

# OPEN DATA TUTORIAL

Opening and promoting use of budget data

Listen to the demand

While opening budgetary data, it is essential to mind its **use as the ultimate objective of all teams involved**: data is valuable in the measure it is used. Therefore it is useful to keep in mind the following questions:

- What kind of data arises people's **interest**?
- Who could be the **final user/user organizations**?
- How **often** will the data be used?
- In what **format** would it be **easier** to use?
- How much **access** and what **digital skills** do the identified people/organizations have?
- What objectives** do these people/organizations have in relation to their **budget data use**?
- How much do they know about the **budget cycle**?
- Can we identify any **socio-demographic pattern** in the users/organizations composition?



Answering these and other questions facilitates the identification of the audiences that will use the published data and allows us to differentiate their needs. Students, journalists, researchers, businesspeople, agents of the many entities and levels of government, have different needs. What does each group or sector want to know? Is there any specific information they are interested in?

The first step will be to identify potential users and listen to them so that we can know potential uses of the information, this will **make it easier to decide** which data sets should be prioritized for their publication, how often to update them, etc.

The following actions will help identify these users and know their interests and demands:

## 1. Analyze information requests

Analyzing the information requests received by the Ministry of Finance (or other ministries), helps to detect the main concerns and demands of citizens, especially those regarding budget information.

Several countries enforce legislation on transparency and access to government public information that allows citizens to request information from the authorities of the various branches, autonomous bodies and sub-national governments about their activities and budget. Even if there is no legislation in this respect, governments receive information requests in different forms.

### TIP

It is as important to identify the information of interest by analyzing the questions received, since this will shed light on the petitioner's understanding of the budget cycle, as well as which are the most common information gaps or misunderstandings.

This will facilitate decision making about the publication format, the data that can be published together to give context, the language and depth that should be sought in the data dictionaries, among other key topics.

## 2. Identify people and organizations interested and listen to them directly to know the possible uses of the information before its publication

Some strategies to build communication channels with different groups are:

- a) Identify the organizations or academic institutions whose agendas consider budget topics. Also, it is recommended to participate in forums with specific communities, for example, representatives of the academy in economics, public administration or accounting; civic advocacy-oriented data science specialists; civil society organizations with public policy agenda and so on, to listen to them and work on a collaborative agenda.
- b) Conduct canvassing exercises, such as polls or focus groups that expose audiences to budget information (or lack thereof), to know their interest and insights on the subject.
- c) Identify and establish communication with communities not specifically related to budget topics, so that we may encourage them to use data in their specific agendas. For example, meetings with people who are beneficiaries of governmental programs, or with groups that are interested in thematic agendas such as gender, environment, poverty reduction, energy efficiency, entrepreneurship, among others.

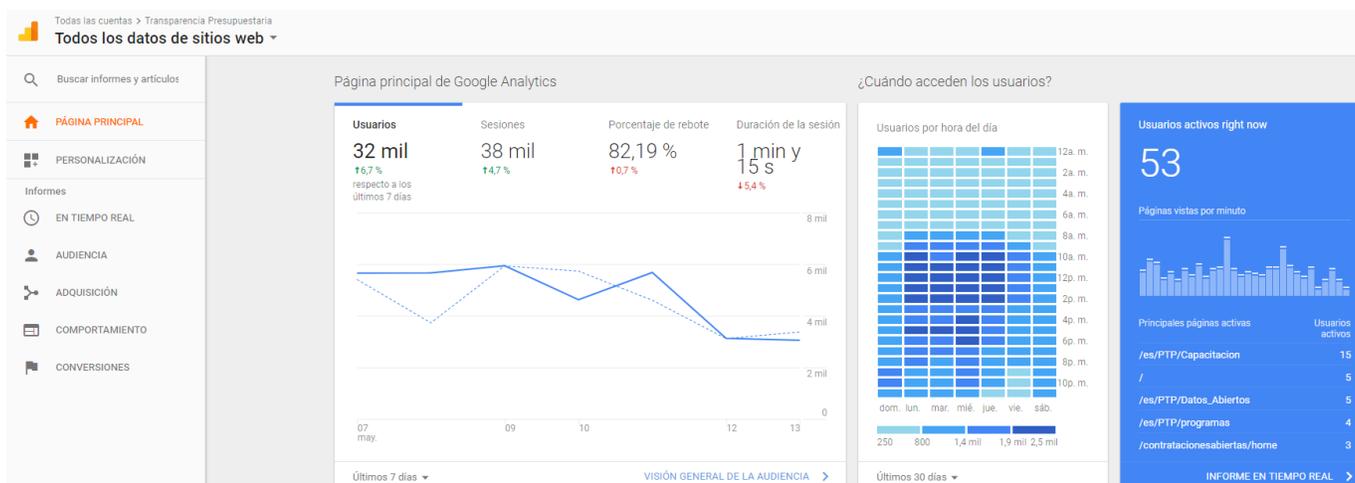
### TIP

The **Open Government Partnership** is a meeting point for different social actors interested in openness agenda in several countries. If your country is part of this initiative, the definition process and the forums associated with it are good opportunities to identify organizations and people interested, listen to their point of view and follow up on their agenda.

## 3. If you already have a site where information, reports, or budget data is published, review use statistics regardless of the format; observe the trends to detect the most used information

Among them:

- a) Identify the most downloaded reports and documents. The transformation of these reports from closed-formats to open-formats will have user traction in advance.
- b) Identify the sections most visited or those in which the users stay the longest.
- c) If there is a specialized budget information portal, it is recommended to use trend measuring tools. One of the most common is Google Analytics.



#### 4. Participate in events led by civil society organizations

Such as: hackathons, meetings of programmers whose objective is the collaborative development of applications and **software**, data expeditions that promote the analysis of public spending data; seminars, conferences, workshops and forums that promote the use and analysis of budgetary data, among others.

Attending to these events will allow you to:

- Know the data people are looking for and whether you have it or not.
- Identify the difficulties in the comprehension of the data already published.
- Distinguish the types of analysis performed by different groups of experts and the tools they use to perform them.

#### TIP

Remember that the listening process must be on-going. The participation in this events must continue during the process of opening, updating and improving the quality of the data.

For example, a data expedition on government contracting processes in which participants analyze the open data and tell stories with them, allows knowing the usability, limitations, areas of opportunity and improvement of the published data, which can go from the clarification of the explanations of the data to the cleaning or the need to incorporate additional data sets.



Participants of a data expedition on government procuring and its execution, in the framework of the International Open Data Day 2018, in Mexico City.

## 5. Organize events encouraging civil society participation

These events should promote the use of open data to track public spending. To achieve this effectively, a good strategy is to host thematic events.

Budget information is very broad and spreads along all aspects of public policy, so it is recommended to focus on certain information to generate greater interest and impact.

Following this, spending in specific sectors (health, education, housing, mobility, etc.), as well as monitoring the progress of public investment projects that are executed in the communities, are examples of information better suited to organize events around. This, since it is easier for people to identify **how spending of public resources affects their daily life** and, in turn, if it is information of interest to specialists in data exploitation, since it can be applied to diverse contexts.

Several countries have carried out infrastructure monitoring exercises, such as the #DataOnTheStreets Rally, where people are invited to verify the information on the infrastructure projects happening in their communities, based on the public data sets and on the georeferenced information visualization tools (maps).

These events encourage the use of data and detect what information located in other data sets could be published, if it is clear, etc.

## 6. Examine social networks statistics and trends

Social networks are a source of information that in recent years has become the space of primary social interaction for large groups of people around the world.

It should be noted that in addition to your own social networks, it is advisable to monitor those of other ministries, organizations or communities interested in budget information, to identify trends and potential audiences.

On the other hand, when having a platform to publish budget data, it is highly recommendable to actively use social networks for dissemination and feedback. You should analyze growth trends, clicks, interactions, etc., to know what information generates more interest and what are the most effective communication strategies.

### Facebook

**Transparencia Presupuestaria**

**Estadísticas**

Tus publicaciones más recientes: 5

Fecha de publicación	Publicación	Tipo	Segmentación	Alcance #	Interacción	Promoción
16/05/2018 16:17	¿Para qué sir...	Video	Global	0	0	Promocionar publicación
16/05/2018 15:45	Mantente al ta...	Video	Global	183	1	Promocionar publicación
16/05/2018 11:53	A 10 a flote de...	Video	Global	583	23	Promocionar publicación
16/05/2018 11:52	Dellie Antlone	Video	Global	287	13	Promocionar publicación
16/05/2018 11:40	Explicación de...	Video	Global	389	30	Promocionar publicación

Ver todas las publicaciones

**Páginas en observación**  
 Compara el rendimiento de tu página y tus publicaciones con el de otras páginas similares de Facebook.

Página	Total de Me gusta	De la semana pas	Publicaciones de	Interacción de esta sema
1 <b>Secretaría de Hacienda ...</b>	345.6K	0%	25	412
2 <b>Open Government Partn...</b>	19.9K	▲0,4%	68	304
3 <b>Transparencia Presupue...</b>	9.4K	▲1,7%	39	775
4 <b>Global Initiative for Fisc...</b>	7.5K	▲4,6%	17	395

# Twitter

## 7. Consider international trends

There are international organizations promoting best practices in budget transparency, knowing them allows for a long-term strategy design.

These are some of the most important international initiatives:

- a) The [International Budget Partnership](#) (IBP) uses budget analysis as a tool to improve effective governance around the world. The IBP publishes the Open Budget Index which biennially evaluates the level of openness of eight main documents of the budget cycle: the Pre-Budget Statement, the Executive's Budget Proposal, the Enacted Budget, the Citizens Budget, In-Year Reports, such as the Mid-Year Review, the Year-End Report and the Audit Report. The results of the index are a reference to the information to be published, it also identifies opportunities for improvement, strengthens openness mechanisms and prioritizes the information disclosure agenda.
- b) The fiscal transparency manual of the [International Monetary Fund](#) (IMF), identifies good fiscal transparency practices to achieve growth as a fundamental element of good governance. In this manual, regulations are identified as tools to help prioritize specific actions during the openness process.
- c) Best practices' for budget transparency of the [Organization for Economic Co-operation and Development](#) (OECD) lists the main types of budget reports that governments must integrate and highlights practices that seek to ensure that reports are integrated with high quality. These practices seek to be a reference for member and non-member countries to increase levels of budget transparency.
- d) The [Global Initiative for Fiscal Transparency](#) (GIFT) publishes blogs and research documents that help identify best practices and relevant data. This international entity works to harmonize standards of fiscal transparency, such as the High Level Principles on Fiscal Transparency and the Guide on Principles and Mechanisms of Public Participation in Fiscal Policy. It should be noted that the GIFT is an international reference on leading trends of opening budget data for Ministries of Finance as well as in its use for people's benefit.



## IMPORTANT

Make sure that the information to be published is **NOT classified or reserved, according to the available and relevant legislation.**

For example: if it compromises public safety, threatens people's integrity or affects trade secrets: it should not be published.

Taking these elements into account, allows us to give a context to the data to be published and, above all, that different actors and sectors such as the government, private initiative, journalists, academics, organized civil society, data specialists, among others, who will use the data to **tell their own stories.**

Once information demands have been identified, it is important to locate where the data comes from and identify the formats in which we can find it at their sources. Always thinking forward to the publication and usability.

