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| **Learner Objectives** | By participating fully in this class, students will be able to:**Part A: Repositories**1. Navigate choose, and integrate repositories into the life cycle of their research.
2. Distinguish among types of repositories, including their stakeholders, purposes, and requirements.
3. Critically evaluate repositories’ scope and policies.
4. Deposit data into a repository.
5. Utilize repositories to measure the impact, quality, and quantity of their or their institutions’ scholarly output.

**Part B: Retention, Records Management, Archiving and Preservation**1. Comply with data and records’ retention guidelines/mandates.
2. Differentiate between long-term storage and permanent archiving.
3. Appraise the perceived long term value of their data.
4. Identify documents generated in association with their research data, and recognize what needs to be kept, for how long, and how to preserve their research projects’ contexts.
5. Identify the additional records, beyond data, that add informational value to their research, to those who study/research within their discipline, and to a broader historical context and audience (these records may be important in informing the selection of their data for long term management and retention, and should be carefully managed and appraised in conjunction with their data).
6. Identify and communicate with the appropriate constituencies to determine archival value.

**Part C: Long-Term Data Management**1. Manage their data for the long-term and maintain data hygiene to facilitate long term preservation and reuse.
2. Provide the documentation necessary to actualize their long-term and archival data management plans.
3. Carry out their long term preservation responsibilities relevant to long term storage and the appropriate stewardship of assets (use of open file types; data integrity issues; security and access control requirements; bit level checking; storage redundancy, etc.)
4. Facilitate the transfer of their research products to institutional archives.
5. Choose an appropriate repository/archive necessary to satisfy long term preservation requirements.
6. Use appropriate and sufficient metadata for their data and records’ long-term management and access.
7. Financially plan for the retention and management of their data for the long-term.
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| **Lecture Content** | **Part A: Repositories**1. Explain the value, purpose, and roles of repositories in the data life cycle.
2. Give an overview of the different kinds of repositories.
3. Explain potential repository policies researchers may encounter related to depositing data, custody, access, and usage of their data.
4. Explain the general steps of depositing data into a repository.
5. Discuss the developing repository landscape encompassing open access, open data, and alternative approaches to professional metrics.

**Part B: Retention, Records Management, Archiving and Preservation**1. Explain the different kinds of data retention guidelines/mandates (e.g., grantor, institutional, and Federal).
2. Explain and illustrate how long term storage and permanent archiving of data are not the same thing and how this may impact the appraisal process.
3. Explain common appraisal tools, checklists, and criteria.
4. Promote awareness of the different kinds of records generated in conjunction with research data and their value.
5. List additional records, beyond data, that add informational value to their research, to those who study/research within their discipline, and to a broader historical context and audience
6. Identify the relevant stakeholder, constituencies, factors that determine archival value.

**Part C: Long-term Data Management and Retention**1. Reinforce the value of data hygiene to facilitate long term preservation and reuse (metadata consistency, naming conventions in place, etc.)
2. Define “long-term data management” and list the documentation necessary to actualize long-term and archival data management plans.
3. Explain researchers’ long term preservation responsibilities.
4. Contrast researchers’ long-term preservation responsibilities with the transfer of research products to institutional archives, illustrating how available services might overlap to meet management needs.
5. Review the repository and policy criteria necessary to satisfy long term preservation requirements (geographic replication, data security, access control, versioning control, bit level integrity/check sums) and illustrate custodial issues relevant to depositing research data and associated records.
6. Explain the different types of metadata that can/should be generated for records and how having good metadata positively affects the submission, discovery, retrieval, and reuse of research data and associated records.
7. Introduce cost planning for long term data management and retention.
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| **Activities** | * Data Appraisal Activity
* Data Retention Activity
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| **Assessment** | 1.) Reflect on the data that you are collecting or have collected for your research. Go online to [re3data.org](http://www.re3data.org/) and research several repositories where you could deposit your data. 2.) Visit the [re3data.org](http://re3data.org) website. Read the list of criteria represented by the icons used to describe the repositories (<http://www.re3data.org/faq/>). Then click on 'Browse by Subject'. Compare the icon descriptors for two repositories in your discipline (<http://www.re3data.org/>). 3.) Reflect on the data that you are collecting or have collected for your research. What criteria will you use to appraise and select data for long-term archiving and/or sharing in a repository?4.) Reflect on the data that you are collecting or have collected for your research. Describe the long-term data management steps you could take to help preserve and archive your data and/or make it easier to share with others, and easier for others to reuse post-project. |
| **Readings** | Educause Review Online. Starting the Conversation: University-wide Research Data Management Policy<http://www.educause.edu/ero/article/starting-conversation-university-wide-research-data-management-policy>Harvard University. Office of the Vice Provost for Research. “How should Research Records be handled after the specified period of retention expires?”<http://vpr.harvard.edu/faq/how-should-research-records-be-handled-after-specified-period-retention-expires>ICPSR. Selection and Appraisal Criteria <http://www.icpsr.umich.edu/icpsrweb/content/datamanagement/lifecycle/selection.html>New York University. Retention of and Access to Data<https://www.nyu.edu/about/policies-guidelines-compliance/policies-and-guidelines/retention-of-and-access-to-research-data.html>National Institutes of Health. Grants Policy & Guidance<http://grants.nih.gov/grants/policy/policy.htm>University of Florida. Protect Research Data<http://irb.ufl.edu/irb01/data.html>Wellcome Trust. Policy on Data Management and Sharing<http://www.wellcome.ac.uk/About-us/Policy/Policy-and-position-statements/WTX035043.htm>Whyte, A. & Wilson, A. (2010). "How to Appraise and Select Research Data for Curation". DCC How-to Guides. Edinburgh: Digital Curation Centre.http://www.dcc.ac.uk/resources/how-guides - See more at: <http://www.dcc.ac.uk/resources/how-guides/appraise-select-data#sthash.TQp4SKSL.dpuf> |