![Understanding Society - The UK Household Longitudinal Study logo]

Understanding Society Data User Group
Terms of Reference

1.   Aims and Objectives

Understanding Society is a flagship longitudinal study of UK households. It provides valuable new evidence about the lives, behaviours and beliefs of UK residents and their families, over time and across their life course. Information is collected on multiple topics repeatedly from the sample members, which enables researchers and policy makers to identify the changing nature of society and its impact on different population groups.

To fulfil these scientific objectives a vast amount of information is collected and processed (nearly 1000 variables). In addition to the data collected, a lot of contextual information is provided post data collection such as identifiers for family members also in the sample, geographical identifiers to allow linking geographical level data to the survey data, imputed summary individual and household level income variables, other derived variables such as summary scores of question modules that belong to a scale (e.g., GHQ & SF12 summary scores), number of dependent children, type of household and so on.

While a substantial amount of data checks are conducted in-house, some are identified later by data users who are able to look into specific sections of the data in more detail (based on their own research analysis interests and needs). We would like to formalise this process by constituting the Data User Group (also referred to as the Group) comprising of experienced data analysts familiar with the Study who will be granted early access to the data to enable quality checks during the pre-release processing stage and, to allow for enhancements and improvements to the next Wave of data before release.

2.   Membership criteria

i.   The Group will represent data analysts who are already familiar with the Study and have experience with analysing the data for research and teaching purposes. They should be able to demonstrate that they have a good understanding of data analysis and data processing/management practices. Ideally the Group will consist of a range of people that represent the different areas of the Study to enable checks across the different areas covered in the Study.

ii. Group members will be appointed for 3 years, after which members are given the opportunity to reapply in accordance with the selection process. Members can leave the group with prior notification.

iii. Group members must be affiliated to an institution to conform to our security controls and Early Access Agreement T&Cs[1].

3. Remit

The remit of the Group will be to:

i. (Required) Comment on data quality for data being prepared for release. In the first instance, the data for which quality checks are sought is the main annual survey data which is released in November of each year. Efforts will be made to ensure equitable distribution of work and matching of data type with research interest and expertise of the group member.

ii. (Optional) Comment on data quality for other datasets such as event history data and child data. These optional checks are in addition to the main annual survey data.

iii. (Optional) Suggest data enhancements and comment on online resources and support documentation. This could include requests or suggestions such as creating new derived variables, suggestions for data harmonisation, adding variables linked from external datasets, etc.

4. Benefits of membership

i. Early access to the data. Group members will receive early access to the EUL version of the pre-release data excluding derived income variables and weights 10 weeks before the data are available via the UKDS, and the option to receive the final version of the data deposited with the UKDS 4 weeks before the data are released.

ii. Group membership affiliation status which will signal their expertise in high quality complex survey datasets and topic expertise.

iii. Early access to Understanding Society datasets. In addition to the main annual survey data, group members may have the opportunity to gain early access to other Understanding Society datasets.

iv. Early access to new online resources. Group members will have the opportunity to explore and provide input into online resources designed to improve documentation and understanding of the data.

5. Special Terms of Reference

i. Group members will be provided early access to the End User Licence version of the pre-deposit data, post the processing and cleaning stage. In the case of the

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[1] See External Request for Early Access Agreement form and cd171- Research Data Handling Guide

main annual survey data, this version will include everything that will be available in the EUL version of the released data *except* for derived income variables and weights. This will be made available around mid-September (6 weeks before deposit), with expectation of a data quality report to be submitted within 2 weeks of data receipt. [Note, this pre-release data conforms to the internal designation of (V3) version of the data without derived income variables and weights. The Data Team will check to ensure that all Special License variables have been removed.]

ii. Data will be supplied in Stata format as default and SPSS format only if requested. R users will be provided with guidance on how to convert the data. Data formats provided are referenced in the Early Access form.

iii. This pre-release data will be provided to the Group members every year for 3 years to enable them to benefit from economies of scale as they will be able to re-use of any syntax they create to run their quality checks.

iv. At this point the new documentation will not be ready to supply with the pre-deposit data but group members will be provided an overview of new modules in that wave and will be asked to prioritise checks of these modules. They will also be provided some suggested checks although they will have a wide latitude in the types of checks they run.

v. Group members will need to commit to the 6 weeks pre-deposit timescale of mid-September to the end of October each year for 3 years and be aware that expectations on turnaround time for feedback will be quick.

vi. Group members will need to sign and adhere to the Early Data Access Agreement prior to receiving access to the pre-release data.

vii. Group members should be aware there can be limitations with pre-release data and all data are subject to possible change until it has been released through the UKDS[2].

viii. Group members who complete the data quality checks within the 2 weeks will have the option to receive early access to deposit ready EUL data at the point of deposit, i.e., at the beginning of November, 4 weeks before general release to the research community. So, this will include the income and weights data.

ix. Any analysis carried out on the pre-release data must be replaced with the released data when it is available through the UKDS. Any resulting publications must only be based on research conducted on the released data, and only made publicly available after the data has been publicly released.

x. Group member will need to destroy pre-release data and sign a Data Destruction form (access will, by default, be granted to pre-release data until the end of November of that year unless the group member makes a case for temporary continued access).

xi. Any data enhancements suggested by the Group will be discussed at the subsequent quarterly internal data improvement group meetings.

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[2] Released data is the data the research community will receive when it is released to them at the end of November each year through the UKDS. Group members gain access to the data 4 weeks before the research community at the beginning of November of each year. In rare situations the data can still change before release, hence group members must switch to the released data when it is available.

6.   How the Data User Group will operate

Members of the Group will be recruited through an open call via X (formerly Twitter), LinkedIn, newsletters and direct mail including the Understanding Society User Support Forum where data users post questions. Those who are interested in becoming members of the Group will be asked to complete a short online application form. They will be selected by an internal selection committee to include a range of experienced data users that represent the breadth of topics covered in the Study. After 3 years they will have the opportunity to reapply for group membership in accordance with the selection process.

Contact with Group members will be via email or zoom call, depending on their personal preference. An (online) meeting with all the Group members will be held once a year. Group members will be sent the data to perform pre-defined major quality checks and make suggestions. They can email their response to us or have a follow up zoom call with a member of the Understanding Society Outreach team.

The **Data User Group** will be managed by the Outreach team with help from the Data team, with oversight for the Group provided by the Associate Director for Outreach.