

RESEARCH DATA MANAGEMENT OFFBOARDING CHECKLISTS

The purpose of these checklists is to serve as a guide for Brown researchers closing out a project or leaving Brown by orienting them to existing policies, guidance, and tools available at Brown for research data management, sharing, storage, transfer, and retention. These checklists are specific to offboarding related to research data and do not reflect all offboarding requirements related to compliance boards and committees and closing out sponsored projects.

Checklist 1: Closing a Project

Review Project and Granting Institution Requirements

The external sponsor of your project may have project closeout requirements related to research data. If you have non-federal funding, check the terms and conditions of your specific award. If you created a data management plan for your project, review your plan and abide by it.

Resources:

- [Policy on Terms and Conditions in Sponsored Research Agreements](#)
- [NSF Data Sharing Policy](#)
- [NIH Data Sharing Policy](#)
- [NIH Public Access Policy](#)
- [DoD Public Access Plan](#)

Review Brown Research Data Management Policies and Guidelines

Resources:

- [Brown Research Data and Research Materials Management, Sharing, and Retention Policy](#)
- [CIS Data Removal Recommendations](#)

Ensure your Data are Stored and Shared Appropriately

See the “Review Data Storage Guidelines and Resources” and “Review Data Sharing Information” sections of the [Research Data Management Onboarding Checklists](#).

If Conducting Human Subjects Research, Ensure All Research Data Collection Activities Are Complete and All Data Are Fully Anonymized

See the HRPP [Research Study Closure Request](#) and associated guidance for more information.

Checklist 2: Leaving Brown

Review Brown Data Management Policies, Guidelines and Recommendations

When leaving Brown, Principal Investigators (PIs) have the right to access and take copies of Research Data they generated while at Brown. Students, postdoctoral trainees, and other researchers must receive permission from their PI before making copies of any Research Data they generated while at Brown and can contact data_management@brown.edu for help making these copies. Before leaving Brown, Brown researchers must give their physical lab notebooks and transfer ownership of their electronic lab notebooks (ELNs) to their PI. If a PI is closing their lab, they should contact the [University Record Manager](#) for guidance related to data storage and data disposal.

- **Resources:**

- [Brown Research Data and Research Materials Management, Sharing, and Retention Policy](#)
 - [Record Management Transition Plan for Leaving a Position](#)
 - [CIS Data Removal Recommendations](#)

Transfer Research Data and Materials

If applicable, transfer research data and materials from Brown to your new institution.

- **Initiate a Data Use Agreement (DUA)**

- A DUA governs access to and treatment of data provided by an outside organization to Brown for use in Brown research, or provided by Brown to an outside organization for use in its research. You may need to initiate a DUA to transfer your research data from Brown to your new institution. Please email dua@brown.edu with questions.

- **Resources:**

- [Office of Research Integrity Research Data Website](#)
 - [Data Use Agreement Request Form](#)
 - [Data Use Agreement Guidance for Researchers](#)

- **Initiate a Material Transfer Agreement (MTA)**

- An MTA is a written contract between a provider and a recipient of research material. If you are interested in transferring research materials from Brown to your new institution, fill out [this questionnaire](#) and send it to Brown Technology Innovations at tech-innovations@brown.edu.
- For further information on MTAs, please contact [Len Katzman](#) in Brown Technology Innovations.

- **Resource:**

- [Material Transfer Agreements](#)

- **Review Data Transferring Resources**

- For secure transfer of large data files, check out [Brown's Globus Subscription](#) or [CCV BrownBox](#).

If you are a BioMed Faculty Member, Review Biomed Research Administration (BMRA) Resource

Biomed faculty members should review the [Faculty Departure: BioMed Checklist](#).