PRIMER

DATA MANAGEMENT PLANS

What is a data management plan (DMP)?

A DMP is a formal document that details the strategies and tools you will implement to effectively manage your data during the active phase of your research, and the mechanisms you will use for preserving and appropriately sharing your data at the end of the project. A DMP is a "living" document that can be modified throughout your project to reflect any changes that have occurred. More resources for DMPs can be found on the Portage website, including a Brief Guide for creating an effective DMP.

Why create a DMP?

A DMP helps you:

- Meet grant application requirements and/or adhere to institutional data mandates.
- Make it easier for all team members to document, understand, find, and use the data.
- Plan the resources, tools, and expertise needed for data management.
- Identify challenges for storing, handling, and managing the types and volume of data.
- Ensure reliability, authenticity, accuracy, and reproducibility of your data.
- Have a detailed account of your data collection, handling, and stewardship practices.
- Plan how to make your data FAIR (findable, accessible, interoperable, and reusable) to maximize the research potential and impact of your data.

Standard Components of a DMP

Data collection:

- Describe the data that you will be collecting, including the type, format, and volume.
- Describe *how* you will be collecting your data.
- Establish standards for naming and organizing data files, folders, and versions.

Documentation and metadata (description of data):

- Describe how you will ensure that your data are understandable, interpretable, and usable both by current and future researchers.
- Provide descriptive information for your data to be discoverable once deposited at the end of your project.

Storage and backup:

- Describe storage methods and backup procedures for the expected data volume to ensure data security and integrity, and to avoid data loss during the active phase of your research.
- Describe how collaborators will access and work with the data.

Preservation for long term access:

- Decide which data to keep and for how long.
- Address any obligations to retain or destroy certain data.
- Describe the resources required to preserve the data for long-term access.

Sharing and reuse:

- Describe where and how data will be shared (if permissible).
- Decide in what form (raw, processed, analyzed, final) data will be shared.
- Select options for sharing agreements or data licenses for reuse.

Responsibilities and resources:

- Identify who will be responsible for each data management task.
- Consider resources and costs required both during and after the project.

Ethical and legal compliance:

- State how you will store, share, and preserve data in a way that ensures ethical and legal requirements are met.

How do I create a DMP?

Use the Portage DMP Assistant

- Designed for Canadian researchers
- Guides researchers step-by-step through key components of a DMP
- Allows you to create, revise, share, and export your DMP in English or French
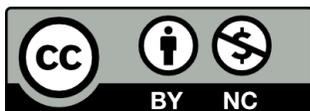
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