

# TUTORIAL on FISCAL TRANSPARENCY PORTALS

A USER-CENTERED DEVELOPMENT

MODULE 7

Amplifying the audience



# MODULE.7

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## Tutorial on Fiscal Transparency Portals

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## Step1 - Information on demand segmentation analysis

To implement a comprehensive strategy and amplify the demand, as seen before, it is necessary to understand users, as well as their goals and capabilities. In this sense, the analysis done previously to identify the audience--not only *thinking* about users, but *engaging* them--is vital for decision making.



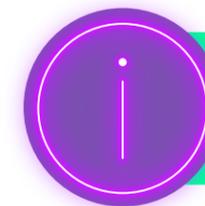
**Tip:** For this task, it is highly recommended to considering and use the tools and examples presented in the fourth module of this tutorial, "Understanding and segmenting the audience".

## Step2 - Communication strategy planning

To create an efficient and effective communication strategy for a fiscal transparency portal during and post launch, it is necessary to contextualize (on a country-by-country basis) the possible channels used to reach different audiences utilizing the information from "Step 1". The communication strategy selected should contemplate both online channels and offline channels.

### Selecting online channels

When selecting online channels, any decision made should be based on which channels are more popular with the content's target population segment. Occasionally, one channel can be used with different messages in order to accommodate the interests, goals and capabilities of many different audiences at once.



**Tip:** As introduced in the fourth module, it is possible to use tools like <https://gs.statcounter.com> to analyze which channels have a higher representative value in the country, whether it's Facebook, Twitter, Qzone, LinkedIn, VK, etcetera.

Digital channel preferences should take note of the types of users--expert, non-expert or casual--to which communications are directed. Let's look at a concrete example: Imagine there's a platform that seeks to monitor the resources for infrastructure improvement delivered to public middle schools. In this case, three different immediate audiences to engage can be detected: that is teachers, guardians and teenage students. Here, the first two audiences are adults, both presumably belonging to a similar age range and used to using comparable online channels, though their motivations and interests may be different causing messaging to vary. On the other hand, teenagers, generally have distinct capabilities, interests and goals from those of adults, and will thus tend to select and interact with digital channels in a different way.

Fiscal information publishers, as well as developing teams, face the difficult task of capturing user interest in a competitive digital context. To meet this challenge, module seven addresses, in four steps and as part of a comprehensive strategy in the development of a user-centered portal, communication and engagement strategies, as well as tips for, and examples of implementation.

The International Association for Public Participation (iAP2) suggests various digital channels to encourage participation through a strategic lens depending on the intention, whether it be informing, consulting, engaging, etcetera.

	Inform	Consult	Involve	Collaborate	Empower
<b>Example Tools</b>	Newsletter, email, video, website, social media, live stream meetings	Social media discussion, polls, blog, workbook, survey	Ideation, survey, polls, serious games, social media discussion	Online forums, document cocreation, mapping, Twitter chat, video meeting	Decision-making: Online voting, participatory budgeting  Community action: Discussion forums

Source: Haas Lyons (2017).

Something to highlight on the above chart by Haas Lyons (2017) is that a single channel, as in the case of social media, can be used for multiple purposes and not only to inform, as is often the case with many institutions.

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**Tip: Depending on the content and objectives of the chosen communication strategy, it is possible to use paid campaigns on social media, directed at the target population so as to achieve wider outreach and more precise engagement.**

While it is very important to use online tools such as digital newsletters, social media, online discussion forums, e-chats, surveys, etcetera., even nowadays, any comprehensive communication strategy on fiscal information must contemplate offline channels in order to reach as many different audiences as possible.

### Selection of offline channels

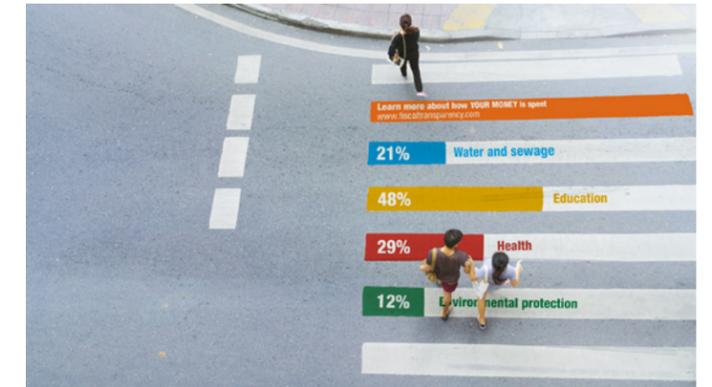
As with online channels, the selection of offline channels depends directly on understanding users. For example, research on different potential audiences can yield profile cases that do use the internet, but make little use of social media. To accommodate these audiences, offline channels are a great tool.

It should be remembered that designing messages on fiscal topics is not just about adding graphic designs or animations to numbers or information; rather, it's about generating effective and functional communications based on users.

Common offline channels like billboards, posters, flyers, etcetera, can be used in communication strategies in addition to less used channels, such as service bills or tax payment notifications, in which communications related to the subject can be incorporated. Examples might include *informative* messages on energy investment projects in an electricity bill, *collaborative* messages on surveys for decision making in determined public works, or messages of *empowerment* in public participation spaces, etcetera.

Finally, in addition to these different channels, the *guerrilla marketing* technique can be implemented. This technique is based on the use of unconventional advertising to reach a high level of engagement at low cost, surprising audiences and sometimes getting them to share communications voluntarily, thus causing them to go viral.

Example of guerrilla marking on a general budget topic. A pedestrian crossing signage is used as a bar chart with the spending functional classification.

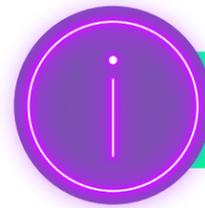


Example of guerrilla marketing on one budget area. Applied in front of public education centers, the approved budget of the current year for primary education is detailed.



Example of guerrilla marketing on a specific program of the budget. In the scale figure, the amount of resources that will be used for fertilizers to support agriculture in 2020, is communicated.

It's important to remember that communication strategies, regardless of the channels selected, should aim exclusively to generate useful information for users through budget openness.



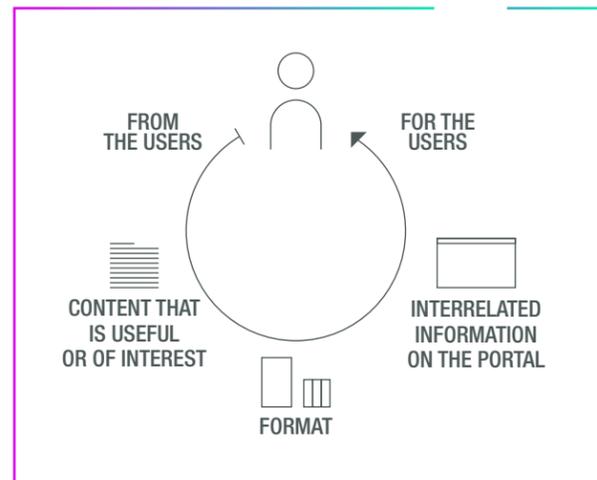
Tip: Keep in mind that user research (discussed in the fourth module) is useful not only for developing the portal but also for developing communication strategies.

## Step3 - Contents and formats selection and development

The preceding two steps, "Information on demand segmentation analysis" and "Communication strategy planning", are the ingredients for starting communication pieces using the formats necessary for the different selected channels.

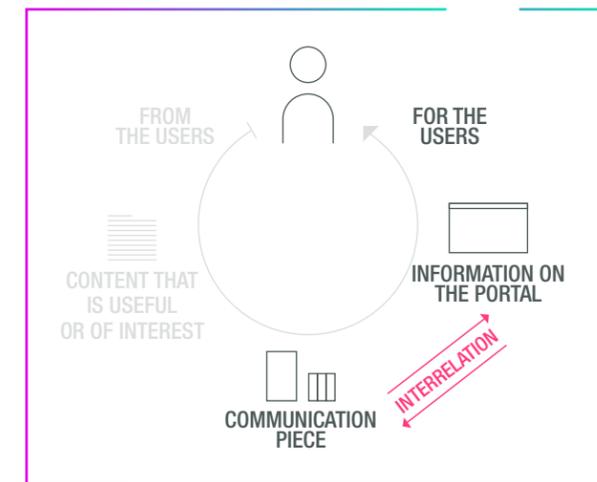
For example, should user profiles determine the selection of offline channels such as posters and flyers, content must be generated for those materials in accordance with the profiles' interests and capabilities regarding fiscal matters. In this way, it can be ensured that messages are useful and attractive for the different profile segments, or personas.

This user-centered content selection and development, whether related to static or animated infographics, videos or images, also applies to online channels. The great advantage of online channels is analytics, which contribute to the iterative improvement of planned communications; in other words, the content developed and published in digital channels can be evaluated based on its effectiveness almost immediately, providing a great space for constant improvement. Published communications can be evaluated either individually or as a whole, comparatively, allowing analyses on which content different audiences find interesting, and which content they do not. Moreover, this analytical information allows for the creation of content for specific groups and target audiences.



Tip: When developing messages (even in accordance with good judgement), think "outside of the box". In the private sector, for example, do marketers create messages talking about the ingredients of a cola drink, or do they talk about happiness? Are ads for watches about proper function and accuracy, or about the lifestyle associated with a certain brand? The information within the different user profiles will be very useful to members of the communications team.

A key point, whether applied to posters, tweets, billboards, newsletters or guerrilla marketing, is that the content of absolutely every communication within the scope of the strategy should have a link to **disaggregated information** in the fiscal transparency portal related to the topic addressed in the message, since the purpose of these communications is to amplify the portal's audience. The user will find it demotivating, and will cease to navigate the portal or platform, if, for example, a communication of interest touting new green areas in a specific city then directs them to the current year's budget for the Ministry of Urban Development and Transport. Every part of the communication strategy should be interrelated with the portal or platform to engage the audience effectively.



## Step4 - Engagement strategies planning

Conversing with and engaging the demand, as previously addressed in the fourth module, is not only necessary to identify possible audiences and segmenting them before the launch of a portal or platform, but also serve as a means for promotion and feedback post launch, so as to increase the demand for information from the portal in a sustainable manner within the user-centered iteration process.

These engagement strategies are based on organizing events where the audience is, in some cases, civil society organizations and, in other cases, the general public. Fiscal information is quite broad and it touches all aspects of public policy. Given the objective of generating greater interest and impact

with different audiences, it is advisable that events focus on specific areas of information--for example, the spending in determined sectors such as gender, environment, education, etcetera, or the monitoring of public investment projects executed in local communities.

Events focused on specific topics allow their target audiences to identify how public spending affects their daily lives, and, at the same time, grant specialists the ability to explore what they are interested in, since public spending can be applied to different contexts.

Among other outcomes, these events assist in:

- 1) Discerning the information that users are looking for and whether or not the publishing organization has it.
- 2) Identifying any difficulty in understanding the information and fiscal data provided.
- 3) Distinguishing the types of analyses carried out by different groups of experts, as well as the tools they use for this purpose.



## Application example

The Better Budget Dataquest is an event promoted by GIFT through its stewards and partners. In 2019, this data exploration event focused on three issues: gender, inequality and environment. In the case of Indonesia, it was implemented between Seknas Fitra and the Ministry of Finance across three universities with more than 80 participating students. Another example is that of Argentina, where the Civil Association for Equality and Justice (ACIJ) carried out a data exploration that resulted in journalistic research being undertaken by one of the participating teams, that focused on the under-implementation and overestimation of goals related to the Attention to the Mother and Child program.

To learn more about this engagement strategy, visit: <http://bit.ly/BetterBudget2020>



Depending on the needs of an institution, there are events that seek to promote the use and analysis of fiscal information, such as seminars, conferences, workshops and forums, as well as those that seek to increase the demand for fiscal open data, such as hack-a-thons and programmer camps, that work towards the collaborative development of applications and software, or data expeditions, boosting budget monitoring content and analysis on public spending.

To conclude this module of the tutorial, the #DataOnTheStreets International Rally is introduced as an engagement strategy promoted by GIFT in different countries, since 2018. This activity invites people who are not specialists on fiscal topics (e.g. the general population) firstly, to verify information on the works and investment projects executed in their communities by using databases and public georeferenced visualization tools (maps), and secondly, to report their findings through their personal accounts on Twitter and Facebook. Four significant benefits of the #DataOnTheStreets Rally as an engagement strategy targeting different audiences are the: 1) promotion of information use 2)

detection of inconsistencies between published information and reality 3) generation of feedback regarding the deficiencies of a fiscal platform and 4) identification of other useful information which could be published in fiscal portals or platforms.



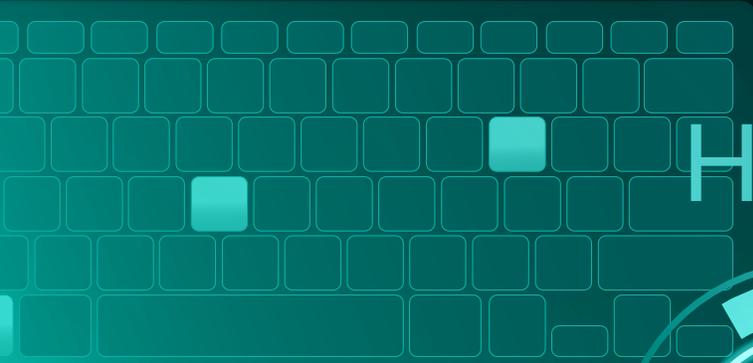
## Application example

Learn more about how the citizens of Chile took to the streets to verify the country's public works through an invitation from the Fiscal Observatory Foundation.



**Tip:** It is common to hear that "users don't come to portals"; however, do information publishers go after them? Hosting events is important, but it is also key to engage audiences by participating in the events organized by civil society, since through these events it is possible to learn what information is sought, how it is sought and the limitations the public encounters when trying to use published information.

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