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DRAFT - Data Management Plan (DMP) Checklist for Awarded Proposals

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1. Purpose:

- The Data Management Plan (DMP) Checklist for Awarded Proposals document is used to assist awarded proposals in fulfilling the commitments that are described in the submitted DMPs accompanying the proposals, so that the accomplishments according to the DMPs can be clearly documented and demonstrated to the funders/sponsors as required and appropriate.

2. Overview:

- The DMP Checklist for Awarded Proposals document is structured based on the actions that are typically needed to be completed in order to fulfill a standard DMP as outlined and required by NCAR's top funders, i.e. the National Science Foundation (NSF), National Oceanic and Atmospheric Administration (NOAA), and National Aeronautics and Space Administration (NASA).
- A total of five sections are included in the DMP Checklist for Awarded Proposals document. The title for each section is listed as follows:
 - Section 1: Maintaining the DMP during the Project Lifecycle
 - Section 2: Acquiring the Supporting Resources for Data Management
 - Section 3: Documenting Project Process/Workflow and Products
 - Section 4: Establishing a Relationship with a Long Term Archive/Repository for the Final Project Products
 - Section 5: Working with the Archive/Repository to Share and Provide Access to the Final Project Products

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3. Instructions:

- While the five sections described in this document could be reviewed sequentially, each section can also be applied to a DMP at any point of a project's life cycle as needed.
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4. Selected Resources:

The following resources can be explored more in detail in order to assist with completing specific data management plan tasks.

- [Digital Asset Services Hub \(DASH\)](#)
 - [Data Management Plan Preparation Guidance and Template](#)
 - [Consultation with the Data Curation & Stewardship Coordinator](#)
 - [Data Management Guidance](#)
- [Computing Resources from NCAR's Computational & Information Systems Lab](#)
 - [Data manage requirements when requesting allocation](#)
 - [CISL Best Practices](#) with additional information for the following two areas:
 - [Check Space usage](#)
 - [Removing Large Numbers of Files](#), especially those that you no longer need.

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Data Management Plan (DMP) Checklist for Awarded Proposals

- Maintaining the DMP during the Project Lifecycle**
 - Obtain and understand the funder/sponsor's DMP review/evaluation requirements.
 - Identify milestones for the DMP.
 - Set up a schedule with specific dates, including the halfway point of the project, to review/update the DMP and document the corresponding progress/accomplishments.
 - Assign at least one team member to be responsible for the updating the DMP and documenting the progress/accomplishments.

- Acquiring the Supporting Resources for Data Management**
 - Meet with NCAR's [Data Curation & Stewardship Coordinator](#).
 - Review the resources listed under the "[Data Management Guidance](#)" page of NCAR's [Digital Asset Services Hub \(DASH\)](#).
 - When requesting [File Systems](#) and [High Performance Storage Systems](#) allocations, comply with Computational & Information Systems Lab's (CISL) [University Large Allocation Request Preparation Instructions](#).
 - Follow [CISL Best Practices](#) for storage and computing, including [Check Space usage](#) and [Removing Large Numbers of Files](#), especially those that are no longer needed.

- Documenting Project Process/Workflow and Products**
 - Assign at least one team member to be responsible for monitoring and documenting project process/workflow and products.
 - Maintain inventories of:
 - Types of research products produced (e.g. publications, data sets, software/scripts, documents/technical notes, etc.).
 - Types of file formats created.
 - Number of files or file size (in bytes) generated.
 - File naming convention.
 - Any applicable legal/ethical policies, such as privacy/confidentiality and copyrights/licenses, related to the project's products.
 - Standardize the method that will be used to describe the project process/workflow and products (e.g. choose a metadata scheme/structure and tool).
 - Record and describe the "5Ws & 1H" (i.e. Who, What, When, Where, Why and How) for all products of the project, including the processes used to provide

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input, calibrate, process, analyze, and perform quality control/assurance for the research products.

- Review and verify the inventories and the documents compiled throughout the project according to the schedule and dates established under the “Maintaining the DMP during the Project Lifecycle” section above.

- Establishing a Relationship with a Long Term Archive/Repository for the Final Project Products**
 - Identify an open archive/repository that the project will submit its products for archive and long term preservation.
 - Understand the difference between a file system/high performance storage system and an open archive/repository (for additional information, please see the [Frequently Asked Questions](#) page of NCAR’s [Digital Asset Services Hub \(DASH\)](#)).
 - Review the information listed under the [Getting Assets into DASH](#) page of NCAR’s [Digital Asset Services Hub \(DASH\)](#).
 - Assign a team member as a point-of-contact to be responsible for communicating with the archive/repository, and working with the archive/repository to understand the archive/repository’s data management practices, such as policies, infrastructure/system capabilities, and fees.

- Working with the Archive/Repository to Share and Provide Access to the Final Project Products**
 - Verify that the project has met funder’s deposit requirements/recommendations for publications and data (for additional information, please see the link to NCAR Library’s [Public Access](#) page from NCAR’s [Digital Asset Services Hub \(DASH\)](#)).
 - Provide to the archive/repository the identification information of the publications that are based on the project’s products.
 - Assign at least one team member to be responsible for assisting the archive/repository during the archive process, and verifying the records that are being created by the archive/repository about your project.
 - Assign at least one team member to be responsible for helping the archive/repository in maintaining the project’s records and answering questions relating the project beyond the conclusion of the project.
 - Identify a method for transferring new contact information to the archive/repository if there are changes to the project’s original contact information.

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