



Two Ridings Community Foundation OPEN DATA POLICY

Statement of Intent

Two Ridings Community Foundation (the Foundation) strives to be an open and transparent grant-making organisation. Through the publishing and analysing of open data we are committed to supporting the community and voluntary sector across North and East Yorkshire.

This document describes our policy on open data, including our definition of open data. It describes our best practice for how we create and publish datasets that are available for open reuse, detailing the several steps we take to ensure this best practice. The policy also includes our Code of Conduct for those that wish to use our data and describes how we utilise data that is already open and available.

Intended audiences

This document is for anyone interested in how we produce, publish and use open data.

Feedback on this policy

Feedback should be provided via grants@tworidingscf.org.uk

Document owners

This policy is owned by Two Ridings Community Foundation.

Reuse of this policy

This policy is published under Attribution 4.0 International (CC BY 4.0)
<https://creativecommons.org/licenses/by/4.0/>

About Two Ridings Community Foundation

Two Ridings Community Foundation (the Foundation) was established in 2000 as an independent charitable trust. It is a Charitable Incorporated Organisation (number 1166471) with a Board of Trustees. Registered office: Two Ridings Community Foundation, Pavilion 2000, Amy Johnson Way, York, YO30 4XT.

The Foundation exists to benefit local communities by making grants to support relevant charitable or voluntary organisations, which addresses needs identified by

local people, meets unmet needs and particularly reaches those people who are most disadvantaged and isolated. It achieves this by managing charitable funds and distributing grants on behalf of individuals, families, companies, trusts and public agencies (referred to as funds, fund holders, donors as appropriate, for the purpose of this document).

The Foundation's primary area of benefit is the local authority administration areas of York, North Yorkshire, East Riding of Yorkshire and Hull (which we describe as North & East Yorkshire).

The Foundation is a Quality Accredited Community Foundation. Quality Accreditation is a programme run by our membership organisation, UK Community Foundations. Two Ridings Community Foundation has successfully achieved Quality Accreditation (last awarded October 2017) which demonstrates our adherence to the key standards relating to the work of the community foundation. At the last assessment in 2017 we achieved maximum scores for the following standards: governance and our board, policies and procedures, finance, managing investments, grant making and continuous improvement.

Context

What is open data?

We subscribe to the following definition of open data:

"Open data is data that can be freely used, reused and redistributed by anyone. It is subject only, at most, to the requirement to attribute and share alike. Open data are the building blocks of open knowledge. Open knowledge is what open data becomes when it's useful, usable and used."

Why open data?

We are committed to a strong community and voluntary sector in North and East Yorkshire and the United Kingdom. We believe that open data can assist with this ambition, through enabling transparency of our actions, in the form of open data.

Our open data goals

When publishing data about our work, we have three main aims:

- That our data is useful

We wish to publish data that brings value to those building a stronger community and voluntary sector.

- That our data is meaningful

We wish to publish data that adds to the ongoing dialogue and discussion about the sector.

- That our data is accessible

We wish to publish data in an open and accessible way, and provide regular narrative and understanding to the stakeholders.

In this context, we aim to operate an open data policy that is robust and practical, leading to greater engagement in the issues faced by the community and voluntary sector in North and East Yorkshire and the United Kingdom.

Our open data commitments

When considering open data at Two Ridings Community Foundation, we commit to the following:

- We will publish data openly
- We will publish data on key aspects of our activities in an open and accessible manner.
- We will update this data regularly and often.
- We will provide documentation and descriptions of the data we publish, including a licence.
- We will use open data
- We will analyse, utilise and discuss our own data
- We will utilise other openly available datasets to provide insight into the voluntary sector of North and East Yorkshire and the United Kingdom.
- We will support those using our data
- When making our data openly available, we maintain a set of expectations, known as our Code of Conduct (see below). If you utilise open data published by us, we request that you consider this.
- We will support the sector with open data
- In our work with voluntary sector organisations across North and East Yorkshire, we will provide advice and guidance in terms of publishing and using open data.

This policy provides information relevant to each of these commitments. We describe the key aspects, actions and mechanisms that we use to deliver our open data policy.

Publishing Open Data

Our principles and best practices

The act of providing open data is to publish and share. We understand that this involves responsibility and due diligence.

When we publish data openly, our aim is to ensure it is of a quality to be accessed, used and understood. In doing so, we place the following expectations on our data publication.

It can often be the case that whilst data is made available openly, it is poorly structured or out-of-date amongst other aspects. It is the intention of this policy to mitigate against such factors, via these criteria.

Note: these best practices should be read alongside our open data workflows and checklists. Together, these describe our expectations and methodologies.

Privacy

| | |
|---------------|---|
| Principle | Our open data will respect privacy. |
| Best practice | We will always ensure our open data is free from identifiers that could be linked to an individual person. We will not disclose any data or information that has been collected privately. |
| See also | Data privacy (Appendix 1) |

Quality

| | |
|---------------|--|
| Principle | Our open data will be comprehensive for the subject |
| Best practice | We will always quality assure our data, in terms of the level of completeness and readiness for publication. We will not knowingly publish data that is incomplete for the relevant focus and/or time period. |
| See also | Data quality criteria (Appendix 1) |

Meaningful and manageable

| | |
|---------------|---|
| Principle | Our open data will be relevant and succinct for the subject |
| Best practice | We will always consider the size, scope and spread of our data – to make it useful for those who may want to access it. We will not publish open data that is overly large, or not provide logics, lookups or additional materials. |
| See also | Data segmentation (Appendix 1) |

Encoded

| | |
|---------------|---|
| Principle | Our open data will be interoperable. |
| Best practice | We will always provide codes and lookups for our data, particularly in terms of administrative geography. We will not publish data that involves jargon or acronyms that are not documented. |
| See also | Data codes checklist (Appendix 1) |

Format

| | |
|---------------|---|
| Principle | Our open data will be presented in an open and standard format. |
| Best practice | We will publish data in common, accessible and standard formats such as CVS, XML. We will not publish open data in bespoke, redundant or proprietary formats. |
| See also | Data formats checklist (Appendix 1) |

Licence

| | |
|---------------|--|
| Principle | Our open data will be appropriately licenced. |
| Best practice | We will always issue an open licence with our open datasets. Our default is a Creative Commons Attribution 4.0 International (CC BY 4.0). We will not publish data that is subject to a restrictive licence |
| See also | Open licence (Appendix 1) |

Documentation

| | |
|---------------|---|
| Principle | Our open data will always be well documented. |
| Best practice | We will always provide notes and guidance to accompany our datasets. We will always detail the nature, scope and purpose of our open datasets in a release document, available to all. We will not purposefully provide data that is poorly described, or requires sector knowledge to comprehend. |
| See also | Data release table (Appendix 2) |

Available

| | |
|---------------|--|
| Principle | We will publish data in open, accessible and consistent ways. |
| Best practice | We will always publish data in a consistent method, making it accessible to all. We will not publish data with passwords or access restrictions, or in places that are not signposted. |
| See also | Open data publishing channels (Appendix 1) |

Updated

| | |
|---------------|--|
| Principle | Our open data will be timely. |
| Best practice | We will always provide regular and timely updates to relevant open datasets. We will not miss updates to our relevant datasets, or let our data go stale. |
| See also | Data publication schedule (Appendix 1) |

Feedback

| | |
|---------------|---|
| Principle | We welcome feedback and discussion about our open data. |
| Best practice | We will always make it clear how to provide feedback on our open data, and any resultant actions. We will not publish data without a feedback mechanism. |
| See also | Open data feedback mechanisms (Appendix 1) |

Using Open Data – Code of Conduct

Two Ridings Community Foundation encourages others to access, use and discuss our open data. We strive towards a strong community and voluntary sector in North and East Yorkshire, and value the contributions and insights that can be gleaned through use of data.

When doing so, we would hope the following basic Code of Conduct is observed:

Accessing our data

Much of the datasets published by Two Ridings Community Foundation are succinct and easily available for download. When accessing our data, we request that you do not place unnecessary burden on our servers by making repeated data requests over a short period of time.

Attribution

When using our data, we request that our licence is observed. When producing any material that uses our data, please ensure attribution to Two Ridings Community Foundation is included.

Derivation

When making use of our data, always state any steps that were made to undertake calculations or analysis that are not present in the source.

Violations

When using Two Ridings Community Foundation data, you must not:

- Make an application that pretends to be from Two Ridings Community Foundation organisation;
- Present the data in a misleading or incorrect manner or to misrepresent or change the data;
- Use the name Two Ridings Community Foundation or the Two Ridings Community Foundation website for party political purposes;
- Use the data in or to support a criminal or illicit activity;
- Use the data on an application to inflame or make comments that are racist, sexist or homophobic, or which promote or incite violence or illegal activity;

Feedback

If you spot any mistakes, errors or points for clarification, please feedback via our designated channels. We also encourage requests and ideas for new data that Two Ridings Community Foundation may publish. Again, please do so via our designated channels.

| DOCUMENT CONTROL: | |
|----------------------------|--|
| Version: | 1.1 |
| Responsibility for review: | Finance and General Purposes Committee |
| Ratified by: | Finance and General Purposes Committee |
| Date ratified: | 15 February 2021 |
| Next review date: | February 2023 |



Two Ridings Community Foundation

OPEN DATA POLICY APPENDICES

Appendix 1: Two Community Foundation related workflows, checklists etc

Open data workflows

The following data checklists are used by Two Ridings Community Foundation in the preparation, publication and update of open data. These are linked to our open data best practices, detailed in our open data policy. Over time, Two Ridings Community Foundation will update and enhance these.

When preparing any data for publication, Two Ridings Community Foundation would always undertake the following tests by key considerations:

| Consideration: Privacy | Action |
|---|---------------------|
| Does the data contain names of individuals? | If yes, then remove |
| Does the data contain any unique identifiers that can be used to retrieve personal information from external systems? | If yes, then remove |

| Consideration: Quality | Action |
|---|---|
| For data that is aggregated, check the results for any outliers | Check source data/reports to validate figures |
| For any dataset, check for any blank fields or zero results | If numerous, check source data. If acceptable, then record in data release table. |

| Consideration: Segmentation | Action |
|--|---|
| For any dataset, consider the overall physical file size | If over 10MB, then check contents and consider further segmentation |
| For any dataset, check the column headers and data labels are eligible | If not, provide lookup file and note in data release table |
| For aggregated datasets, check that aggregations are explained and logged. | Ensure these are documented in data release table |

| | |
|--|---|
| For any datasets, check that the time periods used are in accordance with common standards (e.g.: financial quarters, calendar months) | If there is a bespoke date range, then detail in data release table |
|--|---|

| Consideration: Data Codes | Action |
|---|--|
| For geographic areas used within datasets, provide the code alongside the name | Applicable to: Local authority Ward Clinical Commissioning Groups |
| Provide and/or signpost data users to the latest lookup of any codes used. | In the case of administrative geographic regions, refer to authoritative sources such as Ordnance Survey, Office for National Statistics and the NHS |
| When using internal specific codes, ensure that a lookup and/or explanation is provided | Log this in the data release table |

| Consideration: Formats | Action |
|---|---|
| For spreadsheets and tabular data, release in standard open formats | Release as: Open Document Format for spreadsheets (.odf) Comma Separated Format for flat files (.csv) |
| When working with other data standards and systems, ensure that the format is open and accessible | Consider XML, JSON or RDF formats as open. Check with standard or publication organisation. |
| Avoid publishing data in closed, proprietary and formats that make the data inaccessible | |

Open data licence

When publishing data, we will always ensure a relevant licence is provided. Our default licence is a Creative Commons Attribution 4.0 International (CC BY 4.0)

| Consideration: Licence | Action |
|--|--|
| Does the dataset fit within the default licence for Two Ridings Community Foundation? See: https://creativecommons.org/licenses/by/4.0/ | If yes, then ensure this is in the data release table. If no, then select alternative, and document accordingly. |
| Does the data contain any information that is derived from other sources? | If yes, then detail these sources in the data release table. If there may be an issue with these derivations, then seek advice. |

| Consideration: Schedule | Action |
|--|---|
| For datasets that are updated periodically, ensure this takes place within acceptable timeframe. Guidance: Monthly updates – two weeks after period ends Quarterly updates – one month after period ends Annual updates – three months after period ends | If data publication is outside of these thresholds, update/add to data release table |
| Ensure that relevant older data can be accessed after an update – that it is not deleted or destroyed. | For ongoing statistics, ensure the new time period data is made available alongside other periods. Where data must be overwritten, document in data release table. |

| Consideration: Publishing Channels | Action |
|--|---|
| When creating data files, check the file name is logical, descriptive and devoid of any inconsistencies. E.g.: volunteers_statistics.csv rather than volunteersstats(1)-EDITED.csv | Use the shared naming convention wherever possible |
| When hosting data files, always ensure that the end URL is accessible, and free from any security barriers, passwords or blocks. | If there is an issue in terms of accessing the URL to the data file, seek advice. |

| Consideration: Feedback | Action |
|--|--|
| When an issue is posted, respond accordingly – even if acknowledgement. | Where the issue can be progressed, respond accordingly. In no action can be applied immediately, respond accordingly. |
| When feedback is received via settings such as face-to-face meetings or workshops, consider how best to add this to existing feedback. | Where appropriate, create a new issue for the relevant dataset, attributing the source of the observation/remark. |
| When comments are made about our usage of open data, respond according to the Code of Conduct. | |

Attribution checklist

When using datasets published by other organisations, we will always ensure the following attribution considerations are provided within the context of any material we produce.

| Attribution | Comment |
|---|--|
| Name of the dataset utilised | e.g. Adult learning Centres |
| Publisher of dataset | e.g. Manchester City Council |
| Source URL (from where the data can be retrieved) | e.g. http://www.manchester.gov.uk/site/custom_scripts/getmetadata.php? guid=a65c8dfb-7371-4db9-a3b3a9e4be72a493 |
| Date retrieved | DD/MM/YYYY |
| Notes on usage | Any notes on actions undertaken that result in the source data being changed or modified. |

Appendix 2: data release table template

Example: Grants data

| | |
|---|---|
| Data consideration | Two Ridings Community Foundation response |
| Dataset name | Grant Data |
| Brief description | Information on the grants awarded by Two Ridings Community Foundation following each round (approx. Annually) |
| Responsible person/team <i>Who is the authority for this data?</i> | Data manager |
| Privacy <i>What privacy considerations should be taken?</i> | Names and personal details are not included. |
| Legality <i>Does the data contain any derived data?</i> | No. |
| Format <i>How will the data be made available?</i> | As a spreadsheet, saved in a xls and CVS format |
| Segmentation <i>How will the data be segmented?</i> | One file, with the following reports: Grants awarded from each fund |
| Dates <i>What date period are used in the data, if any?</i> | The grant award date will be the only date information published |
| Structured <i>Does the data contain any inherent jargon or interpretation?</i> | No |
| Interoperable <i>How can other datasets be referenced?</i> | Groups charity number will be included |
| Availability <i>How will the data be disseminated?</i> | Our open data registered with 360Giving |
| Documentation <i>How will the data (and process) be described?</i> | On our open data and grants awarded page. |
| Updated <i>What is the update timetable?</i> | Annually |
| Licencing <i>What licence will be applied?</i> | Creative commons Attribution https://creativecommons.org/licenses/by/4.0/ |
| Feedback <i>How will feedback be progressed?</i> | Established Two Ridings Community Foundation feedback processes |

Open datasets

List of datasets published by Two Ridings Community Foundation. This list will be updated and maintained.

| Dataset | Description | First published | Update(s) |
|--------------|--|-----------------|-----------|
| Funding data | Details of funding provided to other organisations | May 2018 | Annually |