - Arctic Data Center
 - Institutional Libraries
 - DataONE





- 1. Engage your team
- 2. Plan from the start
- 3. Follow good advice
 - Arctic Data Center
 - Institutional Libraries
 - DataONE
- 4. Use good tools
 - DMPTool
 - DMPOnline

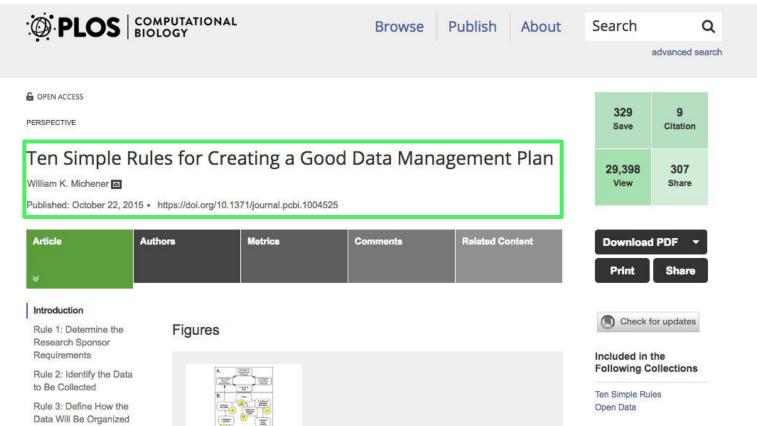




- 1. Engage your team
- 2. Plan from the start
- 3. Follow good advice
 - Arctic Data Center
 - Institutional Libraries
 - DataONE
- 4. Use good tools
 - DMPTool
 - DMPOnline
- 5. Review and Revise



10 Simple Rules for Writing a Good DMP



Rule 4: Explain How the



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



Determine the research sponsor requirements













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











Image credits: World Meteorological Organization on Flickr



Define how the data will be organized

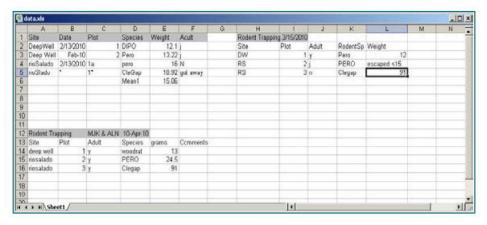


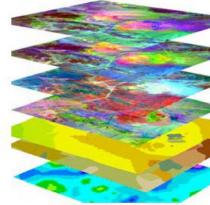








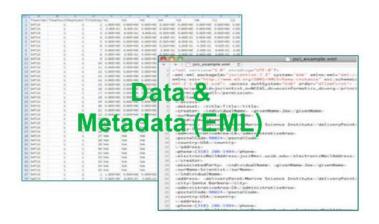


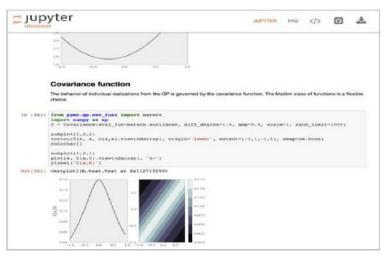




Explain how the data will be documented

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

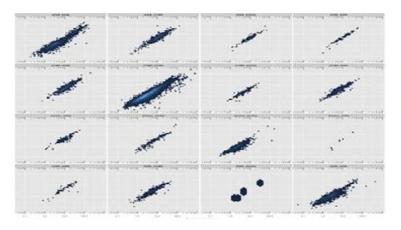






Describe how data quality will be assured

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







Present a sound data storage & preservation strategy

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



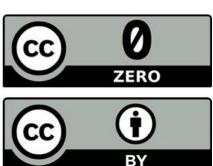




Define the project's data policies

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







Describe how the data will be disseminated

- Active, robust and preferred approaches
 - Publishing data in open repository or archive
 - Submitting the data as appendices or supplements to journal articles
 - 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, system 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
 (<u>https://www.nsf.gov/geo/geo-data-policies/</u>)

- 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



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



Products of research

 Types of data, samples, physical collections, software, curriculum materials, other materials produced during project

Data formats and standards

 Standards to be used for data and metadata format and content (for initial data collection, as well as subsequent storage and processing)



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Including re-distribution and the production of derivatives



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Policies and provisions for re-use

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Archiving of data

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



DMP Tools & Resources Online





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







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



Hands-On: Create a DMP

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

Draft your own Data Management Plan







DMPTool by the Numbers



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Top 5 templates

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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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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.

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

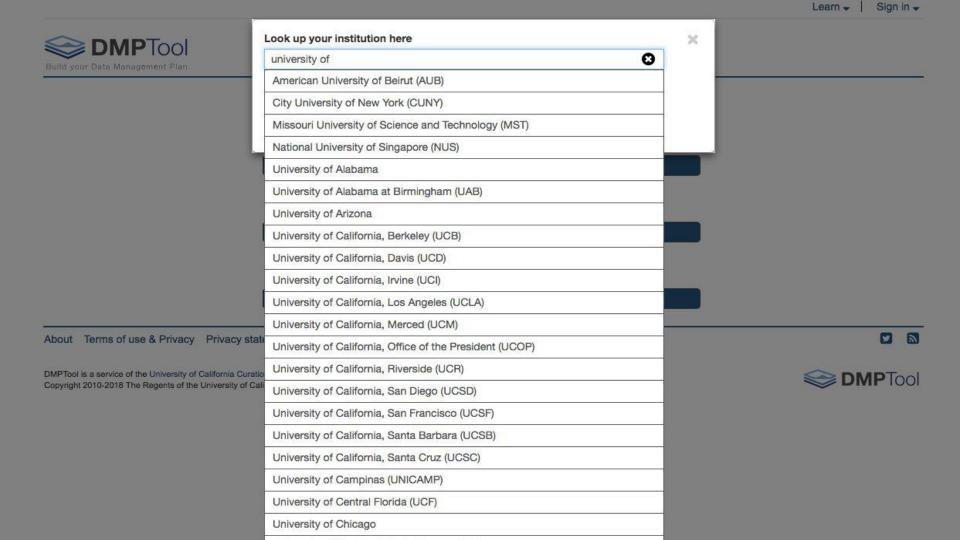
Create account with email address

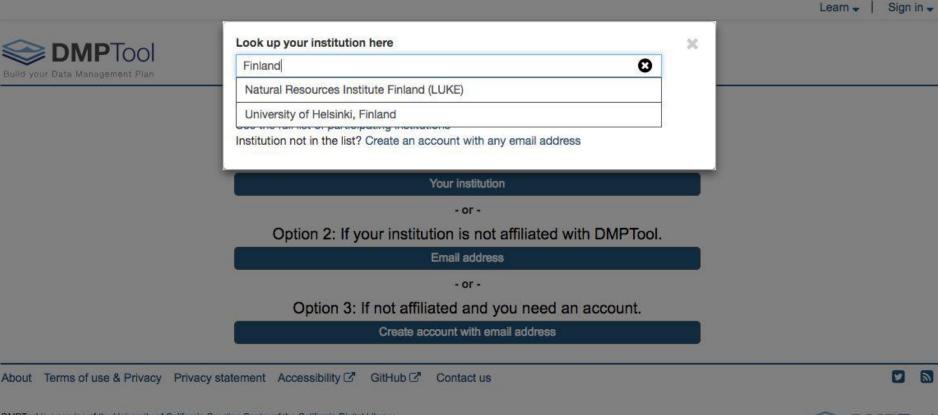
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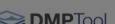






Build your Data Management Plan	Sign in Create account * First name	* Last name	×	
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	* Password			
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	Create	account with email address		

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My dashboard Create plan

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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Create plan





My dashboard Create plan

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Welcome

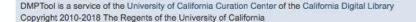
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Funder Requirements

Public Plans

FAQ

Quick start guide

For researchers

Data management general guidance

Learn -

Participating institutions

For Administrators 7 Promote the DMPTool

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Create plan

Kathryn Meyer -







My dashboard Create plan

My dashboard

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Create plan



My dashboard Create plan

My dashboard

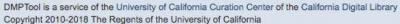
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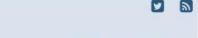
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My dashboard Create plan

Create a new plan

Begin typing to see a filtered list

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	

- or -

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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My research organisation is not on the list or no research organisation

is associated with this plan

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My dashboard Create plan

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? If applying for funding, state the project title exactly as in educational purposes the proposal. Select the primary research organization My research organisation is not on the list or no research organisation Begin typing to see a filtered list - or is associated with this plan

Select the primary funding organization

Begin typing to see a filtered list No funder associated with this plan - or -



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My dashboard Create plan

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Create a new plan

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What research project are you planning? Arctic Data Center DMP Demo Mock project for testing, practice, or educational purposes Select the primary research organization Begin typing to see a filtered list My research organisation is not on the list or no research organisation - or is associated with this plan Select the primary funding organization National Science Foundation (NSF) 0 No funder associated with this plan Which template would you like to use? We found multiple templates corresponding to your funder. Arctic Data Center: NSF Polar Programs [DRAFT] Create plan Cancel About Terms of use & Privacy Privacy statement Accessibility 2 GitHub C Contact us



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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.



Find guidance from additional organizations below

See the full list



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ORCID ID					
Email					
meyer@ncea	ıs.ucsb.edu				
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See the full list



	Plan overview	Write plan	Share	Download
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Submit (Cancel			

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

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



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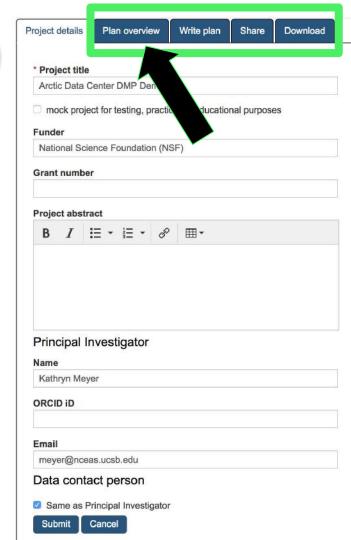
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DMPTool

Find guidance from additional organizations below

See the full list





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Find guidance from additional organizations below

See the full list

Arctic Data Center DMP Demo

Project details Plan overview Write plan Share

.

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).

Download

Instructions

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?

How will date be accessed and chared during the course of the project?

- 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.

Write plan

Arctic Data Center DMP Demo

Project details Plan overview Write plan Share

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- 62



My dashboard Create plan

Arctic Data Center DMP Demo

Project details	Plan overview	Write plan	Share	Download	
expand all co	llapse all				0/12 answered
+ Types of	f data produced (0 / 3)			
+ Data and	d metadata forma	ats (0 / 1)			
+ Roles ar	nd responsibilities	s (0 / 1)			
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+ Policies	for re-use and re	-distribution	(0 / 2)		
+ Plans fo	r archiving and p	reservation (0 / 1)		
104					



My dashboard Create plan

Arctic Data Center DMP Demo



	Guidance	Comments
	NSF DMPTool	
ave F example answer		
The researchers will collect and record (Enter data types here. Examples are conductivity, emperature, 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 emperature, water salinity, photosynthetically active radiation, methane flux, soil albedo, etc.)		

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

Guidance Comments

nat types	of data, samples	, collections, softv	vare, materials, etc. will	be produced during	g your project?		Guidance	Comments
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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

_____ 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

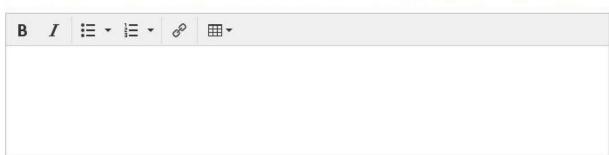
Guidance

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.

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 Id

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

of privacy, confidentiality, security, intellectual property, or other specify all the types of data that are expected to need provisions	No. 100 Carlo Carl
data are expected to need provisions due to	(Examples are ethical restrictions,
release of indigenous knowledge, etc. Make sure to specify exp detailed above.)	lanations for all expected provisions
Because of these expected provisions, it is expected that the archiving requirements set for Arctic Sciences research.	data will need to be exempted from

data are expected to need provisions for ______. (Examples are appropriate protection

Guidance Comments

NSF DMPTool

Guidance

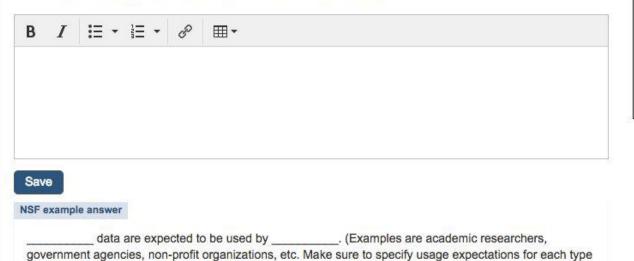
- NSF Office of Polar Programs Guidelines
- Arctic Data Center Guidelines on who must submit

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

of data detailed in your description of data.)

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?



Other groups that may be interested in _____ data are _____. (Examples are academic researchers, government agencies, non-profit organizations, etc. Make sure to specify interest

Guidance Comments

NSF DMPTool

Guidance

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

expectations for each type of data detailed in your description of data.)

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

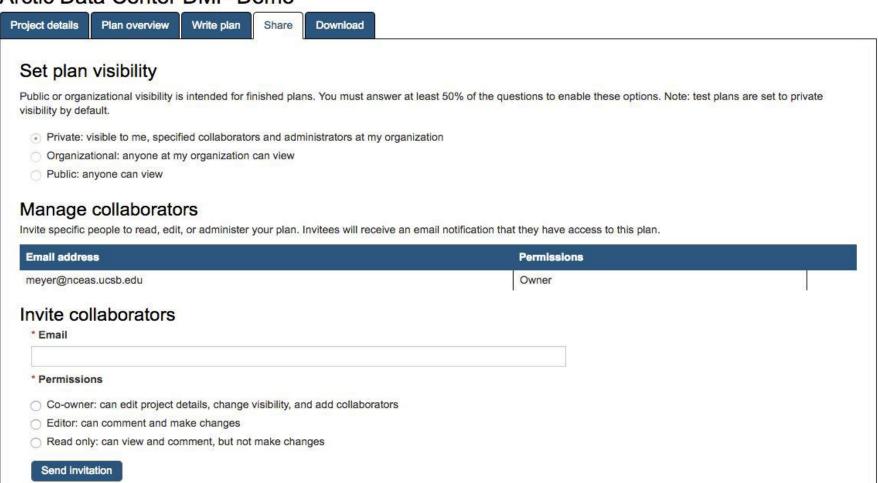


Guidance

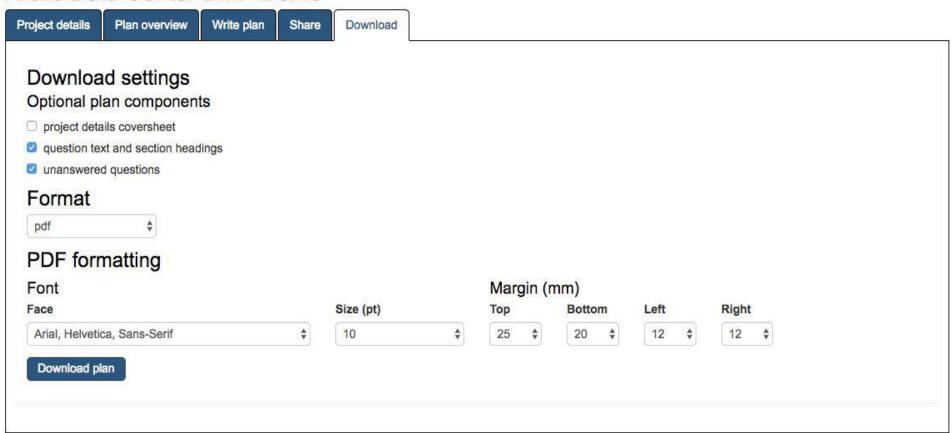
Arctic Data Center Data Preservation
Policy: The Arctic Data Center ensures
the long-term preservation of the data
entrusted to the repository. The guiding
principles for the preservation plan
follow:

- 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



Arctic Data Center DMP Demo







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.

Q Search

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

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DMPTool Community Resources



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 Quentini). 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



https://arcticdata.io