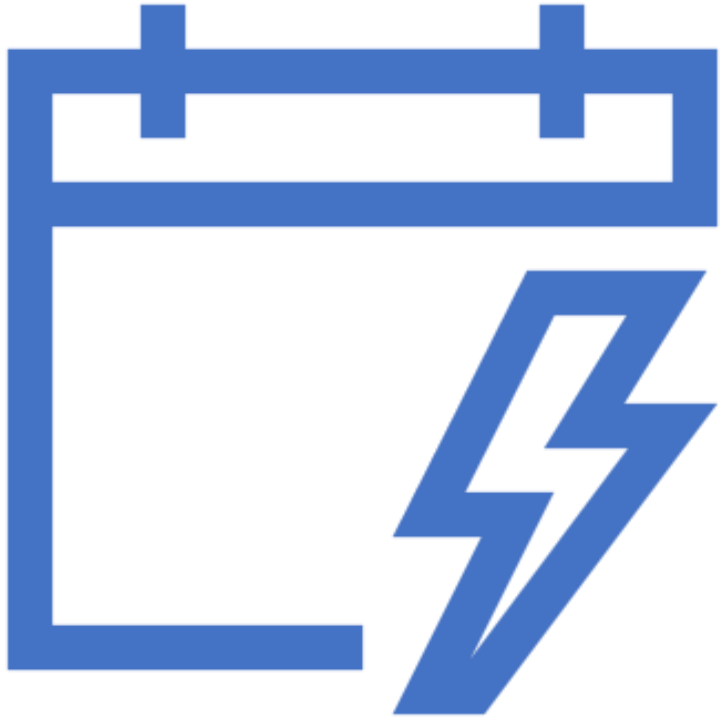
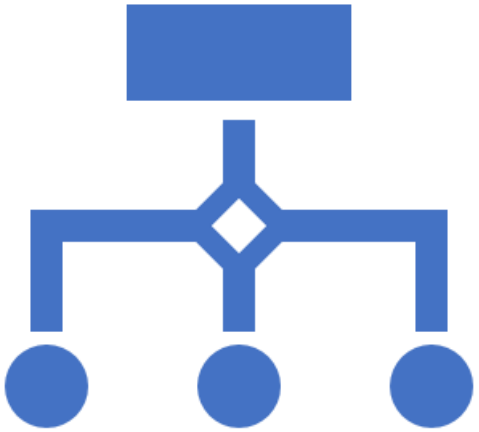


APH Annual Plan & Open Data Schedule

Dorr Elmatad

Stefan Wray

Problem



- No Planning involved in ODP
- Accidental discovery of data followed by request to publish was method of publishing
- Inefficient and room for improvement

Looking Elsewhere

Annual Plan Workbook

Accountable and Planned Progress

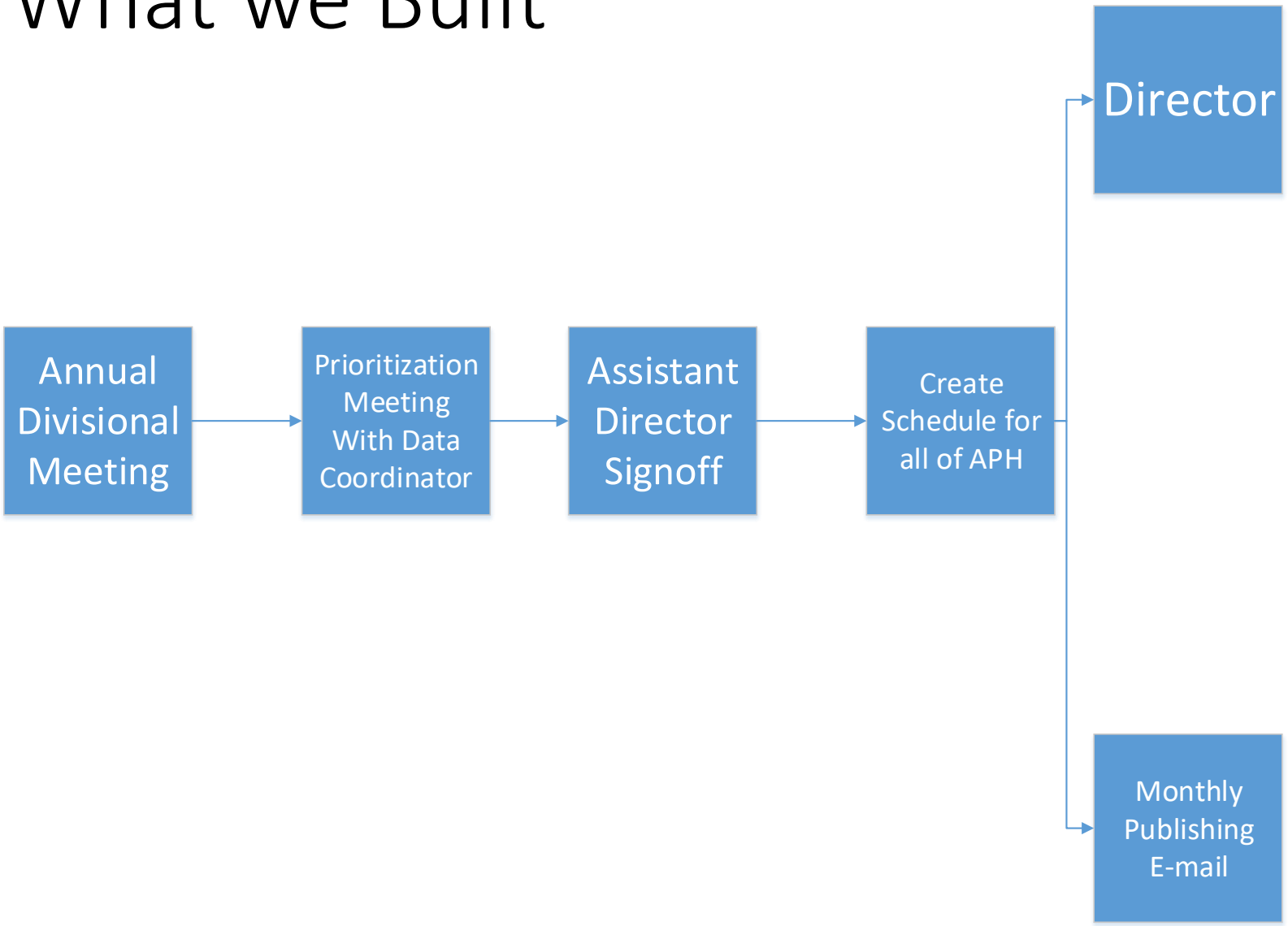
APH's Adaptation

- PIRs
- Civic Engagement

- Original ODC Compliance Workbook
- Documentation for NYC Workbook

What We Changed

What we Built



Annual Divisional Meetings

Evaluating Performance

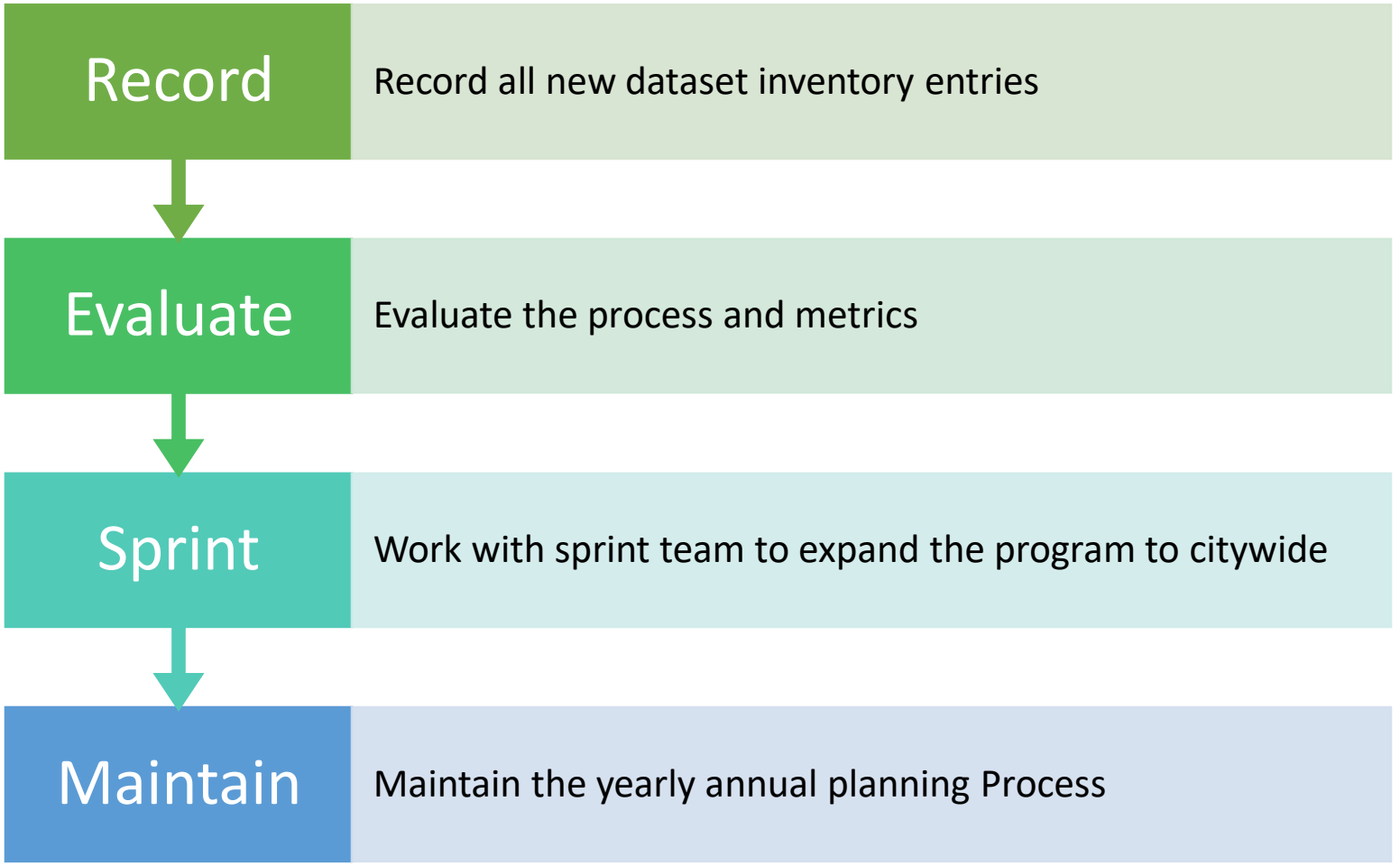
Before Annual Plan:

	Published	Inventoried
CS	1	10
EPI	4	18
DPHP	5	11
HECE	7	10

After Annual Plan:

	Published	Inventoried
CS	10	36
EPI	16	34
DPHP	10	36
HECE	13	30

Next Steps


Record
Record all new dataset inventory entries
Evaluate
Evaluate the process and metrics
Sprint
Work with sprint team to expand the program to citywide
Maintain
Maintain the yearly annual planning Process

How to Apply Annual Planning to Your Department

Open Data Annual Plan Documentation:

8/7/19

1) Identify groupings for Open Data within your department i.e. divisions / units / groups / programs.
    a. For example, Austin Public Health has 7 divisions that we split this project into.
2) Identify a facilitator for open data per group who:
    a. Has a good overview of their group
    b. Understands how data works and is preferably technologically apt
    c. Has authority within the group
3) Meet with your facilitator and explain the Open Data Annual Plan to them. Then ask them to identify stakeholders who might be good to include in a larger discussion later.
4) Once you have a list of people from your facilitator either ask your facilitator to invite all these people or invite them yourself to a one-and-a-half-hour meeting.
    a. It might help to get an assistant director to send an email encouraging attendance
    b. The meeting invite should include language explaining what you are trying to accomplish and WHY they are being invited because in many cases the invitees might have no idea of what the open data program is.
    c. Nothing is required to be brought to the meeting by the attendees
    d. We found the golden number of attendees was around 8 people.
5) Conduct the Annual Open Data Plan Meeting and Discussion
    a. You should bring 4 differently colored post its to the meeting, a wall sized post-it, and a good number of sharpies or writing utensils
    b. We encapsulated ideas in 4 groups (a different color post it for each)
        i. Blue Post-its (Data we already knew about / recommended /obvious ideas)
        ii. Pink Post-its (New Data that would be considered for the Open Data Annual Plan for this year and future years)
        iii. Orange Post-its (New Data that would be considered for the Open Data Annual Plan FOR INTERNAL USE ONLY, for some departments you might not need this color)
        iv. Yellow Post-its (Requests for new data from someone else, in some cases this can become another group's blue post it and this is also not part of the annual plan but rather extra and increases data sharing capabilities.
        v. ALL POST ITS SHOULD HAVE: name of the dataset, name of the contact for that dataset, and a dot in the corner indicating whether it is a Performance Measure
        vi. OPTIONAL: Bring a sheet with lists of different things such as grants the group reports / ideas to get them thinking about what data they might already collect.
    c. On the large post it board create a matrix of value and sensitivity so that each quadrant is some combination of low/high value and low/high sensitivity.
    d. Give an overview of the Open Data Program (feel free to show the portal on a monitor and run through Socrata with the group)
    e. Introduce what you are trying to do with the annual plan process
    f. Introduce the post its in the sequence listed above
    g. Allow people to place post its on the matrix and discuss amongst themselves (this should be the bulk of the meeting)
    h. When you have a satisfactory amount of brainstorming end the meeting (usually doesn't need the full 90 minutes)
6) Take the post its and digitize the information like so:

7) Once you have all the post its in excel meet up one more time with the facilitator identified in step 2 and ask them to create a priority list (this will be your plan for the next Year, which we lined ours up with the Fiscal Year)
8) Also getting a time frame as to when to publish per dataset is important
9) Take this priority list and schedule to the Assistant Director(or other executive) of the group and ask them to amend anything they want and sign off on the plan so that you have executive backing and can enforce it.
10) Show the director of your department the results although she does not need to sign or approve any of it.
11) Repeat this process for each group you identified in step 1
12) Repeat this process yearly as need be (you may have collected enough Open Data ideas to last multiple years)
13) Maintain the project by utilizing your monthly list to send reminders to those people listed on the first of every month, be it by e-mail, teams, skype or whatever it may be.