Open Data Policy

Last Review: June 2023
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Open Data Policy

This Open Data policy describes Herefordshire Community Foundation's (HCF) policy on open data.

It includes the Foundation's definition of open data and describes the best practice of how datasets are created and published for open reuse. It details the steps taken by the charity to ensure this best practice and includes HCF's Code of Conduct for those that use the data published.

Additionally, the policy describes how HCF utilises data that is already open and available.

The policy is available to anyone interested in how HCF produces, publishes and uses open data.

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

Definition of Open Data

HCF subscribes 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 is the building blocks of open knowledge. Open knowledge is what open data becomes when it's useful, usable and used.*"

The Reason for Open Data

HCF is committed to a strong community and voluntary sector in Herefordshire. The charity believes that open data can assist with this ambition, through enabling transparency of its actions in the form of open data.

Aims

When publishing data about the charity's work, HCF has three main aims:

- **The data is useful** - HCF aims to publish data that brings value to those building a stronger community and voluntary sector.

- **The data is meaningful** – HCF aims to publish data that adds to the ongoing dialogue and discussion about the sector.

- **The data is accessible** – HCF aims to publish data in an open and accessible way and provide regular narrative and understanding to the stakeholders.

In this context, HCF aims 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 Herefordshire.

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Commitments

When considering open data, HCF commits to the following:

Publish data openly.
- HCF will publish data on key aspects of its activities in an open and accessible manner.
- HCF will update this data regularly.
- HCF will provide documentation and descriptions of the data published, including a licence.

Use open data.
- HCF will analyse, utilise and discuss its own data.
- HCF will utilise other openly available datasets to provide insight into the voluntary sector of Herefordshire.

Support those using the data.
- HCF will maintain a Code of Conduct when making data openly available.
- HCF requests that this set of expectations is considered by those utilising its published open data.

Support the sector with open data.
- HCF will provide advice and guidance to voluntary sector organisations across Herefordshire, in terms of publishing and using open data.

This document provides information relevant to each of these commitments. It describes the key aspects, actions and mechanisms that are used to deliver the Open Data Policy.

Publishing Open Data

Principles and Best Practices

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

When HCF publishes data openly, it aims to ensure it is of a quality to be accessed, used and understood. In doing so, HCF places the following expectations on its data publication. It can often be the case that whilst data is made available openly, it is poorly structured, out of date and bad quality. It is the intention of this policy to mitigate against such factors via these criteria.

These best practices should be read alongside our open data workflows and checklists at the end of this policy. Together, these describe our expectations and methodologies.

It is the responsibility of the CEO to ensure that all principles, open date workflows and checklists are updated and followed.

Privacy

Principle	Open data **will respect privacy.**
Best practice	HCF will always ensure that its open data is free from identifiers that could be linked to an individual person. HCF will not disclose any data or information that has been collected privately.
See also	Data Privacy (Appendix 1)

Quality

Principle	Open data **will be comprehensive** for the subject.
Best practice	HCF will always quality assure the data, in terms of the level of completeness and readiness for publication. HCF 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	Open data **will be relevant and succinct** for the subject.
Best practice	HCF will always consider the size, scope and spread of the data to make it useful for those who may want to access it. HCF will not publish open data that is overly large or does not provide logics, lookups or additional materials.
See also	Data Segmentation (Appendix 1)

Encoded

Principle	Open data **will be interoperable.**
Best practice	HCF will always provide codes and lookups for the data, particularly in terms of administrative geography. HCF will not publish data that involves jargon or acronyms that are not documented.

See also	Data Codes Checklist (Appendix 1)

Format

Principle	Open data will be presented in an **open and standard format.**
Best practice	HCF will publish data in common, accessible and standard formats such as CVS, XML. It will not be published in bespoke, redundant or proprietary formats.
See also	Data Formats Checklist (Appendix 1)

Licence

Principle	Open data **will be appropriately licenced.**
Best practice	HCF will always issue an open licence with its open datasets. The default is a Creative Commons Attribution 4.0 International (CC BY 4.0). HCF will not publish data that is subject to a restrictive licence.
See also	Open Licence (Appendix 1)

Documentation

Principle	Open data will always be **well documented.**
Best practice	HCF will always provide notes and guidance to accompany its datasets. It will always detail the nature, scope and purpose of the open datasets in a release document available to all. HCF will not purposefully provide data that is poorly described or requires sector knowledge to comprehend.
See also	Data Release Table (Appendix 2)

Available

Principle	Data will be published in an **open, accessible and consistent way.**
Best practice	HCF will always publish data in a consistent method, making it accessible to all. It 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	Open data will be **timely.**
Best practice	HCF will always provide regular and timely updates to relevant open datasets.

	HCF will not miss updates to relevant datasets, or let the data go stale.
See also	Data Publication Schedule (Appendix 1)

Feedback

Principle	**Feedback and discussion** about open data will be welcomed.
Best practice	HCF will always make it clear how to provide feedback on the open data, and any resultant actions. HCF will not publish data without a feedback mechanism.
See also	Open Data Feedback Mechanisms (Appendix 1)

Data Use Code of Conduct

Herefordshire Community Foundation encourages others to access, use and discuss its open data. The charity strives towards a strong community and voluntary sector in Herefordshire and values the contributions and insights that can be gleaned through use of data.

When doing so, HCF would hope that the following basic Code of Conduct is observed.

Accessing the Data

Much of the datasets published by Herefordshire Community Foundation are succinct and easily available for download. When accessing the data, HCF requests that there is no unnecessary burden placed on its servers by making repeated data requests over a short period of time.

Attribution

When using the data, HCF requests that its licence is observed. When producing any material that uses HCF's data, please ensure an attribution to Herefordshire Community Foundation is included.

Derivation

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

Violations

When using HCF data, you must not:
- Make an application that pretends to be from the Herefordshire Community Foundation organisation.
- Present the data in a misleading or incorrect manner or to misrepresent or change the data.

- Use the name Herefordshire Community Foundation or the Herefordshire 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 Herefordshire Community Foundation may publish.

Appendix 1

Herefordshire Community Foundation Open Data Workflows

The following data checklists are used by Herefordshire Community Foundation in the preparation, publication and update of open data. These are linked to HCF's open data best practices, detailed in its Open Data Policy. Herefordshire Community Foundation will continue to update and enhance these.

Publication

When preparing any data for publication, Herefordshire Community Foundation will always undertake the following:

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 Ordinance Survey, Office for National Statistics and the NHS.
When using internal HCF 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 (.cvs).
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.	

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. eg: 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 the usage of open data, respond according to the Code of Conduct.	

Open Data Licence

When publishing data, HCF will always ensure a relevant licence is provided. The 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 HCF? 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.

Attribution checklist

When using datasets published by other organisations, HCF will always ensure the following attribution considerations are provided within the context of any material it produces.
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Attribution	Comment
Name of the dataset utilised	e.g. Adult learning Centres
Publisher of dataset	e.g. Herefordshire County Council
Source URL (from where the data can be retrieved)	e.g. http://www.herefordshire.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	Herefordshire Community Foundation response
Dataset name	Grant Data

Brief description	Information on the grants awarded by Herefordshire Community Foundation following each round.
Responsible person/team *Who is the authority for this data?*	Data Manager
Privacy *What privacy considerations should be taken?*	Names and personal details are not included.
Legality *Does the data contain any derived data?*	No.
Format *How will the data be made available?*	As a spreadsheet, saved in a CVS format.
Segmentation *How will the data be segmented?*	One file, with the following reports: Grants awarded to each project. Grants awarded from each fund.
Dates *What date period are used in the data, if any?*	The project activity will have a start and end date. Each grant round will be identified by a month.
Structured *Does the data contain any inherent jargon or interpretation?*	No
Interoperable *How can other datasets be referenced?*	Groups charity number will be included.
Availability *How will the data be disseminated?*	Our open data registered with 360Giving.
Documentation *How will the data (and process) be described?*	On our data website page.
Updated *What is the update timetable?*	Quarterly.
Licencing *What licence will be applied?*	Creative commons Attribution https://creativecommons.org/licenses/by/4.0/

Feedback *How will feedback be progressed?*	Established Herefordshire Community Foundation feedback processes.

Open Datasets

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

Dataset	Description	First published	Update(s)
Funding data	Details of funding provided to us by other organisations.		Quarterly