



JISC Project Plan

| Project Information | | | |
|-----------------------------|---|-----------------|------------|
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| Programme Manager | Simon Hodson | | |

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1. Project Overview

1.1 Project Summary

The **RoaDMaP** Project will investigate the requirements for, and pilot the implementation of, an institutional research data management (RDM) infrastructure at the University of Leeds. The RDM infrastructure will include policies, data management plans and guidelines, processes, systems, support and training. The project, led by the University of Leeds Library, builds upon the work started at Leeds as part of a UKRDS (UK Research Data Service) feasibility study and will involve a collaboration of staff from the University's central services and academic departments alongside the DCC (Digital Curation Centre) and two commercial partners. RoaDMaP will assess data management requirements of research groups at three broad stages of the research lifecycle – pre-award, live and post-award – via four pilot case studies. The case studies have been defined to ensure that a cross section of research staff (in terms of lifecycle stage, primary role and discipline) contribute to project findings. The project will inform the planned University of Leeds Research Data Management policy and investigate how the policy can be implemented in an effective and sustainable way across the institution. We will record our progress and share our outcomes with the wider research data management community.

1.2 Objectives

- Work with relevant University committees to achieve an institutional Research Data Management (RDM) policy.
- Create supporting materials for the RDM policy including explanatory notes and good practice guidelines. Identify what local policies and practices are required to embed the institutional RDM policy.
- Identify RoaDMaP case study projects, undertake RDM requirements analysis for each and engage with the case studies across several work packages; share information about our case studies with the JISCMRD02 programme.
- Work with the DCC to pilot DMPOnline with a number of pre-award research groups, and define requirements for DMP enhancement to support institutional processes.
- Identify job roles and training needs in the research lifecycle, covering data creation, storage, curation and preservation.
- Identify RDM training needs across different subject disciplines and define and implement a UoL RDM training strategy.
- Pilot a Research Data Management System and develop 'integration' with data capture equipment; use the pilot to inform planning for a RDMS to serve the institution.
- Pilot virtualised storage to stitch together multiple storage silos; test cloud storage as a backup mechanism for live data and a storage tier in its own right.
- Provide evidence to inform the business case for IT infrastructure and personnel needed to support data creation, storage, curation, preservation at UoL.
- Enable UoL to meet the data management requirements of research funders, including EPSRC.
- Agree a Sustainability Strategy which identifies what the institution must do to ensure good RDM practice is embedded and supported throughout the RDM lifecycle post RoaDMaP.
- Share our project outcomes widely and actively engage with the JISCMRD02 Programme.

<http://www.jisc.ac.uk/fundingopportunities/projectmanagement/planning/objectives.aspx>

1.3 Anticipated Outputs and Outcomes

| Output / Outcome Type (e.g. report, publication, software, knowledge built) | Brief Description |
|--|--|
| An institutional research data management policy | A high level, institutionally adopted and supported RDM policy, endorsed by the RDM Steering Group and the Research and Innovation Board. |
| Implementation guidelines for the institutional RDM policy | Hands-on guidelines to enable the institutional RDM to be implemented in practice. |
| Policy roadmap tracked on the blog and in a final reflective report | How UoL achieved an institutional policy, what changed during drafting, issues raised, initial implementation. |
| Four RDM case study reports | RDM requirements at pre-award, live award and post-award stages of the research lifecycle. |
| Improved knowledge and awareness of DMPOnline. Evaluation of DMPOnline with case study groups leading to suggested enhancements. | Suggested enhancement to DMPOnline based on pilot feedback: these may be subject specific requirements or improvements to aid integration with other research data management systems. |
| Pilot RDM system | The pilot RDM system is likely to be based on the DataFlow project's DataStage and DataBank data management infrastructure. |
| Guidelines for implementation of the pilot RDM system. | Guideline to enable research groups outside our case studies to use the pilot RDMS. |
| Metadata descriptions and templates | Metadata templates will be developed through working with the case study groups and will enable ingest to the pilot RDM system. |
| Software: extend the metadata capabilities of Labview from National Instruments. Release open source software modules. | Enhance Labview so that contextual information can be associated with data at the point of capture; the metadata will be in a readily reusable format. |
| Pilot single virtualised storage area; test management rules to apply appropriate physical storage layer. | Work with F5 to implement their ARX file virtualisation system with Cloud Extender module. Seek feedback from users. |
| A core of RDM expertise at the University of Leeds | Identification of key roles and players in RDM linked to the training programme and ongoing mechanisms for support and advice at the institutional level. |
| Training programme for RDM. | Embedded training programme for multiple stakeholders covering core principles but with flexibility to include discipline specific examples. |
| Training materials | Training materials made available via JORUM. |
| Sustainability strategy: document(s) and processes | Agreement with senior committees on the way to embed and sustain RDM across the institution. |
| Events: at least two internal dissemination events; contribution to external events | We will take opportunities to disseminate project information and outcomes throughout the project and via multiple routes but this will include at least two dedicated dissemination events. |
| UoL web pages supporting | A set of web pages which are owned by one of the |

RDM: policy, guidelines,
signposting to further support

research support services at the University, which are well publicised and have a plan for updating and maintenance.

1.4 Overall Approach

1.4.1 Strategy

- The project will adhere to JISC's Project Management guidelines.
- Two key groups were in place at the University of Leeds before the RoaDMaP project: the Research Data Steering Group and Research Data Working Group. These two groups will provide oversight and advice for the project informing priority setting throughout; the project is part of a broader institutional strategy to address research data management infrastructure, practice and support. Regular project review will ensure the work packages and deliverables continue to be appropriate for both JISC and the institution.
- The RoaDMaP Project Team brings together all those directly involved in the project work packages; from this group, small working groups will be formed to undertake work on specific work packages. The groups will be coordinated by the Project Manager.
- Project reflections and outcomes will be made available regularly via the web site and blog; feedback will be encouraged from internal and external stakeholders.

1.4.2 Issues to be addressed

RoaDMaP addresses several issues highlighted in *Grant Funding Call 07/11*. RoaDMaP will:

- Pilot a research data management infrastructure in a large, multi-disciplinary HEI, reviewing the requirements of different disciplines and at different stages of the research process.
- Provide evidence for a business case for sustainability of RDM infrastructure, including preliminary costings.
- Agree and support an institutional Research Data Management policy, including capturing the mechanisms by which this is achieved.
- Explore research data management planning in case study groups – including customisation of the DCC's DMPOnline tool.

1.4.3 Scope and boundaries

- The project will pilot a RDM system (probably DataFlow); this may or may not become part of the RDM architecture for the University but will allow us to scope and investigate RDM system requirements.
- The research data management requirements of the case study groups will be assessed in detail; the project cannot undertake this level of analysis across all subject areas but can suggest a methodology for doing so.
- The project will pilot virtualised storage solutions as part of the institutional investigation into research data storage needs; the project cannot make recommendations about institution wide storage solutions without further work on assessing the scale of research data generation and current state of research data management practice across the institution (see next point).
- The project will not undertake a comprehensive research data audit to assess the size, format and location of research data currently generated by the University. However, the project will make recommendations for an approach and may take on implementation if additional resources are made available.

1.4.4 Critical success factors

- Buy-in from senior managers at the institution including an institutional Research Data Management policy.
- Formal data management planning becomes more widely understood and adopted across the institution for funded and unfunded research projects.
- A pilot RDMS which allows us to scope and investigate RDMS requirements and make a case for a fully supported RDMS post-project.
- A training programme which is embedded in the core offer of Staff and Departmental Development Unit / other institutional training providers and relevant for multiple subject disciplines.

1.5 Anticipated Impact

| Impact Area | Anticipated Impact Description |
|---|--|
| Maintain research excellence | Good RDM practice in the institution enabling greater promotion, citation and reuse of research data. Facilitate interdisciplinary research by increasing breadth of data sets available and fostering open access to data sets where possible. Evidence: case studies, policy, guidelines and training. |
| Maintain teaching & learning excellence | Greater availability of primary research data for use in teaching and learning. Evidence: examples. |
| Be more effective/save money | Appropriate storage mechanism for data for more efficient and effective storage, backup and retrieval. Risk of data loss decreased. Data to meet FOI requests. Evidence: feedback from service users, cost data. |
| Have a positive impact on wider society | Greater availability of research data - positive benefit on research efficiency and effectiveness. Research data available for consultation and exploitation by others - charities, SMEs and future generations of researchers. Better return on investment for publicly funded research. |
| Be ready for technology needs in the future | Pilot and test an RDM infrastructure. Investigate and facilitate interoperability – with internal research data management systems but also with the wider research data management repository ecology. Evidence: lessons learned from RDMS pilot, business case. |

Impact Areas : maintain research excellence; maintain teaching & learning excellence; be more effective/save money; have a positive impact on wider society; be ready for technology needs in the future.

1.6 Stakeholder Analysis

| Stakeholder | Interest / stake | Importance (H/M/L) |
|------------------------------|---|--------------------|
| University senior management | <ul style="list-style-type: none"> • Organisation strategy & policy • IT capacity • Management of institutional assets (research data) | H |

| | | |
|--|---|---|
| | <ul style="list-style-type: none"> • Institutional reputation and distinctive research profile | |
| Research Data Steering Group (acts as Project Steering Group) | <ul style="list-style-type: none"> • Institutional policy • Project findings and recommendations • External compliance • Sustainability of outcomes | H |
| Research Data Working Group (acts as Project Advisory Group) | <ul style="list-style-type: none"> • Project strategy and scope • Project progress • Project issues | H |
| RoaDMaP Project team | <ul style="list-style-type: none"> • Successful delivery of RoaDMaP work packages • Enhanced local RDM practice | H |
| Practitioners in RoaDMaP Project case studies | <ul style="list-style-type: none"> • RDM solutions and support, including discipline specific elements | H |
| Practitioners in university departments not directly involved in RoaDMaP Project | <ul style="list-style-type: none"> • Awareness of good RDM practice • Awareness of institutional RDM support • Tailorable training and support materials | M |
| Library staff | <ul style="list-style-type: none"> • Project lead • Increased understanding of library role(s) in RDM | M |
| External | | |
| JISC | <ul style="list-style-type: none"> • Funder • Project progress and outcomes • Project issues • Mechanisms for sharing outcomes with wider community | H |
| Projects in JISC MRD02 Programme | <ul style="list-style-type: none"> • Project outcomes • Shared issues | H |
| All researchers | <ul style="list-style-type: none"> • Access to and reuse of University of Leeds research data • Opportunities for research collaboration | M |
| DCC | <ul style="list-style-type: none"> • Expertise and support for work packages 4 and 7 • Results of piloting DMPOnline | M |
| Research funders | <ul style="list-style-type: none"> • Compliance with RDM requirements • Good RDM practice and advice, including by discipline | M |
| External commercial partners – F5 and National Instruments | <ul style="list-style-type: none"> • Expertise and support for work packages 5 and 6 • Project outcomes and recommendations • Software module for Labview | M |
| Other HEIs (staff in research support, repository, computing, library, staff training/development) | <ul style="list-style-type: none"> • Project outcomes • Opportunities to share experience and expertise | M |

| | | |
|---------------------|---|---|
| White Rose partners | <ul style="list-style-type: none"> • Strategic direction for repository and RDM services • Potential for shared staff development and IT infrastructure | M |
| General Public | <ul style="list-style-type: none"> • Access to publicly funded research | L |

1.7 Related Projects

- JISC MDR02 Projects
- DataFlow Project <http://www.dataflow.ox.ac.uk/> in the UMF Shared Services and the Cloud Programme.

1.8 Constraints

Particularly with the approach of REF, researchers may be less willing to become involved with research data management if the immediate and personal benefits are not apparent. We should manage this by emphasising the many benefits of RDM to researchers and disciplines and also the wider policy framework (institutional, funder, government) which drives the need to address RDM issues, including the need to ensure compliance with funder requirements which could impact on getting grants in the future.

1.9 Assumptions

The outcomes of the project should be applicable across the institution; we assume we will be able to secure input and commitment from a range of researchers and support staff in several subject disciplines.

Continuing buy-in and support from senior managers at the University.

1.10 Risk Analysis

| Risk Description | Probability (P) 1 – 5 (1 = low 5 = high) | Severity (S) 1 – 5 (1 = low 5 = high) | Risk Score (PxS) | Detail of action to be taken (mitigation / reduction / transfer / acceptance) |
|---|---|--|------------------|---|
| Staffing | | | | |
| Project staff are not seconded in time for the start of the project | 5 | 2 | 10 | Impact mitigated by input from a range of University staff not directly employed on the project. Renegotiate project start and end dates. |
| UoL staff are unable to dedicate sufficient time to the project due to other work commitments | 3 | 4 | 12 | Clear agreements on amount of staff time required to achieve deliverables. Flexible scheduling of project meetings / activities. Awareness of REF and other key commitments which will impact staff availability. |
| Staff members leave during the course of | 2 | 3 | 6 | 3 month notice period. Ongoing documentation of |

| | | | | |
|--|---|---|---|---|
| the project | | | | project to facilitate smooth handover |
| Organisational | | | | |
| Key stakeholders do not support the project | 1 | 5 | 5 | Key institutional groups are already in place with wide stakeholder representation. Senior level commitment to meeting EPSRC requirements provides a key driver. Ensure stakeholder feedback and review integral to project management. |
| Project team members do not deliver on time | 2 | 4 | 8 | Clear agreements and timescales for the project Effective project management and communication. Agile approach to changing goals. |
| Scope creep – stakeholders expect the project to address more areas than resources allow | 3 | 2 | 6 | Clarify scope from the outset. Identify what additional resources required to take on extra work. |
| Technical | | | | |
| Technical problems delay / prevent installation of DataFlow | 3 | 3 | 9 | Work closely with DataFlow team. Ensure internal IT staff have necessary technical skills to overcome issues. Keep RDMS options open; keep Eprints in the equation. |
| Technical problems delay / prevent installation of ARX file virtualisation system | 2 | 3 | 6 | Work with F5 to establish storage / infrastructure requirements for integration with ARX. Work with F5 to install / configure system. |
| External suppliers | | | | |
| Hardware or technical expertise not provided in timely manner | 2 | 3 | 6 | Clear agreements and timescales with suppliers. |
| Legal | | | | |
| Concerns about ownership of data / appropriateness of open availability | 3 | 3 | 9 | Ensure institutional IPR policy clear in relation to datasets. Ensure restricted access can be managed in the pilot RDMS. Clear guidelines in RDM planning on IPR issues, including audit trail. |

1.11 Technical Development

Preliminary work by stakeholders prior to the start of the RoaDMaP Project identified DataFlow (then known as ADMIRAL) as an appropriate platform for our pilot research data management system. University of Leeds supports a research papers repository, EPrints, and has expertise in this area. We will ensure the rationale for moving forward with DataFlow is sound and consider what role, if any, the existing EPrints infrastructure should play in research data management.

The software development work with National Instruments will be released according to JISC's Open Source Software Policy with guidance from OSSWatch.

1.12 Standards

| Name of standard or specification | Version | Notes |
|-----------------------------------|---------|--|
| SWORD | 2.0 | Emerging standard for system to system deposit |
| RDF | | Used by DataFlow |
| OAI-PMH qualified Dublin Core | | To maximise metadata reuse |
| PREMIS | | |
| METS | | |
| MODS | | |
| XML | | |
| DATAcite | | |
| accessibility standards | | |

Appropriate standards will be investigated as part of the project. As standards are adopted, we will document the rationale and publicise this on the project web site.

1.13 Intellectual Property Rights

IPR in project datasets is addressed by the University's IPR policy. We will address IPR issues in our work packages on data management planning, in our policy guidelines and in training materials. IPR is an identified risk and will be addressed in this context.

Project documents will be owned by University of Leeds but will be made openly available with an appropriate licence where possible.

2 Project Resources

2.1 Project Partners

| Partner | Role | Contact | Agreement |
|-------------------------|--|----------------------------------|--|
| Digital Curation Centre | Advice and expertise on data management planning and training requirements | Joy Davidson and Martin Donnelly | |
| F5 | Loan of equipment. Engineer time to implement the ARX file virtualisation | Alastair Parsons | F5's evaluation agreement - can be supplied to JISC on request |

| | | | |
|----------------------|---|--|----------------------------------|
| | system with Cloud Extender module (WP 6). | | |
| National Instruments | Software development for WP5 – LabView contextual metadata module | | Will be addressed as part of WP5 |

2.2 Project Management

2.2.1 Governance

Steering Group: UoL Research Data Management Steering Group – chair PVC for Research and Innovation (meet 4 times a year)

Advisory Group: UoL Research Data Management Working Group - chair Pro Dean for Research Performance, Visual Arts and Communication Faculty - (meet approx every two months). Reports to Steering Group.

RoaDMaP Project Team: UoL project team members - convened by Project Manager – meet every two months in alternation with Advisory Group: most business will be progressed by smaller project working-groups. Reports to Advisory Group and Steering Group.

Project working-groups: small, highly focussed groups linked to specific deliverables – convened by Project Manager in conjunction with work package leads (ad hoc meetings as required). Report to RoaDMaP Project Team and high level reports to Advisory and Steering Group.

Project Review Group: Project Director, Project Manager, Project Officer, WP5 & 6 Leads – regular meetings to review actions and keep the project on track.

2.2.2 Decision making

Recommendations will arise from the project working-groups and the Project Review Group. The Project Team will be given opportunities to comment on all outputs. The Advisory Group (RDWG) will comment on, agree and endorse project outputs. Where appropriate RDSG will make recommendations or raise issues with the Steering Group (RDSG).

2.2.3 Issue escalation

Issues will be discussed by the Project Review Group as they arise. If necessary, institutional issues will be flagged to the Advisory Group and, if required to the Steering Group; project issues will be raised with the JISC Programme Manager.

2.3 Project Roles

| Team Member Name | Role | Contact Details | Days per week to be spent on the project |
|------------------|------------------|---------------------------|--|
| Brian Clifford | Project Director | b.e.clifford@leeds.ac.uk | 0.5 |
| Rachel Proudfoot | Project Manager | r.e.proudfoot@leeds.ac.uk | 5 |
| Brenda Phillips | Project Officer | b.phillips@leeds.ac.uk | 5 |
| Tim Banks | WP4 Lead | t.banks@leeds.ac.uk | 2 |
| Graham Blyth | WP5 Lead | g.j.blyth@leeds.ac.uk | 1 |

2.4 Programme Support

Identifying areas of common interest with other projects in the programme.
Scoping metadata requirements.

3 Detailed Project Planning

3.1 Evaluation Plan

| Timing | Factor to Evaluate | Questions to Address | Method(s) | Measure of Success |
|---|--|--|--|--|
| Bi-Monthly | Project progress, senior buy in | Progress and issues. Continuing fit with institutional priorities. | Reports to RDSG or RDWG. | Project progresses to time; project deliverables. Feedback / direction |
| Ongoing | Sharing experience with other projects | What are the areas of shared interest? Which project do we need to talk to? Are we effectively sharing out outputs? | Monitoring programme blogs RoADMap blog frequency & variety. | Interaction with other projects. Feedback. |
| 6,12, 18 months | Buy-in from senior managers at the institution including an institutional Research Data Management policy. | Has the policy been agreed and endorsed? Is it widely known about? | Feedback from stakeholders. | Institution wide coverage of new policy. Enquiries and feedback on the policy. |
| Formative: ongoing Summative: April 2013 | A pilot RDMS which allows us to scope and investigate RDMS requirements and make a case for a fully supported RDMS post-project. | Can the pilot system accommodate dataset from different subject disciplines? What metadata standards should we use? What templates are required? | Pilot deposit process. Evaluation and feedback from stakeholders. | Working system. Positive feedback from pilot users. Lessons learned to feed into fully developed RDMS. Roadmap to extend RDMS across subject disciplines. |
| June12 – May 13 | A training programme which is embedded in the core offer of Staff and Departmental Development Unit and relevant for multiple subject disciplines. | Have we identified training needs? Are these addressed through the training programme? | Stakeholder feedback – evaluation forms. DCC input. | Training materials available in JORUM. Suite of training materials available at UoL linked with Staff and Departmental Development Unit programme. |

3.2 Quality Assurance

| Output / Outcome Name | Project reports and findings | |
|------------------------------|---------------------------------|--|
| When will QA be carried out? | Who will carry out the QA work? | What QA methods / measures will be used? |
| Draft stage | Project working-groups RDWG | Comment and feedback leading to revision. Versioning control. |

| | | |
|--|--|---|
| | | Formal sign off by Project Director, Project Manager and RDWG. For more substantial documents, or those with institutional recommendations, formal sign off by RDSG. |
|--|--|---|

| Output / Outcome Name | Institutional research data management policy and accompanying guidelines | |
|--|--|---|
| When will QA be carried out? | Who will carry out the QA work? | What QA methods / measures will be used? |
| Draft Committee stage Ratification by Research and Innovation Board | RDWG RDSG RoaDMaP team | Comment and feedback from appropriate committees. Ratification by Research and Innovation Board. Invite peer review of accompanying guidelines using case study contacts and external contacts in other RDM projects. |

| Output / Outcome Name | Case study approach | |
|---|--|---|
| When will QA be carried out? | Who will carry out the QA work? | What QA methods / measures will be used? |
| April 2012 (approach) April 2013 (reports) | RoaDMaP team Case study leads Other projects | Review from DCC. Available for comment by JISC RDM02 projects. Open documents for comment |

| Output / Outcome Name | Data management plans – application, pre-award – and suggested amendments | |
|---|--|---|
| When will QA be carried out? | Who will carry out the QA work? | What QA methods / measures will be used? |
| Ongoing 6 and, if time, 12 months into case study research project | RoaDMaP team DCC Research and Innovation Service | Application stage: debrief with key contacts when bid outcome known. Pre-award: review DMP efficacy six months into case study project Fit with institutional research application processes: review with Research and Innovation Service |

| Output / Outcome Name | Pilot RDM system including metadata needs assessment and tailored deposit templates | |
|-------------------------------------|--|---|
| When will QA be carried out? | Who will carry out the QA work? | What QA methods / measures will be used? |
| Post pilot data deposits | RoaDMaP team WP 5 lead Case study leads | Data available in and accessible from pilot system. |

| Output / Outcome Name | Labview modules | |
|-------------------------------------|--|--|
| When will QA be carried out? | Who will carry out the QA work? | What QA methods / measures will be used? |
| Early 2013 | WP5 lead Case study lead | Interoperability (specific standard?) Availability of Labview module code for reuse with appropriate licence. Technical documentation. |

| Output / Outcome Name | Virtualised storage | |
|------------------------------|---------------------------------|---|
| When will QA be carried out? | Who will carry out the QA work? | What QA methods / measures will be used? |
| Early 2013 | WP6 lead Technical support | Data is stored and appropriately accessible / retrievable. Feedback from sample users. |

| Output / Outcome Name | RDM training programme and supporting materials | |
|------------------------------|---|---|
| When will QA be carried out? | Who will carry out the QA work? | What QA methods / measures will be used? |
| 2013 | SDDU PM RDWG | Participant evaluation forms. Take up of materials (sign up to courses, traffic to online resources). Materials available in JORUM with suitable licence. |

| Output / Outcome Name | Sustainability strategy and institutional expertise | |
|-----------------------------------|---|--|
| When will QA be carried out? | Who will carry out the QA work? | What QA methods / measures will be used? |
| Ongoing May 2012 Early 2013 | RoaDMaP Team RDSG RDWG | RDM Policy and Guidelines in places with clear review mechanism. Business case and plan to extend pilot RDM agreed by RDSG and Research and Innovation Board. Evident points of contact for RDM information and advice. Governance infrastructure in place (RDSG or similar body); Faculty level RDM policies. EPSRC accept institutional plans (May 2012) for 2015 compliance deadline. |

3.3 Dissemination Plan

| Timing | Dissemination Activity | Audience | Purpose | Key Message |
|---|---|----------------------------|---|--|
| Monthly | Written and verbal updates (email, meetings). | RDSG & RDWG | Shared understanding of RoaDMaP goals and progress. | Key findings. Please give constructive criticism. RoaDMaP scope – including what issues <i>won't</i> be covered. |
| Project kick-off. When RDM policy adopted. | Reports. University-wide communications. | University Senior Manager | Awareness and buy-in. | Key findings. |
| Library meetings | Presentation / papers on project. | Library staff, researchers | Awareness of project. | Core areas addressed by |

| | | | | |
|----------------------------|--|---------------------------------------|--|--|
| (GTM, Library reps) | | | Encourage feedback and promotion to researchers. | project. Institutional policy. External drivers. |
| Summer 2012 Easter 2013 | Open invitation RDM lunchtime events | All stakeholders | Awareness of RDM at UoL. Awareness of Project. Feedback from stakeholders. | How to follow / contribute to project. Later event(s) – RDM system demo / DMP demo. |
| May 2012 | White Rose Research Information Forum: one day event | Research support staff, library staff | Exchange of experience across Leeds, Sheffield, York | Awareness of RoaDMaP. Interested in shared services / support. |
| Ongoing | Web, blog, participation in programme activity. | Projects in JISC MRD02 Programme | Share experience. Adopt similar standards where appropriate. | Project scope. Key findings. |

Throughout the project we will have the support of the Research Data Steering Group which has representatives from a number of different research and service areas; they will advise on dissemination opportunities and mechanisms on an ongoing basis. We will also seek assistance from the University's Communications Team.

3.4 Exit and Embedding Plans

| Project Outputs/Outcomes | Action for Take-up & Embedding | Action for Exit |
|--|---|---|
| Research Data Management Policy & guidelines | Endorsement by RDSG and Research and Innovation Board. Work with Research and Innovation Service to embed RDM as standard research practice. Identify key roles and expertise within the institution. | Sustainability plan. Policy review schedule. |
| RDM Training Programme | Readily available and publicised. Good feedback mechanisms. | Agree review and updating mechanisms. Clear ownership of training programme. |
| Change in researcher DMP practice | Clear articulation of RDM benefits – collate discipline specific examples/testimony. Publicise case study outcomes. Publicise DCC's DMPOnline tool. If possible, adopt standard DMP tool for the institution. Ensure guidance and training available. | Establish where ownership of DMP strategy at the institution lies. |
| Pilot RDMS | Develop exemplars with case studies/early adopters. Identify academic champions. | Cost and agree resource for ongoing development. |

3.5 Sustainability Plans

| Project Outputs | Why Sustainable | Scenarios for Taking Forward | Issues to Address |
|----------------------------------|---|---|---|
| RDM Policy and Guidelines | Supported by senior committees and institutional processes | Policy review timetable. Identified resource to review and update guidelines. | Awareness. Compliance. Support infrastructure. |
| Training programme and materials | Incorporated into central and departmental training. SDDU involved in design, review and delivery. | Regular evaluation. Identified resource to review ongoing RDM training requirements. | Keep up to date with good practice. |
| RDMS and storage | Essential to support local data capture and curation. Emphasis on interoperability to avoid siloisation / fit with external RDM infrastructure. | Clear ownership and governance for the system. Data planning and deposit becomes standard institutional practice. | Tailoring system to support the requirements. Ownership and ongoing development. Required storage capacity. |

Sustainability is a key success factor for the project. It will be addressed during the project and a more detailed Sustainability Strategy produced for endorsement by the Research Data Management Working Group and Research Data Management Steering Group. The project forms part of a wider, ongoing institutional strategy to address RDM and has already engaged a wide cross section of stakeholders; these features increase the likelihood of sustainable outcomes.

Appendices

Appendix A. Project Budget (see separate document)

Appendix B. Workpackages (see separate document)