Childlight Research Project Closure Guidelines: Metadata

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Childlight Global Child Safety Institute

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1 Introduction

At some point in the lifecycle of a research project, the actual data analysis will come to an end, and findings will be published. However, responsibilities around data management and output management do not end with the research – it is important to record, share, and archive data for the long-term. Research project closure ensures that data are managed in line with FAIR principles, outputs are appropriately shared (increasingly with a data availability statement and access to the open datasets that informed the paper), and project records are archived securely for audit, transparency, and reproducibility.

Closure procedures also contribute to Childlight's commitment to research quality, governance, and continuous improvement. This policy sets out the processes and minimum requirements for closing a research project within Childlight.

2 Definitions

Research Project A distinct body of research activity undertaken by Childlight. This may take the form of:

- Searchlight projects: Research projects culminating in publication on the Searchlight dashboard.

- Into the Light (Index indicator projects): Indicator-specific projects contributing to the annual Into the Light global index.

Dataset A structured collection of research data generated or compiled during a research project. Datasets may be archived openly via DataShare or under closed access in DataVault, depending on sensitivity.

May include raw data, processed data sheets, codebooks, data extraction sheets, any analytical code used.

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Closure	The formal process by which a research project is marked as complete, its outputs are finalised, and associated data and information are archived in line with Childlight and University of Edinburgh standards.
Outputs	Published products of research including Searchlight publications, journal articles, reports, good practice guides, and other knowledge translation materials.
Research Project Information	Documentation generated during the lifecycle of a research project, including but not limited to protocols, ethics approvals, project management files, governance records, correspondence, and audit trails.

3 When is a Project Considered Closed?

Childlight projects are broadly split into two categories: those that are published as a part of Searchlight, and Index indicator projects that contribute to Into the Light.

Searchlight projects
A project is considered closed when its outputs have been published on the Searchlight dashboard. The Project Closure Checklist (Appendix 1) must be completed within one month of publication.

Into the Light (Index indicator projects)
Each indicator area functions as a specific research project, with its own set of research workflow and project management files. However, the spectrum of index indicator research projects functions collectively as one ongoing research project, with annual review and publication aligned to the global index. Closure only occurs when the indicator area is no longer included in the index, this may occur after multiple years of index publications. Until that point, annual audits will be conducted by the Quality and Compliance Manager, and closure requirements (as outlined in Appendix 1: Project Closure Checklist) apply only when the indicator is retired from inclusion in the Global Index.

Note: On occasion, a project contributes to both Searchlight and Into the Light. In these instances, the closure process for that of the longer duration will apply.

The remainder of these guidelines provide further background information to assist researchers with understanding the actions set out in that Project Closure Checklist.

4 Data Retention

Data retention plays an essential role in ensuring that research remains transparent, reproducible, and useful to others beyond the life of a project. Retaining data and project information safeguards against loss, enables future re-use, and provides a clear record of how research was conducted. Retention allows Childlight to preserve:

- Data which supports a research output (journal article, Searchlight publication, etc.).
- Data which would be difficult for someone to re-collect.
- Data which is likely to be of interest to other researchers in their work.
- Information that provides a record of how the research was undertaken and decisions along the way, supporting audit and accountability.

Retention Duration

The minimum duration to retain all Childlight research information and data is three years from the end of the project. This aligns with the University of Edinburgh Research Data Management Policy. Where funders, data owners, or legal agreements require longer retention, those requirements take precedence. Researchers should therefore ensure they are acting in line with the terms of the partner contracts, as reflected in the Data Management Plan.

Retention of Research Data Sets

Research data will have different retention needs, depending on the data grade. Retention and sharing mechanisms are established in the Data Management Plan put in place at the start of a research project and should be referred to by the lead researcher at the end of the research project.

- Grade 1 Data: Retain openly via DataShare, under a Creative Commons licence.

- Grade 2 Data: Retain with closed access in DataVault.

Some research projects may already have research data shared externally through DataShare, for example, if a research project has had multiple outputs into the Searchlight dashboard or publication. If this is the case, lead researchers must confirm that the DataShare or DataVault entries are up to date and that access and usage conditions are clearly recorded.

Note: In limited instances, an embargo or specific restrictions may be used to manage access to Grade 1 datasets through DataShare. This may apply, for example, if the data could be used for perpetrator tradecraft. Such requirements will be agreed with data owners to mitigate risks and set out in the Data Sharing Agreement.

Retention of Project Information

Alongside research data, each project will generate documentation and records that provide important context for the research and may be of value to others working in the field. These include governance materials, decision-making records, and supporting documents that create a reliable audit trail and enable others to understand how research was conducted. Childlight retains such data:

- <u>On OSF (Open Science Framework):</u> Store research protocols and other relevant project documents (e.g., DMPs, ethics approvals, consent forms, and other governance records). Embargoes may be applied where justified (e.g., disclosure of offender methods).

- <u>On SharePoint:</u> Project information that has been stored in a Childlight SharePoint folder should be moved to an Archive folder. Researchers are advised to review the structure and documentation in the SharePoint folder and ensure this is up to date, in a tidy structure, with clear file names. The title of the overall research project folder should remain the same. Access to the Archive folder on SharePoint will be limited to the Quality & Compliance Manager and Global Director of Data, with the folder password protected.

- <u>On CPMS:</u> The relevant research project entry in the CPMS should similarly be reviewed by the lead researcher to ensure that records are up to date, including any emails and correspondence. Once updated, the research project entry in CPMS should be moved to the "Closed" status.

The Quality and Compliance Manager will maintain an Archived Project Log, capturing project details (including the project name and reference, lead researcher and research team names, and project active dates [to/from]), links to archived datasets (via DataShare or DataVault links) and OSF entries, restrictions, review dates, and scheduled deletion dates.

Deletion

Project information will be securely deleted by the Quality and Compliance Manager when the scheduled retention period has expired, and only after written confirmation from the Global Director of Data. Secure deletion protocols consistent with University of Edinburgh standards will be followed.

5 Output Management

In addition to Searchlight and Into the Light outputs, further publications (e.g., journal articles) must be tracked on the Publications Tracker and flagged to the Global Director of Data and Pathways to Impact Manager. Other outputs, such as best practice guides or lessons learned, should be shared via Childlight's Lighthouse website page in consultation with the Pathway to Impact Manager, and published as they are completed.

Where datasets are archived via DataShare, lead researchers must request that the Searchlight dashboard study entry is updated to include the relevant DataShare link in the "More Information" section.

6 Pathway to Impact

At project closure, lead researchers must:
- Hold a final Pathway to Impact meeting.
- Develop/update a Pathway to Impact plan (owned by the Pathway to Impact Manager). This plan should summarise the intended influence and application of the project's findings, as well as any further outputs or activities planned to maximise reach and engagement.
- Complete a Lessons Learned review (Appendix 2). This review will inform Childlight's continuous improvement processes and will be added to Childlight's Lighthouse

platform (in consultation with the Pathways to Impact Manager) to share knowledge with others in the field.

- Ensure that all outputs arising from the research are recorded in Pure, the University of Edinburgh's Current Research Information System (CRIS). Pure acts as the official institutional repository of research activity, ensuring that outputs are discoverable, appropriately linked to funded projects, and compliant with university and funder requirements. Recording outputs in Pure supports institutional reporting and the demonstration of research impact, including contributions to REF and other assessments.

  Note: Recording outputs on Pure is an ongoing responsibility throughout the project's lifecycle. Closure is the final assurance step that all outputs have been captured. Outputs should be entered into Pure at each publication/output stage the point of acceptance or publication.

By embedding project outputs in both Childlight platforms (Searchlight and Lighthouse) and university systems (Pure), researchers ensure that their work contributes not only to Childlight's mission but also to the wider academic and policy landscape.

7 Continuous Improvement and Retrospective

Part of Childlight's culture is continuous improvement. A retrospective session will be conducted by the Chief Operating Officer for every closed research project. This is a start-to-finish review of the project to gather feedback on processes, governance, partnerships, and impact. Outputs of retrospectives will feed into the Childlight continuous improvement log, overseen by the Quality and Compliance Manager.

8 Contracts and Agreements

Some research projects may involve working with external partners and have an agreement in place that governs this working. These agreements could be Memorandums of Understanding, data transfer agreements, data sharing agreements, or sub-contracts for funded work.

Where there is a formal written agreement in place between Childlight and an external partner, the lead researcher must complete the Contract Closure Checklist (Appendix 3)

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working with the contract owner [if different] and the Quality and Compliance Manager to complete the actions set out. This ensures that:

- Data retention obligations are clear and observed.
- Intellectual property and publication requirements are documented and understood for future publications.
- Final deliverables are received and archived.
- Final invoices are processed.

9 People and Team Members

Closing a research project is not only about ensuring data and outputs are properly managed; it also involves careful consideration of the individuals who contributed to the work.

Lead researchers are responsible for reviewing the involvement of team members, including those external to Childlight such as Global Data Fellows, co-investigators at partner institutions, and project collaborators. At the point of closure, the lead researcher should work with the Office Manager to ensure that access to Childlight systems is appropriately withdrawn. This includes access to Childlight SharePoint folders, mailing lists, and any other digital platforms used during the project.

It is equally important to confirm with team members that all data and project documentation have been managed in accordance with the Data Management Plan. Local copies of files should be deleted from individual computers to reduce duplication and protect confidentiality.

As a final step, the lead researcher is encouraged to send a formal communication to all project team members. This message should confirm that the project has been officially closed, thank colleagues for their contributions, and remind them of any ongoing responsibilities relating to data or publications. The communication should also make clear who will act as the point of contact for any future queries relating to the project.

10   Roles and Responsibilities

Role	Responsibility
Principal Investigator (who may delegate to a Lead Researcher)	• Completion of appropriate closure checklists • Ensuring that all closure activities are followed, across team members • Adherence to the Data Management Plan, including retention schedules • Awareness of third-party contracts, including data transfer agreements where applicable • Completion of a lessons learned log • Updates to the publication tracker • Ensuring project data and information is stored in the appropriate location with the appropriate access rights
Childlight Quality and Compliance Manager	• Maintenance of the closed projects log • Support for completion of closure checklists • Review of closed projects for upcoming deletion points in line with retention schedules • Dip sampling of research projects for compliance to closure checklists
Pathway to Impact Manager	• Completion of a final pathway to impact meeting • Ownership of an ongoing pathway to impact plan linked to the research project
Childlight Chief Operating Officer	• Support completion of contract closure checklists • Manage data risks with the Global Director of Data • Facilitation of a research project retrospective session
Childlight Global Director of Data	• Accountable for compliant data retention and management processes • Confirmation of project information deletion in line with retention schedules

11 Appendices

Appendix 1: Project Closure Checklist

Specific requirements as per any agreement with a data owner or contracted third party
Specific requirements as per participation consent forms

Instructions: This checklist must be completed within one month of Searchlight publication by the Lead Researcher and submitted to the Quality & Compliance Manager. Supporting documentation should be linked or attached where noted.

Core Project Closure Tasks

Task	Details	Complete	Link/Notes/Deviations
Primary product published	Main condition for project closure		
CPMS record reviewed and marked "Closed"	Ensure contact logs, dates, and summaries are complete		
SharePoint folder moved to Archive	Structure tidied, filenames clear, access restricted		
Archive Project Log entry created	Managed by Quality & Compliance Manager		

Data Management and Retention

Task	Details	Complete	Link/Notes
Data Management Plan reviewed	Confirm alignment with retention/sharing obligations		
Data sets archived	Follow Data Grade policy: DataShare (open) or DataVault (closed)		
Embargo applied (if needed)	Justified and documented (e.g., child protection risk)		
Local data copies deleted	Confirm with team members		
OSF entry updated	Includes: protocol, metadata, documentation		

Outputs and Publications

Task	Details	Complete	Link/Notes

Publications tracker updated	Include planned articles, conference submissions		
Lighthouse tracker updated	Include any guides or reflections e.g., methodology, how-to, etc.		

Pathways to Impact

Task	Details	Complete	Link/Notes
Final Pathway to Impact meeting held	With Pathway to Impact Manager		
Pathway to Impact plan documented	Ownership transferred to Pathway to Impact Manager		
Lessons Learned review completed	Found in Appendix 2 of the Research Project Closure Guidelines		
All outputs recorded in Pure	With Pathway to Impact Manager		

Organisational Learning

Task	Details	Complete	Link/Notes
Project Retrospective held	Facilitated by Chief Operating Officer		
Retrospective outputs shared	Quality & Compliance Manager to log learning		

People and Access Controls

Task	Details	Complete	Link/Notes
Team access revoked	Remove from SharePoint, mailing lists, etc.		
Team data compliance confirmed	Locally stored copies deleted		
Final communication sent to team	Thanks + closure note + point of contact		

Contract Closure (if applicable)

Task	Details	Complete	Link/Notes
Contract Closure Checklist completed	Found in Appendix 3 of the Research Project Closure Guidelines		

Checklist completed by Lead Researcher	
Name	
Signature	
Date	

Approved by Quality and Compliance Manager	
Name	
Signature	
Date	

Appendix 2: Lessons Learned Template

Project / Research Title		
What worked well?	**What could have been better?**	**What learning do we have to share with others?**
What benefited the project? Were there key people, moments, processes, etc that helped to move the project forwards?	*What got in the way of success? What hindered the project getting done, or the impact we hoped to see?*	*What should we share with others so that they can do this quicker or better next time?*

What tools or templates could we create to help others learn from our experience?
Are there tools, templates, guides, etc that we could create to help accelerate others and improve the field?

Appendix 3: Contract Closure Checklist

Project Title	
Contractor/Partner	
Contract Owner	
Contract Manager	
Contract ID	
Contract End Date	
Project Lead/Point of Contact	

Deliverables and Performance	Yes	No	N/A	Comments
All agreed deliverables have been received and saved in the appropriate storage location	☐	☐	☐	
Deliverables meet the scope and quality as defined in the contract	☐	☐	☐	
The contract owner has signed off all deliverables	☐	☐	☐	

Financial and Administrative	Yes	No	N/A	Comments
All time sheets, expense claims, or logs (if applicable) have been received	☐	☐	☐	
Final invoice has been received	☐	☐	☐	
Final payment processed (or in process)	☐	☐	☐	
Final budget reconciliation complete	☐	☐	☐	

Legal and Contractual	Yes	No	N/A	Comments
All contract terms fulfilled	☐	☐	☐	
All amendments and variations documented and saved centrally	☐	☐	☐	
IP, data ownership and usage rights reviewed and transferred/retained as per contract	☐	☐	☐	

Data and Documentation	Yes	No	N/A	Comments

	Yes	No	N/A	
All raw and processed data received as per the data transfer agreement	☐	☐	☐	
Data documentation (metadata, codebooks, etc.) received	☐	☐	☐	
Access credentials (if any) deactivated or transferred	☐	☐	☐	
All project documents organised and archived	☐	☐	☐	
Partner data retention / deletion complete as per contract terms	☐	☐	☐	

Knowledge Transfer and Handover	Yes	No	N/A	Comments
Debrief or retrospective session conducted	☐	☐	☐	
Knowledge transfer plan completed	☐	☐	☐	
Continuous improvement log updated with project learnings	☐	☐	☐	
High level case study drafted and approved by the partner	☐	☐	☐	

Relationship Management	Yes	No	N/A	Comments
Final communication/thank-you email sent to partner	☐	☐	☐	
Feedback collected from both parties on collaboration	☐	☐	☐	

Checklist completed by	
Signature	
Date	

Approved by Contract Owner	
Signature	
Date	