DATA MANAGEMENT PLANNING @ CSUN

# DMP – TEMPLATE

Depending on the discipline, the nature of a project and the requirements of the funding agency, each data plan created will be unique. Below are five major categories usually included with comprehensive data management plans. Not all sub-headings will necessarily be described in your plan.

1. **Plan overview**
   1. Title of your DMP; Author(s); Date;
   2. Project name
   3. Relevant award information, including names of funding agencies, proposal reference #s, etc.
2. **Data types expected to be created during the project**
   1. *Data*
      1. What kind of data will be created by the project?
      2. Does the data include private or other sensitive information? If so, describe.
   2. *Data Formats & rendering tools*
      1. What data file formats will be used?
      2. What tools (i.e. software) will be required to read the data?
   3. *Data generation, acquisition & storage*
      1. How are data generated & acquired?
      2. What, if any, quality control standards are applied to data generation, acquisition & storage?
      3. What is the anticipated volume & rate of data generated during the project?
   4. *Documentation & metadata; (i.e. descriptive standards)*
      1. What metadata standards (both schema & elements) will be used?
      2. How will metadata be generated? (e.g.: automatic, manual, or both?)
      3. Do you have a data dictionary (a.k.a. taxonomy/controlled vocabulary) that will be shared?
      4. Are there project & data documentation standards used in your discipline? If so, describe.
      5. What directory & file-naming conventions will be used?
      6. What project & data identifiers will be used?
      7. Is there a community standard for metadata sharing & integration? (e.g.: OAI-PMH, et al.)
3. **Data Storage & Preservation** 
   1. *Storage & backup* ***during*** *the project*
      1. Who will be responsible for stored data & data backup?
      2. Where will the data be stored & backed up?
   2. *Security*
      1. How will security be enforced in the system? (i.e. Is authentication required?)
   3. *Storage & Backup –* ***post-project completion***
      1. How will data be stored **after** the project has been completed?
      2. What policies & agreements will be used to manage data after project completion?
      3. What data repositories are appropriate for your data? (i.e. ScholarWorks, subject repository, etc.)
   4. *Long-term archiving & preservation*
      1. What data will be archived & where?
      2. Who will manage & administer the archive?
      3. What metadata will be used & required?
   5. Roles & Responsibilities
      1. Who makes decisions regarding overall / day-to-day data management?
      2. Who & what is responsible for preserving the data?
4. **Data retention**
   1. *Operational data*
      1. Who will be responsible for data in near-term, following project completion?
      2. What is the lifecycle & retention for the data in the near-term? (i.e. How long will each type of data be kept & why?)
   2. *Archival data*
      1. Who will be responsible for the data for long-term archiving?
      2. What is the lifecycle & retention policy for the archived data? (i.e. How long will each type of data be kept & why?)
5. **Data sharing & dissemination: After the project**
   1. *Legal & regulatory*
      1. Describe / consider any regulatory constraints on sharing / disseminating data.
      2. Are there any sharing requirements? (e.g. funder data sharing mandated policy)
   2. *Stakeholders*
      1. What data will be made available & to which stakeholders?
   3. *Privacy & confidentiality*
      1. Are there any data with privacy concerns?
      2. Are there data relating to human subjects & what policies exist that must be followed?
      3. How will such privacy requirements be enforced?
   4. *Ownership of IP (copyright, patent, co-authorships) etc.*
      1. Is your data copyrightable?
      2. Who owns the copyright if it is?
   5. *Third party & data*
      1. Is there any data owned by someone else?
      2. What are conditions of use, sharing, dissemination, re-use?
   6. *Re-use of data* 
      1. What are the policies on the re-use of the data, metadata, citations, & the creation of derivative works?
      2. How can others specifically re-use your data? (provide applicable Creative Commons licenses)