

Local Metrics Planning Workshop (26/02/2016) – Write Up

What process should local metric uploads take?

- LGA should continue its facilitation role to work with regional user groups, subject specialists and individual authorities to encourage a flexible and pragmatic approach to metric type definitions to avoid a proliferation of local metrics (19).
- LGA will need to produce a series of documents setting out how the system will be managed in terms of governance, addition and sign-off of metric types, FOI implications, publication schedules, retention/change policy of metric values and metric types (27).
- There was general support that local metrics should use the same publication process as LGI national benchmarking club (12).
- Have regular newsletter about new metrics (3).

Users' minimum responsibility? Provide metadata such as a definition, units of measure, frequency, locality of cover and the source data or updates.

- There was a general consensus that the current metadata template used for the national Benchmarking Club covered the minimum fields (20), with further support for making the mapping of metrics to local government functions and themes compulsory to aid discoverability and avoid duplication (15).
- Users should be encouraged to define metric types as numerator and denominators rather than just ratios (11) and there should be transparency of calculations (display the numerators and denominators in the system (2).
- Create metric types from raw data (Aka uploader incidents/amenities) (2).

What form of data input best suits your needs?

- In terms of data input there was very strong support for Excel/CSV templates (which can be downloaded, populated and then uploaded) (35) but also support for a form based system as an additional option (17). Regardless of the upload method there was a number of comments about data quality and the need for the system to have validation routines which check against metadata and metric values (15), some suggested that this validation should be performed 'pre-upload' to avoid poor data entering the system (7).

- With regards to when data should be added there was some support for the upload window/timetable to be metric type specific (9) but with some flexibility to fit with local processes (3). Users were also interested in receiving reminders of relevant upload windows (NB to self – JIRA model of watch list might do the trick)) (5).
- User also expressed the need to be able to correct values quickly, possibly outside the upload window and without the need to upload all metrics again (5).
- There was some support for automatic extraction from systems but only a few examples were given (DataShare, NDL.co.uk and other commonly used systems) (11).
- Metadata and metric values should include caveats and warnings (to explain locally collected mgmt. info) (12) and users should be encouraged to include details of system sources used to generate data (3).

Security and access levels given to: upload process, sight/discovery of local metrics, use of local metrics

- There was significant support for upload to be limited to users with the appropriate permissions (30) and a few suggested that it should be possible to delegate metric upload rights to partners/other organisations (4). Linked to this was a requirement to record which users loaded which value and a need to include within the process some means of dealing with deactivated users (6).
- Additionally, there was a requirement to support 'sign-off' of data uploaded into the system although it was mixed; 16 votes were cast in favour of a process within the system for 'sign-off' while 6 votes were in favour of the authority having their own 'internal sign-off' procedures.
- There was a general consensus that a key requirement is a comprehensive sharing model similar to the sharing model used in LGI (35), furthermore there was support to have an option to share anonymously (11).

Data discovery

- Near universal support for an improved means for users to suggest, comment and vote on metric definitions. The tool should include features such as:

Alert service for new suggestions and notification of discussions backed up by a regular cycle of promotion and voting to get metrics added, when new metrics are suggested highlight similar metrics already suggested or in the system to avoid duplication (NB to self can we show similar suggestions based on cloud search relevance?), include who the author of a metric type is and who has commented or voted on it, allow searching for local metrics independent of published metrics (34)

- Other ideas included allowing the duplication of suggested metrics so that alternatives can be proposed (1), allow searching by geography (3), for local metrics which are 'live' show which authorities are submitting data (4), allow multiple users to tag metric types (4), allow users to create a personal metric list (a bit like LGI areas of interest) (5) and allow authorities to upload additional extra column(s) so they can add their own references (3)
- Largely the type of metric types users wanted to add were ones that they could benchmark against other authorities, however there was some table discussion about hyper-local metrics only relevant to a single authority and in relation to these users suggested that the author should be able to decide whether to share their definition or keep it private (5).

What process should local metric uploads take?

- Users' minimum responsibility? Provide metadata such as a definition, units of measure, frequency, locality of cover and the source data or updates.

13. User permissions for upload – 111111
14. Hyper-local metrics should still be discoverable (metadata) – 11
15. Metadata and metric values should include caveats and warnings (to explain locally collected mgmt. info???) – 11111
16. Sharing (public/private switch) – 11
17. Metadata schemas/templates/examples – 1111111111111111
18. Validation rules – 1111
19. LGA facilitation – 1
20. Flexibility of metric upload timetables – 11
21. Collect numerators and denominators – 1111
22. Process of tagging/themes for metrics so that other users can find them – 11
23. Uploaders agreement – 111
24. Date metric values loaded key metadata – 111
25. Regional user groups facilitate definitions of local metrics – 111
26. Tool for suggesting, commenting and voting on metric definitions – 1111111111
27. Data retention policy – 11111

28. Facilitated agreement of definitions; encourage users to be flexible around common definition rather than lots of similar ones - 111111
29. Upload of metric values should include details of system sources used to provide data – 111
30. Search and suggest tool should allow indicators to be replicated – 1
31. Time periods key metadata field – 11
32. Reminders for upload widows – 11
33. Polarity key metadata field – 111
34. On metric value upload record who loads the value and include process on how to deal with deactivated users – 11
35. Metadata 'official signoff' by experts – 1
36. Support Confidence Intervals – 1
37. Threshold after metric goes from hyper-local to local, how do you ensure commitment to load data – 11
38. Measure and properties key metadata – 1
39. Transparency of calculations; display calculation steps (like PSSA VfM) – 11

What form of data input best suits your needs?

40. Excel/CSV templates (with some key download only fields) – 11111111111111111111111111111111
41. Automatic extraction from performance system NDL.co.uk – 1111111
42. Create metric types from raw data (Aka uploader incidents/amenities) – 11
43. System validation – 111111
44. Upload numerator and denominator – 1
45. Form based entry with inbuilt validation – 111
46. Optional metric value field 'commentary' – 1111111
47. Allow authorities to upload additional extra column(s) so they can own references – 111
48. Develop Excel plugin which convert to XML – 1
49. Users need to be able to upload/correct values quickly (possibly outside upload window) – 11
50. Validation pre-upload (more likely confirmation to continue with upload) – 1111
51. Uploader agreement - 1
52. Fix metric value errors without whole upload of metric values (form based view?) – 111
53. On metric upload record who uploaded data – 1
54. Form based entry – 1111111
55. Formal process for changes to metric values- 11
56. Process for removing poorly used/discontinued metrics from DB – 11
57. Develop online definition form – 1

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58. Multiple users within councils can upload metrics – 111
59. Flexible sharing of metric values – 11111111111111111111111111111111
60. Sign off procedures (with alerts) – 111111111111111
61. Retention policy – 111
62. Who can delete metric values (should we record when they do?) – 111
63. FOI implications (who owns the data?) – 11
64. Metadata for private metrics should still be discoverable – 1
65. Eventual publications as LGI does – 111111111111
66. Internal sign off procedures – 111111
67. Share metric values anonymously – 11
68. Metric values have owners – 111
69. Delegated metric upload writes (partners/other orgs can load data) – 11
70. Administrators that can delegate upload rights – 11
71. Alerts for data upload windows – 11
72. Need policy and procedures if allowing changing access rights as people may be relying on previously published data – 1
73. User permissions – 111111111
74. Transparent metadata, easy to find published v local metrics – 11
75. Governance – 111

Data discovery

76. Suggested metrics need to be tagged/themed – 11111111111111
77. Need to be able to search/filter separately for local metrics – 11111111111111
78. Allow search by geography – 11
79. Share users details for creator of local metrics/data owners – 1111
80. Personalisation of metrics list (bit like LGI areas of interest) – 11111
81. Search suggestion tool need to highlight new additions/popular – 111
82. Only show metrics with data for your selected areas – 1
83. Don't mix public and local metrics in search (standards pages) – 11
84. Don't show hyper local metrics – 1
85. Show what metrics are live and who is using them – 1111
86. Have regular newsletter about new metrics – 1111
87. User voting on new metrics – 1
88. If search for metric returns no results, display button which says suggest new metric – 11
89. Need better search weightings - 111
90. Metric type author decides whether to share metric definition – 11
91. Allow multiple users to tag metric types – 1111
92. Alerts for metric upload timetable – 111