Managing data management: building a RDM service at MIT Libraries

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Massachusetts Institute of Technology

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Managing Data Management:
building an RDM service at MIT Libraries

Christine Malinowski & Phoebe Ayers
eScience Symposium | April 6, 2017
MIT by the numbers...

4,524 undergraduates

6,852 graduate students

~12,000 staff & faculty *

* half academic
MIT Libraries by the numbers...

~170 staff

5 libraries
+ Institute Archives & Special Collections

Research-level collection in most areas
Data Management Services
@ MIT Libraries

is NOT:

● GIS services
● Data reference or collection development support
● Data visualization support *(yet)*
● Embedded in grants/research projects
● Systematic review service
● IT or Archives
Data Management Services
@ MIT Libraries

PROVIDES:

● assistance with all questions about storing and organizing research data
● assistance with data management plans and DMPTool
We ...

- answer **direct questions** and **referrals**
- give **individual consults** by email or in person
- offer research **group consults** on file organization, etc.
- **teach** classes
Wednesday August 10, 8:37pm

To: data-management@mit.edu

“We are asked to provide a data management plan for our grant proposal that has been accepted for award negotiations by the DOE. We put together a draft according to the guidelines. It is to be submitted by Friday ... 

It would be very helpful to have your feedback on the draft. Do you think the language looks good? Would you have any suggestions about how to improve it?”
Tools for managing consults

Coordinating
- Contact address that is a list
- Referrals from other service points & librarians
- Monthly email screening schedule

Delivering
- Consultation pair ups
- Review DMPs via DMPTool feedback mechanism

Tracking / Follow up
- Researcher contact log on wiki (what, who, duration, status...)

Tools for managing consults

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Tracking / Follow up
- Researcher contact log on wiki (what, who, duration, status...)
15-30 consults / yr
includes brief 1-2 hrs and multi-week/visit consults

~15 workshops / yr

to individual departments and whole campus
DMS Projects behind the scenes...

- Reviewing and updating public website & knowledgebase
DMS Projects
behind the scenes...

- Reviewing and updating public website & knowledgebase
- Developing IR procedures for student-generated data
- Supporting LabArchives
- Interviewing faculty about their data needs
- Reviewing agency guidelines for DMPs & updating our documentation
- ...

Case study

DMS internal project: Knowledgebase

Data Management Consulting Knowledgebase

Added by Katherine F. McNell, last edited by Phoebe Ayers on Feb 22, 2017 16:47 (view change)

Search Knowledgebase

General/Getting Started
- Data Management Services procedures
- Outreach
- Questions to ask in a consultation
- Points to make in a consultation
- Consultation Worksheets
- Services Across the Data Lifecycle
- Knowledgebase maintenance
- RDM Professional Resources

External Requirements
- Funder & Publisher Requirements
- DMPs: What are they?
- DMPs: Answering DMP review queries
- DMPs: DMPTool & other drafting resources (includes examples)

File Organization
- File naming best practices
- Version control and collaboration
- Questions to ask in a consultation: file organization

Data Storage during the Active Phase of Research
- Campus data storage resources
- Backups
- File format recommendations
- Digitization and format conversion
- Electronic Lab Notebooks (ELNs)

Metadata
- Metadata: What is it?
- Metadata: Creating it
- Science dataset read me example: txt version | PDF version
- Social science dataset read me example: txt version | PDF version

Data Security & Confidentiality
- Data protection and security
- Confidentiality of data

Intellectual Property
- Data licensing
- Data and copyright

Data Sharing and Long-term Storage
- Data repository resources
- Repository recommendations provided, use cases
- Questions to ask in a consultation: repository selection criteria
- Points to make in a consultation: long-term data storage
- Data citation and credit
- Data Preservation Resources
- Citing and preserving software/code

Referrals or Other Resources
- Referrals
- Putting data in DSpace
Comparing and selecting among repositories

Repository comparison tools

- Tool that can be filled in for relevant repositories and presented to a user to help them understand differences among repositories
- Lists criteria for evaluating different types of data repositories
- Includes baseline information about DSpace, Dataverse, and Dryad

DCC How-to Guide: Where to keep research data: checklist for evaluating data repositories

- Describes different types of repositories, their pros/cons, and special cases such as confidential data
- Focuses on 5 key questions:
  1. Is a reputable repository available?
  2. Will the data you want to deposit?
  3. Will it be safe in legal terms?
  4. Will the repository sustain the data value?
  5. Will it support analysis and track data usage?
- Outlines 3 tiers of service capability levels for each criterion
- Includes bibliography of key good practice recommendations

re3data.org: Registry of Research Data Repositories

- Can search or browse for repositories by criteria such as subject, content type, or country
- Features of repositories are described in a standardized way

Options to present to the user

At minimum, consider presenting the following options to the user (guided by what you already know about his/her needs):

1. DSpace@MIT:
   a. Policies: [About DSpace@MIT Policies](http://guidelines.re3data.org/policies), scroll down to Guidelines for Research Datasets
   i. Make sure to note for user also the Format Support policy on [About DSpace@MIT Policies](http://guidelines.re3data.org/policies), which indicates what level of support/preservation is provided depending upon the file format: bottom-line, if they are planning on depositing files in the "known" (i.e., proprietary) format, encourage them to also make a copy in a "supported" format as this will receive more full treatment long-term.
   b. To begin the deposit process: see [putting data in DSpace](http://guidelines.re3data.org/policies)
2. Harvard Dataverse Network, a service of the Harvard MIT Data Center
   a. Policies: [Harvard Dataverse Network Guidelines](http://guidelines.re3data.org/policies)
   b. To begin the deposit process: go to the Harvard Dataverse Network > create an account > create a Dataverse > then begin to add data
   c. Documentation: [User guide covers: account creation/management, Dataverse management, dataset and file management, and use features](http://guidelines.re3data.org/policies)
3.  [Cases and Codes](http://guidelines.re3data.org/policies) (at [Harvard Depository](http://guidelines.re3data.org/policies) and [Harvard Dataverse](http://guidelines.re3data.org/policies))
### Case study

**DMS internal project: Knowledgebase**

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**Knowledgebase Content Tracking**

Added by Christine N Malinowski, last edited by Christine N Malinowski on Mar 16, 2017 12:27

**Related Pages**
- Data Management Consulting Knowledgebase
- Knowledgebase maintenance

### Content Review Tracking Table

**Instructions for Content Creators:** Add pages to the table as they are created.

**Instructions for Content Reviewers:** Review the content on the pages for which you are assigned. Mark the review status as:
- In progress when the review is underway
- Needs input when the review requires additional input from the group (provide notes on what the content in question is in review notes column)
- Complete when all needed revisions have been completed
- Complete, edited when the review is complete and content edits have been made

#### 2017 Review

- Pages assigned to individual reviewers (Miki and Ece will self assign individual pages)
- Reviewers check pages, following instructions for reviewers above; for minor changes (e.g., broken links), reviewers can go ahead and make changes
- Review team discusses review notes, determines updates (or issues to take to larger DMS team)
- Residual edits are made to pages

<table>
<thead>
<tr>
<th>General / Getting Started</th>
<th>2017 Assigned Reviewer</th>
<th>2017 Review Notes</th>
<th>2017 Review Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>DMS procedures</td>
<td>ooo</td>
<td>minor edit: added A. Chassanoff name to CLIR post-doc wish list</td>
<td>complete, edited</td>
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<tr>
<td>Outreach</td>
<td>ooo</td>
<td></td>
<td>complete</td>
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<tr>
<td>Questions to ask in a consultation</td>
<td>ooo</td>
<td>covered by other reviewers below</td>
<td></td>
</tr>
<tr>
<td>Points to make in a consultation</td>
<td>ooo</td>
<td>covered by other reviewers below</td>
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<tr>
<td>Knowledgebase maintenance</td>
<td>ooo</td>
<td></td>
<td>complete</td>
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<tr>
<td>Services Across the Data Lifecycle</td>
<td>ooo</td>
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<td>complete, edited</td>
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<tr>
<td><strong>External Requirements</strong></td>
<td><strong>Assigned Reviewer</strong></td>
<td><strong>2017 Review Notes</strong></td>
<td><strong>Review Status</strong></td>
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<tr>
<td>Funder &amp; Publisher Requirements</td>
<td>ooo</td>
<td>minor update to U Vic site link</td>
<td>complete, edited</td>
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<tr>
<td>DMPs: What are they?</td>
<td>ooo</td>
<td>minor edit to WHouse 2013 mamo link</td>
<td>complete, edited</td>
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<tr>
<td>DMPs: Answering DMP review queries</td>
<td>ooo</td>
<td>question: have we not had a DMP review request since 10/2016?</td>
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<tr>
<td>DMPs: DMPTool &amp; other drafting resources</td>
<td>ooo</td>
<td>couple of broken links</td>
<td>complete, edited</td>
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<tr>
<td>File Organization</td>
<td>Assigned Reviewer</td>
<td>2017 Review Notes</td>
<td>Review Status</td>
</tr>
</tbody>
</table>

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Tools for project management

**Individual project management**

- Wiki pages for projects
- Small teams for each project assignments, including project lead, based on member capacity

**Project portfolio management**

- Monthly, in-person team meetings
- Tableau visualization
### DMS Project & Activity Plan, FY17

**Updated: 03.07.2017**

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<tr>
<th>Project Category</th>
<th>Project Name (group)</th>
<th>Jul 1</th>
<th>Aug 1</th>
<th>Sep 1</th>
<th>Oct 1</th>
<th>Nov 1</th>
<th>Dec 1</th>
<th>Jan 1</th>
<th>Feb 1</th>
<th>Mar 1</th>
<th>Apr 1</th>
<th>May 1</th>
<th>Jun 1</th>
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<td>Instruction</td>
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<td>Blog Writing (Group sessions)</td>
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<td>RDM Biweekly updates</td>
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<td>Web, DMPTool, &amp; KB Review</td>
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<td>What's up with DMS brown bag</td>
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<td><strong>DMS Development</strong></td>
<td>New Program Head</td>
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<td>Create a base calendar of DMS services and activities</td>
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<td><strong>Work with MIT: Services</strong></td>
<td>DMP followup</td>
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<td>Develop File Organization Consultation Materials</td>
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<td><strong>Work with Others Outside Libraries</strong></td>
<td>Campus RDM Network: Pre-work</td>
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<td>Campus RDM Network: Phase I</td>
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<td><strong>Tools/Technology</strong></td>
<td>Dispace Student Research Data</td>
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<td>Data Management Infrastructure: Discussion</td>
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<td>Data Management Infrastructure: Project Prioritization &amp; Submission</td>
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<td><strong>Other</strong></td>
<td>Consider DMPTool Article</td>
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<td>Write/Submit DMPTool article</td>
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</tbody>
</table>

### Projects to Potentially Add to FY17

<table>
<thead>
<tr>
<th>Project Name</th>
<th>Category</th>
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<tbody>
<tr>
<td>LabArchives article</td>
<td>Other</td>
</tr>
<tr>
<td>Map project open data metadata to metadata standards</td>
<td>Tools/Technology</td>
</tr>
</tbody>
</table>

### Projects by Commitment Level

- Data Management Infrastructure: Discussion
- Dispace Student Research Data
- Campus RDM Network: Pre-work
- Develop File Organization Consultation Materials
- New Program Head
- Create a base calendar of DMS services and activities
Tools
for keeping up with RDM

- professional development opportunities
- internal documentation (via knowledgebase)
- RDM Updates biweekly digest of external RDM information

DMS is hard;
there’s never just one “right answer”
RDM Updates

Biweekly email digest from 40+ RSS feeds and Twitter

CALL FOR PARTICIPATION

New DLF Interest Group: Government Records Transparency and Accountability

With this blog post we officially announce the formation of the DLF Interest Group on Government Records Transparency and Accountability. A few emails have been exchanged, and an initial conference call has been convened.

RDA Data Versioning Interest Group: Call for policy examples

The demand for reproducibility of research results is growing, therefore it will become increasingly important for a researcher to be able to cite the exact extract of the data set that was used to underpin their research publication. It is widely acknowledged that published data need to be versioned but no guidelines exist to date.

RESOURCES, TOOLS, ETC.

RISE, a self-start tool for research data management service review

DCC releases RISE, a new framework aiming to help review RDM services.

New rdatoolkit.org website

We are excited to announce that we will roll out a new rdatoolkit.org site next week! Just to clarify the rdatoolkit.org is the information and communication site that serves as a kind of entranceway to the RDA Toolkit proper. Our goal is to make the site easier to navigate and more informative. The updated site will include a more dynamic home page with images and headlines that will make valuable news more conspicuous and accessible. Learn more about the new rdatoolkit.org website.

Full Text Book: "Curating Research Data" (Open Access Version Available)

An open access edition of Curating Research Data (two volumes) published by ACRL (Association of College and Research Libraries) are linked below. Bound volumes are also available for sale.

ARTICLES

Nature News: Peer-review activists push psychology journals towards open data

Editor asked to resign from journal for saying he'll review only papers whose data he can see.

Nature, Editorial: Don't let useful data go to waste

Researchers must seek out others' deposited biological sequences in community databases, urges Franziska Denk.

Library Workshops in Support of Data-Driven Research in Top NIH- and NSF-Funded Universities

In response to an urgent need for computationally-savvy researchers, leading university libraries are developing and offering participatory workshops to introduce their patrons to data-driven research methods and resources. In doing so, libraries help to improve the competitive advantage of their universities relative to other schools that compete for federal funds. We conducted a qualitative study to explore the nature of library workshops offered in top NIH- and NSF-funded universities. To guide strategic planning, we present a catalog of the workshops offered in fall 2015, two indexes for mapping library workshops, and a typology of workshop participants and presenters.
Case study

Research group: Environmental data

Scenario
● Decade-long, multi-site, multi-million dollar research project
● Multi-terabyte data and software with several versions used worldwide
● Hosted several places, including sites maintained by now-departed people

Request
● Wanted secure place to store latest versions & documentation

Image credit: Gael Forget
Case study

Research group: Environmental data

April - August, 2016
Tools for promoting our services

**Internal**
- Library staff **brown bags**
- **Regular interactions** with IT, Office of Research, OGC, etc.

**External**
- Public **website** & regular **blog posts**
- **Open classes** offered as part of library instruction
- **DMS promoted by liaisons** in orientations & to new faculty
DMS
looking ahead

What do we want [to do]:

○ more community outreach and promotion
○ more research into & public documentation on tricky topics (file organization, software, etc.)
○ better local data storage support
○ clearer relationships with liaisons, archives, IT ...
DMS
looking ahead

Future projects:

○ engage with **campus partners** to develop **RDM network**
○ develop a **research data repository**
Discussion & Questions

- What aspects of managing RDM have proven difficult?
- Do you have tips to share?
- What kinds of questions do you get most often?
- Questions for us?
Thanks!

Any questions?

http://libraries.mit.edu/data-management | data-management@mit.edu

cmalin@mit.edu & psayers@mit.edu
Credits

Special thanks to SlidesCarnival who made and released the presentation template used (‘Fidele’ with modifications) in this slide deck.