**Meaningful AND Measurable**

**Project Partners Guide to Research Data**

This document provides guidance and information for project partners on safe and secure collection of data and information across all of the aspects of the Meaningful AND Measurable project. It outlines the different types of data and information gathered during the process, and the ethical procedures relating to safe and secure collection, storage and dissemination of data.

Outlined below are the various aspects of the work and the various aspects of project data.

**The Action Research Projects**

These are the 8 local projects which are taking place within the partner organisations. Data within these projects falls into two categories.

1. Data from existing sources used by partner organisations

Use of information or data already gathered by partner organisations is classed as service audit. The relevant representatives of the partner organisations have agreed to:

* Adhere to all internal relevant procedures for ensuring anonymity and confidentiality of all information relating to staff within their organisation when sharing information with academic mentors and the wider project team.
* Adhere to all internal relevant procedures for ensuring anonymity and confidentiality of all information and data relating to service users (and others who would be identifiable e.g. carers) when sharing information with academic mentor and the wider project team.
* Ensure all data and information that any project or academic partners share will be stored securely and treated with respect.

2. New data gathered

Some of the project partners are gathering new data. “New data” is any record (written or audio recorded) of:

* One-to-one interviews/ conversations/ discussions with colleagues within organisations
* One-to-one interviews/ conversations with service users
* Focus groups or discussions with colleagues or service users

If you are collecting new data, you will need to apply, with support from academic mentors, for ethical approval from the University of Edinburgh School of Health in Social Science Research Ethics committee. Please speak to your academic mentors or Sarah Keyes about this process – we have templates ready which you will be able to adapt for local use, though note you will need to leave two weeks between applying for ethical approval and collecting any data.

Checklist for deciding whether new data is being gathered

If you answer yes to any of the questions below, then you should be seeking advice from your academic mentor about further ethical approval:

* Do the conversations you are having involve service users or carers?
* Are you going to be recording the conversation or meeting in any way (written, audio or visual)?
* Are you going to be feeding the outputs of the conversation or meeting back into the Meaningful AND Measurable project in any way OTHER than:
  + Your personal reflections?
  + Discussion with other partners or the academic team (as covered by the section below on collaborative inquiry)?

**Collaborative Inquiry**

This is the process, managed by the academic team, is capturing evidence across all 8 project partners.

Data in this aspect of the work is:

* Written notes
* Audio recordings (including telephone conversations)
* Organisational evidence
* Outputs of discussions e.g. flip charts
* Photographs or audio visual recording

This will be collected in the following forums:

* Data Retreats
* Knowledge Exchange Events
* Any discussion involving project partner(s) and/or the academic team e.g. partners within the same organisation or with partners in other organisations, academic team meetings, meetings between the academic team and project partner(s).
* Personal reflections from any project/ academic partner

A copy of the consent form and data sharing agreement completed at the data retreat can be found in appendix A.

*NB the guidance we are giving you in this document is different from that in an e-mail from Sarah Keyes on 19/02/2014 – please don’t record conversations with anyone outside of the core project team without completing a formal consent process: this will enable us to ensure that everyone who is well informed about why their views or experiences are being recorded are well informed about the work and why we are involving them.*

***Conversations that aren’t being recorded***

If the conversations you are having with others in your organisations are not formal data collection (see above), it is still important to make sure that people are a) informed about Meaningful and Measurable and why you are having conversations with them and b) know how anything they tell you will be used by yourself and within the wider project.

Please use:

1. The “project briefing document” to inform people about the overall work
2. The “local briefing document” template to inform people about what is taking place within your organisation. This includes a space for each project partner to insert information on their Action Research Project as well as a checklist for project partners.

***Use of data in project outputs***

In order to balance our participatory approach to developing project outputs with a realistic approach to consulting with people whose views were used in the outputs (i.e. we need to be realistic about our time frames and the to-ing and fro-ing that would be necessary to check with everyone). We have developed this important aspect of developing the outputs of the work to say that:

* All core project partners will be given the opportunity to review project outputs
* If project partners think that their organisation or someone within their organisation is named in a way that could be problematic, they will alert the academic team who will follow up as appropriate
* People out with the core project team who are involved in collection of new data will be given the opportunity when signing the consent form to opt to see any project outputs in which they might be identifiable

**Appendix A**

**Meaningful AND Measureable: project partners**

**Sharing information: Consent Form**

**Section one: sharing of information and data from individual organisations with the wider project**

This section relates to the information and data that individual partner organisations will be sharing with academic mentors, the wider academic team and other partner organisations.

|  |  |  |
| --- | --- | --- |
|  | **YES** | **NO** |
| As a Project Partner, I confirm that I will follow all internal relevant procedures for ensuring anonymity and confidentiality of all information relating to staff within my organisation when sharing information with my academic mentor and the wider project team |  |  |
| As a Project Partner, I confirm that I will follow all internal relevant procedures for ensuring anonymity and confidentiality of all information and data relating to service users (and others who would be identifiable e.g. carers) when sharing information with my academic mentor and the wider academic team |  |  |
| I agree to ensure that all data and information that any project or academic partners share with me will be stored securely and treated with respect |  |  |
| As a project partner, I agree to abide by the principles for sharing information and data that will be finalised following a discussion with all project and academic partners at the Meaningful and Measurable data retreat (21st-22nd January 2014) |  |  |

**Section two: capturing evidence and sharing learning**

An important aspect of the Meaningful and Measurable project is the process of capturing the process of learning within and between organisations. This could take many formats: notes taken by academic mentors or project partners during meetings; notes taken during data retreats; recordings of discussion at data retreats; photographic evidence that captures work within the project; flip-charts from discussions.

All of the evidence that is captured will be held in a password protected database. If the evidence is used at a later date e.g. in project briefings, reports or journal articles, all project partners will have an opportunity to review any documents prior to them being made public.

|  |  |  |
| --- | --- | --- |
|  | **YES** | **NO** |
| I agree to the academic team making observational notes and audio recordings during the data retreats, subject to consent from all present. |  |  |
| I understand that these notes/ recordings will be stored securely and in accordance with the Data Protection Act. |  |  |
| I understand that, prior to any information or data gathered at the data retreats being used in publications or presentations I will be given the opportunity to review the content. |  |  |
| I confirm that any notes that I make during the data retreats that I share as evidence will be stored securely. |  |  |
| I confirm that if I wish to say something that should NOT be recorded or used as data in any way I will inform the academic team and they will ensure it is not recorded. |  |  |
| I agree to abide by the principles for sharing information and experiences that will be finalised following the discussion at the data retreat on January 21st. |  |  |

**Partner organisation:**

**Name and signature:**

**Academic team signature:**

**Please note any issues relating to sharing of data or information that have not been covered within this form and agree strategy for addressing them:**

**Meaningful AND Measurable Project Partners’ Data Sharing Agreement**

Activity involving existing data within the partner organisations is classed as an audit.

If any of the partner organisations are collecting new data, they will ensure that they have ethical approval for this.

All organisations to ensure they have adhered to internal regulations around confidentiality/ anonymity.

Project partners are also asked to capture evidence around the action research projects. All evidence will be handled sensitively and within the data protection act.

The data retreats will be safe places where people are free to share experiences with confidence that what is discussed at the retreats remains confidential. This includes discussion sessions and informal networking during breaks.

Capturing Evidence at data retreats

The academic team are capturing evidence throughout the data retreats. All partners to complete a consent form for this process, including clarity that if people want to speak “off the record” then they will tell the team, either at the time or retrospectively.

Development of project outputs will be a participatory process: all partners will be given a chance to review outputs prior to wider circulation.

It is really important that the work within the project is being communicated as the project develops. This will only be done through: KE events; Project Briefings; Blog; E-mails from project account

The nature of the work means that it will be impossible (and not necessarily desirable) for organisations to remain anonymous when the work is being disseminated. Participation in development of outputs will be essential, including opportunities for partners to disguise references to their organisations.

All information to be shared with a wider audience to be sent to meaningful.measureable@ed.ac.uk Information will then be circulated as appropriate. All partners to indicate on what level they would like any information to be circulated

All project partners are free to share any documentation (e.g. baseline summaries) about their organisation within the organisation, but should not share documentation about other partners without permission.