

# Building The Business Case And Funding Advocacy For Data Management Services

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## ABSTRACT

In this hands on workshop we will address the tools, models and process used when building the business case for data management services including those relating to, research data, preservation, curation, discovery and access. We examine and test the use of existing tools with real world institutional problems and potential future tools/services.

## Keywords

Research data management; Sustainability; 4C project; CESSDA SaW; Business case; Cost-benefit advocacy.

## 1. INTRODUCTION

In the current economic climate it is widely acknowledged that a robust business case is a prerequisite for a sustainable data management service. It is also becoming clear—particularly in the case of research data and the associated funder mandates—that data management needs to be considered holistically; all aspects of the data life cycle from the active creation phase through to preservation/curation (and ultimately disposal) affect the costs and benefits and need to be accounted for.

A number of tools and modelling techniques have emerged in recent years that allow practitioners to estimate costs and benefits which in turn help in the formulation of a business case. However, it is not clear if these are fit for purpose in this holistic context. Past 4C<sup>1</sup> work has shed some light on cost and benefit estimation techniques that are particularly suited to the post data publication phase, but these haven't been applied to the whole research data management (RDM) lifecycle. We are by no means sure if they can be applied in this fashion. And if they can't be used, nor do we know why in particular they may not be appropriate.

The CESSDA SaW project<sup>2</sup> is funded by the Horizon 2020 programme. Its principal objective is to develop the maturity of every national data archive service in Europe in a coherent and deliberate way towards the vision of a comprehensive, distributed and integrated social science data research infrastructure, facilitating access to social science data resources for researchers regardless of the location of either researcher or data. The funding advocacy toolkit being developed as part of the project will draw on a range of projects and studies looking at benefits, costs, return on investment and advocacy including inter alia 4C, Keeping Research Data Safe (KRDS), and a range of economic impact studies.

## 2. SCOPE

In the first part of the workshop we wish to explore which tools and models—in particular the CESSDA SaW project funding and cost-benefit advocacy toolkit and those tools and methodologies researched over the duration of the 4C project—might be applicable/appropriate when it comes to formulating a business case. It will be conducted with input from those who have put together business cases for data management services, both complete services and particular component services. We will explore their experiences, how they articulated their business cases and see if the lessons learned could benefit others. We will also address the problems of what it is that's stopping people from producing business cases and local barriers to progress.

In the second, more practical part of the workshop, in small groups we will work through institutional problems provided by attendees. We will test some of the current tools, identify the practical steps needed when using them to produce business cases and highlight any problems that might be encountered when using them in particular contexts. More experienced practitioners will be on hand to support participants in using the tools.

## 3. INTENDED FORMAT

Half day workshop

### Session 1

- Introduction to the workshop
- Examination of the current tools with provocations from current users regarding their fitness for purpose
- Examples of real world business cases and lessons learned

### Session 2

- Group work—practical application of current tools and methods to particular problems brought in by participants

### Session 3

- Summing up

## 3.1 Planned outputs

After attending participants should have:

- A clear comprehension of the current understanding/ thinking around business cases for data management services
- Practical strategies for producing business cases with current tools in real world situations
- Understand the purpose of CESSDA SaW and the toolkit
- An indication of areas for further investigation with a view to the future provision of modified tools and

<sup>1</sup> <http://4cproject.eu>—4C is a recently completed FP7 European project—a Collaboration to Clarify the Cost of Curation

<sup>2</sup> <http://cessda.net/CESSDA-Services/Projects/CESSDA-SaW>

services to address the end to end data management lifecycle

### **3.2 Speakers**

The leads for the workshop will be William Kilbride (DPC), Neil Beagrie (CESSDA SaW) and Paul Stokes (Jisc). Other Jisc / 4C / CESSDA SAW project partners will contribute and, if possible, affiliate stakeholder organisations will also present.

### **3.3 Intended Audience**

Practitioners, Managers and Funders—this has applicability at all levels and should be of practical, tactical and strategic interest.

The workshop is free.

### **3.4 Programme Strand**

Aspects of this workshop straddle both the research and practice categories of the conference. However, it is intended to be primarily a practical workshop addressing the application of currently available tools and models to real world costing and

business case scenarios. The identification of gaps and areas for further development addresses the research category.

It impacts upon various iPRES themes:

- Preservation strategies and workflows: preservation planning, access provision, risk analysis;
- Digital preservation frameworks: Digital preservation requirements and implications for the system lifecycle, business models, sustainability and economic viability.
- Infrastructure, systems, and tools: preservation resources

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