10-8-2013

Suddenly...I'm Consulting on Data Management Plans! Data Management Plan Consultant Checklist

Kiyomi D. Deards
University of Nebraska - Lincoln, kdeards2@unl.edu

Suddenly...I'm Consulting on Data Management Plans!
Data Management Plan Consultant Checklist

SLA First Five Years Council Webinar, October 8,2013

Kiyomi D. Deards, University of Nebraska-Lincoln
kdeards2@unl.edu

1. **Don't panic, breath!**

2. **Schedule a meeting to discuss the project and data management needs, allow at least an hour and a half.** How long the meeting takes will depend on how receptive the researcher is to the consultation and how much information they are willing to share with you. They can be as short as 15 minutes or go for a couple of hours.

3. **If possible, get a copy of the grant proposal/project outline.** Not all researchers will be willing to share this information. That is ok, but limits how useful your consultation will be. If you can get them to provide a short summary of what their project is about you can determine if you should bring other experts to the consultation. Examples of such experts include: librarians for related disciplines, metadata specialists, and digital imaging and archives specialists.

4. **Send the faculty or staff member some basic information on data management plans to review before your meeting.** This can be a handout you've created, a web page on data management, and copies, or links, to sample data management plans.

5. **Know the difference between a regular data repository and trusted repository.** The later is a specific legal definition referring to the security of the repository allowing for the deposit of information on at risk populations without deidentification.

6. **Print out 3 examples of data management plans so that you can refer to them during your consultation to demonstrate examples of the different ways.** After a successful consultation ask the researcher if their plan can be shared as a training tool within your organization.

7. **Go to the consultation.** Explain metadata, image standards, open file formats, trusted repositories, standard data backup requirements (3 copies minimum, at least one copy must live in a geographically separate location), that funders can have multiple layers of requirements and can change them at any time without warning. Emphasize the need to address every file type, and file conversion, as well as physical samples, physical laboratory notebooks, and other methods of data collection such as images, videos, etc. Example: NSF has overall guidelines, plus there are directorate specific and program specific guidelines. Grantees will have to review all of these to ensure their data management complies every time they submit a proposal.

7.5 **If the researcher would like you to manage their data they should write your time into the grant.** Unless you are already working for the group in an information management capacity they will most likely have to buy out your time since managing data for a major research project is a usually a full time project.

8. **Review existing data repositories to recommend an appropriate repository (if one exists).**
Check the index of data repositories (1. by subject, 2. by content type and 3. by country): http://www.re3data.org/browse/
If a researcher does not have an existing subject repository, and there is no institutional repository available, FigShare is a viable alternative. http://figshare.com/

9. **Review the plan for the researcher.** If something confuses you it will confuse a reviewer. Ensure that all samples, data file types, and methods of recording data have been thoroughly addressed. Send your detailed comments to the reviewer, if possible have another librarian review the plan and add their own comments. Two heads are better than one.

Tip: If a physical sample will no longer be viable after a specific amount of time the researcher can state that the sample is only viable for x amount of time before degrading and will thus only be preserved for that amount of time. Note that the method and date of disposal are purposely not mentioned.

Tip: If you have a copy of the proposal go through and highlight every mention of a sample, where sample information is recorded, instrument, type of data and file type mentioned. Then look at the data management plan and ensure that all the highlighted items are mentioned and thoroughly addressed in the data management plan.

10. **Relax, you've done it!**

Links to Other Resources:
University of Nebraska-Lincoln, University Libraries Data Management Overview and Services
http://libraries.unl.edu/data-management

Data Management LibGuide
This guide contains detailed examples, explanations of terms, and links to resources on data management.
http://unl.libguides.com/datamanagement

O'Reilly Strata
O'Reilly hosts international industry conferences about data analysis and data mining. The have a free newsletter and offer free online seminars on a regular basis.
http://oreilly.com/data/