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)