



Data Management Plan (DMP) - Planning Checklist

Use this checklist to get started with creating a Data Management Plan (DMP). Note that NOT all sections or questions will be relevant to your project, use this as a starting point. Please refer to the full [DMP Question Guide](#) for additional guidance. You can also consult the [UTL RDM website](#) or contact rdm@utoronto.ca for support.

Sections	Questions for Preparing a DMP	Circle if you have gathered this information (Y-Yes / N-No / N/A-Not Applicable)
1. Administration	Name(s) and contact information for Principal Investigator (PI)(s), Co-Investigator(s), and, research assistant(s) who have access to the data	Y / N / N/A
	Is the main data contact (the person responsible for the data) identified?	Y / N / N/A
2. Data Types	Have you provided a description about the nature of the research data being collected (e.g. qualitative, quantitative, surveys, interviews, experimental, observational, computational, digitized text, images, etc.)?	Y / N / N/A
	Have you included a list and description of data formats?	Y / N / N/A
	Are you including data from other source(s)? If so, have these been described?	Y / N / N/A
3. Metadata & Documentation	Have you included Documentation so that others can understand the data (e.g. readme file, dictionary, labels or codelist, codebook, etc.)?	Y / N / N/A
	Have you provided a Description about how the data are organized (e.g. folder structure documentation, supplemental files, etc.)?	Y / N / N/A
	Have you provided a Description of the software and version used and / or required to read the data?	Y / N / N/A
	Is the metadata in a disciplinary standard format?	Y / N / N/A
4. Storage & Security	Have you considered where will the data be stored, (including any backups)?	Y / N / N/A
	Have you included an outline of procedures and protocols for access to original backups if needed to recover the data	Y / N / N/A
	Have you identified and performed anonymization practices for confidential and sensitive data in accordance with the University of Toronto's Research Ethics Board Data (REB) Security Policies ?	Y / N / N/A
	Are you keeping confidential and sensitive data in a secure server environment with access only via virtual private network or encryption operations?	Y / N / N/A
5. Sharing & Reuse	Are you planning to share the data in any form?	Y / N / N/A
	If sharing, are you aware of any legal or ethical restrictions to sharing the data?	Y / N / N/A



	If sharing, do you require a delay for the publication of the data, such as an embargo period?	Y / N / N/A
	If sharing, will the data be open?	Y / N / N/A
	If sharing, are there specific formats for sharing you are considering?	Y / N / N/A
	If sharing, do you plan to use a reputable repository (e.g. UofT Dataverse, Dryad, or disciplinary repository, etc.)	Y / N / N/A
	If sharing, have you considered what end-user licence to apply to the data for reuse? (e.g. Creative Commons - Public Domain (no attribution); CC BY 4.0 (attribution), etc.)	Y / N / N/A
	If restricted, have you looked at options for making the data more open (e.g. anonymisation, share project description or metadata only, etc.)?	Y / N / N/A
6. Retention & Preservation	Will you be keeping all the data?	Y / N / N/A
	If not keeping all data, will some data be destroyed?	Y / N / N/A
	If keeping all data, have you planned for any long-term archiving?	Y / N / N/A
	If planning to archive, is someone on the project team or a particular department planning to be responsible and available for questions should they arise?	Y / N / N/A
	If planning to archive have you considered what format(s) the data will be stored in for long-term access and preservation?	Y / N / N/A
	If planning to archive, do you have the documentation and accompanying files packaged for long-term access and reuse by others?	Y / N / N/A