

Standard Fields for Data Collection

Considering what data to collect?

What might you want to collect for your records and for reporting to staff, your board, to funders, for quality control, for planning, for knowing if what you are doing is making a difference?

What variables do you need or want to collect about your organisation, work, participants or clients?

Your Excel dataset contains rows and columns.

Each **row** of an Excel spreadsheet will contain the data on **who** or **what** for recording, reporting and analysis. A general term often used for what goes in rows is the 'observation'.

Examples might be:

- the names of all the individual recipients of your service/programme(s) – eg clients, patients, trainees, whānau, students.
- your staff or your volunteers or donors
- programmes or projects or components of them
- equipment or products

Each **column** - is headed up with the name of a variable you want to collect data on, depending on your requirements. Examples of column headings might be:

- First Name
- Second Name
- Unique Identifier (can be assigned within an organisation to anonymise an individual's data. Otherwise the Privacy Act has specific rules about use of Unique ID such as Drivers Licence, NHI numbers etc)
- Gender
- Date of Birth
- Ethnicity
- Date of referral
- Source of referral
- Training courses they attended
- Ratings of satisfaction for the Bees Knees course

Deciding what data to include

What do you want to collect by row and by columns?

What personal information do you really need? Keep at the forefront a person's privacy, safety, confidentiality and comfort. Why is the information being collected and how will that be done? How will it be stored securely? The guidelines in Ngā Tikanga Paihere are a framework guiding ethical and culturally appropriate data use developed through Statistics New Zealand.

How much detail do you need to include? For example, for an address you may want to include a column for each of street number and street; suburb, city or town or rural district, postcode or Rural Delivery Address number? Or is that too much detail?

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Collecting Demographic Data

Below are some standard suggestions for collecting data on variables (columns) based on the work of Statistics New Zealand and the consultations/reviews it has done. Resources are attached.

Demographic Details	Use	Comments
Name	First Name and Last Name	You might like to have one column with first and middle name and one column with Surname.
Date of birth	Format is usually dd/mm/yyyy	Date of Birth gives a solid base from which age can be calculated in Excel.
Age and Age Group	Use DOB in the first instance as it's a definitive base to start from. However you may need to include options of <ul style="list-style-type: none"> ● Don't Know ● Choose not to disclose ● or Age. 	This can be calculated from the DOB. You can develop age groups such as 0-5 years at the stage of analysing your data and reporting on it.
Gender NZ Stats has developed a statistical standard for gender, sex and variation of sex characteristics. It was developed through a review process with extensive public consultation, expert advice and other input. [See diagram below].	Principles of collection These are noted in the standard and should be used when deciding what data to ask. They include: <ul style="list-style-type: none"> ● Privacy, safety, confidentiality and comfort ● Dignity ● Relevance (it is not always relevant to ask/collect data). ● Provide information about collection <p>Use the Gender by default principle; as in the following:</p> <p>What is your gender? Male Female Another gender*. Refused to answer *If you can process text responses you could ask Please state _____.</p>	

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<p>Ethnicity Ethnicity can be coded at 4 different levels of detail, codes. The codes have been developed through consultation by Statistics New Zealand (Ethnicity Classifications NZ). It defines ethnicity as ‘the ethnic group or groups that people identify with or feel they belong to’ and ‘a measure of cultural affiliation, as opposed to race, ancestry, nationality or citizenship.</p>	<p>Level 1 includes: European / Pākehā Māori Pacific Peoples Asian MELAA (Middle Eastern /Latin American / African) Other Ethnicity Don’t know Refused to Answer</p> <p>Level 2 includes: NZ European Māori Other European Samoan Cook Islands Maori Tongan Niuean Tokelauan Fijian Other Pacific Peoples Southeast Asian Chinese Indian Other Asian Middle Eastern Latin American African</p>	<p>Level 1 or 2 are probably the most suitable reporting or output levels used.</p> <p>Be mindful if you only have a small number of people of a particular ethnicity that your reporting doesn’t identify them and breach their confidentiality and privacy rights e.g. rather than report one Argentinian, you could use the broader (Level 1) Middle Eastern/Latin American. African (MELAA) coding for reporting.</p>
<p>Address</p>	<p>Address 1 – Street Address Address 2 – Suburb City – Town /City Postcode - Postcode</p>	
<p>Contact Details</p>	<p>Email – email address Phone 1 – main phone number Phone 2 – alternative contact number</p>	

Privacy of Individuals

Collection - <https://www.privacy.org.nz/responsibilities/your-obligations/collecting/>

If you’re thinking about collecting personal information, the first thing you should consider is why you’re collecting it. The Privacy Act requires that you only collect personal information that’s necessary for a lawful purpose. For example, it could be to deliver a product or service, or find the right person to employ. Having a clear purpose will help you make good decisions about collecting and using personal information.

Before you collect personal information, think about what information you need to achieve your purpose. You may find you don’t need to collect as much as you originally thought, or you may not need to collect any at all. The more unnecessary information you have, the more you have to keep up to date, and the more likely mistakes are to happen.

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Privacy of Individuals continued

Holding & Storing Information -

<https://www.privacy.org.nz/responsibilities/your-obligations/holding/>

You must keep the personal information you hold safe and secure. You must also give people access to the information you hold about them, and take reasonable steps to correct it if it's wrong.

Make sure that you take reasonable steps to store and use personal information securely. You may need a locked cabinet for physical documents, or password protection for electronic files. Make sure only appropriate people can access the information. Look after information in transit as well, e.g. a secure payments channel for people buying things from your website.

Security includes taking steps to prevent unauthorised or inappropriate access by staff. Have clear policies and guidelines in place that set out acceptable staff behaviour. Depending on the sensitivity of the information, it may be necessary to set up systems that limit or keep track of who accesses it.

Contact Us

Feel free to contact the Community Insights team if you have any questions relating to your data. We are available to provide guidance relating to anything covered in these guidelines.

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