



Understanding Society Strategic Oversight Board Terms of Reference V4, November 2025

1. Introduction

Understanding Society is a flagship longitudinal household panel study of the UK population. It provides valuable new evidence about the people of the UK: their lives, behaviours and beliefs, and enables researchers and policy makers to identify the changing nature of society and its impact on different population groups. Understanding Society receives significant public funding as a resource of major importance for social science and wider research. As such, it should be managed, promoted and used so as to maximise its benefit as a long-term scientific resource of importance both nationally and internationally. The rights and interests of the research participants must be protected whilst the long-term value of the Study is realised.

The Strategic Oversight Board's role is to advise the Study PI and team on the conduct of the Study to maximum public benefit from this major research resource and to safeguard the future of the Study.

2. Overview

The Strategic Oversight Board, will represent the range of stakeholders who engage with the Study and will advise on the strategic direction and operational delivery of the Study. The broad remit of the Board will be to review and advise the Study team on:

- (a) how well the Study is managed, curated, developed, and enriched;
- (b) how well the relationship with participants is managed and that participants' rights and interests are respected;
- (c) access arrangements for the resource so it is suitably managed and maximised for public benefit;
- (d) the procedures to monitor progress towards the fulfilment of the Study's key aims and objectives and to monitor risks; and;
- (e) the team's plans for the long-term future of the Study.

3. Membership

The Board will include 10-12 external members invited to cover the breadth of stakeholders – in terms of sector and focus – relevant to the Study. Members of the Board will be appointed to staggered terms of three years. No individual may serve more than two consecutive terms. The

initial members of the Board will be divided into equal sized groups each to serve terms of two or three years.

The Chair of the Board should serve a three-year term and be eligible for one additional term after which he/she will leave the Board. The Chair normally should have served as a member of the Board at least one year prior to taking on the role of Chair. The Chair has particular responsibility for providing effective strategic leadership, encouraging high standards of propriety and ensuring that the Board, in reaching decisions, takes proper account of guidance provided. The Chair should ensure that the Board meets at regular intervals twice a year, and that the minutes of meetings accurately record the decisions taken and, where appropriate, the views of individual Board members.

The Chair will be appointed by the Study team, and work with the PI to identify other Board members based on an open annual call for new members. The full Board will advise on gaps in members' areas of expertise and overall balance but not propose individual members.

The Study Director (PI), Deputy Director and Executive Director will be ex officio members of the Board.

4. Specific Terms of Reference

The Strategic Oversight Board for the UK Household Longitudinal Study (UKHLS) is the body with the responsibility to review and advise on the Study's management to ensure the team is leading it effectively to develop and maintain it in a manner that maximises its benefit as a long-term scientific resource of importance both nationally and internationally. To discharge this responsibility, the Board should review and advise on:

- the strategic conduct of the survey;
- progress, reviews plans and risks to the Study;
- strategic priorities to ensure that the Study continues to be developed and enriched in ways that enable it to provide information which will allow the scientific and policy communities to address a wide range of issues of national and international importance;
- processes that have been set up to ensure the content of the Study achieves a wide and balanced representation of the range of academic disciplines and policy concerns and to enable interdisciplinary research within and beyond the social sciences.
- ways to maximise the possible range of academic disciplines and policy interests that are well represented among the researchers who use the survey, and that communication among researchers using the Study is promoted efficiently;
- procedures to protect participants' rights and interests,;
- plans for access to the resource and to make recommendations for actions to improve the public benefit derived from the Study, and to maximise the opportunities which researchers have to use the Study;
- the public and scholarly dissemination of the results of research conducted using the Study by a wide range of external researchers and to make recommendations for actions by the Study team designed to widen such dissemination to the fullest extent;
- plans for the use being made of the Study for training researchers by the Study team and to make recommendations for enhancing such use;
- the study team's strategic long-term plans for the future.

The Board will review the Study's strategic highlight report of progress against goals and monitor the Study's Benefits Realisation Plan, Risk Register, and Data Access Strategy. It (or a delegated subgroup) will act as arbitrator in any disputes/complaints about data access decisions.

5. Board operations

The Board will normally meet twice a year. The Chair and/or members may call extra meetings at the Chair's discretion. Reasonable expenses associated with membership of the Board (travel, subsistence, etc) will be paid by the Study budget.

All papers and discussions at Board meetings should remain confidential (unless they are noted as documents published elsewhere). Secretariat for the Board will be provided by the Study team. Board meetings may be recorded solely for the purpose of ensuring accuracy in the preparation of the minutes. Recordings will be securely stored and deleted once the minutes have been reviewed and formally approved. Confidential minutes from the meetings will be shared with ESRC. ESRC staff are invited to attend Board meetings as observers.

It is expected that the Board will, at all times, seek to resolve any differences that arise between Board members, relating to its current activities and future actions and which fall within the broad remit of the Board, by reaching a consensus view. If this cannot be achieved, the Chair of the Board may ask members to resolve issues by majority voting, where each member's vote will have equal weight. In the event of a tied vote, the decision of the Chair will be final.

Terms of Reference will be reviewed by the Board annually and shared on the Study website, along with Board membership.

The Board may conduct part of the meeting without Study team members if required and will escalate concerns to the ESRC (via the Investment Manager) if appropriate. Similarly, the Study team may seek advice from the Board, for example on funding proposals, without the Funder's observer being present.

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