360Giving guide to publishing for community foundations

In collaboration with UKCF, 360Giving has supported the development of a tool for the Digits2 (D2) system which means that grant information can be extracted from your system ready-formatted to the 360Giving Standard.

Community foundations participating in a pilot were consulted to agree a field specification for the 360Giving data extract file. Hyphen8 has completed development of the D2 data extract tool, and following tests by the pilot group this is now available for any community foundations that wish to become a 360Giving data publisher.

This tool means that the technical aspect of preparing your data has been automated, making the process much easier and quicker. There are some additional practical steps you need to follow when sharing your 360Giving data for the first time, for example the hosting and licensing of the data.

We have developed this guidance to support you through the whole publishing process, with answers to frequently asked questions and links to sources of further advice.

This guidance is accessible as a PDF document and online via http://threesixtygiving.org/cf-publishing-guide.

Is there a charge for publishing 360Giving data? How long will the process take?

All our support to organisations is provided for free of charge; however, there will always be some resource required in terms of staff time, especially when releasing your data for the first time.

The amount of time it takes can vary depending on your circumstances. The amount of data to be published, and whether the data is clean or requires some additional work to be ready for publication are key factors in determining whether the process will be more or less time consuming.

If you have queries about the 360Giving publishing process and this guidance please contact Katherine Duerden at 360Giving: katherine.duerden@threesixtygiving.org.

Three stages of opening up your grants data

1)

1) Plan: What to consider before preparing data

a) Decide what information to share

The D2 360Giving data extract tool allows you to publish useful information about the grants you have awarded. The range of information fields included in the extract file is fixed, however you can control the content of your data by using report filters, for example to decide what time period or grant programmes will be included. See the **Prepare section** for further details.

i) How far back should your data go?

You can publish data going as far back as you wish (and have data for) or focus on sharing information about recent grants – this decision is entirely up to you. The more grant data you can share, the richer the information about your local area will become in the growing 360Giving dataset.

Things to consider: Several grantmakers have shared many years of historical data, while others have opted to share data about their most recent year or grant award round. The decision about how far back to go is often informed by practical considerations:

- How accurate and complete is the data in your systems? If there are gaps or inaccuracies in your older data, then start from a point where you are confident in the quality of the information.
- Is your past grantmaking similar to your current funding priorities? If your historical grant awards are not representative of what you fund now, you may prefer to start from the beginning of your most recent grantmaking strategy.
- If you start by publishing recent grants, you can always go back and publish historical data at a future point.

ii) Do we have to publish all of our grants?

360Giving is a voluntary initiative and each grantmaker should decide what information is appropriate to share as open data, based on their circumstances.

Things to consider: If you find there are some practical or policy issues to address before you can publish all the details of your grants, consider which grant programmes or records are unaffected by any barriers, and move forward with publishing these. The learning from this process can then be applied back to other areas of your grantmaking once the issues are resolved.

b) Review data protection and privacy implications

Data on awards to grantees belongs to the grantmaker and information about organisations and the grants they receive is not personal data. However, grants to individuals, grants to smaller organisations, or named contact details for organisations, may contain or constitute personal data.

In general, open data should not contain personal or sensitive personal data that could allow a living person to be identified. Data published to the 360Giving Standard which does relate to individuals should be removed or anonymised to protect their privacy. Personal data that is published should only be done so with the consent of the individual concerned.

Before publishing grant information for the first time, review your privacy and data protection policies, and also look at your Grant Agreements or Terms & Conditions, which should provide a framework for promoting information about the grants you make.

Things to consider: Be aware that information other than recipient names might include personal data. For example, description text may include the names or contact details of individuals involved in a project or organisation. Pay attention to any information fields that are entered by applicants via an online application form, and which may not be edited during the grant assessment process.

i) Do we need to ask permission before publishing open grant data?

Read our guidance about what to consider when publishing your grant data openly for the first time, and notifying your grantees about your 360Giving data: http://www.threesixtygiving.org/support/do-we-need-permission-from-grantees-in-order-to-publish/

ii) Can grants awarded to individuals be published too?

It is possible to publish grants awarded to individuals if personally identifying data is appropriately anonymised or consent to publicly share the information has been given by the individual concerned.

The D2 360Giving extract tool automatically anonymises the names of individuals who have received grant awards. The beneficiary location for individual grant awards is shared at local District or Ward level.

Things to consider: The D2 extract anonymises the names of individuals, however extra care should be taken to check other fields in the grant data, such as Title, Description and Recipient Org:Description, as well as Beneficiary fields, to ensure that this information, on its own or when combined, cannot be used to identify the individual concerned. If you take further steps to anonymise or remove potentially identifying data make a note of the changes you make, and ensure these checks and steps are taken each time you publish new data.

iii) What if a donor wishes to remain anonymous?

The D2 360Giving extract has been developed to allow grant programme names to be redacted. See the **Prepare section** for further details of how to set programme names as 'undisclosed'.

iv) Example open data policy

An example of an open data policy is available, written by some of the experts who helped create the 360Giving Standard. It can be used as a template for any organisation's data policy and adjusted to reflect specific circumstances and needs: https://github.com/opendataservices/opendatapolicy

Examples of open data policies that have been adopted by community foundations publishing 360Giving data can be viewed on the following websites.

- http://oxfordshire.org/footer/open/
- http://cheshirecommunityfoundation.org.uk/our-grants/
- https://wiltshirecf.org.uk/open_data

## 2) Prepare: Formatting your data to the 360Giving Standard

a)   Prepare your data using the D2 extract

Watch the Hyphen8 video walk-through and follow the instructions below to export 360Giving formatted data from your D2 system: https://vimeo.com/239307295/d94dd749c1

Each community foundation must be set up with access to the 360Giving reports folder in order to generate the source report and extract 360Giving formatted data. If you cannot find the 360Giving report folder in your D2 system, please contact support@threesixtygiving.org to request this to be set up.

Source report

A dedicated report folder is created for each community foundation containing the template report that is used as the source for the data extract. This report can be used to check data quality and to apply the correct filter criteria to limit the grant applications that are included.
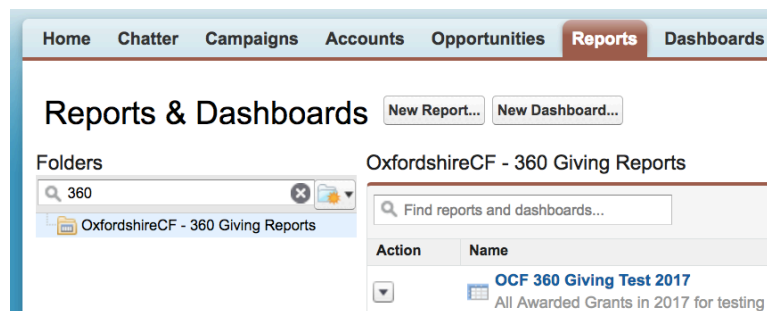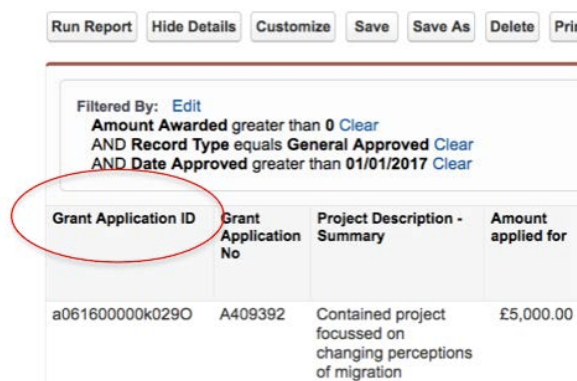

Navigate to the Reports tab:
- Locate the folder that is prefixed with your Community Foundation name and followed by '360Giving Reports' (enter 360 in the folder search box to find this folder)
- Click on the folder to display the template report
- Click on the report name to open the report

The report template contains all the fields that are sourced directly from the grant application and the associated applicant account records that are included in the agreed 360Giving field specification.

The default filter shown below is set to include all grant applications that have a Record Type of 'General Approved' and an amount greater than zero.

You can change the DATE filter to control the grant applications that you would like to include in the extract. Use this report to check the information that will be published and edit it in the source fields if required – particularly text fields such as **Project description – summary** and **Purpose of Organisation** and **Project name.**

Note:
- DO NOT remove the Grant Application ID (circled above) from the report OR move it from the first column – this must remain where it is for the extract process to work
- If you drag additional fields in to the report, they will NOT be included in the grant extract file but can be included for checking purposes
- Individual grant recipient names will appear in the report, but these will default to 'Individual recipient' in the extract file if they are a Person Account instead of an organization.
- If project name is blank, then the output will default to 'Grant to org name' – if it is person account this will output 'Individual recipient'

The following system-generated fixed or calculated values will **not** appear in the report but will be included in the extract file:

360Giving field	Salesforce source	Notes
Identifier	Grant Application Reference Number	The grant identifier will be the Grant Application unique Grant Application reference number prefixed with each Community Foundation's unique organization identifier e.g. 360G-CF-XXXXXXX
FundingOrg:Identifier	Static value for each CF held on CF Profile record	This is a unique identifier for each Community Foundation made up of a prefix and their charity number. Eg GB-CHC-1151621
FundingOrg:Name (Required)	Static value for each CF held on CF Profile record	Name of Community Foundation
Planned Dates: Duration (months)	Default Value	To be calculated based on start and end dates
Beneficiary Location: Country Code	Default Value	Default to GB
Beneficiary Location:Geographic Code Type	Default Value	The data extract supports all geography levels Super output area, Ward, Local authority, Westminster Parliamentary or Constituency.
Currency (required)	n/a Default Value	Default to GBP
Last modified	n/a Default Value	This is the date on which the data was last updated and will be populated automatically

Undisclosed programme

If you do not want to publish the name of specific Programmes, there are 2 new fields in the 360 Giving section on a programme record. Tick the 360Giving – Display as undisclosed checkbox and the 360Giving – Programme Title will default to Undisclosed. This is the value that will show in the programme name on the data extract.

Generating the file

To generate the formatted extract file in .xls format, go to the new tab called **Export Grants Data to 360 Giving.**

This can be added to the tabs across the top menu bar (by accessing customise my tabs via + symbol) or just by locating it in the list of **All tabs** displayed when you click on the + symbol on the right of the menu bar.
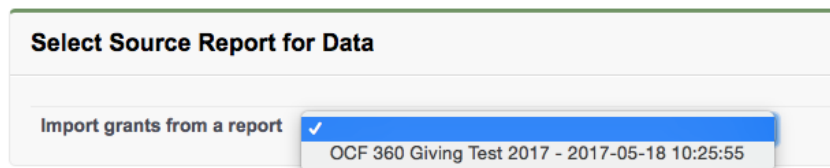

You will see your Community Foundation's summary identifier information displayed at the top.

Click on the **Import grants from a report** dropdown and the report template that is stored in the dedicated folder will be displayed.

Click on the report and the following message will appear:
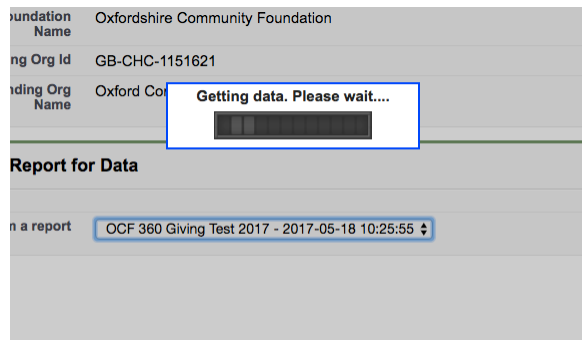
The total number of rows in the report will display.
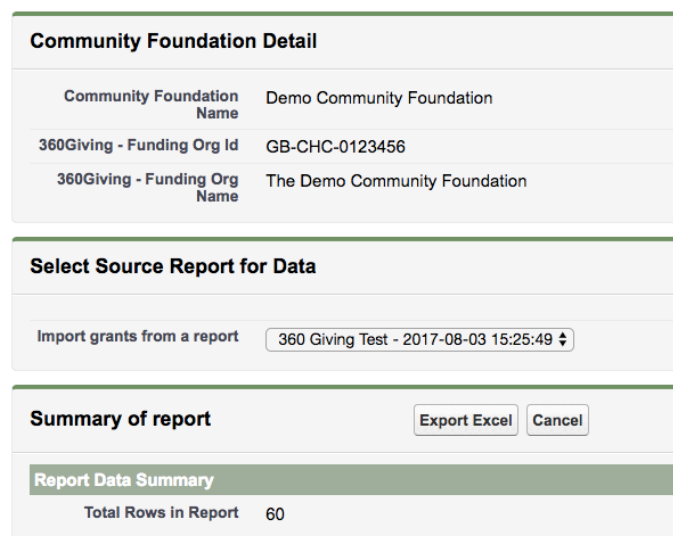
Click on the **Export Excel** button to generate the extract file.

Open the excel file to review data. *Note: the file may take longer to open if there are a large number of records in the file so be patient!*

Save the file to your local drive in .xlsx format. To do this click on 'Save file as' and choose Excel Workbook with the .xlsx file extension.

b)   Check data quality and receive feedback

Once you have exported a file of your data using the 360Giving extract, the next step is to check that the data is valid. Valid data means the file includes all the required fields and the information has the correct formatting.

Each Community Foundation is responsible for the data it publishes. You can check that your data is valid using this Data Quality Tool developed, which will tell you if there are any issues with your dataset.

https://dataquality.threesixtygiving.org/

To use the Data Quality Tool choose the **Upload** option, and select the 360Giving formatted file downloaded from the D2 extract and click on the **Submit** button. Make sure the file is in Excel Workbook 'xlsx' format before testing the data.
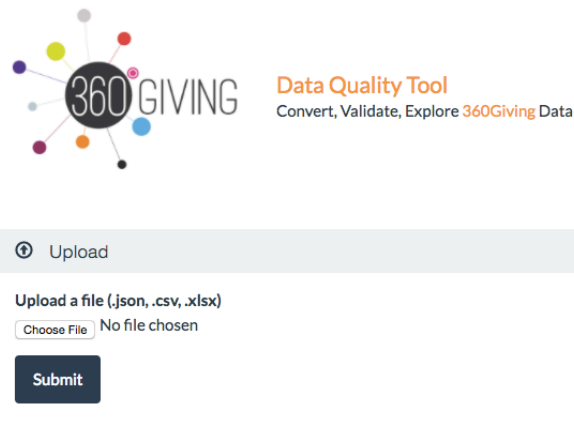
Once uploaded, the screen will display a summary – a green tick means that it has passed (using the small arrow icon on the far right to display/hide detail).
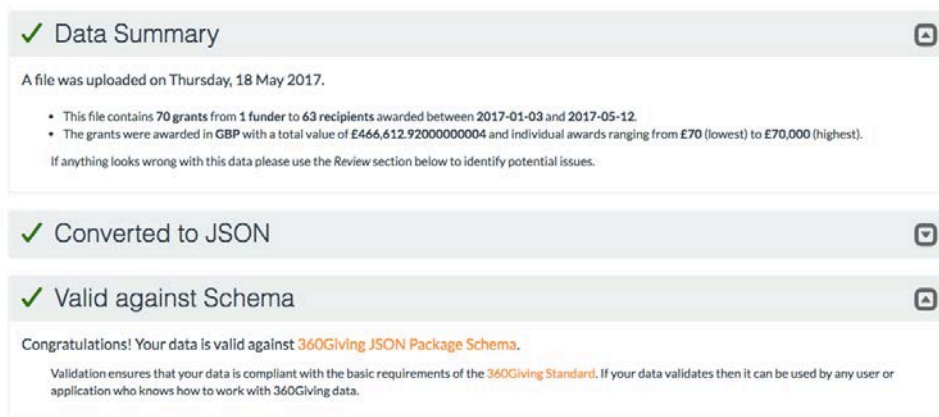
The Additional checks section highlights specific field values that may need further attention, as well as general feedback ack about the range of data in your file.

Check Description	First 3 Locations
27 grants have a Recipient Org:Identifier that starts '360G-' If the grant is from a recipient organisation that has an external identifier (such as a charity number, company number, or in the case of local authorities, geocodes), then this should be used instead. If no other identifier can be used, then this notice can be ignored.	**Sheet:** grants **Row:** 8 **Header:** Recipient Org:Identifier **Sheet:** grants **Row:** 17 **Header:** Recipient Org:Identifier **Sheet:** grants **Row:** 18 **Header:** Recipient Org:Identifier
21 grants have a value provided in the Recipient Org: Company Number column that doesn't look like a company number Common causes of this are missing leading digits, typos or incorrect values being entered into this field.	**Sheet:** grants **Row:** 2 **Header:** Recipient Org:Company Number **Sheet:** grants **Row:** 4 **Header:** Recipient Org:Company Number **Sheet:** grants **Row:** 7 **Header:** Recipient Org:Company Number
22 grants have funder or recipient organisation IDs that might not be valid The IDs might not be valid for the registration agency that they refer to - for example, a 'GB-CHC' ID that contains an invalid charity number. Common causes of this are missing leading digits, typos or incorrect values being entered into this field.	**Sheet:** grants **Row:** 2 **Header:** Recipient Org:Identifier **Sheet:** grants **Row:** 4 **Header:** Recipient Org:Identifier **Sheet:** grants **Row:** 7 **Header:** Recipient Org:Identifier

The screen will show the first 3 locations where this issue is occurring, and a hyperlink will allow you to look at the full list.

Please contact 360Giving if you have any questions about using the Data Quality tool or the feedback messages you receive: support@threesixtygiving.org.

i) Is the Data Quality Tool secure?
The Data Quality tool has been designed to support people when they are preparing their data, meaning the data inputted into it is in varying stages of readiness. The feedback report you receive has a private URL which means only those with the link can access the page and the data. If your data is not suitable for sharing publicly then you should treat this URL with care and only share it with people who are allowed to have access to the data. If this URL is not linked to from public pages, it will not be possible for people to come across it by accident.

There are further details about how the files are stored, and deleted automatically after 7 days. Click on the 'More Information' section on the home page of the tool: https://dataquality.threesixtygiving.org/

ii) My data passed the validation checks - is it ready to publish now?
Passing the Data Quality checks means the file is ready for use, including in platforms such as GrantNav. However, there may be further checks needed to make sure the information is accurate, and that the data does not include information that is unsuitable for publishing as open data. See the **Plan section** on data protection and privacy implications of publishing your data. Adopting an open data policy for your organisation will help to guide the checks you make before publishing data, and record the range and type of changes that may need to be made to your grant information before sharing it openly.

360Giving can look at the data you are preparing to check it and provide feedback. Please contact support@threesixtygiving.org at any point during the preparation process with queries and questions.

3) Publish: Making your data available for use

Once you are happy with your data file and the Data Quality tool shows that the data is valid, the next step is to find a place on your website for hosting the file and outlining the open license you are releasing it under.

All organisations publishing data to the 360Giving Standard host their files on their own website, which means they have control over and are responsible for their data.

a)   Choose an open license

Data published to the 360Giving Standard is open data, which means the information is available for anyone to use, reuse and share. Providing the data under an open license is a straightforward way to let users know that they have permission to use the data, as well as any conditions of use. There is no charge for using an open license, and it can be simply stated which license the data is being made available under, and linking to the full details.

Our default recommendation is the **Creative Commons Attribution 4.0 International (CC BY 4.0)** license, which does not restrict use but does require that users attribute the data to the original publisher.

We have prepared standard wording for the licensing of 360Giving data which you can adapt for your own website. You can see this in our **Guide to 360Giving Open Data Licensing**: http://standard.threesixtygiving.org/en/latest/licensing/

b)   Prepare a hosting place for your data on your website

The final step is to prepare a place on your website where your file will be available for download. You can host the data file anywhere on your site and place a link to it where it can be easily found. This could be at a dedicated "open" section/page on your site. You can also link to your data file from an existing page which shares information about your grants awarded or alongside your annual report.

Here are some examples of what other community foundations have done:

- Community Foundation for Surrey: http://cfsurrey.org.uk/about-us/open-data/
- Cheshire Community Foundation: http://cheshirecommunityfoundation.org.uk/our-grants/
- Quartet Community Foundation: http://quartetcf.org.uk/report/grants-awarded/

Some organisations link to their data from an existing page on their site:

- Blagrave Trust: http://www.blagravetrust.org/learning/
- Lloyds Bank Foundation: https://www.lloydsbankfoundation.org.uk/about-us/what-funding
- Virgin Money Foundation: https://virginmoneyfoundation.org.uk/grants-awarded/

Some organisations link to their data from a dedicated open data page:

- Tudor Trust: http://tudortrust.org.uk/what-we-do/open-data/
- Landaid: http://www.landaid.org/what-we-do/how-we-award-grants/transparency
- City Bridge Trust: https://www.citybridgetrust.org.uk/learning-resources/360-giving/

i)   Can 360Giving host the data on our behalf?

It is best practice for organisations to host their own data, so the ownership of the information is clear, and you have full control over the file and can make changes and updates to the data. However, if you are not able to create a place on your website to host your file or information about your open license, please contact 360Giving about options for temporarily hosting files and licensing text on your behalf: support@threesixtygiving.org.

c) Publish your data file – and tell 360Giving when it is live

Once you have added your file to your website with the open license please inform 360Giving so a link to your data will be added to the 360Giving Data Registry:
http://www.threesixtygiving.org/data/data-registry/

This data is now available for anyone to view, download and use.

i) When will our grants appear in GrantNav?

GrantNav is a platform that uses 360Giving data. It is updated on a monthly basis. At the end of each month, all the data linked from the 360Giving Data Registry (which is both valid and has an appropriate open license) is used to update GrantNav. Following some checks and tests the new version of GrantNav will go live, usually by the 10th day of the month.

This monthly cycle means that there can be a delay of up to four weeks before newly published data will appear in GrantNav, depending on which day the information goes live.

ii) How often should we update our data?

This decision is up to you and should be informed by your grantmaking processes and capacity. Some organisations choose to publish annually, some publish every six months or quarterly, with others doing an update following each grant award round. The aim is to have timely information available, but what 'timely' means will be different for different organisations, depending on circumstances and how often grants are awarded.

Things to consider: Once you have completed the entire publication process for the first time, you will have an understanding of the amount of time and resources needed, and how it could fit alongside your other grantmaking and publicity cycles. If you already have a regular process for sharing information about your recently awarded grants, aim to align or integrate the 360Giving publication process over time.

iii) Once published can we remove our data?

A fundamental aspect of publishing using the 360Giving Standard, and publishing open data in general, is that once the information is released it may be downloaded and used by anyone. An organisation is free to decide to stop publishing data and/or can remove the data from their website, however the information that has been published will still be held and used by anyone who has already downloaded it.

360Giving has a Take Down policy for the data linked from our Data Registry and loaded into GrantNav, so we will remove any published data on request. You can read the full policy here: http://www.threesixtygiving.org/take-down-policy/.