PROVA WORKSHEETS

TEMPLATE

Community Study Plan

With consent and data-ownership terms

FOR:
the people leading a community inquiry, and the board, committee or members' meeting that approves it

INCLUDES:
a ten-section plan to fill in once for one inquiry, consent terms to adapt for the people you ask, data-ownership terms to adopt before any answers are gathered, a partner agreement checklist and a sign-off

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Contents

	How to use this plan	4
01	The question	5
02	Who is running the inquiry	6
03	Who you will ask, and how you will reach them	7
04	What you will ask, and how	8
05	Consent terms	9
06	Data-ownership terms	12
07	Partner agreement checklist	15
08	Making sense of the answers	16
09	Time, money and stopping	17
10	Sign-off and changes	18
	Before you start gathering	19
	Further reading	20

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How to use this plan

Fill in this plan after you have chosen your question (see *Which Question First*) and before you ask anyone anything. Complete every field. Where you do not know something yet, write **not known**, name who will find out, and give a date. A blank field is not a decision.

Have the finished plan agreed by whoever governs your organization. Keep the signed copy. If you change the plan once work has started, note the change, the date and the reason in section 10, and tell anyone the change affects.

Sections 5 and 6 are terms, not just notes. They are promises to the people who answer. Do not adopt a term you cannot keep. If a term below does not fit your situation, change it and write down why.

For a filled-in example of the decisions this plan asks for, work through *Worked Case: A Tenants' Survey From Question to Brief*.

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01 The question

Field	Your entry
The question, in one sentence	
Why it matters to the people affected, in their words	
Who can act on the answer (person, office or body)	
When they decide (date or meeting)	
Date the two-page findings brief must reach them	
What the inquiry will not try to answer	

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02 Who is running the inquiry

Field	Your entry
Organization leading the inquiry	
Lead person, and who stands in if they are unavailable	
Volunteers or staff who will ask the questions	
People affected who are part of planning and making sense of the answers	
Partners (university, funder, agency, other group) and what each does	
How volunteers and participants are paid or thanked	
Training volunteers will receive, including on consent and what to do if someone is upset or discloses harm	
Anyone with a conflict of interest (for example, employed by the institution being asked) and how it is handled	

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03 Who you will ask, and how you will reach them

Field	Your entry
The group of people whose experience the question is about (for example, all households in one building)	
How you will list or find them	
Whether you will try to ask everyone, or some, and how you will choose	
How you will reach people who are harder to reach (language, disability, work hours, distrust)	
Languages and formats you will offer	
Who you will not ask, and why	
How you will record how many were approached, agreed, declined or could not be reached	

Before finishing this section, read *The Missing People Problem*.

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04 What you will ask, and how

Field	Your entry
Method (survey, interviews, group discussion, observation, records people bring)	
Where the questions are written down (attach the questionnaire or discussion guide)	
Who outside the group read the questions for clarity and fairness, and what changed	
Who you tried the questions on first, and what changed	
How answers are recorded (paper, phone, laptop, audio)	
Questions you decided not to ask because the risk outweighed the use	
Log: who keeps it, and where	

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05 Consent terms

These are the terms on which people take part. Put them in plain language, in the languages people use, and give or read them to every person before they answer. Tick each term you adopt, adapt the wording, and fill in the blanks.

Adopt?	Term	Your wording or details
☐	**Who we are.** This inquiry is run by [organization]. You can contact [name, phone, email] with any question or concern.	
☐	**Why we are asking.** We want to find out [question] so that we can tell [decision-holder] before [decision].	
☐	**What we will ask.** We will ask about [topics]. It will take about [time].	
☐	**Your choice.** Taking part is up to you. You can skip any question, stop at any time, or say no now. Saying no will not affect [services, membership, tenancy, standing in the group] in any way.	
☐	**Changing your mind later.** You can ask us to remove your answers until [date, usually when counting starts]. After that, your answers will be part of totals and cannot be separated out.	
☐	**Who will see your answers.** Only [named roles] will see your individual answers. Your name will be kept separately from your answers.	

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☐	**What we will never do.** We will not give your individual answers to [the institution being asked] or anyone else unless you agree to that separately.	
☐	**How we report.** We will report totals and themes. We will not report any number about a group smaller than [number], so that nobody can be recognized. Any words we quote will not include details that could identify you, and we will ask you first if [yes/no].	
☐	**The limits of confidentiality.** If you tell us that a child or another person is in danger, we may have to [action required of your organization]. We will tell you if that happens.	
☐	**Thanks.** We will offer [payment or thanks], whether or not you answer every question.	
☐	**Seeing the results.** We will share what we found with everyone who took part by [date and method], before or at the same time as we send it to [decision-holder].	
☐	**How you agreed.** We will record your agreement by [signature, ticked box, or the asker's note that you agreed out loud].	

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People who need extra care

Field	Your entry
Young people under 18: whose permission you will ask (usually a parent or guardian as well as the young person), and how	
People who may not be able to agree for themselves, and how you will handle that, or whether you will not ask them	
People who depend on someone present during the conversation (for example, a landlord's agent, a caseworker, a family member) and how you will make sure they can speak freely	
Interpreters: who they are, and what they promise about confidentiality	

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06 Data-ownership terms

These terms decide who holds what people tell you, and what can be done with it. Adopt them before any answers are gathered. Share them with any partner before they join.

Adopt?	Term	Your wording or details
☐	**Ownership.** The answers belong to [organization], held on behalf of the people who gave them. No partner, funder or institution gains ownership by funding, hosting or helping with the inquiry.	
☐	**Decisions about the data.** Decisions about using, sharing or publishing the data are made by [named body, such as the board or an inquiry committee that includes people affected].	
☐	**Storage.** Paper forms are kept in [locked place]. Electronic files are kept on [device or service], protected by [password, encryption]. We have read the terms of any online service we use.	
☐	**Names kept apart.** Names and contact details are kept in a separate file from answers, linked only by a number, and only [named role] can open both.	
☐	**Access.** Only [named roles] can see individual answers. Access ends when a person leaves the role.	

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☐	**Sharing with partners.** A partner may receive [nothing; totals only; answers with all identifying details removed] for [purpose], only after [named body] agrees in writing.	
☐	**Requests from the institution being asked.** If [institution] asks for individual answers, we will offer our method, counts and questionnaire instead. We will not share individual answers without each person's separate agreement.	
☐	**Requests from anyone else.** Journalists, officials or other groups may receive the published brief. They will not be given access to participants or individual answers.	
☐	**Publication.** Findings are published only in totals and themes, following the reporting rule in section 5. Participants see results before or at the same time as anyone else.	
☐	**Keeping and destroying.** Individual answers are kept until [date] and then destroyed by [method] by [named role]. The name file is destroyed [earlier date]. Totals and the published brief may be kept.	
☐	**If the organization closes or the inquiry ends early.** The data will be [destroyed / passed to named organization under these same terms], decided by [named body].	
☐	**If something goes wrong.** If answers are lost, stolen or seen by someone who should not see them, [named role] will tell [named body] within [time], tell affected participants, and record what happened and what changed.	

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☐	**Community standards.** Where the people asked belong to a community with its own data standards (for example, an Indigenous nation), those standards apply and its leaders decide how.	
☐	**Legal duties.** We have checked [privacy law, mandatory reporting duties, partner ethics review] with [adviser], and these terms are consistent with them.	

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07 Partner agreement checklist

Complete one copy for each partner, before collection starts. A partner is anyone outside your organization who funds, hosts, helps with or receives anything from the inquiry.

Field	Your entry
Partner and contact person	
What they contribute (money, staff, training, analysis, space)	
What they receive (nothing, the brief, totals, de-identified answers)	
What they may do with it, and what they may not	
Whether they may publish from it, and whether your organization reviews first	
Whether their own ethics review applies, and whether it is done	
What they must return or destroy, and by when	
Public comment: who may speak for each organization about the findings, in what form, and from what date	
Signed by both, with date	

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08 Making sense of the answers

Field	Your entry
Who will count and read the answers	
How you will check the counting (for example, a second person recounts a sample of forms)	
When and where people affected will see the first results and discuss them	
How disagreements about what the results mean will be recorded	
What you decided, before seeing results, would count as an important finding	

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09 Time, money and stopping

Field	Your entry
Timeline: planning, testing questions, gathering, counting, sharing with participants, sending the brief	
Budget: printing, translation, interpreters, payments or thanks, refreshments, travel, storage	
Where the money comes from, and any conditions attached	
What would make you pause or stop (for example, a participant harmed, threats from the institution, data lost)	
Who decides to pause or stop	

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10 Sign-off and changes

Field	Your entry
Approved by (body)	
Date approved	
Signed by	

Changes after approval

Date	What changed	Why	Approved by	Who was told

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Before you start gathering

- Every field is filled in, or marked **not known** with an owner and a date.
- Every consent term you adopted is something you can keep.
- The consent terms exist in every language you will use.
- Data-ownership terms were agreed before any partner joined, and each partner has signed section 7.
- Volunteers have been trained on consent, on what to do if someone is upset, and on the limits of confidentiality.
- The log is set up and someone is responsible for it.

RELATED: *Running a Community Inquiry That Institutions Can Act On*, for the wider approach; *Which Question First*, for choosing your question; *Two-Page Findings Brief*, for writing up what you found.

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Further reading

1 **National Commission for the Protection of Human Subjects, The Belmont Report (1979)**. Respect for persons, beneficence and justice, and what each means for informed consent.

2 **First Nations Information Governance Centre, The First Nations Principles of OCAP® (brochure)**. Ownership, control, access and possession of First Nations data.

3 **Carroll and colleagues, The CARE Principles for Indigenous Data Governance, Data Science Journal 19 (2020)**. Collective benefit, authority to control, responsibility and ethics.

4 **Chicago Beyond, Why Am I Always Being Researched? (2018)**. Questions community organizations can put to research partners about consent, ownership and who benefits.

QUESTION IT

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