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# From planning to implementation: data management in real-time research

Montreal, March 31st, 2018

Alexandra Stam and Brian Kleiner
FORS, Swiss Centre of Expertise in the Social Sciences

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## Swiss Centre of Expertise in the Social Sciences

- Methodological research
- Large-scale surveys
- Data and research information services (DARIS)

## DARIS

| Data service | | Data enhancement |
|---|---|---|
| **Data archiving** | **Data access** | **Data management** |
| New requirements | Direct access to: | Training |
| Long-term preservation | + 500 data sets | Consulting |
| Enhance the value of research projects | + 11’000 project descriptions | |

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# Data management at DARIS

## Early days: Focus on DM from a data service point of view

- Early 2010's: increasing awareness of the importance of data management
- Follow the flow

## Current days: Focus on DM from the researcher's point of view

- Need for more concrete guidelines and solutions
- Focus on 'day-to-day' data management

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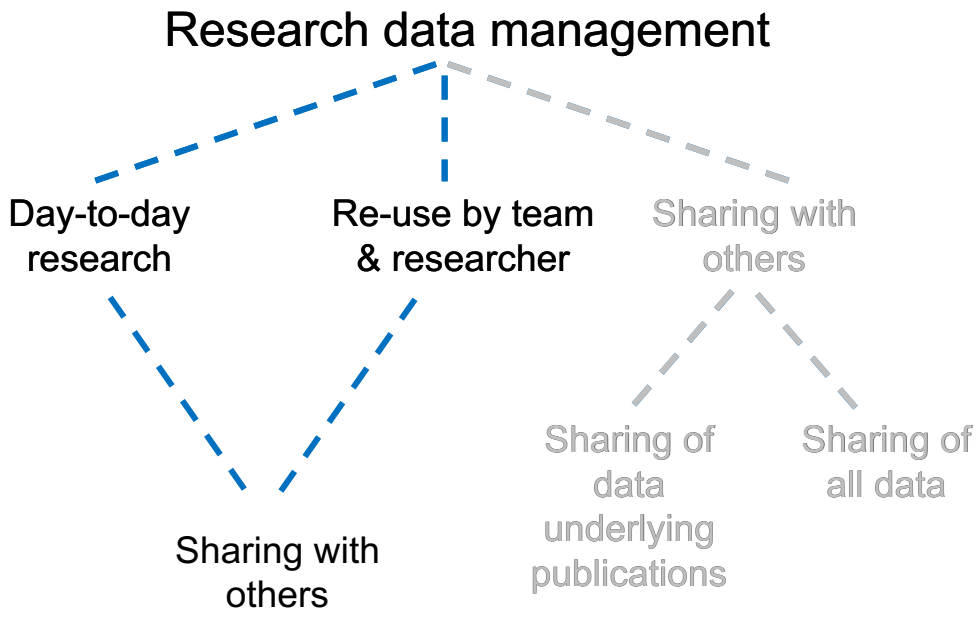
# Our vision




- It is important to think beyond the declaration of intent (DMP)
- It is important to think in practical terms (operationalisation)
- Data management represents an opportunity

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# 2017: our DM story takes a new turn

- June: we start a pilot with the University of Lausanne to focus on day-to-day data management
- October: Our main funder, the Swiss National Science Foundation (SNSF) requires DMPs with all proposals

➡ Strong reactions from the research community (‘one more administrative burden’)

➡ A great opportunity for us

*How to use the DMP (and forced-interest in data management) to pass on our messages?*

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# Our initial intention

- Develop one good DMP example
- Include post-funding guidance

What we did:

- Provided assistance with DMPs
- Organised and participated in DMP events

What we learned:

- There is no such thing as **one** good example
- There are various shortcomings with the current template
- Even reluctant researchers can get to appreciate data management (plans)

➡ Instead of **one** good example, provide a reflexive model

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# Content of the SNSF DMP

## 1. Data collection and documentation

- What data will you collect, observe, generate or re-use?
- How will the data be collected, observed or generated?
- What documentation and metadata will you provide with the data?

## 2. Ethics, legal and security issues

- How will ethical issues be addressed and handled?
- How will data access and security be managed?
- How will you handle copyright and intellectual Property Rights issues?

## 3. Data storage and preservation

- How will your data be stored and backed-up during the research?
- What is your data preservation plan?

## 4. Data sharing and reuse

- How and where will the data be shared?
- Are there any necessary limitations to protect sensitive data?
- [checkbox: I will choose digital repositories conform to the FAIR data principles]
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# Shortcomings of the SNSF DMP

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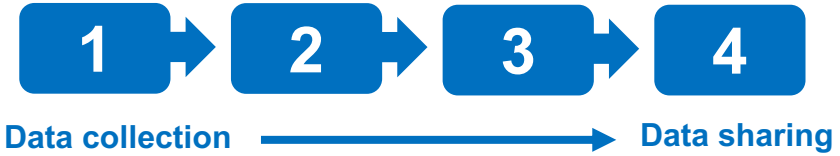


- It suggests a chronological order

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- It suggest a chronological order
- Administrative feel

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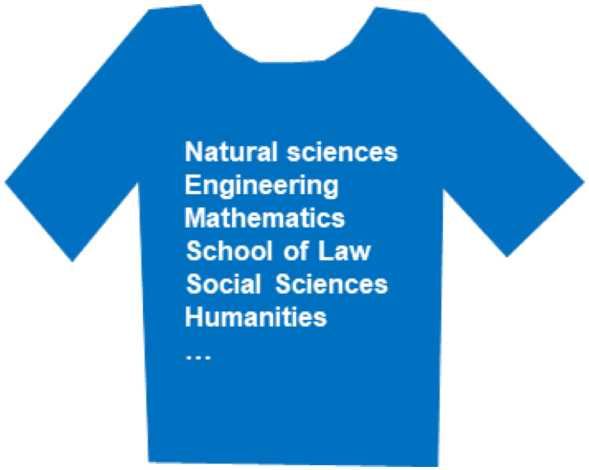


- It suggest a chronological order
- Administrative feel
- ‘One size fits all’

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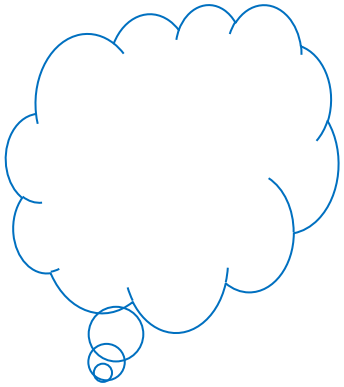

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- ‘One size fits all’
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- It suggest a chronological order
- Administrative feel
- ‘One size fits all’
- Intention of good practices
- Most important, it doesn’t provide true guidance

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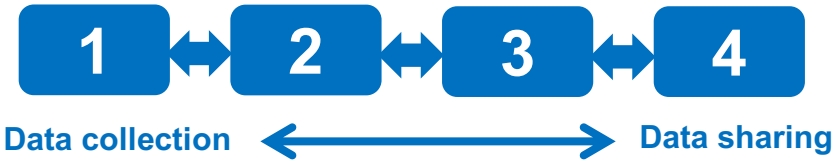
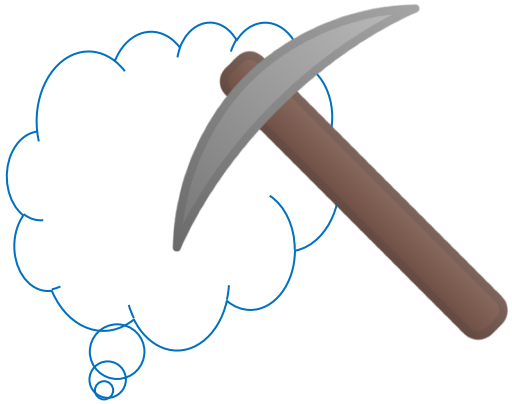
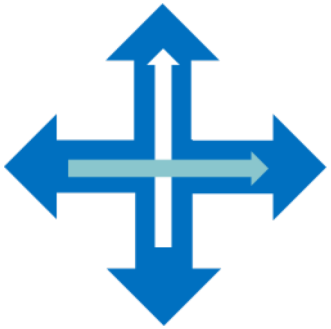
# Towards a reflexive SNSF DMP







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# How do we do that?

**1. Data sharing and reuse**
- …..
- …..

**2. Data collection and documentation**
- …..
- …..

**3. Ethics, legal and security issues**
- …..
- …..

**4. Data storage and preservation**
- …..
- …..

1. Bring sharing to the forefront
2. Revisit questions
3. Provide tips and guidance
4. Get people to think beyond the proposal

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# Data collection and documentation – an example

Reflexive DMP

- Will I / am I obliged to collect sensitive and personal data?
- Will I share (all or part of) my data?

- What type of re-use would be relevant for my data?
- What is my epistemological stand?
- What documentation is needed to re-use the data or reproduce findings?

- What data will you collect observe, generate or re-use?
- How will the data be collected, observed or generated?
- What documentation and metadata will you provide with the data?

Documentation: We will for example provide three case studies representing three disciplines: ethnography, qualitative sociology, and statistics

We will raise awareness about what needs to be done after the project gets funded, including project management

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# Conclusion and next steps

- It is possible to get people to engage seriously with DMPs and subsequent DM practices
- There is a need to approach DMPs in a reflexive way and address the right questions
- As next steps we will finalize our reflexive template
- We also aim to build a decision tree

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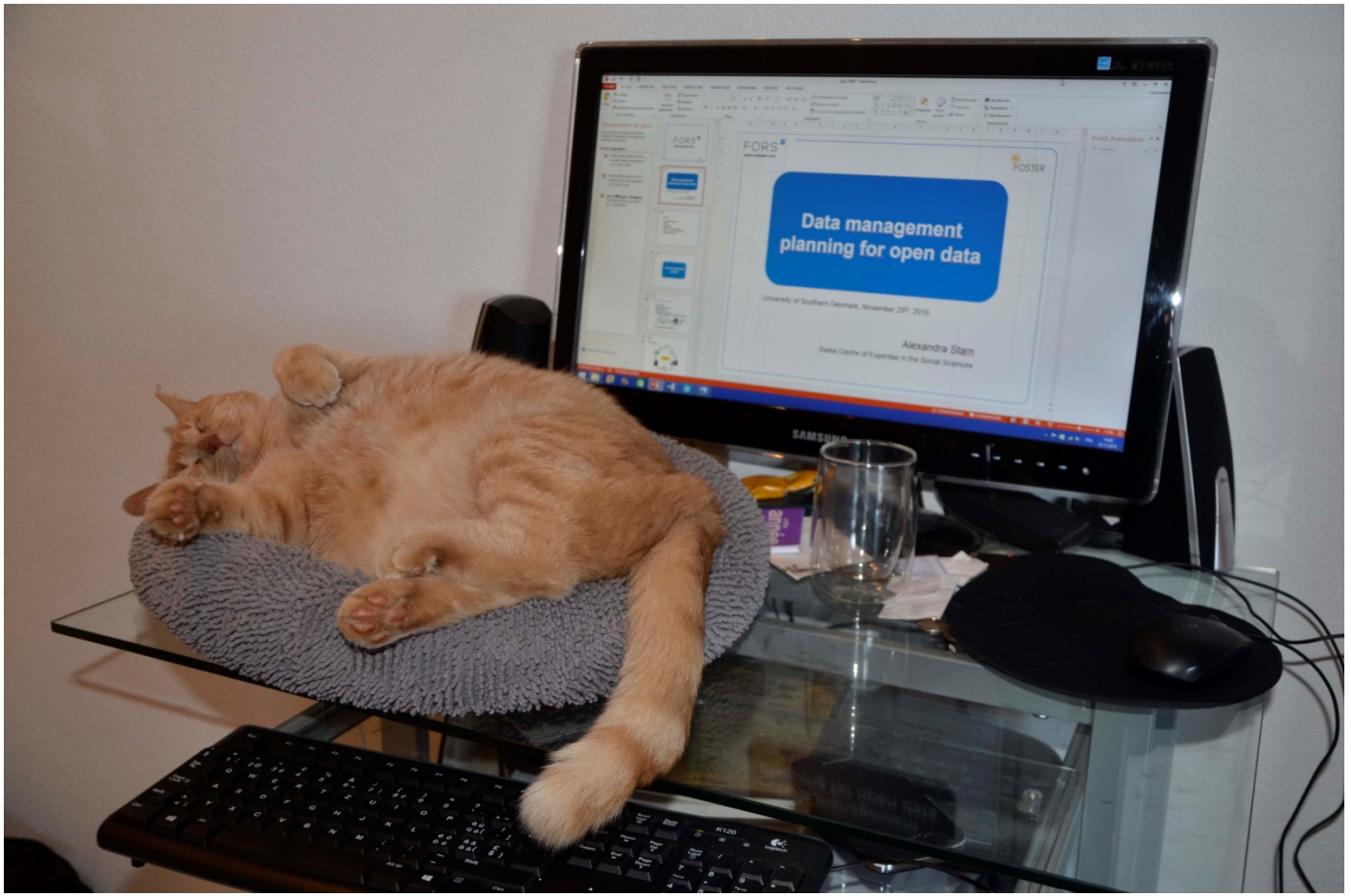
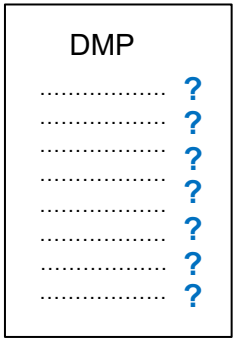



# Thanks for your attention!

**alexandra.stam@fors.unil.ch**


DMP


DMP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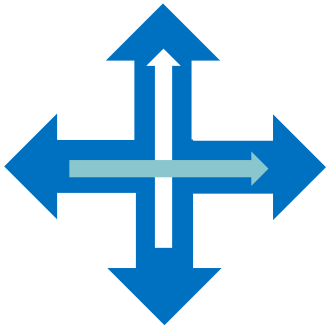

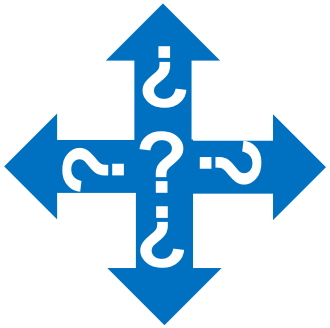

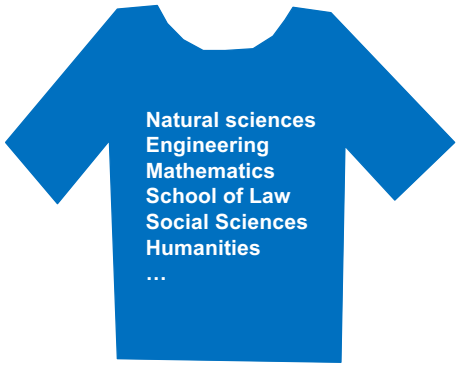
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