

Data Management Plan Checklist

This checklist is based on the generic NSF data management plan template. Always refer to the specific guidance for your grant proposal when writing a data management plan, as requirements differ.

Types of data, samples, physical collections, software, curriculum materials, and other materials to be produced in the course of the project

- What data will be created/used
- How big the data will be and how fast the data will grow
- The format(s) the data be will in
- Where the data will be stored

Standards to be used for data and metadata format and content

(Where existing standards are absent or deemed inadequate, this should be documented along with any proposed solutions or remedies)

- How the data will be documented
- Any standards for documentation, such as an ontology or metadata schema, that will be used

Policies for access and sharing including provisions for appropriate protection of privacy, confidentiality, security, intellectual property, or other rights or requirements

- Whether the data will lead to a patent or other intellectual property claim
- What regulations apply to the data (HIPAA, FERPA, etc.)
- What security measures will be put in place to protect the data
- Who will be responsible for data security

Policies and provisions for re-use, re-distribution, and the production of derivatives

- Where and when the data will be made available
 - Data can be deposited in the CaltechDATA repository: <https://data.caltech.edu/>.
- Any limitations on data sharing to due privacy restrictions, intellectual property, etc.
- What specific data will be shared
- What the reuse permissions for the shared data will be
- Whether research code will be shared and under what reuse permissions
 - Code sharing can be integrated into CaltechDATA; contact data@library.caltech.edu

Plans for archiving data, samples, and other research products, and for preservation of access to them

- How long the data will be retain
 - Data must be retained for at least three years after the completion of the grant.
- Who will be responsible for long-term data stewardship
- What file formats will be used for archiving
- Where the data will be archived
 - Data can be archived in the CaltechDATA repository: <https://data.caltech.edu/>.