



UNLOCKING
THE POWER OF
GRANTS DATA





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1

WHY ARE WE HERE?

Our vision is that UK grantmaking is more informed, effective and strategic.

Our mission

As part of a more innovative approach to grantmaking, 360Giving supports organisations to publish their grants data in an open, standardised way. And we help people to understand and use the data to support decision making and learning across the charitable giving sector. This 'open data' approach allows grantmakers to compare and contrast their work with others and grant seekers to find out who is doing what.

The challenge

At present, it is not possible to find a complete dataset on all charitable grants provided in the UK. This means the huge financial flows from grantmakers to grantees are opaque. This vastly increases costs for all actors in the sector – collaboration between grantmakers is made harder; due diligence is done with limited information and grant applicants face significant information barriers to find out who might fund them. Ultimately, this impacts negatively on grantees and their beneficiaries – the people and organisations that grantmakers want to support.

“the huge financial flows from grantmakers to grantees are opaque. This vastly increases costs for all”

Although grantmakers are collecting lots of information they are often failing to use it to review their own work and struggle to turn it into insights they can act on. Few grantmakers employ in-house data analysts, and staff are not confident or skilled with using data. There is also a nervousness within the sector about data being used to criticise funding decisions.

360Giving was set up to change this. Since we were founded in July 2015, we have worked with over 100 of the UK's leading funders to open up their grants data. As the data is being shared in the standard format we have developed – the 360Giving Standard (which is now approved as an official UK Government standard) – it's available for anyone to access, download and share for free. This helps funders to make the most of new opportunities to work together, as well as allowing external stakeholders to better understand and assess grantmaking in the UK. But the sector is not currently set up to undertake this kind of work on its own.

Our focus

We are now at a tipping point where publishing open grants data is becoming the norm; but funders need to become more data-informed and improve the quality of the information they share if we are going to create the lasting change we want to see. This is what our new strategy focuses on.

Our success over the past three years means there is now a critical mass of open, comparable information available on UK grants. We are creating real and meaningful change in the sector. We need to build on this momentum and utilise our learning and the infrastructure we have developed to get UK grantmakers to shift from sharing data to using it in their day to day work. In order to do this, we have designed this strategy around the four key themes shown here.

Seeing through what we started

1 Making data sharing the norm within the sector, including the process, tools and support needed to do that.

Raising the bar

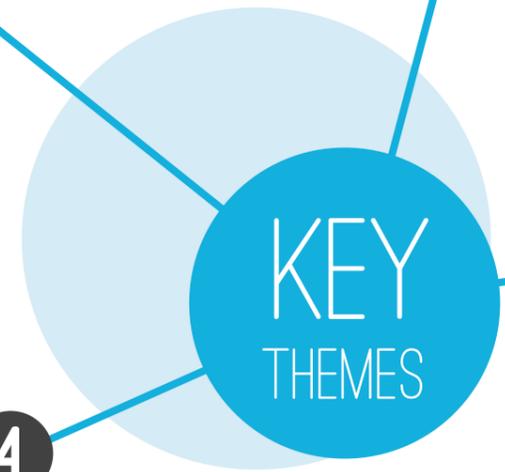
2 Improving the quality of the data that's being shared and ensuring the 360Giving data standard remains fit for purpose.

Testing new approaches

3 Bringing together funders to improve their data literacy and identifying their data needs, including at key points in the grantmaking cycle when data would be useful.

Inspiring

4 Undertaking data analysis and supporting the use of 360Giving data, including examples that inspire and to make sure the data is useful for different stakeholders, not just funders.



2

WHAT ARE OUR AIMS?

Information is an asset. It is also knowledge and power, so it matters how information is shared if you want others to benefit from it.

Why this matters

Mapping the landscape of UK grant giving is hard, as so many different kinds of organisations award grants using different funding models.

Although grant spending from the top 300 charitable foundations reached a record high of £3.3bn in 2016/17¹; grants from government are less than half of the level seen 10 years ago.² The impact of this is being felt across the sector. Being able to easily see and compare different funding flows will help ensure that limited resources are deployed more effectively. Collaboration between funders is key to achieving this; but historically they have had limited visibility of how other grantmakers spend their money. This makes it hard to assess UK grantmaking as a whole and its collective impact. It also limits the ability to look at shared challenges and opportunities.

“Being able to easily see and compare different funding flows will help ensure that limited resources are deployed more effectively”

Making sharing and using data the norm

We agreed our first 3-year strategy in 2016, setting ourselves the moonshot goal of opening up 80% of all UK grants by the end of 2020. We have made great progress since then, opening up £26 billion worth of grants. This means that for the first time in the UK, it’s possible to see and compare grants awarded by different funders all in one place. This includes grants awarded by central and local government, lottery funds, charitable trusts, and corporate and community foundations. This data is transforming the knowledge base of the whole sector, powering new and exciting data tools and supporting strategic planning and decision-making. But there is still some way to go if we are to embed this behaviour across the sector and make the most of the information that’s being shared.

“This data is transforming the knowledge base of the whole sector, powering new and exciting data tools and supporting strategic planning and decision-making”

WHY THIS MATTERS*

166,000 voluntary organisations

£15.3BN voluntary sector contribution to the economy

£3.3BN grants by government to the voluntary sector

£6.5BN grants by charitable foundations

HOW WE DEFINE GRANTMAKING

We do not restrict which organisations can publish their data to the 360Giving Standard and use a broad definition for describing grantmakers. We consider these to be any registered organisation that provides non-repayable funding in the form of a charitable gift to charities or other voluntary or community organisations. Any grantmaker can publish to 360Giving, including charitable trusts and foundations; central and local government agencies; and other publicly-funded bodies that primarily make charitable grants. We will continue to focus on UK grantmaking for the duration of this strategy, but we encourage all grantmakers to engage with 360Giving and to share their data openly.

“this won’t happen unless we make it easier to access the data and help people to understand its potential”

Our aim is to catalyse more data use within UK grantmaking, not to be the ‘data gurus’ that organisations rely on to do analysis for them. In the longer term, we want grantmakers, researchers, fundraisers and others to lead on using 360Giving data with minimal inputs from us; but this won’t happen unless we make it easier to access the data and help people to understand its potential, showcasing examples and highlighting how this benefits their work. We aim to address these issues by:

- **Making the sharing of good quality grants data the norm within the sector.**
- **Building the capabilities of funders to explore and use data.**
- **Bringing stakeholders together to use 360 data and develop tools and platforms to support this.**

1 Foundation Giving Trends 2018, ACF, Cass Business School, The Researchery and Pears Foundation (2018).

2 Civil Society Almanac, NCVO and Cazenove Capital (2018). Of the £15.3bn provided to the voluntary sector by government in 2015/16, 75% was earned through contracts or fees.

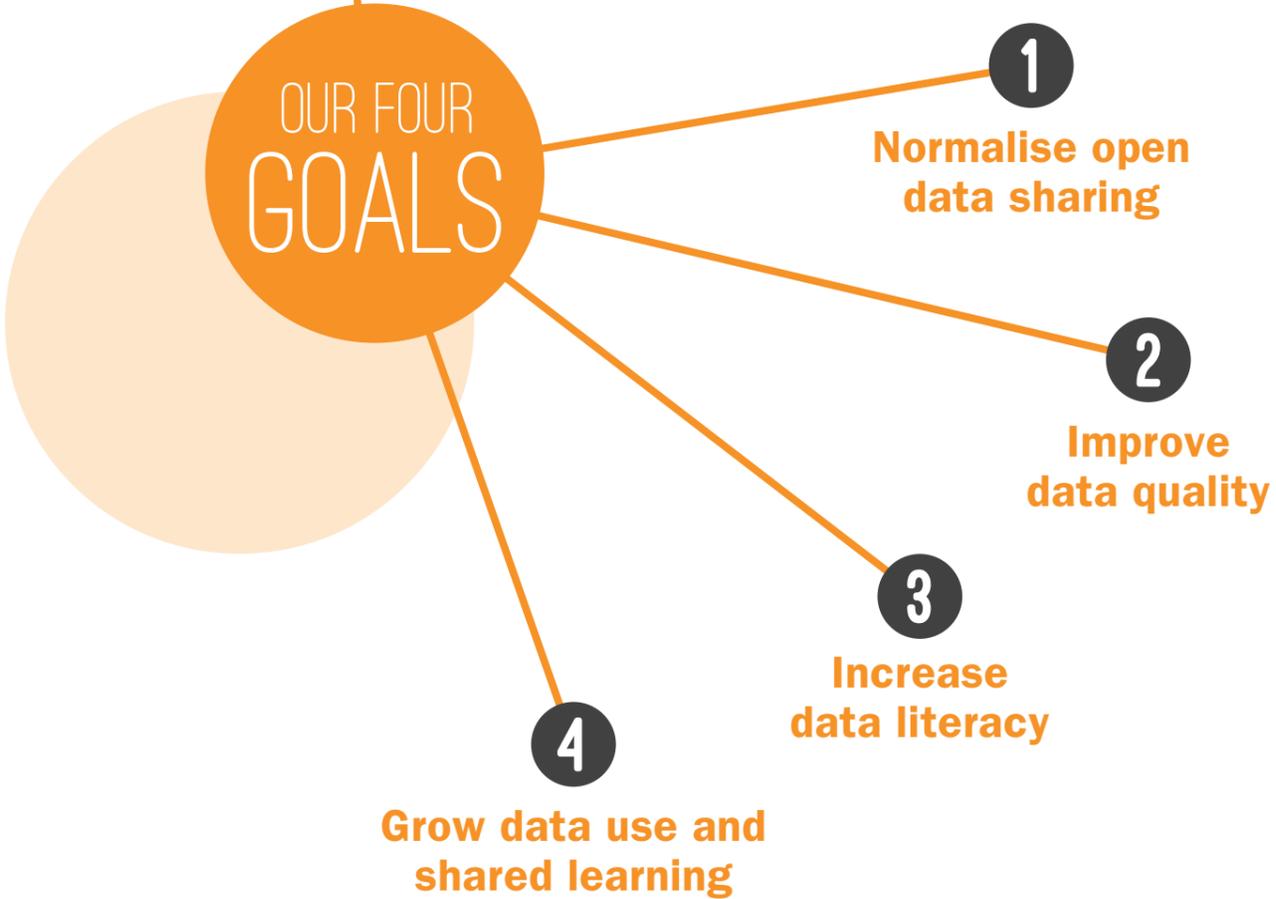
* Figures are for UK, per year, for 2016/17. Sources: NCVO’s UK Civil Society Almanac 2018 and ACF’s Foundation Giving Trends 2018.



3

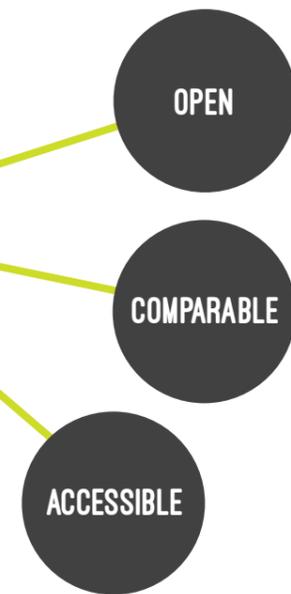
WHAT ARE OUR GOALS?

This strategy's four goals build on our experience of opening up and using data and our learning from our first three year strategy.





NORMALISE OPEN DATA SHARING



We will improve the online guidance and tools we provide, helping grantmakers to better understand the steps involved and what systems they need to set up in order to publish regularly and automatically in the future.

Our hands-on experience supporting grantmakers means we are acutely aware of the low-tech capability in the non-profit sector. We will continue to provide pro bono technical support to organisations that want to publish their grants data in the 360Giving Standard, but under this new strategy we will encourage organisations to take more ownership of the process.

We will continue to engage with a wide range of organisations to publish their data, honing in on key missing funders as part of improving the comprehensiveness of the dataset and getting 80% of UK grants opened up by 2020. Our aim is to make sure that all grantmakers understand the relevance of sharing their data openly and see their peers doing it – as we know peer influence works.

The technology bit – the 360Giving Standard

The 360Giving data standard has been designed for simplicity. It is a spreadsheet with standardised column headings for crucial information – date of grant, amount provided, name and address of grantee, description of grant – and basic rules about what can be in each column, such as format of date, currency, text, etc. The Standard is designed to expand beyond this core information. If organisations want to share other information such as evaluations or impact appraisals, then they can. We help each organisation with producing this data the first time they do it and provide tools to check the quality of the data. Then we show them where and how to publish it on the web as open data so others can find it easily via a central registry.

We have made publishing to the 360Giving Standard as straightforward as possible. We also provide ongoing support to organisations via a helpdesk. By providing more online materials and automated technical support, our aim is to reduce grantmakers' reliance on us in the longer term. It is important we continue to provide our technical support for free as we only ask for data to be shared for the wider public good – there is no hidden agenda to monetise this work.

Organisations currently publishing to the 360Giving Standard

Since 2015, we have worked with over 100 organisations on publishing their data to the 360Giving Standard, making over 300,000 individual grant records publicly available in one place. The full list of publishers and their datasets is available via a central registry: <http://data.threesixtygiving.org/>. We also have a pipeline of funders that have committed to publishing their data. This means that for the first time in the UK, we can now see the full 360-degree view of grants made to a specific organisation, sector or region regardless of what kind of organisation the grantmaker is – public or private.

Under this new strategy we want to see this work through, making sure that we are on track to hit our moonshot goal by the end of 2020. This means honing in on key funders that are missing from the list, or who need help with making sure their data is regularly re-published. This includes the Cabinet Office, which is responsible for publishing all central government grants annually, the lottery bodies and some of the larger charitable trusts and foundations who are yet to come on board.



- 1 Individual publisher support**
– based around a clearly identified target group of key missing organisations and featuring one-to-one support, workshops and a virtual help desk.
- 2 Tools and technology**
– including online how to guides, an updated data quality tool and a dashboard that provides an overview of the data currently being shared.

GOAL 2

IMPROVE DATA QUALITY

Increasing the quality of the data that's being shared is key to the success of 360Giving.

We will ensure a minimum threshold for data quality is met, reducing the risk of the information not being useful or its relevance being undermined. This will give us insights into the processes and systems grantmakers use and help with identifying common challenges as well as examples of best practice that can be shared. We have helped several organisations to improve their data and will start targeting some of them more strategically.

Regular maintenance of the 360Giving Standard is a key part of ensuring data quality. We will regularly review and update the schema and documentation, making sure the governance procedures are adhered to and that the Standard remains fit for purpose.³ We will establish a series of working groups to address specific issues such as collecting beneficiary location data, organisation identifiers and the use of taxonomies, bringing together data experts and grantmakers to help develop and test practical approaches to addressing them. This will also help with getting buy-in for any new approaches or changes we want to make. We will also provide platforms that help check and improve 360Giving data.

ACTIVITIES UNDER THIS GOAL WILL FOCUS ON:

1

Driving up data quality

– ensuring 360Giving data is regularly updated and improved and that grantmakers understand what's in their data and what would make it more useful.

2

Keeping the 360Giving Standard fit for purpose

– ongoing maintenance and documentation of the technical assets of the Standard, ensuring it remains relevant and meets users' needs.

3

Addressing technical challenges

– exploring with working groups how to deal with specific data quality issues, bringing together grantmaking practitioners with technical experts.

WHAT DOES GOOD QUALITY DATA LOOK LIKE?

Making sure data published to the 360Giving Standard is of good quality is important if it's going to be useful to others. For data to be considered high quality, it needs to be:

Comprehensive: The information should be complete (although grantmakers don't have to publish all their data in one go – they can do it in stages, starting by sharing what they can). We provide tools to check which data fields grantmakers are publishing and to highlight any issues or gaps.

Timely: The data needs to be current, i.e. not only for historical activities but for grants that are being implemented at the moment.

Accessible: Data should be publicly available in machine-readable format. The data should be released under an open licence and users should be able to bulk export it. Grantmakers should actively promote access to and use of their data.

Comparable: Data should be disaggregated and detailed to allow different users to access, use and compare it with other data sets in many ways.

Checking the quality of 360Giving data

Our data quality tools are part of our work to develop a data infrastructure for the sector. They are all open source, which means others can re-use and re-package them.

We have already developed a central registry that supports easy discovery of all the data that's being shared, as well as a data quality tool that allows grantmakers to validate their 360Giving data and receive feedback on its quality. This is a key tool when preparing data for release.

We will also develop the following:

Data Dashboard – This will show what information items are being shared by each grantmaker and the comprehensiveness of the dataset as a whole. This will make it easier for people to engage with the data; for example, to help identify what datasets to include in their research based on the time period or if it contains certain information items. The dashboard will also help grantmakers better understand what's in their own data. We will use it to showcase examples of best practice and identify issues with coverage or quality.

Identifiers tool – We will support further development of a tool which allows users to identify different organisations and grantees, called Find That Charity: <https://findthatcharity.uk/>. This provides an easy way to find the register record for any UK charity when you search for it by name. It shows when a charity is dual-registered and if it has a different trading name. Several grantmakers are missing organisation identifiers in their 360Giving data, significantly reducing its usefulness. By extending the tool to include records for education and NHS institutions and not for profit companies, more data gaps can be filled and quality checks can be made on the data already being shared.

We will consolidate these various tools, ensuring they support less technical users with understanding how the features of their data impact on its usefulness.

3. For more on the Standard and its governance model, see: <http://www.threesixtygiving.org/support/standard/>.

GOAL
3

INCREASE
DATA LITERACY

Having data about £26 billion worth of grants means we can support sector-changing analyses; but only if people know how to use the data and understand what questions they can ask of it.

It's important that 360Giving is not seen as a transparency initiative but that we catalyse real change among grantmakers and how they use data to support their decision making and learning. If we want the sector to be more data-informed then we need to build individuals' capacity to use data and make them feel part of a community. Activities under this goal specifically aim to address this.

We will run a series of Data Champions trainings. We will also offer "Office Hours", where people can book free one-on-one guidance on using data. We will roll out a new format for our Data Expeditions and demonstrate what tools are available to help people understand and use 360Giving data along with other datasets they can explore. We will monitor the demand for these different resources to see how the data is being used, what for and the support needed to do that. Through regular workshops and meet ups, we will develop a peer network that can share ideas, inform and inspire one another and be ambassadors for our work.

ACTIVITIES UNDER THIS GOAL WILL FOCUS ON:

- 1 **Scaling up grantmakers' skills**
– to encourage more data literacy in individual organisations via a series of data expeditions and a new Data Champions programme.
- 2 **Developing a data maturity framework for the sector**
– prototyping a data maturity framework for grantmaking organisations that will help them to understand how to progress and become more data oriented.

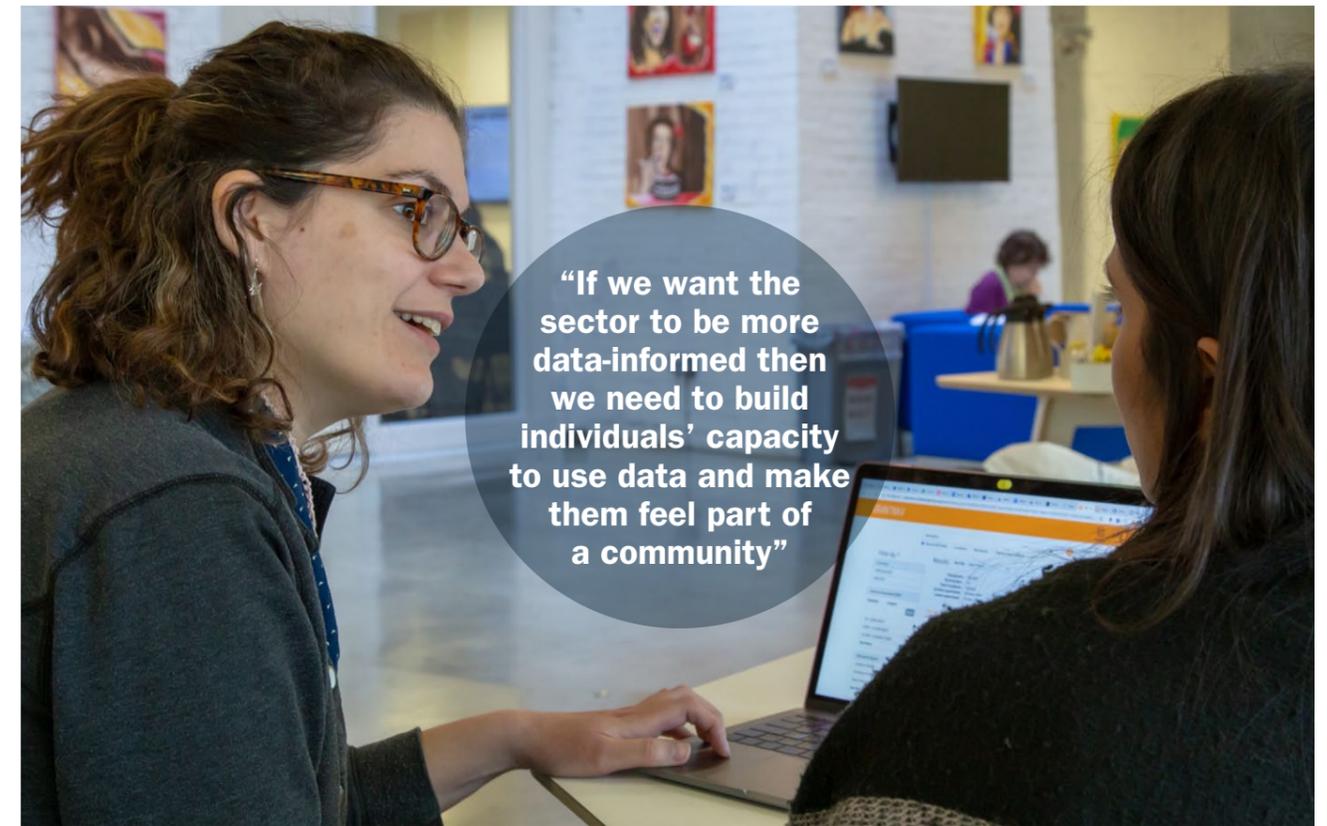
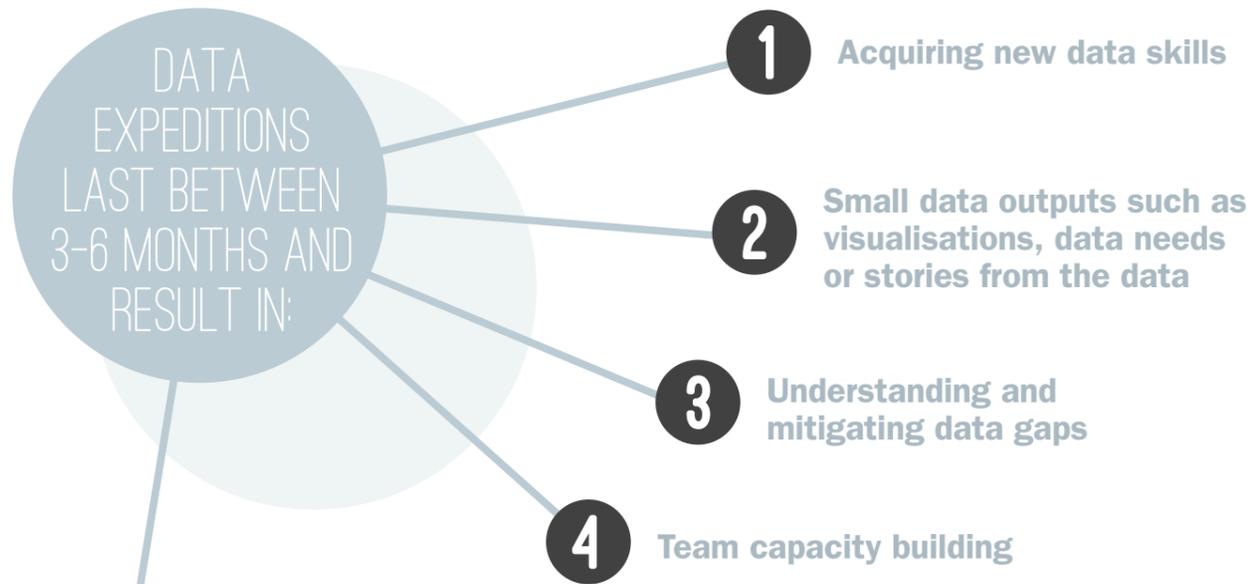


Fig. 1 The data pipeline (School of Data)



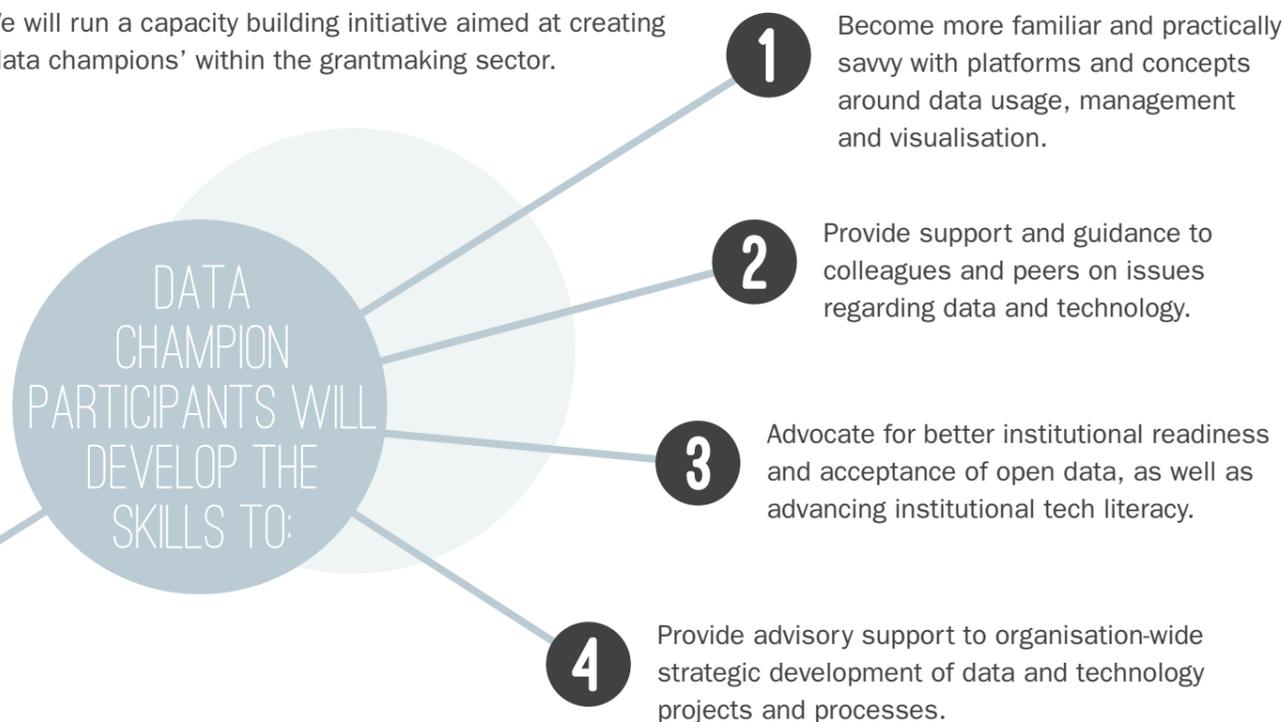
360Giving Data Expeditions

Data expeditions are a great way to learn new skills around using data and how to conduct analysis using the data pipeline. It's also a practical approach to building organisational capacity to work with data and kick start processes around that.

Each expedition involves a series of three guided workshops where participants identify a question they want to answer, find data that can help do that, then use the data to try and answer the question. They can be run with total beginners, with mixed ability groups as well as experienced data users. Each participant has an opportunity to engage in a practical way.

Creating Data Champions

We will run a capacity building initiative aimed at creating 'data champions' within the grantmaking sector.



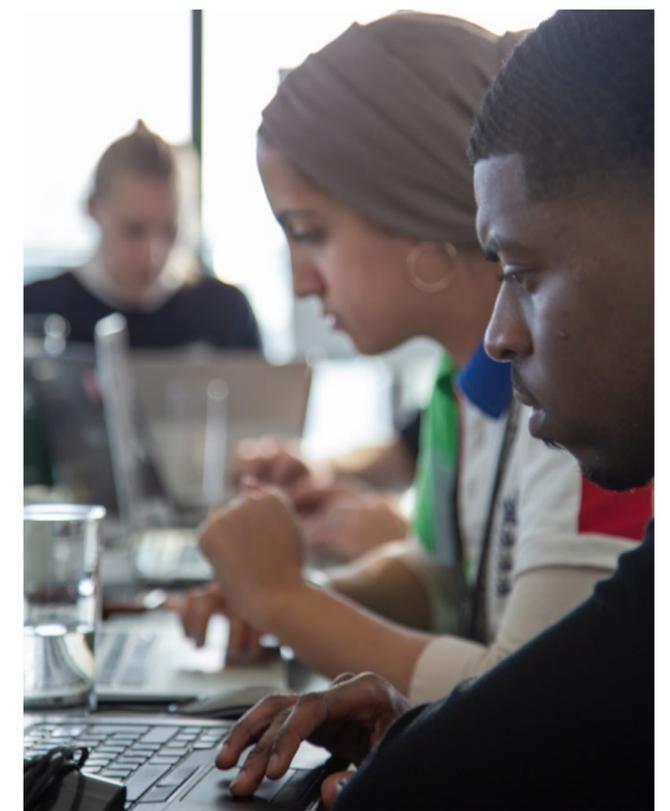
We will use a bespoke framework that supports participants with improving their organisation's data culture, helping them to become champions for using data. By running a series of complementary trainings that build on each other, the framework can be adapted depending on how participants' respond to the learning curve of new skills and knowledge. The framework includes participant interviews, skill-building workshops, on-call mentorship and peer learning.

We take a user-centred design approach to the training, focusing on real-life challenges and examples. We will run a Data Champions programme annually, engaging with each cadre of Champions after the course has ended, encouraging them to continue with their work and share their experiences.

We will consolidate these various tools, ensuring they support less technical users with understanding how the features of their data impact on its usefulness.

Developing a Data Maturity Framework for the sector

At the moment, there is no model for evaluation and learning that's tailored to the grantmaking sector and supports organisations with developing their data culture. We will create a framework which will allow individual organisations to examine their



data culture and help them identify and understand their next steps to becoming more data-oriented. It will be based on an existing approach developed by DataKind UK and Data Orchard (see fig. 2), modifying it to cater to grantmakers' needs and realities. We will create resources that are relevant to multiple organisations but give tailored advice.

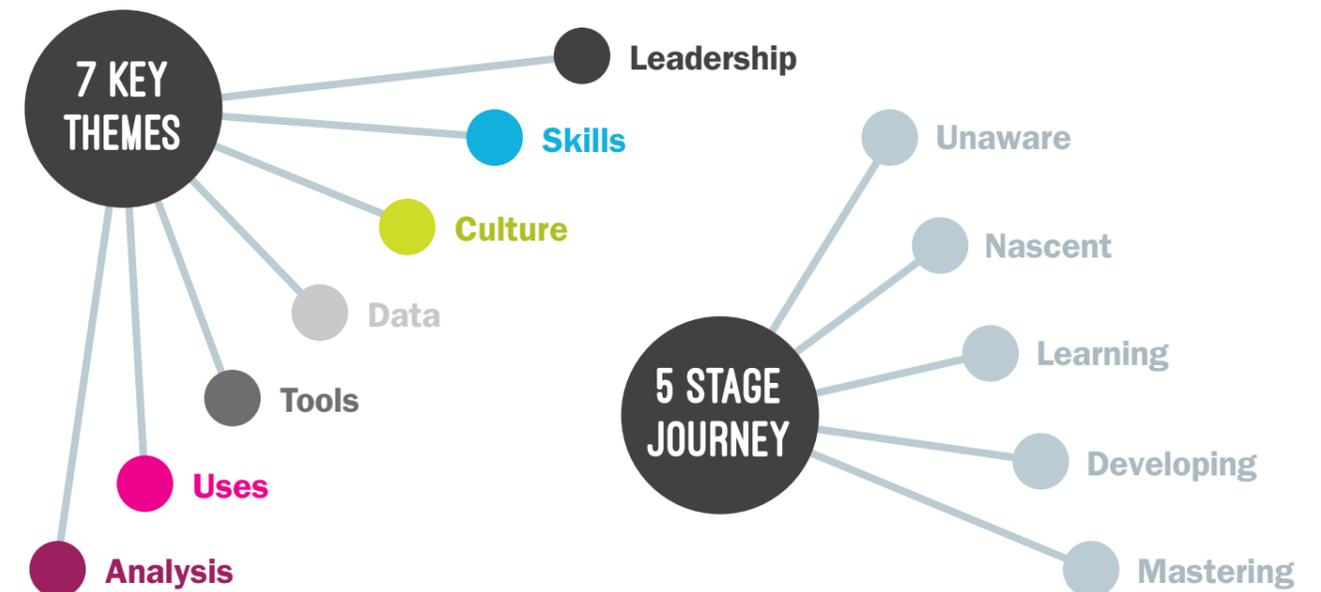


Fig. 2 Data maturity framework, based on DataKind UK and Data Orchard

GOAL 4

GROW DATA USE AND SHARED LEARNING

We know that inspiring examples of how 360Giving data is being used drives up interest in and the publication of more and better data.

We will showcase ideas and work-up projects that use the data to create useful analysis and tools. We will work in partnership with grantmakers and developers to help shape this work. We also need to better understand how 360Giving data can

help with addressing challenges, and if not why not. We are not grantmakers so do not want to set the exam questions. We will create space for people to come together and explore shared questions and challenges and help them to do that using data.

ACTIVITIES UNDER THIS GOAL ARE GROUPED UNDER THREE PRIORITY AREAS:

1

Collaborative learning projects

– a series of exploratory projects run in partnership with funders and researchers helping them undertake research on a place, sector or theme.

2

Tools for data use

– a suite of flagship web platforms and visualisations that showcase 360Giving data and offer a first point of call for anyone wanting to use the data.

3

Creating a sector data resource library

– with sector-specific data, tools and guidance that help people to use 360Giving and other relevant datasets.



There are intermediaries in the sector that work with data and help us to demonstrate its value. Under our previous strategy, we worked with the Ariadne Network to develop a guide on sharing data responsibly;⁴ the Young Foundation, supporting their research on philanthropic giving, public spending and the 2016 EU referendum results;⁵ and New Philanthropy Capital, exploring funding to homelessness.⁶

We will continue to work on similar projects in the future. Through these collaborations, we aim to reduce siloes between grantmakers by bringing organisations and individuals together to have more data-informed conversations. For projects being led by researchers and data analysts, we will provide pro bono advice and help disseminate any findings.

We launched 360Giving Labs in 2017 so we could showcase the tools and visualisations that people have created using 360Giving data. We will continue to liaise with data analysts, researchers and developers to make sure the data is easy for them to access and understand; but we will focus more on helping others to build tools and visualisations rather than building these ourselves.

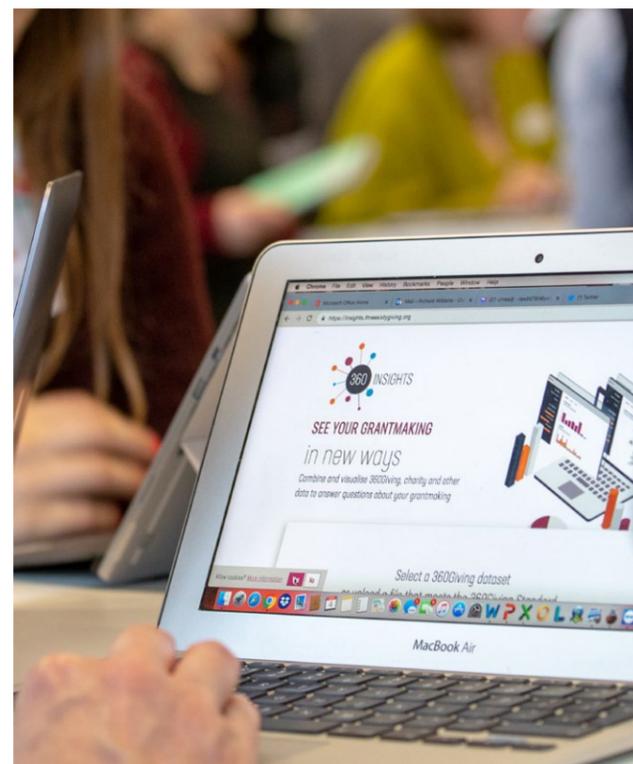
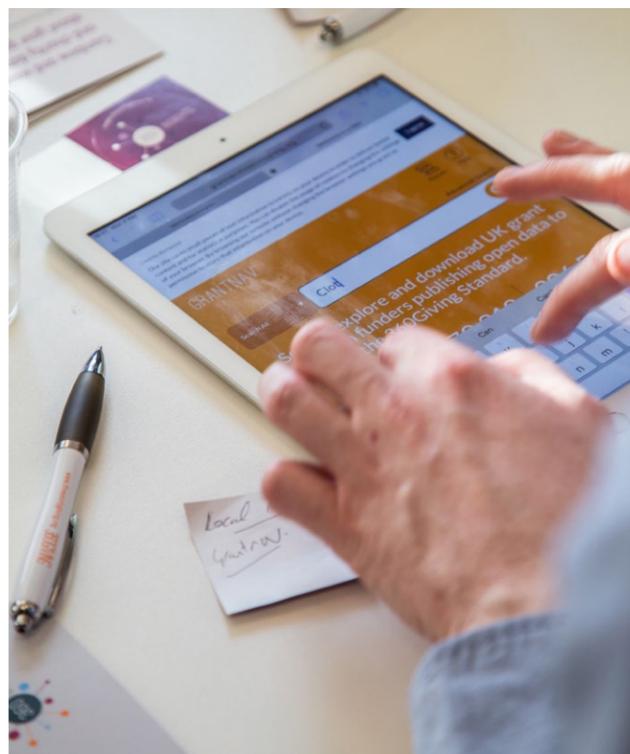


4. See <https://www.theengineroom.org/our-conversation-guide-for-human-rights-funders/>.
 5. See <https://youngfoundation.org/publications/patchwork-philanthropy/>.
 6. See <https://www.thinknpc.org/themes/explore-causes-and-issues/housing-and-homelessness/>.

WE WILL
MAINTAIN THREE
ONLINE PLATFORMS
THAT SUPPORT USE
OF 360GIVING DATA

GrantNav: This is our flagship platform. It brings 360Giving data together, allowing near instantaneous search of over 300,000 grants. Users can explore and download the data, and because its openly licensed, they can re-use it in their own tools and analysis for free. Several grantmakers have included a link to GrantNav from their websites: <http://grantnav.threesixtygiving.org/>

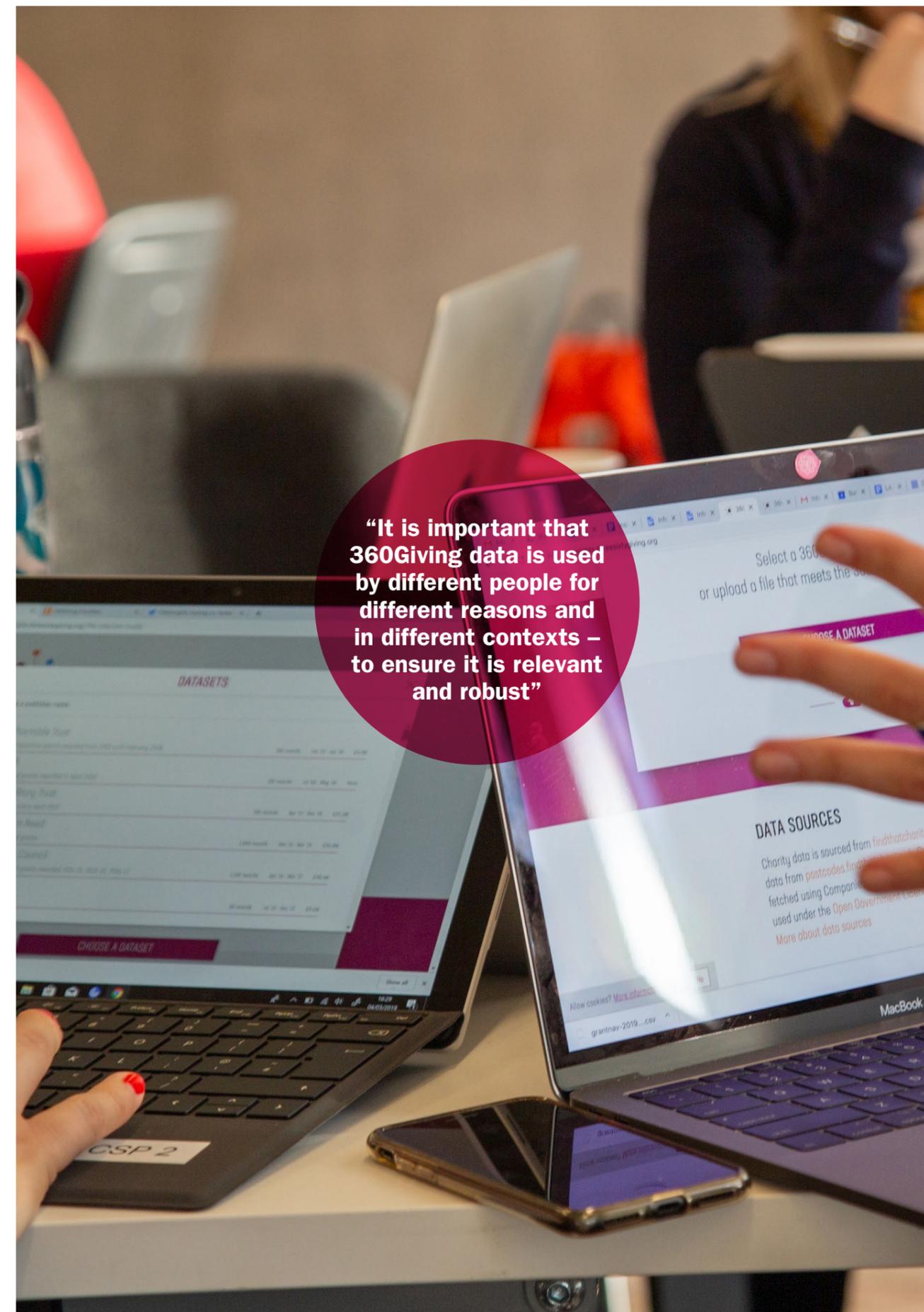
360Insights: This gives organisations tangible feedback on their data, focusing on seven key pieces of information such as the type of organisations they are funding, their location, age and income. 360Insights is unique as it brings together data from 360Giving, the Charity Commission and Companies House, all in one place: <https://insights.threesixtygiving.org/>



Giving Map: The platform demonstrates how mapping can be used in grantmaking. It shows UK funding distributed through the lenses of deprivation and charity geo-location. This is currently in beta and is due to be launched later in 2019.

We will apply user-focussed design when maintaining these tools, making sure that we provide appropriate resources and that the right kind of information is being shared to support grantmaking. It is important that 360Giving data is used by different people for different reasons and in different contexts – to ensure it is relevant and robust. We will coordinate these efforts under this strategy. In the longer-term, we expect that demand will grow for other tools and these will be developed independently.

There is no dedicated place for the sector to share information and knowledge about data so we will create a resource library that can be used and updated by the sector. As a first step, we will gather the resources for the community, basing it on how long it takes to use each resource and by theme. We will then open the library for community edit so others can share their resources and work. All resources will be provided under a creative commons licence and open to everyone to use and borrow ideas from.



“It is important that 360Giving data is used by different people for different reasons and in different contexts – to ensure it is relevant and robust”

4

WHAT IS OUR THEORY OF CHANGE?

The hypothesis behind our theory of change is that the use of open, comparable grants data will result in more informed and strategic grantmaking. This outcome needs to be tested and in order to do so, good quality data needs to be flowing on a regular basis.

Having focused heavily on opening up good quality data during 2016-2018, we intend to see this work through over the next three years. This will be complemented by new activities under goals 3 and 4. We anticipate these will be the most challenging part of this strategy given they involve capacity building, multi-stakeholder engagement and new approaches to learning.

THE PROBLEM WE WANT TO SOLVE

Charitable funders working in siloes and not as informed and strategic as they could be.

OUR KEY AUDIENCES

Grantmakers – charitable trusts and foundations; central government; local authorities.

Researchers and policy influencers in think tanks, universities and third sector bodies.

Grantee organisations and professional fundraisers.

Media, organisations and expert consultants focusing on charitable giving and open data.

STEPS NEEDED TO BRING ABOUT CHANGE

GOAL 1

Normalise open data sharing

- Majority of UK charitable grants published to the 360Giving Standard.
- Publishers tools and guidance regularly used to open up data.

GOAL 2

Improve data quality

- Grantmaking community engaging with maintenance of the data standard, ensuring it remains fit for purpose.
- 360Giving data being used in research projects and third-party platforms for grantmaking and fundraising.

GOAL 3

Increase data literacy

- Cadre of Data Champions acting as ambassadors for open data sharing and use.
- More organisations undertaking their own data maturity assessments.

GOAL 4

Grow data use and shared learning

- Grantmakers using 360Giving data as part of best practice approach to data-informed giving.
- Target audience actively engaging with us, including increased use of our platforms and tools.

MEASURABLE EFFECT OF OUR WORK

That organisations already know or want to learn what questions they can ask of the data whilst acknowledging that not everything can be measured or answered by data alone.

That organisations want to fund data use and the development of tools themselves, rather than relying on 360Giving to do this in the longer term.

WIDER BENEFITS OF OUR WORK

Increased collaboration between different stakeholders in UK grantmaking.

Increased transparency and more democratic engagement between grantmakers and grant seekers.

Development of a data structure for the sector.

Raised profile of the importance and impact of charitable giving in the UK.

That open data has a positive impact on collaboration within the sector, rather than providing more power and information to already powerful grantmakers.

THE LONG TERM CHANGE WE WANT TO SEE

Open data being used to support more informed, effective and strategic grantmaking.

STAKEHOLDERS

Political: leading grantmakers, influential researchers, media, grantees and membership bodies.

Technical: open data experts, developers, and commercial providers of grantmaking and fundraising tools.

Organisational: trustees and funders of 360Giving.

ASSUMPTIONS

That enough charitable funders recognise the siloes in UK grantmaking and want to come together to address it.

That we can engage constructively with these different audiences and bring them together to identify shared problems and opportunities.

That there is sufficient interest in publishing and using open grants data and that this will lead to new partnerships and changed approaches.

Having evidence of the impact of open grants data – how it is being used, who by and for what purposes – will help us to test whether the change we want to see is achievable or not; and if not, then what obstacles need to be overcome in order to achieve it.

A possible obstacle during the early phase of this strategy is that improving the quality of the data being published (goal 2) is considered too burdensome compared to the benefits, particularly by organisations with low levels of data literacy. This is why we have identified four strategic goals that are distinct from one another but mutually supportive, encouraging grantmakers to participate in an ongoing cycle of data publication, use and learning that drives up both the quality and demand for open grants data (see fig. 3).

There is a danger that 360Giving is seen as an exercise in transparency, rather than encouraging a continuous cycle of information sharing, using and learning. We will mitigate against this by making it easier for organisations to understand what data they are sharing, showcasing examples of how the data is being used and working with sector influencers as part of our advocacy.

“making it easier for organisations to understand what data they are sharing, showcasing examples of how the data is being used”

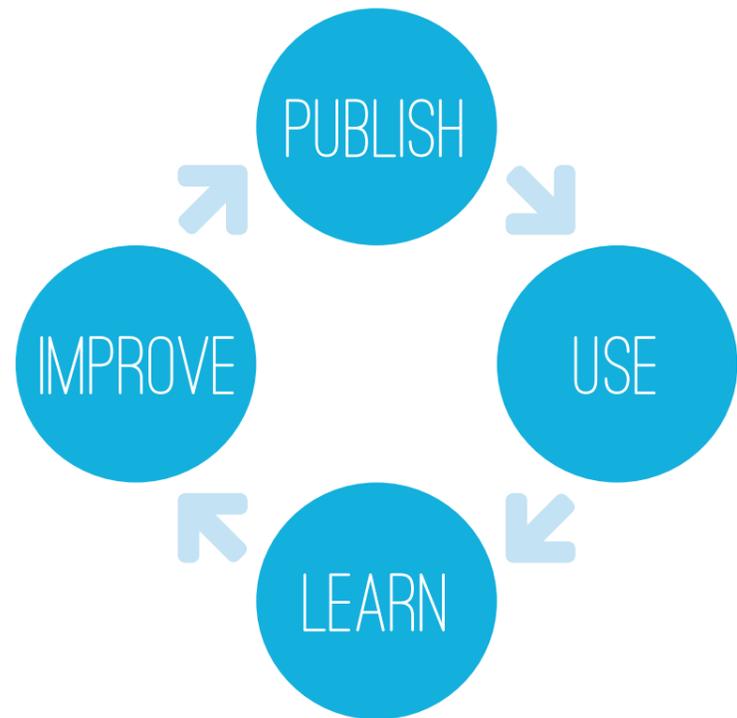


Fig. 3 An integrated approach built on learning



5

HOW WILL WE DELIVER OUR GOALS?

The activities that will deliver this strategy are grouped around our four goals (see section 3).

GOALS AND ACTIVITIES

1

Normalise open data sharing

- Ongoing relationship building and pro bono technical support to target grantmaking organisations who have yet to share their data or need help refreshing it.
- Design, user testing and roll out of online publisher resources as part of helping organisations to publish their data and identify potential issues.
- Roll out of improved help desk to support organisations with ad hoc requests and to support regular, automated publishing of high-quality data.

2

Improve data quality

- Upgrade and promotion of tools that support organisations with publishing better quality data.
- Launch a Dashboard to show the information items each organisation is sharing and any gaps.
- Maintain the 360Giving Standard, ensuring it remains fit for purpose and is embedded into the knowledge infrastructure of UK grantmaking.
- Run a series of Data Surgeries and practitioner working groups as part of building our community of data users and understanding their needs.

3

Increase data literacy

- Run a series of Data Expeditions with funder networks in different sectors/regions as part of addressing shared challenges and to embed long term demand and use of 360Giving data.
- Establish a bi-annual Data Champions programme as part of building the capacity of grantmakers to use data in their day to day work.
- Develop a Data Maturity Framework so grantmakers can assess their organisation's progress.

4

Grow data use and shared learning

- Run a series of collaborative research projects with individuals/organisations conducting research on charitable giving.
- Ongoing maintenance and promotion of online platforms that use 360Giving data (GrantNav, 360Insights and Giving Map) to encourage further engagement with and use of the data.
- Development and ongoing curation and promotion of a Resource Library.

INTERMEDIATE OUTCOMES

Our near-term impact

More grantmakers regularly sharing their data in an open, comparable way, providing a more comprehensive picture of grantmaking across the UK.

Better quality data being shared more regularly and improved understanding of the standard, what data is currently published and how it can be used.

Improved understanding of and capacity to use data as part of good grant giving and greater ambition to become data-informed organisations.

Ensure the ongoing credibility and influence of 360Giving, built on testing and learning, demonstrating the initiative's relevance to different stakeholders.

ULTIMATE OUTCOMES

The long-term change we expect to see

A changed policy environment and a sustained movement for openness around UK grantmaking, with open data being used to support decision making and learning across the charitable giving sector.

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HOW WILL WE KNOW IT'S WORKING?

Experimenting and learning is key to this strategy – so we can better understand who is using 360Giving data, what for, what help they needed and what changed as a result.

We also need to check if our work is having a positive impact in line with our Theory of Change. We will hold quarterly meetings to review if we are on track with our work plan and to assess our progress. These will be complemented by annual learning workshops where we will test the assumptions in our Theory of Change. By managing our work in this way, we can react to changes and new learning over the course of the strategy rather than waiting until it has ended to review our impact. This also helps us to better integrate the technical and non-technical sides of our work and make sure they continue to complement one another.

OUR LEARNING WILL FOCUS ON:

- 1 Monitoring:**
We will regularly monitor progress with meeting the four strategic goals. We will conduct an annual review to track our progress with delivering the 10 milestones and identify if any changes need to be made.
- 2 Evidence:**
Anecdotal feedback and data-driven evidence will be collected on all elements of this strategy to analyse what has gone well and how that can be built on; and what needs to be improved and how to address it.
- 3 Sharing:**
We will share our experiences, findings and ideas with the grantmaking community as part of our efforts to engage openly and constructively with the sector.

What we have learned so far

Our first 3-year strategy ran from April 2016 to March 2019. It had three goals:

1. Support organisations to publish their grants data in an open, standardised way.
2. Help people understand and use the data.
3. Support decision making and learning across the charitable giving sector.

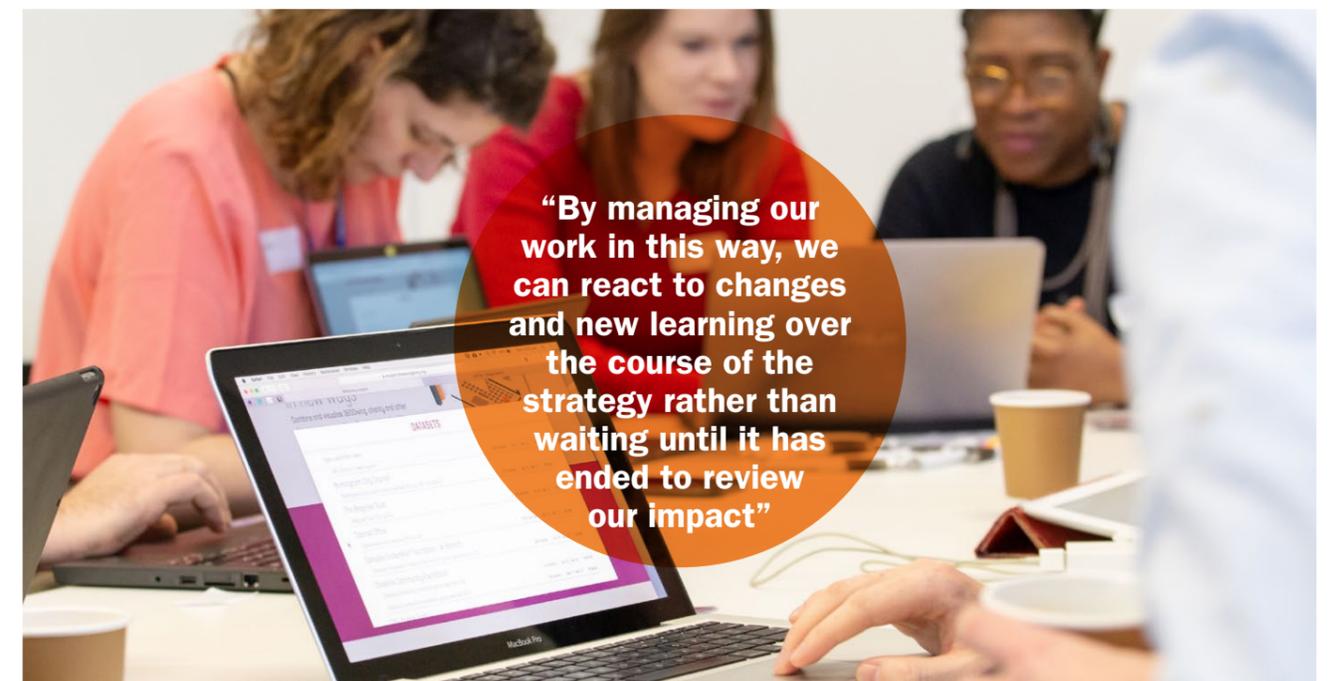
Overall, we made good progress with goal 1, which dominated our work. We made fair progress with goal 2; but we were hindered by data quality and low data literacy. We made limited progress with goal 3, which was a longer-term aim that required more progress with goal 2 and closer engagement with grantmakers that want to learn and change their approach; but we did see some positive examples.

During our first strategy we learned that:

- The majority of funders support our aims but need practical help with publishing their data. We underestimated the effort required to get them to refresh their data.
- Many funders are not confident working practically with data and struggle to identify their data needs.

- We mainly engage with organisations that are comfortable working with data. We have been successful in getting others to join in by focusing on a sector or region.
- Focusing on shared challenges has worked well; but there are targets we have failed to get to and limited pressure on them to engage if they choose not to.
- We need to deep dive into some data quality issues if we are to address them properly. We need to leverage our networks more strategically to do this.
- Funders want us to help them share their data, advise on their IT systems, build tools and analyse their data. We need to bring them with us more; not do things for them.
- Expectations are high. People want examples of data use and the impact this has had, but they don't understand why issues with data quality means this may not be possible.
- Examples from the sector are more likely to help us achieve our vision than getting regulators to take up our cause.

Our learning has helped shape this new 3-year strategy and identify the four key themes its organised around: seeing through what we started; raising the bar; testing new approaches; inspiring.



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WHAT HAVE WE ACHIEVED SO FAR?

For the first time in the UK, it's possible to see and compare grants awarded by different funders all in one place.

Since establishing 360Giving in July 2015, we have:

- Designed a data standard for UK grantmaking and agreed its independent governance model.
- Worked with over 100 funders to publish over 300,000 grant records worth £26 billion.
- Got a written commitment from the government to share its grants data in the 360Giving Standard and opened up an initial batch of central government grants totalling £4 billion.
- Developed a Data Quality tool to provide useful feedback to grantmakers on the information they are sharing and how it can be improved.
- Set up a series of quarterly workshops to support grantmakers' data needs and share learning.
- Supported the incubation of the Beehive Giving platform, helping grantseekers find the best potential funders of their work.
- Developed GrantNav - the free to use search tool that lets anyone easily explore and download grants data.
- Developed 360Insights – enabling grantmakers to quickly visualise information on seven key areas, revealing their funding patterns.
- Run a series of data expeditions to build grantmakers' skills to use data as part of their work.
- Launched a Challenge Fund, including a training programme and a visualisation challenge.
- Run a series of data use pilots with regional funder networks exploring shared challenges.
- Delivered our first 3-year strategy and developed a framework for monitoring future progress.
- 360Giving Standard was approved as an official government standard for the open publication of grant awards by the public sector.

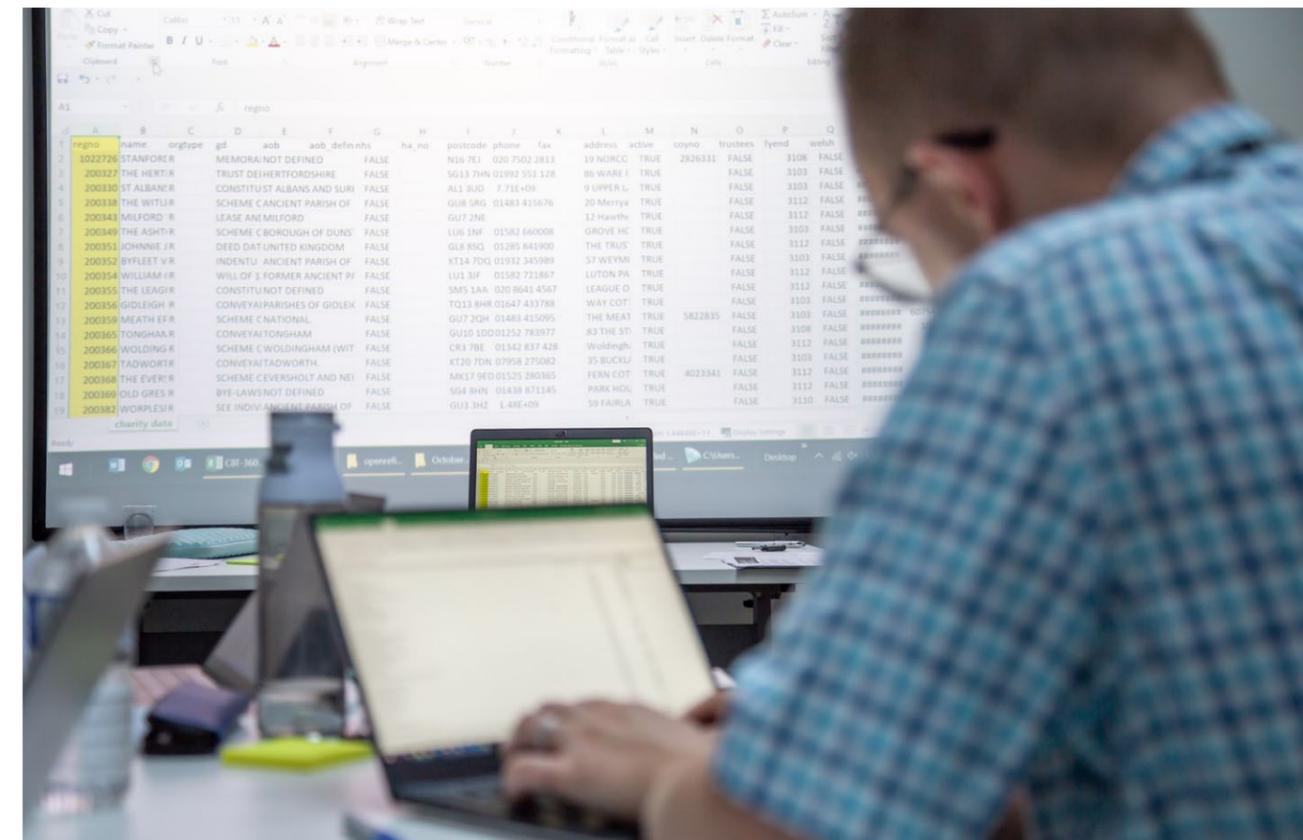
In line with our learning approach (see section 6), we will regularly monitor progress with achieving our goals. We will conduct an annual strategic review where we will track our progress against agreed indicators and milestones. We will conduct this work internally, but will share some of our findings with the grantmaking community as part of our efforts to engage openly and constructively with the sector. We will also ask for regular feedback on our work.



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HOW ARE WE GOVERNED AND FUNDED?

360Giving is a not-for-profit company and a registered charity. We follow best practice with regards to our financial management and governance systems.



Governance

From 2014 until mid-2015, 360Giving was governed by a Steering Group, consisting of the National Lottery Community Fund, Indigo Trust, Nesta and Nominet Trust. Each member provided financial and in-kind resources during this start-up phase. This enabled initial outreach to grantmakers to help identify their information needs, as well as designing the data standard.

A Board of Directors was established in July 2015, when 360Giving was registered as a company. It was subsequently registered as a charity and all the Directors were appointed as trustees.⁷ The board oversees the governance of the charity and advises on strategy, operations, outreach and fundraising. The trustees meet every quarter and all policies are reviewed annually.

360Giving is run by a Chief Executive who reports to the Chair of the Board and attends all board meetings. More details about our Directors and staff is available from the 360Giving website, including the Director's terms of reference.⁸

Staffing

It is not expected that we will expand to become a large team but, subject to funding, another 1–2 team members may be recruited during the period of this strategy. Staffing needs will be reviewed on a regular basis by the Chief Executive and in consultation with the Board.

We do not plan to make any other changes to our staff team under this strategy. Instead, we will work with a network of core consultants to help deliver specific activities. This will include technical and training experts with experience in the fields of grantmaking, open data and data analysis. Using a trusted network of consultants allows us to work with experienced professionals whilst retaining the flexibility needed for our approach, where it is important to be opportunistic and reactive to new learning as our work progresses.

Funding

All our funders and income is detailed in our annual accounts which are independently audited and published on our website, as well as being logged with Companies House and the Charities Commission. Any information requests about 360Giving will be responded to promptly and in accordance with our disclosure policy.⁹

Our focus is on making information available for the wider public good so we do not feel it is appropriate to monetise this work at present. We will gradually start introducing some pay-for services under this strategy, starting with our Data Expeditions; but it is important we continue offering pro bono technical support on publishing the data. In the longer term, we would like to explore options for introducing a mixed income model. We will always be clear what services we can provide and which of these are philanthropically funded.

There is real momentum around what we are doing and we will build on that under this strategy in order to make open data sharing the 'new normal' within the grantmaking community. We welcome the opportunity to discuss our work with you and how we hope to achieve our vision of open data being used to support more informed, effective and strategic grantmaking.

“There is real momentum around what we are doing and we will build on that under this strategy”

“We welcome the opportunity to discuss our work with you and how we hope to achieve our vision of open data being used to support more informed, effective and strategic grantmaking.”

7. For more on our Directors and their terms of reference visit: <http://www.threesixtygiving.org/about/the-team/>.
8. See <http://www.threesixtygiving.org/about/governance/>.

9. Available at: <http://www.threesixtygiving.org/about/governance/>.

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