

2022 IEP Data Management Plan Instructions

Starting with the 2018 Interagency Ecology Program (IEP) Work Plan, all studies need to develop a Data Management Plan (DMP). The DMP is short (2-3 pages) and it is meant to be a living document. A template for writing your DMP will be included with your other Work Plan templates. It will be due to the Program Manager at the same time as the IEP Work Plan Checklist.

- Brief instructions are provided below for what to include in each section.
- Avoid leaving any sections blank. In rare cases, a section may not apply to your study. If this happens, write “not applicable to this program element” in the space provided.
- Be concise. Descriptions should fit in the space provided. Feel free to reference any study documentation (protocols, reports, etc.) when you feel that more details are necessary.
- Refer to previous DMPs for guidance on what to include in each box, if needed. Examples can be found on the IEP website under the [Data Management Plan](#) web page.
- Contact Rosemary Hartman (rosemary.hartman@water.ca.gov) of the Data Utilization Work Group (DUWG) if you have any questions.

What is a DMP?

- DMPs are documents that capture and share essential information from data providers to ensure proper accommodation for their data management needs and practices.
- DMPs are usually developed as a first step of a project to identify the format and subject matter of data being collected, methods for housing and sharing data, and quality control steps. DMPs are updated throughout the life of the dataset to identify changing needs and resources.
- They establish a common understanding of the data for long-term maintenance beyond the point of initial submission and processing.
- For more information about DMPs, see the [California Water Quality Monitoring Council Data Management Plan Factsheet](#).

How will the DMP be used?

The DMP is part of the IEP Work Plan, so it will be shared with the public on the IEP website. The IEP Data Utilization Workgroup (DUWG) will also use information provided in the DMPs to support IEP’s data sharing and data documentation goals.

Feedback is welcome

Although DMPs are commonly used in some agencies and fields of study, DMPs are a relatively new requirement for the IEP Work Plan. Please do not hesitate to contact Rosemary if you have questions about what your DMP should include or if you have suggestions to improve the template. The DUWG values feedback that will help us improve the template for future Work Plans. The DUWG revised the template for 2020 in response to feedback on the 2019 version.

Component	Description
Program Element Number (PEN)	The Program Element Number (PEN) that corresponds to the study in the IEP Work Plan.
Year	The Work Plan year for which you are updating this DMP.
Date Updated	The date that this DMP was updated. This is important in case a DMP is updated more than once per year. Please use YYYY-MM-DD format.
Start Date	The date when the information in this DMP became effective. This is important in case major changes were made to the data management plan.
Principal Investigator	Names of the individual(s) responsible for the research project during the current Work Plan year. Include name, agency, e-mail address, and phone number.
Point of Contact	Names of individuals who data users should contact for access to the data or questions about the data. This could be the same as the person listed in the "Principal Investigator" section, or other individuals. Include name, agency, e-mail address, and phone number or write "same as above."
Data Description	A very brief description of the information to be gathered; the nature and scale of the data that will be generated or collected. Ok to copy/paste from program description (checklist page 2) and include any additional data related information not included in the program description.
Related Data	Optional. Existing datasets that you incorporate into analysis and reporting for this program element, or existing data that are relevant to your study. This could also include data that are collected simultaneously.
Metadata	A description of the metadata to be provided along with the generated data, including the metadata standards used. Provide the file name and information on how users can access the metadata (e.g., a link).
Storage & Backup	A description of the short-term storage methods and backup procedures for the data (electronic and physical), including the physical and cyber resources and facilities to be used for short-term preservation and storage of the research data.
Archiving & Preservation	The procedures for long-term archiving and preservation of the data, including succession plans for the data should the expected archiving entity go out of existence. If this study is ending, then include information where the data will be permanently stored. For electronic files, archiving may be like backup procedures.
Format	Formats in which the data will be generated, maintained, and made available. Formats should include both general data types (e.g., spreadsheet, relational database) and specific file format (extension). This may include software type (e.g., Excel, Access) used to generate the data where appropriate. Specify BOTH file type and software type. This is important so that data maintainers and users will know how to access these files. Include approximate size (in MB) of the resulting data set.
Quality Assurance	Brief description of procedures for ensuring data quality. Provide links to Quality Assurance Project Plan and/or QA/QC Standard Operating Procedures.
Access & Sharing	A description of how data will be shared. Include (1) access procedures, (2) embargo periods, (3) technical mechanisms for dissemination (e.g., website addresses, listserv information), (3) whether access will be open or granted only to specific user groups, and (4) a timeframe for data sharing and publishing.
Rights & Requirements	A link to or instructions to locate the agency's rights and requirements for data use.