Leibniz Institute of
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Regional Development

**Sustainable
Data Stewardship**

Stefano Della Chiesa

Some numbers

Leibniz IOER

- ~80 Researchers (2023)
- 1 Data Steward (DS)

Leibniz Association

- RDM Working Group
- ~2 Meetings per year
- Information, exchange & networking framework

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DS strategic profile within the organisational structure

Embedded into the Directorate

- Authority, reporting lines
  - Regular meetings with the management
  - Participation in the steering committee

- Alignment with strategies & governance
  - E.g. Publication & Transfer strategies
  - Bridging organisation silos (IT, Library, Administration, Research Management, etc)
  - Opportunity to establish governance procedures

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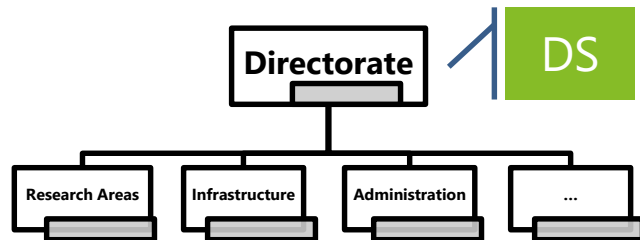
Roles within the Leibiniz IOER

Dual strategical roles

- Research Data Steward
- Digitalisation Officer

  - Roles are Strongly related
  - Particularly when the DS is strategically embedded within the institution
  - Depending on the framework, DS provide and designs solutions.

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The nexus between Research Data Management & Digitalisation
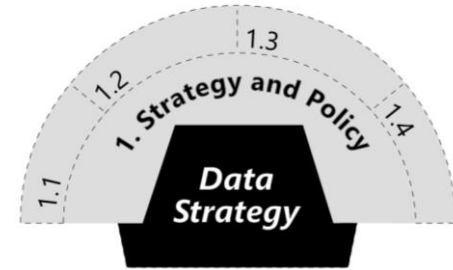
The reference scheme for institutional RDM (RISE-DE)

Digital Solutions

5. Training
5.1 Training materials
5.2 Training events

6. Active Data Management
6.1 Basic IT services
6.2 Services for collaborative working

7. Data Publication
7.1 Publication services
7.2 Archiving services
7.3 Risk management

4. Communication
4.1 Information
4.2 Counselling
4.3 Public relations

8. Service Requirement
8.1 Failure safety
8.2 Data security
8.3 Metadata and indexing
8.4 Standards compliance and long term archiving services

The proposed new scheme for the RISE-DE reference model[1] for strategy processes in institutional research data management deals with 3 strategy pillars, 8 thematic areas and 25 topics (*Adaptation of Figure 1 of the RISE-DE reference model*).

2. Business Model
2.1 Governance and organisational development
2.2 Personnel investments
2.3 Technology investments
2.4 Cost model

1. Strategy and Policy
1.1 Strategy development
1.2 Strategic goals
1.3 Commitment and incentives
1.4 RD policy

3. Management procedures
3.1 RDM into project planning
3.2 Integration into the Research Information System
3.3 Integration into the processes of law and ethics

RDM in practice

Strategy Pillar

- Research Data Management Strategy (Drafted)

- Research Data Management Strategy Plan (Partial implementation RISE-DE)

- Leibniz Research Network „LeibnizData" (Network joined)

- IOER Research Data Centre (Weekly meetings)

- DORA & CoARA (Ageement signed & Working Group)

1. Strategy and Policy

1.1 Strategy development
1.2 Strategic goals
1.3 Commitment and incentives
1.4 RD policy

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RDM Governance

The Power of Habit

THE TRIGGER   **THE ROUTINE**   **&**   **THE GOOD HABITS**

THE POWER OF
HABIT

Why we do what we
do and how to *change*

CHARLES DUHIGG

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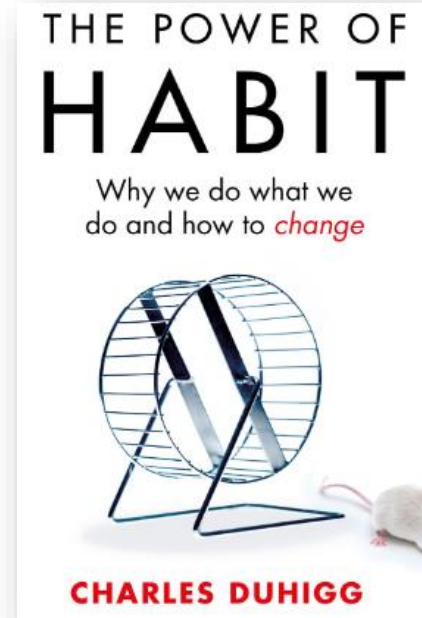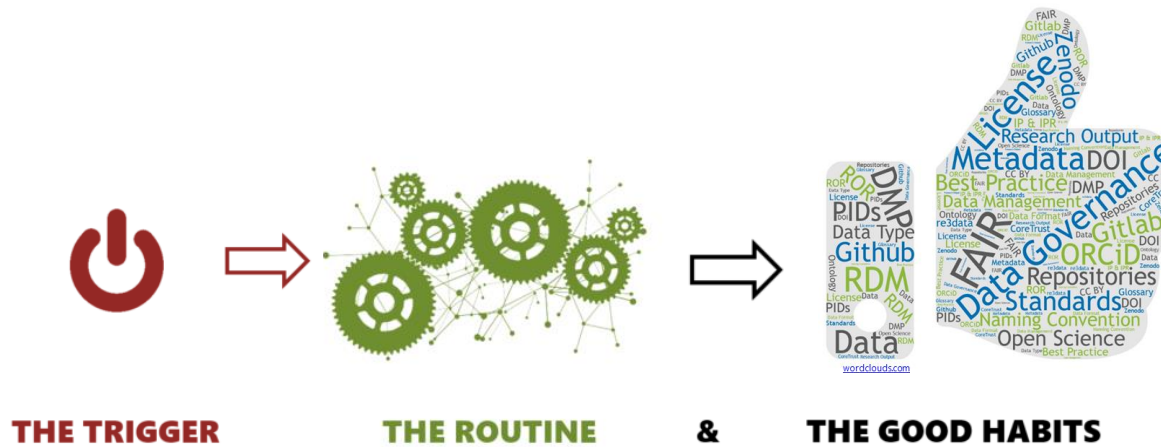
RDM in practice

Governance Pillar

2. Business Model

⏻ [RDM Onboarding](#)

- Small Investments ([Zotero Institution](#))
- Large Investments: Emerging [IOER Research Data Centre](#) (Dataverse repository & HR)

3. Management Procedures

⏻ Research Information System **notification** (for new projects)

⚙ **Project planning & execution** (Proposal DMP and **R**esearch **O**utput **M**anagement **P**lann**i**ng [ROMPi](#))
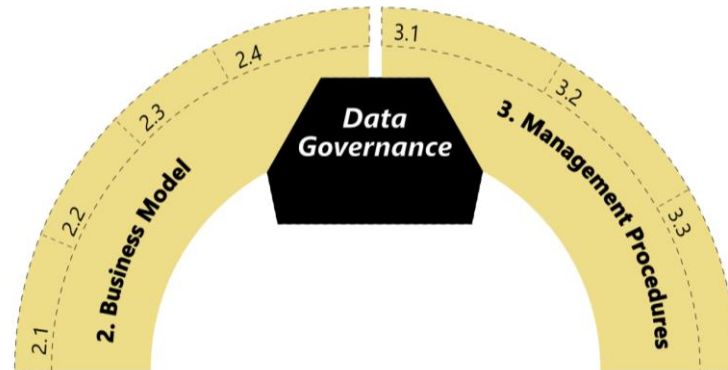
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Governance

Onboarding

Laufzettel für neue IÖR-Beschäftigte / Onboarding route card

⏻ RDM Onboarding

⚙ RDM Checklist Introduction (~30 mins)

⚙ RDM Seminar (~4h)

Assign some To DOs

Outline – Today`s RDM Recipe

4 Modules and 1 group exercise	
Short Presentation:	(9:00-9:15)
Module 1: Introduction to RDM	(9:15-10:00)
Coffee break:	(10:00-10:15)
Module 2: High-Level Policies	(10:15-11:00)
Module 3: Knowledge Bricks	(11:00-12:30)
Lunch break:	(12:30-13:30)
Module 4: Data Management Plans	(13:30-14:15)
DMP Exercise (*World coffee style*): in 3-4 groups Outlining a DMP	(14:15-16:00)

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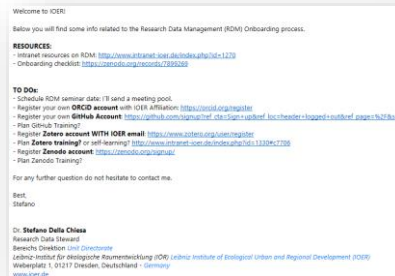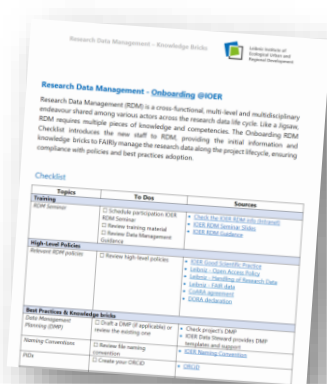
Governance

Research Information System (RIS) & **R**esearch **O**utput **M**anagement **P**lann**i**ng **ROMP**i

⏻ Monthly check into the RIS (calendar)

- Schedule a meeting with the project responsible
- Get the Proposal/ Work plan (WPs)

⚙ Draft **ROMP**i

(~1h meeting)

Research Output Management Planning (ROMPi)

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Research Output Management Planning - ROMPi

1) Work Break Down Structure (WBS)

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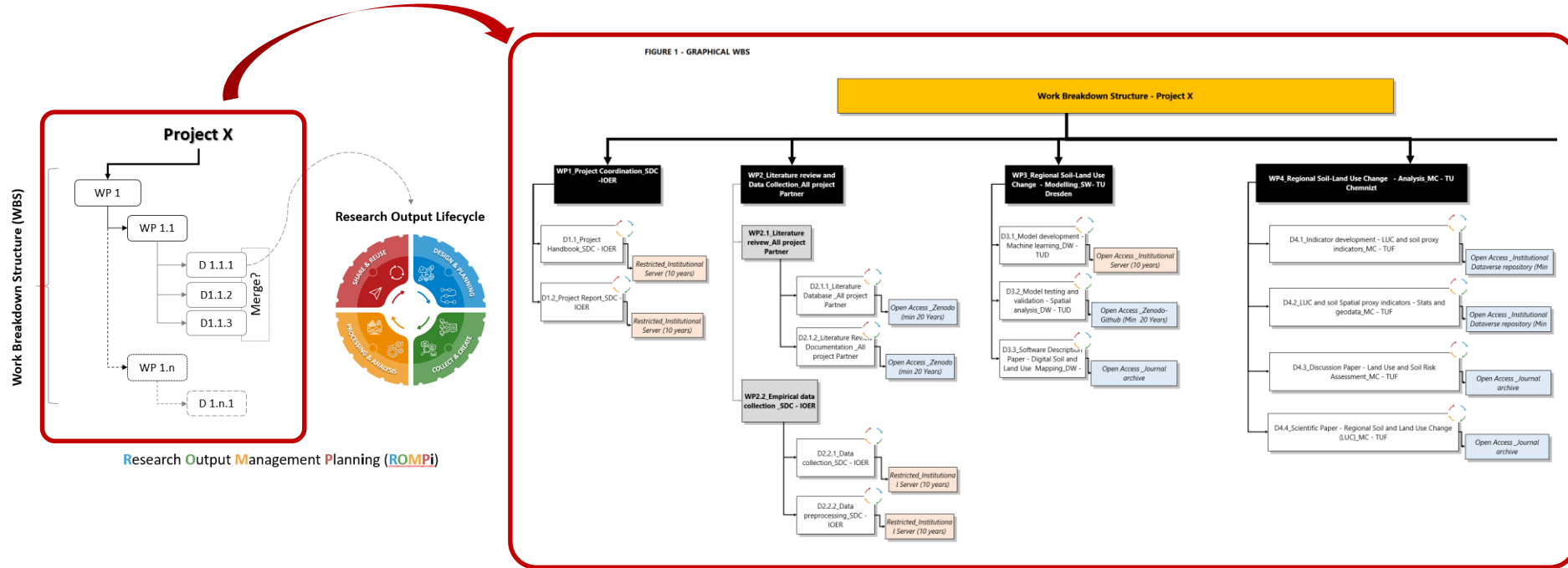
Research **O**utput **M**anagement **P**lann**i**ng - **ROMPi**

2) Research Output Life Cycle

ROMPi

WBS + **Research Output Life Cycle**

Research Output Management Planning (**ROMPi**)

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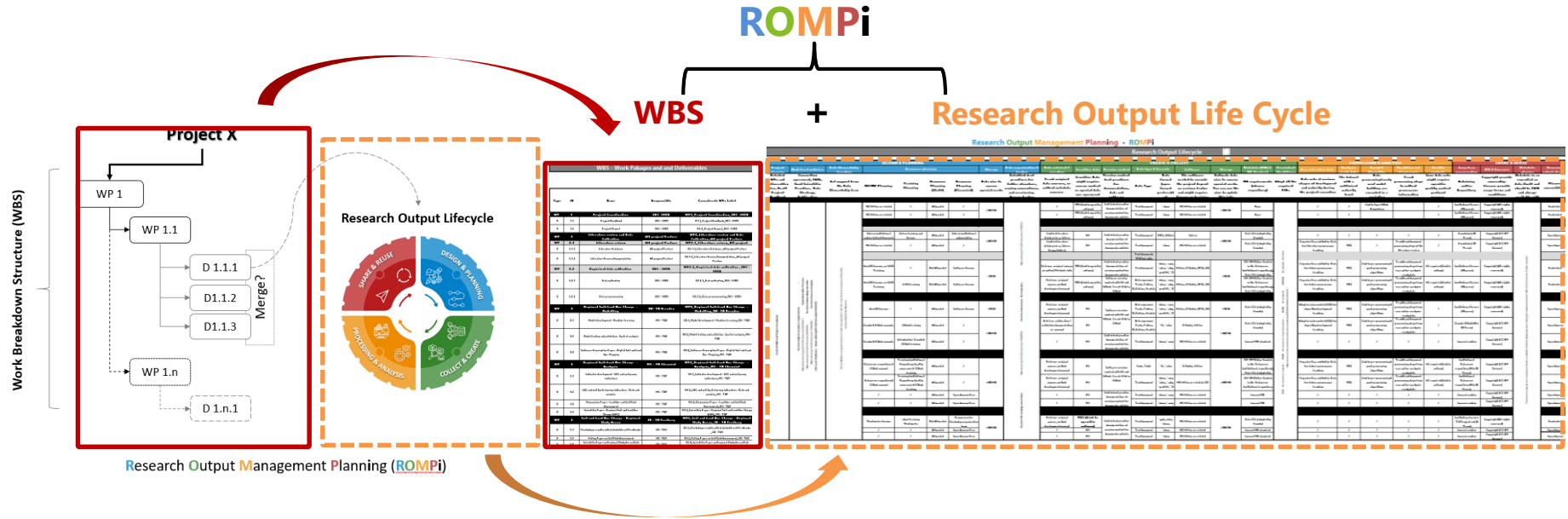
RDM in practice

Stewardship Pillar

6. Active Data Management

6.1 Basic IT services
6.2 Services for collaborative working

- **Onboarding&Project level:** Consulting solutions
- **Cloud solution:** SharePoint, Matrix element, Zotero groups

7. Data Publication

7.1 Publication services
7.2 Archiving services
7.3 Risk management

- **Zenodo Communities** (IOER, DFNS, ILUS)
- RDC Dataverse (testing)
- Consulting Data paper, software paper

5. Training

5.1 Training materials
5.2 Training events

- **RDM Seminar** on demand ~5*yr)
- **Other seminar**: Zotero, Zenodo, Git
- Material online

Data Stewardship

4. Communication

4.1 Information
4.2 Counselling
4.3 Public relations

- **Monthly RDM email** (on actual topics)
- **Coaching** on demand (Open door)
- **Networking** land, national and international

8. Service Requirement

8.1 Failure safety
8.2 Data security
8.3 Metadata and indexing
8.4 Standards compliance and long term archiving services

- **Consulting** for the Research Data Centre

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4. Communication

Openness

THE POWER OF SMALL TALK

 Open Door "policy"

 Foster communication, Enhance interactions

open source

OPEN DATA

Open Door

2. SaxFDM-Beratungsstammtisch

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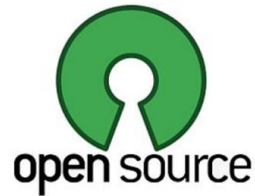
4. Communication

Internal email

⏻ **Google Scholar alerts**

2. SaxFDM-Beratungsstammtisch

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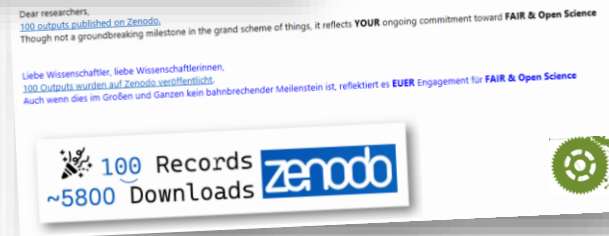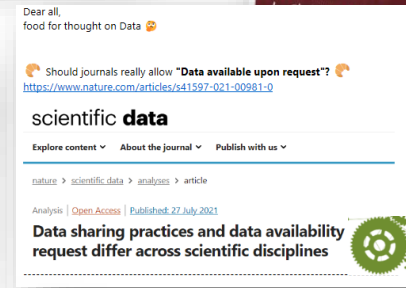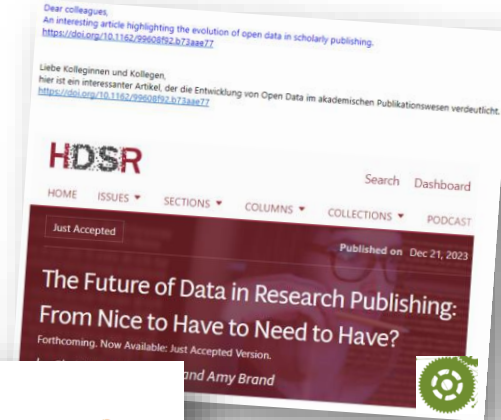
RDM in a small research institution

Small is more? *Maybe...*

- **Strategical:** Embed Data Steward into a strategic profile
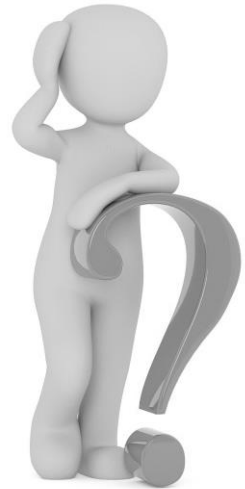- Top management **support**
- **Contractual:** Permanent & full time
- **Skills:** Cross-cutting, multidisciplinary, research experience, data hands-on & project management

These requirements would likely work also in large institutions
*(Perhaps **Small is more AGILE**)*

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Thank you
for your attention

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