

IATI data policy for Omidyar Network Fund Inc

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Overview

Who should read this document?

This policy is for anyone interested in why we published our grant data according to the International Aid Transparency Initiative (IATI) standard and how we produce, publish, and use IATI data.

- It details our commitments to the International Aid Transparency Initiative (IATI).
- It includes our goals in producing IATI data, using the IATI standard.
- It lists the principles we have to help implement IATI.
- It describes our processes for creating, publishing, and using IATI datasets.

Feedback on this policy

Feedback should be provided via iati@omidyar.com.

Document management

Owners

This policy is owned by Andrew Clarke.

History

This policy was first published on November 14, 2016. It was updated on February 15th, 2017.

Review

This policy will be reviewed on March 31, 2017.

Version

This is version 1.1 of this policy.

IATI data context

Why IATI data?

Omidyar Network is committed to supporting a collaborative, open, and effective funding community. We believe we can contribute to this by publishing our grant information in line with a global common open data standard. The [International Aid Transparency Initiative](#) (IATI) has developed a pioneering open data standard (the [IATI Standard](#)). It links together financial and non-financial information about development assistance projects (or “activities”) and investments using international classifications to enable aggregation, comparison, and development of analytical and visualization tools. A critical mass of international development funders has now agreed to publish their data to IATI. For these reasons, we have chosen to publish information on our grant portfolio using the IATI Standard.

IATI data that we produce:

- is structured, open, and comparable data on charitable and development-focused support
- can be freely used, reused, and redistributed by anyone
- is subject, at most, to the requirement to attribute and sharealike.

Our IATI data goals

By publishing data to the IATI standard, we aim to ensure that:

- our data is open, useful, meaningful, and accessible
- we publish data that brings value and supports dialogue and discussion
- we provide transparency and accessibility of information to our stakeholders.

In line with our core values of being collaborative and in service to our grantees and ultimate beneficiaries, we aim to operate a data practice that is robust, comprehensive, and leads to greater engagement on the issues faced by funders and grantees.

Our IATI data commitments

When considering IATI data, we commit to the following:

We will observe the IATI standard

- We will strive to make our data valid in terms of the IATI schema.
- Where feasible and appropriate, we will utilize common IATI codelists and references.
- We will register our data with the IATI Registry.

We will publish data openly

- We will publish data on key aspects of our grants portfolio in an open and accessible manner.
- We will publish data on all our grants, except in cases where there is a need to exempt, on legitimate grounds of safety, security, or commercial confidentiality.
- We will update this data regularly and in a timely manner.
- We will provide documentation and descriptions of the data we publish, including a license.

We will use IATI data

- We will analyze, use, and discuss our own data.
- We will use other openly available datasets, including IATI data published by other organizations, to provide insight into the sectors in which we work.

We will support those using our data

- We will be open to queries and feedback, via email (iat@omidyar.com).
- Where appropriate, we will respond accordingly.

We will support the uptake of IATI amongst our peers

- We will champion the publishing and use of IATI data by other philanthropic funders.
- We will provide advice to our peers on publishing and using IATI 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 IATI data policy.

Our IATI data principles

The act of providing IATI 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 high enough quality to be accessed, used, and understood. It is the intention of this policy to reduce potential issues that make data less useful.

These principles guide the implementation of our IATI data policy, and can be broadly categorized as follows:

Technical principles that inform our IATI data.

These are in line with the specification of the IATI standard.

Operational principles that guide our IATI data.

These are in line with processes around open data.

Organization principles that govern our IATI publication.

These are in line with our core values.

Technical principles that inform our IATI data

Our support of the IATI standard means that our data will be in line with the technical specifications published by the International Aid Transparency Initiative.¹

Principle 1

Principle: Our IATI data will be valid, in line with the specification of the IATI standard.

Processes: We will test our IATI data against the relevant version of the IATI schema.² Where issues occur, will fix and resolve prior to publication.

Outcome: Our data will pass validation tests for the IATI standard.

Principle 2

Principle: Our IATI data will use commonly available references where applicable.

Processes: We will utilize the common IATI codelists within our data. Where we use our own codes or vocabularies (e.g. sectors), we will document accordingly. We will publish data that is free from jargon and document acronyms and abbreviations used.

Outcome: Our data will include our portfolio investment codes (our investment “initiatives”).

Principle 3

Principle: Our IATI data will be presented in common technical file formats.

Processes: We will publish our IATI data in the common format for IATI: XML. We will not publish IATI data in bespoke or redundant formats or solely in proprietary formats. We will provide our IATI data in additional common formats, such as CSV.

Outcome: Our data will be published in XML and CSV.

¹ The IATI standard is specified at <http://iatistandard.org/>

² The IATI validator tool enables this: <http://validator.iatistandard.org/>

Principle 4

Principle: **Our IATI data will be accessible and consistent.**

Processes: We will always publish data consistently, making it accessible to all.
We will not publish data that needs passwords or put other access restrictions in place, unless these are signposted.

Outcome: Our data will be registered on the IATI Registry.

Principle 5

Principle: **Our IATI data files will be a workable size that can be used on a personal computer.**

Processes: We will always consider and monitor the size of our data - to make it usable for those who may want to access it.

Outcome: Our data will not exceed 40MB, in one file.

Operational principles that guide our IATI data

We will ensure that our publication is conducted in a manner that is accessible and user-centric.

Principle 6

Principle: **Our IATI data will be timely.**

Processes: We will always provide regular and timely updates to relevant IATI datasets. We will not miss updates to our relevant datasets, or let our data go “stale”.

Outcome: Our data will be updated every financial quarter.
Our data will detail historical activity, at most one quarter behind.

Principle 7

Principle: **Our IATI data will be comprehensive.**

Processes: 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.
We will only exempt data on legitimate grounds of risk to grantees or our personnel.

Outcome: Our data will cover our nonprofit grants portfolio.

Principle 8

Principle: **Our IATI data will be relevant and succinct for the subject.**

Processes: We will always consider the scope and spread of our data - to make it useful for those who may want to access it.

See also: Our data will be structured into IATI activities that each describe an investment in our grants portfolio.

Principle 9

Principle: **Our IATI data will be appropriately licensed.**

Processes: We will always issue an open license with our IATI datasets.
We will not publish data that is subject to a restrictive license.

Outcome: Our data will be published with Creative Commons Attribution 4.0 International License.³

Principle 10

Principle: **Our IATI data will be documented.**

Processes: We will always provide notes and guidance with our datasets.
We will always detail the nature, scope, and purpose of our IATI datasets in a release document, available to all.
We will not purposefully provide data that is poorly described.

Outcome: Our data will be presented alongside explanatory guidance.⁴

³ <https://creativecommons.org/licenses/by/4.0/>

⁴ Also found in the appendices of this document

Organization principles that govern our IATI data

In line with our core values of being respectful, collaborative, and in service to our grantees and ultimate beneficiaries, we will not publish data that would compromise the safety or commercial interests of our grantees and we will ensure a high degree of accuracy.

Principle 11

Principle: **Our IATI data will respect privacy and security concerns**

Processes: *We will ensure we have informed grantees that data will be published.
We will ensure our IATI data respects commercial confidentiality clauses.
We will ensure that our IATI data does not expose our grantees to safety or security risks.*

Outcome: Our data publication will include an exclusions policy.⁵

Principle 12

Principle: **We welcome feedback and discussion about our IATI data.**

Processes: We will always make it clear how to provide feedback on our IATI data, and where appropriate, publicly document our actions.
We will not publish data without a feedback mechanism.

Outcome: Our data publication will include clear feedback details.

Principle 13

Principle: **We will take down inaccurate IATI data.**

Processes: We will act to remove or replace published IATI data where mistakes have been identified in a timely and considerate manner.

Outcome: Our data will be checked on a quarterly basis for accuracy.

⁵ This is also included in the appendices of this document.

Our expectations of you

Our IATI data policy provides a framework for our practice. When using our IATI data, please consider the following:

Accessing our data

According to our principles, the datasets we publish 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.

Feedback

If you spot any mistakes, errors, or points for clarification, please provide feedback via iati@omidyar.com.

We also encourage requests and ideas for new data that we may publish.

Reuse of this policy

This policy is published under [Attribution-ShareAlike 4.0 International \(CC BY-SA 4.0\)](#)⁶ and based on version 2.0 of the [Open Data Policy](#) on GitHub.

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Contains text from the Macc IATI data Policy

Source: <http://www.macc.org.uk/sites/macc.org.uk/files/Open%20Data%20Policy.pdf>

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⁶ <http://creativecommons.org/licenses/by-sa/4.0/>

Appendix 1: IATI activity data - schedule & overview

Consideration	Our response
Dataset name	Grants
Brief description	Key information on the non-profit investments (grants) made by ONFI
Responsible person / team <i>Who is the authority for this data?</i>	Andrew Clarke
Privacy <i>What privacy considerations should be taken?</i>	All grantees have been notified of this publication. Personal names and details of grantees are not included. Where grants have security risks, information may be removed or anonymized.
Legality <i>Does the data contain any derived data?</i>	No
Format <i>How will be the data be made available?</i>	As an XML file, valid to version 2.02 of the IATI standard As a spreadsheet, saved in a CSV format
Segmentation <i>How will the data be segmented?</i>	One activity file is published, detailing all relevant investments.
Dates <i>What date period are used in the data, if any?</i>	All currently funded grants will be published in the first file. Subsequent updates will add new activities.
Structured <i>Does the data contain any inherent jargon or interpretation?</i>	Omidyar Network Investment Initiatives will be used for sector codes. A full list of these codes will also be provided.

<p>Interoperable</p> <p><i>How can other datasets be referenced?</i></p>	<p>The IATI codelists will be utilized where feasible.</p>
<p>Availability</p> <p><i>How will the data be disseminated?</i></p>	<p>On the Omidyar Network website - at https://www.omidyar.com/values-policies</p> <p>The URL(s) to the data will also be logged on the IATI Registry</p>
<p>Documentation</p> <p><i>How will the data (and processes) be described?</i></p>	<p>Supporting guidance will be published on the Omidyar Network website</p> <p>Reference to this will be made in the IATI Registry profile</p>
<p>Updated</p> <p><i>What is the update timetable?</i></p>	<p>Quarterly - one month after the end of each financial year quarter</p>
<p>Licensing</p> <p><i>What license will be applied?</i></p>	<p>Creative Commons, Attribution</p> <p>http://creativecommons.org/licenses/by/4.0/</p>
<p>Feedback</p> <p><i>How will feedback be progressed?</i></p>	<p>Feedback should be provided via iati@omidyar.com.</p>
<p>Additional Notes</p>	

Area of IATI	IATI field	Inclusion in ON	Notes
1 - Basics	iati-identifier	included	This provides a globally unique identifier for each "activity" in IATI, which for Omidyar Network's purposes is the individual grant. It consists of the ONFI ID (US-EIN-201173866) followed by an ID internally generated by our system
1 - Basics	reporting-org	included	ONFI: US-EIN-201173866
1 - Basics	title	included	This is the title of the "activity" - i.e. the investment name
1 - Basics	description	included	A brief description of the organization
1 - Basics	participating-org	included	Includes Funder (ONFI) and Implementing (grantee) orgs
1 - Basics	activity-status	included	All currently active grants (Implementation) (code: 2)
1 - Basics	activity-date	included	Effective and projected end dates for grants
1 - Basics	contact-info	included	Investment Lead name + email address (iati@omidyar.com) to collate user feedback
2 - Geography	activity-scope	included	For global grants (code: 1).
2 - Geography	recipient-country	included	Where collected for particular grants (India and Myanmar)
2 - Geography	recipient-region	included	Geographic region, e.g. Africa
2 - Geography	location	not included	ON does not record this data
3 - Classifications	other-identifier	included	ON's internal systems identifier.
3 - Classifications	sector	included	Will use Primary Investment Initiative for now - will explore feasibility and suitability of mapping these to IATI common classifications in the future
3 - Classifications	country-budget-items	n/a	Not relevant to ON
3 - Classifications	humanitarian-scope	n/a	Not relevant to ON
3 - Classifications	policy-marker	n/a	Not relevant to ON

3 - Classifications	collaboration-type	included	This will be a default for all grants - "private sector outflow" (code: 6)
3 - Classifications	default-flow-type	included	This will be a default for all grants - "private grants" (code: 30)
3 - Classifications	default-finance-type	included	This will be a default for all grants - "grant" (code: 110)
3 - Classifications	default-aid-type	included	This will be mapped to one of three choices - "core support" (B01), "contributions to specific programmes" (B03) or "project-type interventions" (C01)
3 - Classifications	default-tied-status	included	This will be a default for all grants - "untied" (refers to whether the aid is "tied" to donor country procurement)
4 - Financials	budget	potential	Will be reviewed in the future
4 - Financials	planned-disbursement	potential	Will be reviewed in the future
4 - Financials	capital-spend	n/a	Not relevant to ON
4 - Financials	transaction		Commitment (total grant) will be included; actual (dated) Disbursements to grantee will be reviewed for publication in the future
5 - Performance	document-link	potential	URL links to research materials / publications - to be considered for the future
5 - Performance	related-activity	n/a	Not relevant to ON
5 - Performance	conditions	not included	Will not be published in IATI data
5 - Performance	result	not included	Will not be published in IATI data
6 - Other	crs-add	n/a	Not relevant to ON
6 - Other	fss	n/a	Not relevant to ON