Creating and sharing structured policy descriptions - a step by step guide

By creating and sharing a structured version of your data policy, you help ensure your policy is itself findable, accessible, interoperable and reusable (FAIR). You will also help make ongoing assessment of the policy landscape comparable efficient by ensuring your policy description is available to those monitoring the landscape as outlined in the EOSC Strategic Research and Innovation Agenda (SRIA)[1].

This guide walks you through creating a structured version of your data policy using the FAIRsFAIR policy structured description template and suggests how you can make it accessible. Before you begin, you may wish to review your policy using the FAIR data policy checklist[2] to assess how FAIR-enabling it currently is.

Step 1. Download the structured policy characterisation template

Download a copy of the structured policy description template[3] from the FAIRsFAIR Zenodo Community. Familiarise yourself with the information provided on the 'ReadMe' tab before beginning your characterisation.

Step 2. Complete your policy characterisation

Move to the 'Policy Characterisation' tab. Here you will find a list of policy elements that should be addressed in FAIR-enabling policies (column C) grouped under one of three broad headings (column B). The three broad headings are policy context, policy content, and support.

As shown in Figure 1, work through the list in 'Policy Elements' and select the option from 'Options' that best reflects the content of your current data policy. In most cases the options presented are controlled so you select your response from the provided drop-down list.

[1] https://www.eosc.eu/sria
[2] https://doi.org/10.5281/zenodo.6225775
[3] https://doi.org/10.5281/zenodo.6225938

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Figure 1. Extract from the policy characterisation template

Policy Element	Options
Definition of data provided?	Yes No Other
Data sharing is...	Suggested Required Required and monitored Not covered Other
Metadata sharing is...	Suggested Required Required and monitored Not covered Other
Exceptions to data sharing are allowed?	Yes No Other
If exceptions to data sharing are allowed, please indicate which exceptions are referenced. Please tick all that apply.	Commercial sensitivity Personal sensitivity Security Other
Policy includes expectation on Data management planning (DMP) development. Please tick all that apply.	Recommended Required Assessed Monitored Other
If a DMP should be developed, please indicate the stage at which it should be produced (tick all that apply)	Pre-award Post-award Other N/A

If you choose 'other' in column D, please provide some additional information in column E 'Notes'. An optional step is to include the relevant text from your data policy in column F for reference.

Step 3. Deposit the structured version of your data policy with a repository

Deposit a clearly versioned copy of your data policy and your structured version with either your institutional repository or Zenodo (see Figure 2). Be sure to obtain a Digital Object Identifier (DOI) for each.

> **Tip:**
> **When depositing your policy document and structured version with a repository, use a generic organisational account rather than a personal account. That way, future updates can be carried out even if the person who deposited the policy has left the organisation.**

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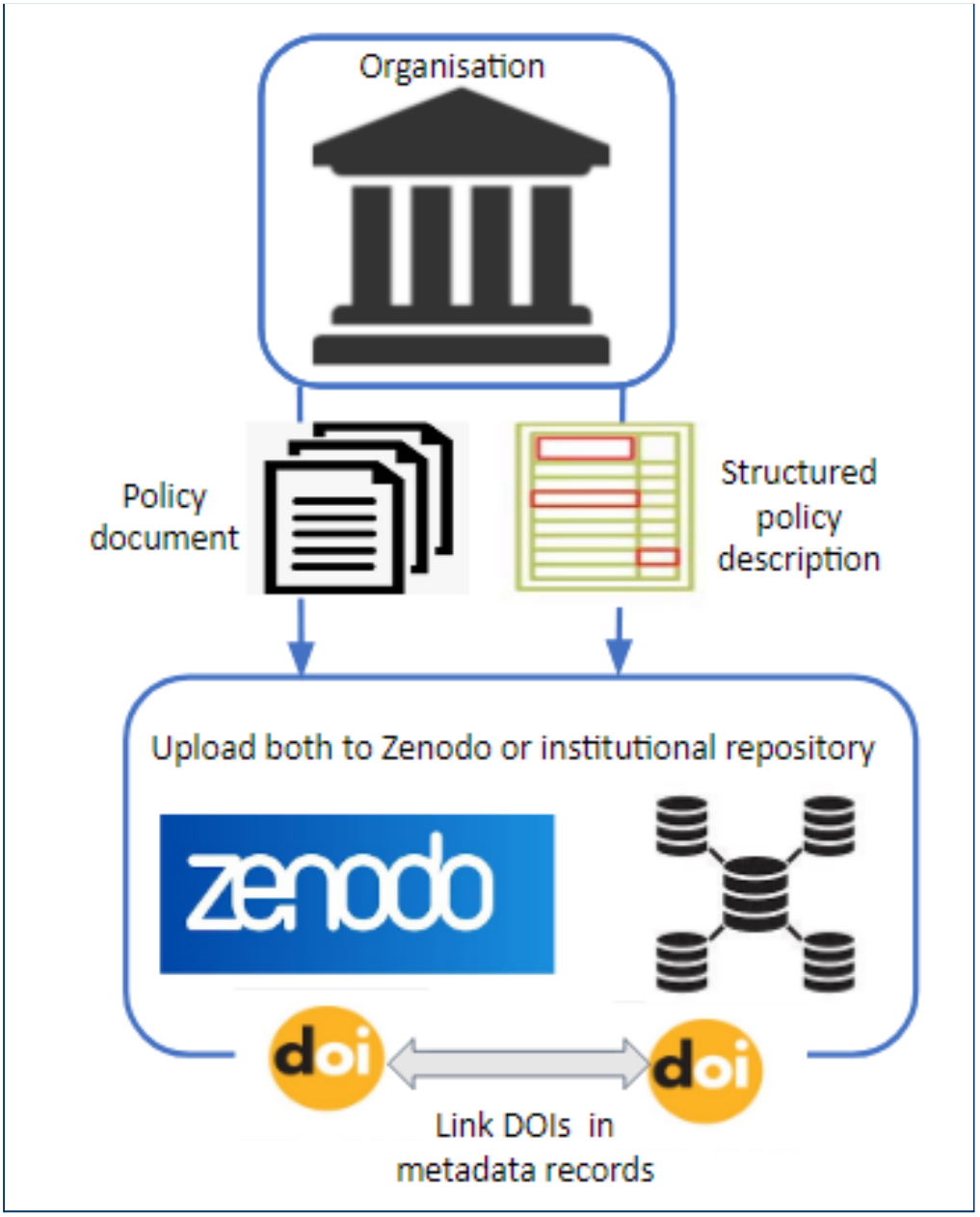
Complete the required metadata and for your deposits and be sure to consider any optional metadata fields to support reuse. Link the PID for the structured version of the policy to the policy document record and vice versa.

Figure 2. Depositing your policy with a repository



Step 4. Register your data policy with FAIRsharing

FAIRsharing curates and integrates descriptions of community resources, such as standards and databases, progressively linking them to policies that address data preservation, management and sharing.

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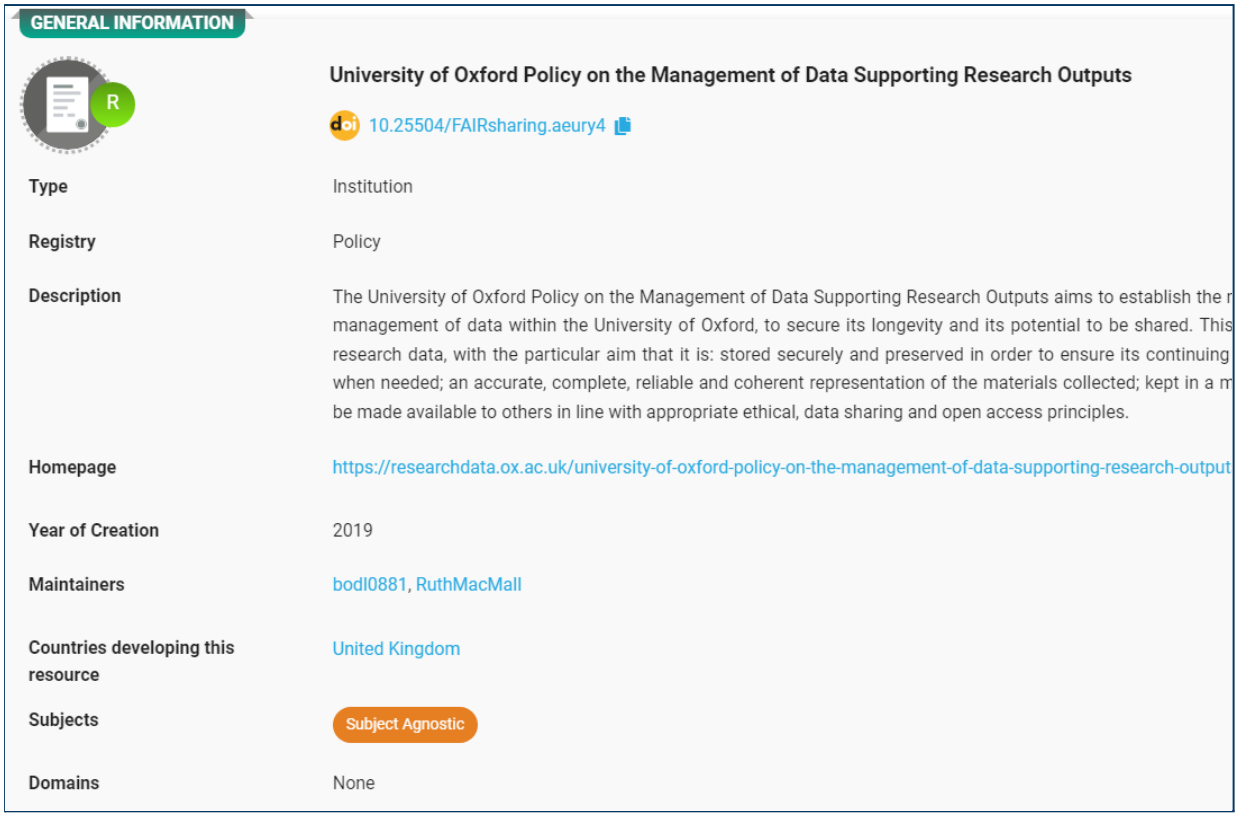
Register your policy at https://fairsharing.org by completing the required matdata fields. You will need to create an account if you do not already have one. For advice on adding content, please refer to guidance provided by FAIRsharing[4].

Figure 3. Example from the University of Oxford Policy on the Management of Data Supporting Research Outputs FAIRsharing entry[5].



When completing the metadata for your policy record in FAIRsharing, add the persistent identifiers assigned to both the deposited copy of the policy document and the structured version of your policy in the 'Other Related Records' section to provide links (as shown in Figure 4).

> **Tip:**
> **When adding the persistent identifier for the structured version of your policy to FAIRsharing, use the umbrella DOI provided. This way, you can add new versions over time using the same DOI.**

[4] Adding and Claiming content in FAIRsharing https://fairsharing.org/new
[5] FAIRsharing.org: University of Oxford Policy on the Management of Data Supporting Research Outputs, DOI: 10.25504/FAIRsharing.aeury4

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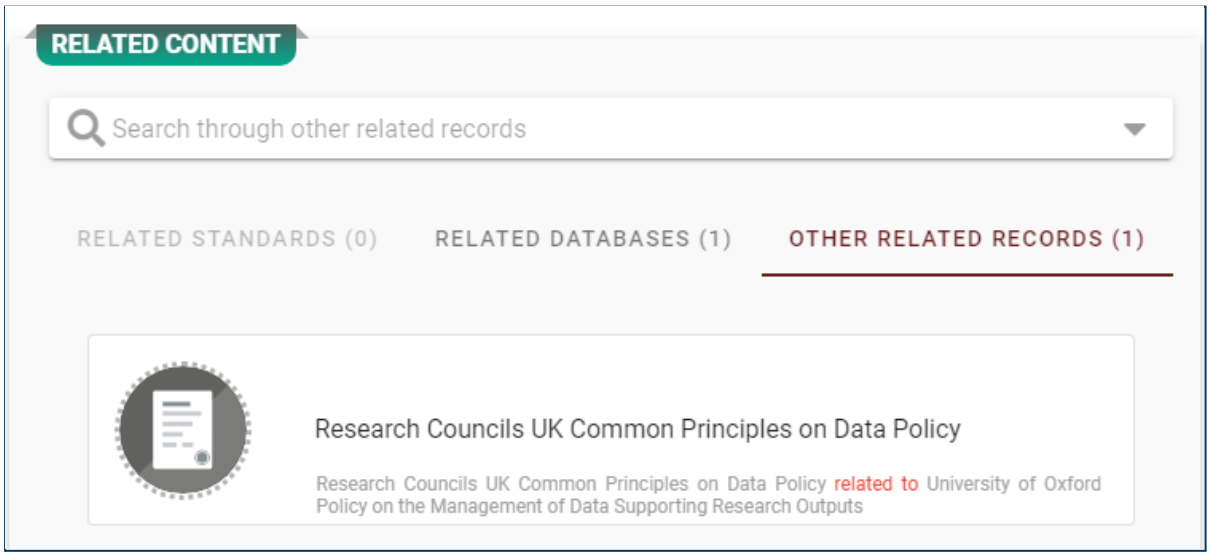
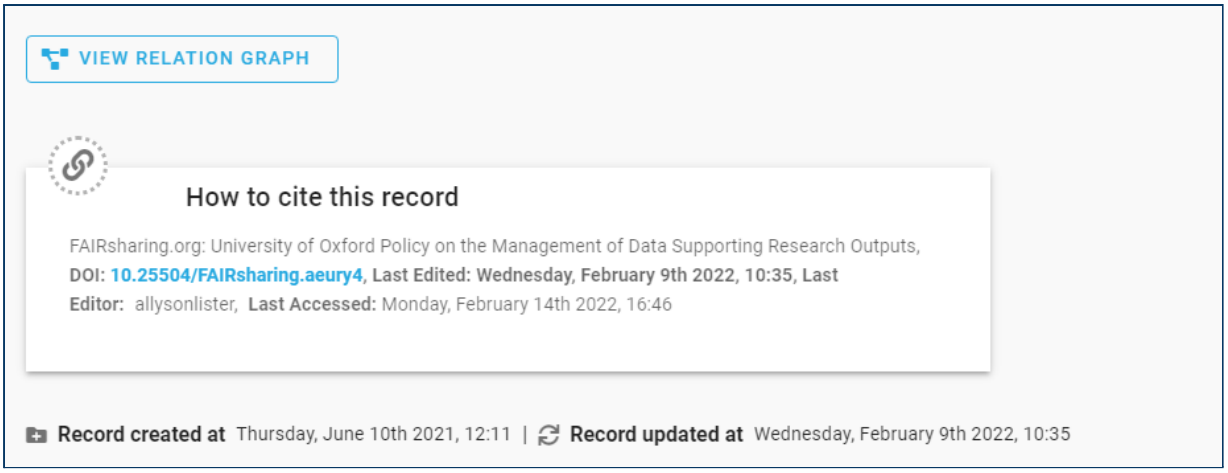
Figure 4. Related content. Example from the University of Oxford Policy on the Management of Data Supporting Research Outputs FAIRsharing entry.



Step 5. Point to the FAIRsharing record from your organisational webpage

When you register your policy with FAIRsharing, you will receive a DOI and a suggested citation for the registry metadata record (Figure 5).

Figure 5. Citation for policy record. Example from the University of Oxford Policy on the Management of Data Supporting Research Outputs FAIRsharing entry.



Include the citation and link to your FAIRsharing record on your organisational policy webpage so it is visible (Figure 6). Also provide a sentence explaining your FAIRsharing registry entry provides persistent identifiers to the copy of your policy document and the structured version of your policy that have been deposited with a repository.

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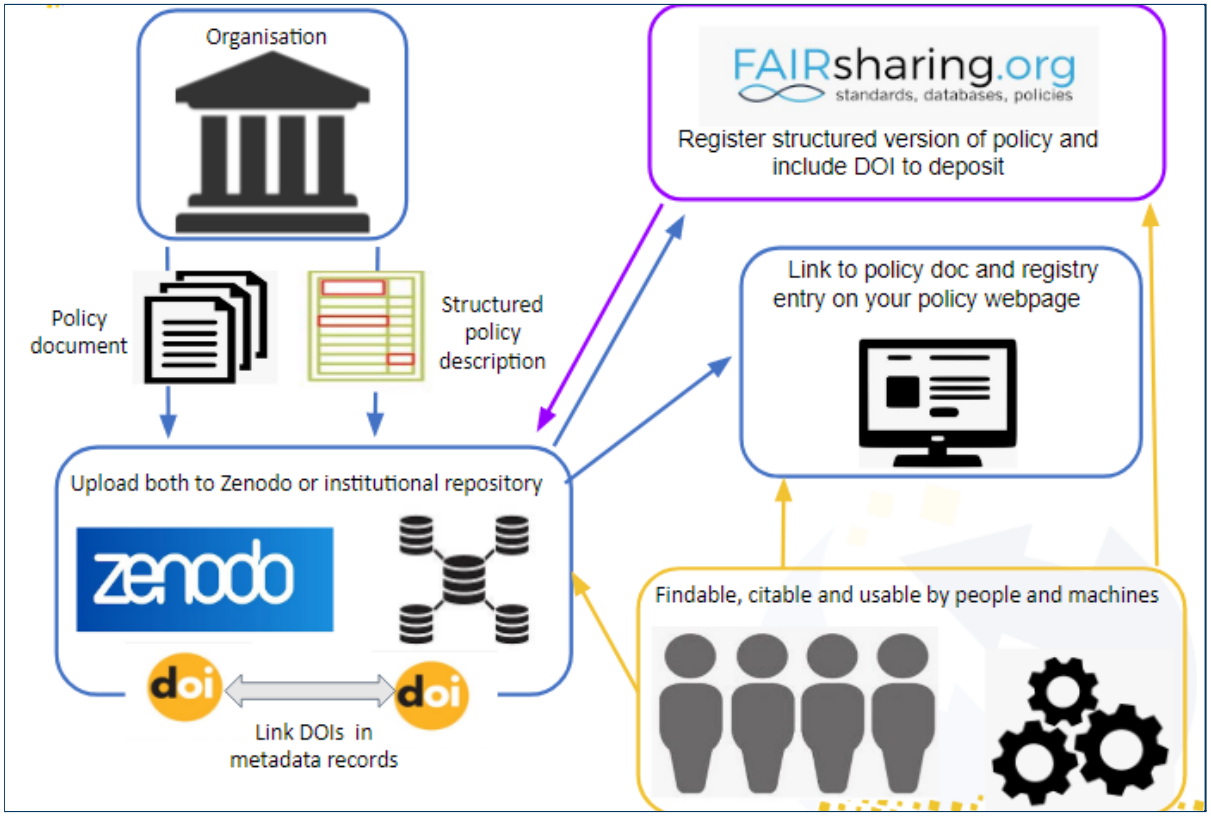
Figure 6. Make your registry record visible from your organisational policy web page.



Update your structured description any time your policy changes and deposit the new version with your repository.

Benefits of this approach

There are four identifiable benefits associated with adopting this approach.

- First, it makes sure policies themselves are FAIR: finable, accessible, interoperable, and reusable.
- Second, it removes gatekeepers and ensures policy-makers are in control of updates to policies and the related metadata descriptions over time.
- Third, is the use of freely available repositories and registries to make policies and structured descriptions FAIR, so they are not stored and managed on proprietary systems.
- Fourth, the result is that the policies and a structured description of their content are available to multiple users for different uses. This includes those monitoring the landscape (EOSC Association, SPARC Europe, OpenAIRE, EOSC Future, etc).

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