



# A Guide to Tactical Data Engagement

Facilitate impactful use of open data by collaborating with communities

SEPTEMBER 2017



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# What Works Cities



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## A Guide to Tactical Data Engagement

*Version 1.0*

Facilitate the impactful use of open data by collaborating with communities

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# Preface

Since the beginning of the What Works Cities initiative, the Sunlight Foundation (Sunlight) has worked to expand access to public data nationwide. We have helped nearly 40 U.S. cities enact open data policies. We have also tracked and analyzed open data policies in over 100 cities, counties, and states. Sunlight's efforts have fostered democratic access to government data across the nation.

Cities are now going beyond making data simply accessible. To fully engender openness and to get the most out of their open data programs, governments need to build upon this infrastructure of access and work with residents to use data to solve community challenges.

**Tactical Data Engagement is designed to help cities go beyond open data policy and even open data portals, to facilitate opportunities for the community use of open data to improve residents' lives.**

Sunlight believes that [information is power](#) and that all residents of a democracy have the the right to power through the access and use of public information. Community leaders need public data and information to build an evidence base for addressing local challenges. Governments should capitalize on the opportunity to facilitate community problem solving through the use of open data.

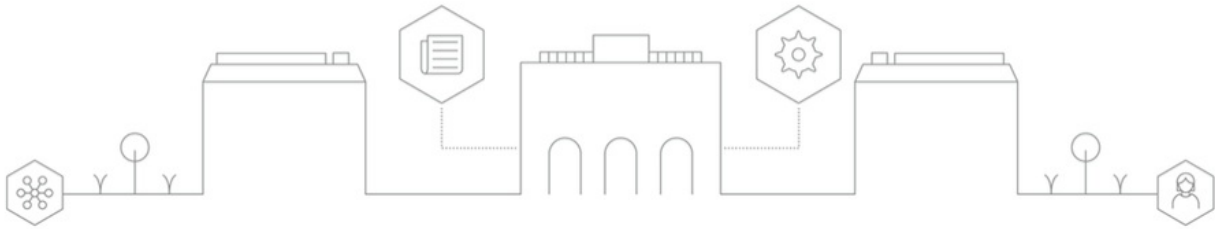
Our vision is that city halls and other governments will use Tactical Data Engagement to facilitate the use of open data in all communities. In particular, we hope city leaders will use this framework to take action in marginalized communities that often go overlooked as audiences for civic technology, open data, and transparency. Tactical Data Engagement presents a uniquely valuable opportunity for city halls to empower residents from systemically disenfranchised communities who need open data and public information to address local challenges.

This guide's approach to facilitating the community use of open data is, at its core, about radically valuing residents' information needs as well as the outcomes governments and residents can achieve together when those needs are placed at the center of a city's open data program. This guide encourages readers to ask: What can governments do to actively facilitate opportunities for open data use in communities? Where are information gaps that governments might help to close? And how can government become an equal partner with residents in leveraging open data for community impact?

We hope this guide helps communities everywhere answer those questions.

**“No other expertise can substitute for locality knowledge”**

**—Jane Jacobs**



# Introduction

## What is Tactical Data Engagement?

**Tactical Data Engagement is a four-step method for City Hall to help residents make an impact in their community using open data.**

This guide puts forth a vision for **Tactical Data Engagement (TDE)**. We created this method based on the core concepts of [human-centered design](#) and [tactical urbanism](#), with steps that guide city officials in carrying out interventions that facilitate the community use of open data for local impact. This approach goes beyond basic resident engagement. It seeks to make open data programs more transparent, accountable, and participatory by challenging city halls to actively help residents use open data to better their communities.

The four steps outlined in this guide will help readers complete a resident-informed project, product, or tool that supports the community use of data.

Readers can carry out each of these steps “tactically” — using lightweight, adaptable, incremental, and inexpensive tactics that can be realistically catered to fit within a city hall’s or community’s unique constraints and capacities. The tactics are drawn from examples of good resident engagement around the country, and ensure that in every step, residents are collaborators in determining promising opportunities for impact through the community use of open data.

## Who should use Tactical Data Engagement?

**This guide is designed for city officials and other public servants who want to work with community actors to get more value out of open data and information.**

The TDE method is primarily for city officials who want to help residents generate impact and success stories using open data. However, this guide is also designed to be adaptable to meet the needs of a broad range of readers.

If you work for a city government with an open data program already in place, TDE can help you take that program to the next level by building on your policy and/or portal. TDE can also help city halls that are just starting out with open data begin sharing the right data with the right people, and begin demonstrating what open data success can look like.

If you are an advocate, researcher, librarian, or organizer who wants to incorporate the use of open data into your existing work with communities — or seek out opportunities to partner with governments in facilitating the community use of open data — TDE has a lot to offer you as well.

This broad applicability stems from TDE's lightweight and adaptable tactics. Tactics can be applied to align with on-going activities and strategies, and they range in the level of effort and impact, thus providing options for governments with varying technical, data, or outreach capacity.

No matter where your community is in its open data work, we hope you enjoy reading about the TDE method, and are able to put these tactics to work!

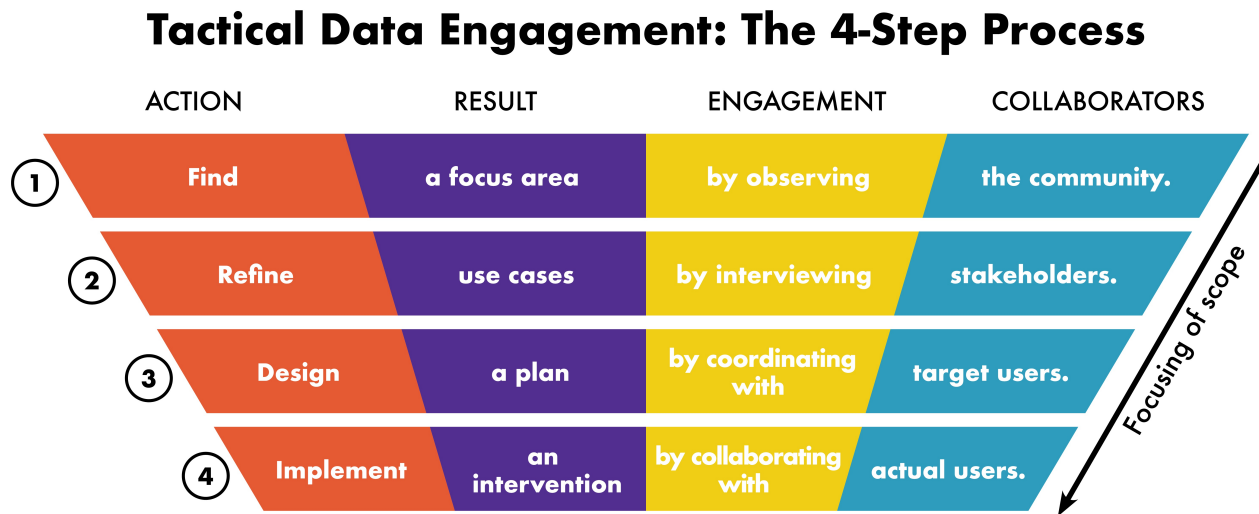
# How-To

*So you’ve got a basic idea of what Tactical Data Engagement is — but how exactly do you use it? Here’s an overview of the four-step TDE method.*

## Using the method

TDE’s steps start big with a broad focus area and community of collaborators. Step-by-step, you’ll narrow down your scope to a tangible intervention within your capacity to implement, and an increasingly specific group of collaborators with whom to engage. The result will be a finished project (an intervention) that helps actual users from the community leverage open data for tangible impact. Figure A, below, provides an overview of the four steps this process will guide you through, demonstrating the narrowing effect of each step.

FIGURE A:



## The Tactical Data Engagement process

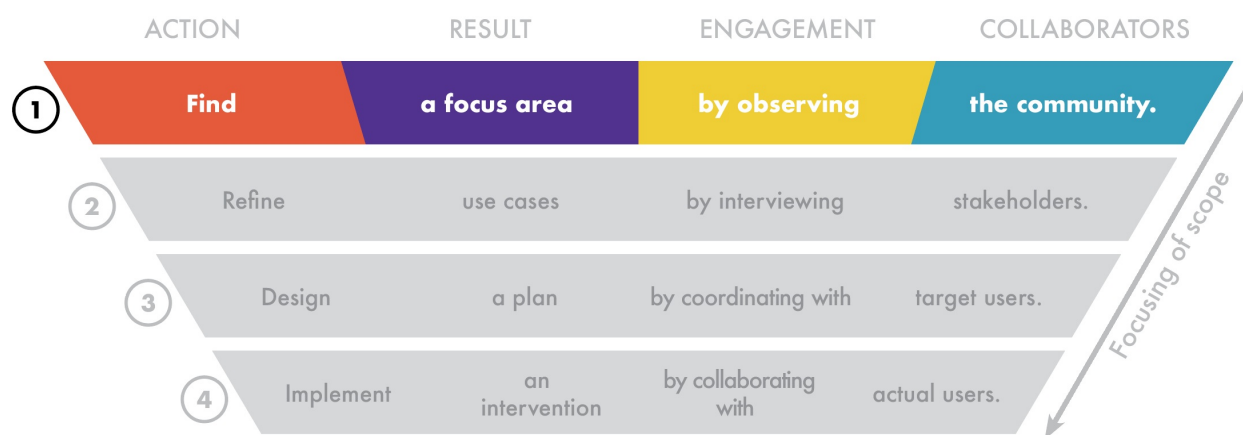
To break down how each step builds toward the final goal, we mapped out each step’s four most important components: the action, the mode of engagement, the collaborators, and the result.



In the TDE method, you start with broad actions and goals, then slowly hone the scope of your work by checking in and engaging with collaborators. See Figure A to visualize how narrowing down each of the four main components, the action, the collaborators, the mode of engagement, and the result, can bring you to a refined finished product that addresses the specific data needs of your community. TDE ensures that your end product is both impactful, thanks to consistent input from the community, but also lightweight and implementable, thanks to limited scope.

This process is meant to be repeated, or *iterated*, so that it can be applied to new opportunities for communities to use open data. Over time and various iterations, TDE can help local leaders develop a more open culture and consistently facilitate a community's use of open data with varying members of the community and across various opportunities.

## Step 1: Find



- **THE ACTION:** Identify a general focus area with potential opportunities for the community use of open data.
- **THE ENGAGEMENT:** Observe, listen to, and analyze community needs.
- **THE COLLABORATORS:** A broad group of community members who can illuminate potentially impactful focus areas.
- **THE RESULT:** A focus area where community voices and needs suggest impactful opportunities for the community use of open data.

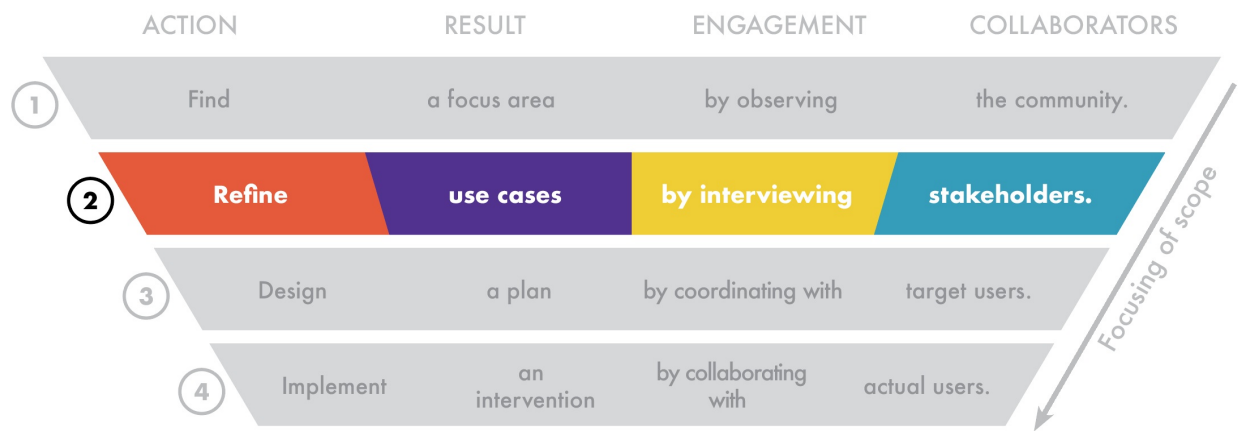
The first step in TDE is listening to your community's priorities and concerns, and identifying the issue areas where open data might help. You may already be listening to residents' concerns and needs by conducting surveys, maintaining relationships with trusted community groups, or regularly joining community meetings. Use each opportunity you have to collect and analyze broad community interest in open data. This is an opportunity to pay attention to any communities that are missing or excluded from conversations about public data and decision-making.

As you listen to and observe the community's needs, identify opportunities where public data or information would empower residents to better understand, address, or collaborate to solve their concerns. Observe whether a majority of promising opportunities for the use of open data are clustered around a single issue or focus area. After listening to a variety of challenges that might require the community use of open data, choose a focus area by aligning those opportunities with the city's on-going strategic priorities as well as with the cities information holdings.

## Tactics to help you *find a focus area*:

TACTIC	DESCRIPTION
Identify shared priorities	Ask a broad swath community members which issues they care about most. Are any of these priorities in alignment with City Hall's strategic goals? Areas of overlap are a good place to start, with built-in support from both the city and community stakeholders.
Analyze data/ information requests	Formal or informal channels where residents or data users submit requests for data, information, files, or services can provide ideas about what's on residents' minds. Public records requests, requests for datasets, or even 311 calls logs are potential places to look. Choose a focus area based on the most common types of requests.
Identify valuable partners	Look for partners in the community with whom your agency has contracts, data-sharing agreements, or other similar trusted relationships — for example, partners who receive government grants. Issues of importance to these partners may be impactful focus areas for their (or their stakeholders') use of open data.
Join public meetings	Attend community meetings where residents voice their concerns. Listen in at multiple meetings, document conversation, and determine whether concerns center around a focus area. Think about whether residents need support in using open data or information to address that focus area.
Map impactful focus areas	Study which focus areas other governments have had success addressing through the community use of open data and whether you can partner with them, learn from them, or replicate their solutions. Using this tactic means you'll have to ensure that focus areas important in similar places are important to your community's residents.

## Step 2: Refine



- **THE ACTION:** Narrow and segment your focus area down to detailed use case scenarios, complete with user stories and personas that expose opportunities for the use of open data.
- **THE ENGAGEMENT:** Collect context and information from specific stakeholders via direct conversations or interviews.
- **THE COLLABORATORS:** Stakeholders who have academic or lived experience and insight into your chosen focus area, and who can refine the scenarios for potential open data use.
- **THE RESULT:** A few promising open data use cases that outline the potential impact of supporting specific open data use scenarios via user stories and user personas.

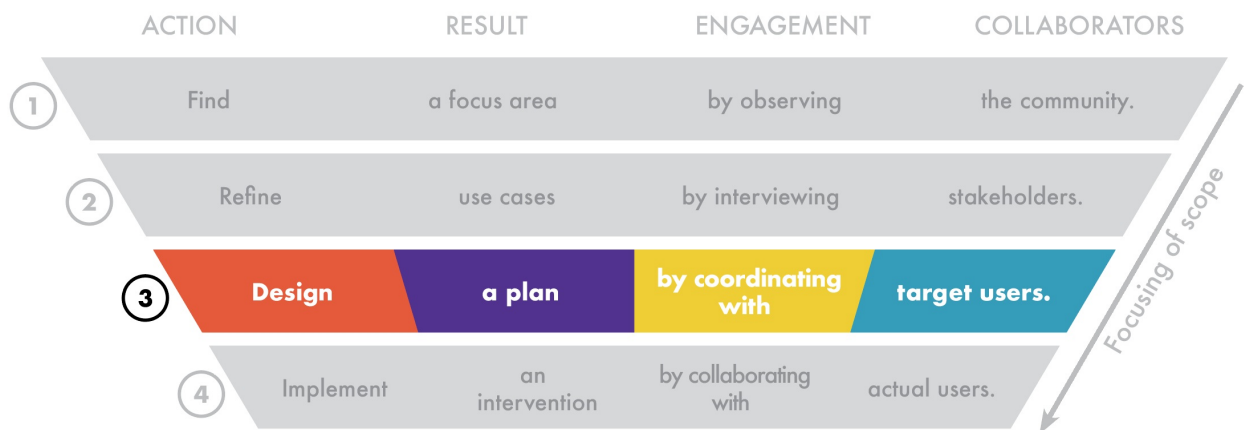
The second step in TDE is to refine your broad focus area into a more specific opportunity or “use case” with the help of people who have a deeper understanding of your chosen issue. “Use case” is a term meant to describe how data might be used by a certain user to solve a particular goal. The residents identified in these use cases will have “user personas” and you should take this time to develop your understanding of their stories. More than simply a problem statement, a use case scenario should dive deep into understanding a stakeholder who could use open data to address their concern within your focus area. In crafting various use case scenarios, remember that residents are experts in their own neighborhoods, communities, and issue areas, and listening to their knowledge will help refine the details around specific use cases in your focus area.

To complete this step, you should narrow down a few promising use case scenarios with particularly strong community partner support, strong resident interest, or obviously relevant gaps in information or data. Hearing about residents' data use scenarios and incorporating their thoughts into what you determine are "promising" opportunities will help residents' experiences matter in ultimately crafting a TDE intervention. Being as detailed as possible in this stage ensures that when you craft an intervention to address a single use case later on, the result will have dedicated end users, who you identified in this step, and will meet their real needs.

### **Tactics to help you *refine use cases*:**

TACTIC	DESCRIPTION
Interview stakeholders individually	Identify and survey or interview individual stakeholders around your chosen focus area. Individuals with relevant perspectives may include individuals who requested data about your chosen issue, who work in relevant fields, who commonly interact with services, or who are most greatly affected by issues within your focus area. Consider their responses for details about their open data needs and the potential impacts of addressing those needs, and use that insight to generate one or more use cases.
Host a “scope-a-thon”	Host an event where local nonprofits, researchers, civic hackers, government officials, journalists, and other stakeholders can gather to brainstorm what the most pertinent opportunities are for open data’s use within your chosen focus area. Scope specific stakeholders’ needs and find details about how better open data might generate impact. Collaboratively generate one or more promising, detailed use cases.
Consult data users and experts	Convene a user group meeting with local data experts to generate ideas for which opportunities within your focus area might be most pressing or feasible to address with data. Leverage local knowledge and data user feedback to find how open data can fit into solutions for residents. Collect subject matter detail on how addressing open data needs might play a role in community impact to develop a use case scenario.
Consult the public	Attend meetings or plan a community meeting centered around your focus area. Collect detail on specific issues, for example by conduct low-tech, digital, verbal, or physical exercises and try to tailor activities to a wide range of experience levels for the general public. “Data days,” “data walks,” or similar events, where residents can see and comment on data in person, or other hands-on activities could help residents express specific details about use cases for better data or information within a focus area.
Workshop with partners	Gather your trusted partners and brainstorm ways that each partner can reach out to their own community network and assess what specific needs within your focus area might benefit from the use of open data. Host workshops to come up with a specific use cases based on expressed community needs.

## Step 3: Design



- **THE ACTION:** Select a single use case, and draft a plan for an intervention to support that use case.
- **THE ENGAGEMENT:** Share a draft plan and ask for feedback through multiple avenues.
- **THE COLLABORATORS:** Intended users of open data, based on the target audience for a specific intervention to support your chosen open data use case.
- **THE RESULT:** A user-informed plan that outlines an intervention to actively support and facilitate your chosen open data use case.

Examine your use cases from Step 2 and select a single one that has the most potential for an effective intervention. Take into account both your capacity and stakeholder interest. Limiting the opportunities in this step is crucial for taking a tactical, focused approach to facilitating the community use of open data, one use case scenario at a time.

Narrow down which specific stakeholders will be the intended users of relevant data and work more closely with them to begin mapping interventions like products, projects, or tools. Note that you are not carrying out an intervention in this step, but rather putting together a plan that you will carry out. Review the [implementation tactics in Step 4](#) so you can plan ahead accordingly. The plan generated in this step should outline the intervention that supports your chosen use case, and should feature feedback from intended users on how they would like to be incorporated.

Planning alongside the your intended users entails either collaboratively drafting a plan or soliciting feedback on a draft plan and incorporating responses. Collaborative planning with the intended data users in your community is essential for ensuring that planned interventions address exactly what data users need and account for details of implementation, for example,

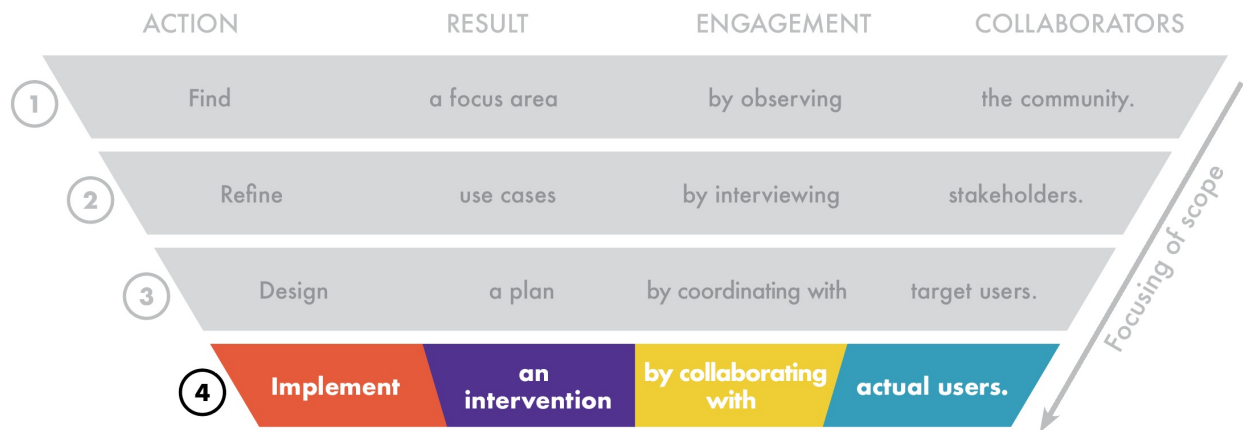
ensuring that the community agrees on who should house the project or sustain it once the government's role is complete. A plan that hasn't been reviewed by residents is less likely to be effective. **“How formal does my plan need to be?”** It depends on your context. In a community that has already had lots of conversations about open data and shared goals, a short back and forth over email or an in-person conversation at a community meeting might be enough. In a community where there is less common understanding, you will probably need to do more work building consensus. The idea of Tactical Data Engagement is to focus on a specific end goal — use your judgment about how to best achieve that.

### Tactics to help you *design a plan*:

TACTIC	DESCRIPTION
Solicit user feedback	Using crowdsourced policy feedback as a model, for example, post your draft plan in the open and solicit feedback from your intended, primary audience. Solicit comments on the plan through digital tools and update the draft accordingly.
Hold expert focus groups	Convene a user group meeting with local experts or data users to generate input on whether roles, timelines, and activities are appropriate for your desired outcomes. Invite your intended community data users to comment on a draft plan or collaboratively draft an action plan based on their experience in the field. Solicit in-person, detailed input pertaining to subject matter and the feasibility of your shared, desired outcomes.
Host public planning workshops	Invite the broader public to a community meeting where the main activity will include a low-tech engagement activity like note card sorting, diagramming, or collecting sticky note feedback on how your agency should proceed with addressing your specific opportunity for community use of open data. Commit to implementing feedback gathered at public meetings and express next steps.



## Step 4: Implement



- **THE ACTION:** Execute your plan to carry out an intervention that supports the use case opportunity you outlined for better open data use in the community.
- **THE ENGAGEMENT:** Work with actual users to ensure the intervention meets their needs.
- **THE COLLABORATORS:** Members of the community who are the final, actual users of your open data.
- **THE RESULT:** A product, tool, or completed project where specific community members use open data in a new way thanks to your partnership and intervention.

This step is where you should help actual users, identified in the course of the method's previous steps, to carry out the planned intervention that addresses your community-approved open data use case. Carrying out this intervention is the culmination of facilitating community use of open data. We developed the tactics in this section based on interventions that data providers and cities have used to facilitate community use of open data through projects, tools, or products. The opportunity to facilitate data use may mean sharing datasets that are not currently available in formats and with contents that best suit the needs of the requesters.

Commit to consistent or open feedback channels with residents to ensure you met needs and are driving toward impact. Note that the first solution may not always be the best one, and that those members of the community who contributed to the project — and who are the primary users or beneficiaries of community improvements through the use of open data — have crucial insight into any product's usability.

The tactic you choose at this stage should build on your work from Steps 1, 2, and 3 and should meet the community's needs as directly as possible.

## Tactics to help you *implement an intervention*:

TACTIC	DESCRIPTION
Do low-tech outreach	If your target community users are not tech savvy, consider low-tech options that meet them where they are. Interventions such as signage, posters, advertisements, or hotlines can expand access to data without requiring digital literacy.
Create data help guides and resources	Notice where the community use of open data is stunted by gaps in understanding or good data definition, and fill those gaps with educational resources. This can involve creating user guides that live online, issue hubs that help contextualize data, building help chatbots or texting hotlines, or creating analog data tools that teach residents to analyze information without requiring advanced technical or data literacy.
Invite intermediaries to improve data utility	Empower data intermediaries in your community who add value to data by helping them access, process, or promote public data. Data intermediaries can be local research organizations or nonprofits that regularly warehouse and process data with community needs in mind. Actively connect them to data that allows them to better do their jobs, and allow them to add value to the public data you're releasing. In this tactic, it may be appropriate for data intermediary partners to lead or manage a significant portion of the action.
Co-create with civic hackers	Contact and coordinate with local civic hackers. Collaborate with them either by allowing them access to new relevant datasets or open-source code that supports data tools. This tactic is best for agencies that have the tech capacity to maintain tech/software tools in the long-term and work on an equal playing field with tech talent in the community.
Crowdsource data quality improvement	Improve a dataset by asking members of the community and stakeholders to check the data points and offer contributions. Poor-quality data sets misrepresent local issues and cause workflow challenges inside city operations. Work alongside residents either digitally or in-person through workshops or events to improve the quality of datasets relevant to addressing the opportunity for community data use that you chose within your focus area.
Generate data stories	Data becomes richer when supplemented with contextual, qualitative information, or "data stories." Residents and local organizations have a wealth of knowledge about what is going on in their communities, and can contribute this knowledge to help inform both cities' and residents' data use or analysis. Host either in-person meetings or virtual spaces where people who are interested community members can share data stories that accompany quantitative data to add context and qualitative information.
	Release a new data set and encourage widespread participation in a data challenge that asks residents to propose solutions to local issues based on the new information released. Data challenges can be high-tech

### Host a data challenge

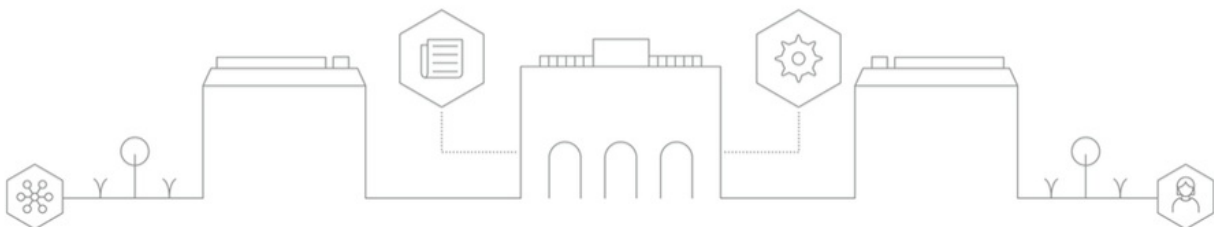
coding challenges or more low-tech to reward good ideas that aren't quantitative or technical. The data challenge should inspire residents to engage with the information and come up with their own solutions to local issues. Implement the winning solution. This is a fairly hands-off intervention, but works best in cities where community-driven solutions can actually be adapted and implemented with community members.

# You Did It!

Congratulations! If you made it this far, you have successfully completed the Tactical Data Engagement process. You found a focus area by observing community needs; refined the opportunities for engagement by interviewing key stakeholders; designed a plan to act on one specific opportunity together with target users; and then implemented that plan to create a data intervention.

At some point during the TDE process you may have identified other opportunities to support your community's use of open data. You can use this guide a number of times to tackle each of these opportunities in turn.

Tactical Data Engagement is about helping your community use open data resources to tackle shared challenges. And like any community improvement project, it is not a one-time thing. Making your community a better place to live takes time, effort, and regular attention. The ideas in this guide are intended to be put into regular practice. In doing so, they can help make open data a routine part of your community's approach to addressing challenges with shared and becoming a better place for everyone who lives there.



# Additional Resources

## Real-time improvements to the TDE process

*The success of the TDE method relies on documenting and improving the TDE method in cities across the country.*

We encourage cities to bring an iterative, constantly improving approach to their open data work — and we practice what we preach. As we hear from cities using these tactics and documenting best practices, we will update our online resources to reflect new learning and knowledge around how to implement the method.

In a similar way, this guide builds on previous work from the Sunlight Foundation and What Works Cities. Specifically, our two self-assessment tools can help you better understand your environment and foundations for using TDE.

- **“Finding tactic criteria” checklists:** Figuring out how to get started with a major initiative can be challenging, so we developed this criteria document to help you sort through which of the tactics in Step 1 might be best for you. Read the description and check off the criteria for each tactic to determine what you have and what you still might need to start a TDE project.
- **“Refining an opportunity for TDE” worksheet:** This tool is an activity intended for city or other government staff looking to do an internal brainstorming around potentially impactful TDE opportunities. This worksheet will help not substitute for actually carrying out the refining step of the TDE method. Instead, it will help you self-assess what doing this process “for real” might look like in your city. Use discussion questions to think through how you might develop a use case.
- **User Stories: A Manual:** In Step 2 we discuss creating user personas, or detailed descriptions of the people will be using the open data in question. This manual provides more information about how to create user personas.

Finally, **we want to hear from you.** If you have engaged in some or all of the TDE process, if you are interested in helping Sunlight pilot this method, or if you have comments on this guide and its resources, tell us about it. Send us an email at [opencities@sunlightfoundation.com](mailto:opencities@sunlightfoundation.com) with “TDE” in the subject line — we want to know what works, what doesn’t, and what we could be doing better.



# Criteria checklists for getting started with TDE

In Sunlight's Tactical Data Engagement 1.0 guide, we outline the 4-step method that guides cities and government officials in facilitating the community use of open data. The first step of the method is to [Find](#) a focus area rich with opportunities for community use of open data to drive local impact. This resource will help you determine how to get started with TDE by outlining the suggested criteria for using each Finding tactic.

Figuring out how to get started with a major initiative can be challenging, so we developed this criteria document to help you sort through which Finding tactic for getting started might be best for you. Below are five of Sunlight's favorite tactics for finding focus areas where community members might benefit from using open data. For each tactic, we provide a description, a hypothetical example, and list of criteria to help identify what you have or need to get started with TDE.

## Tactics & checklists:

### Analyze data/information requests

In using this tactic, identify your data or information that is most requested and/or used, and later you may reach out to requesters/users to refine community use opportunities. If you're not sharing data online, using this tactic would include analyzing request channels like public records request systems. If you're already sharing data online, this approach might include a review of most viewed, downloaded, or requested datasets.

EX. The majority of the requests for public information that are sent to the planning department are for basic zoning, land use, and other parcel information. Can the city identify what users are doing with parcel information (as it relates to improving the community) and facilitate more direct data-sharing or product development to support those specific use cases?

This tactic will work well in places with:

- An electronic records request system and/or structured records request data
- An open data portal and data on usage/demand (dataset views/downloads)
- An open data portal with an API, and contact info/usage data for those registered for API

keys

- A well-used system for informal requests for data (such as an open data portal with a “request a dataset” form)
- Structured data containing other kinds of public feedback relevant to information flows: 311 data, service requests, other complaint data, etc.

## **Identify most valuable partners:**

You may start finding and refining opportunities to encourage open data’s re-use by exploring existing partnerships with community actors. If you are already investing in a non-profit (or for-profit) with funding, by contract, grant, staff time, formal, or informal partnership, that investment might be further leveraged through intentional data sharing aimed at helping those partners use city data.

EX. A city has partnered with a local housing advocacy group to reduce lead paint and resultant lead poisoning in the community by contracting with this non-profit to get the word out to residents to sign up for lead abatement resources available. The housing advocacy group is charged with targeting outreach and assistance to neighborhoods, tenants, and properties that are most at risk, however, they don’t have access to the city’s data, or, perhaps they do, but don’t know how to use it to target the most at-risk households.

This tactic will work well in places with:

- Existing partnerships with community non-profits that might benefit from reuse of city data
- Contracts with vendors to perform public functions that might be improved with a data-driven approach
- MOUs, grant awards, contract documents, or other relevant documentation of existing partnership
- Community actor leading a project to reuse city data who demonstrates interest to the city/What Works Cities

## **Seek out shared priorities:**

You may have strategic goals that are a core aspect of how a department does its work or are a priority for the current administration. These goals are in the public interest and are therefore typically shared by community stakeholders and other organizations outside of government that also work in the public interest. You can identify stakeholders with shared goals and challenges



and engage them through events like data walks, open houses, or roundtables to scope out a specific re-use opportunity that serves the community. This tactic may be increasingly valuable in cities with strong communications or outreach departments.

EX. The city has a strategic goal of redeveloping vacant or abandoned properties for productive use in a specific neighborhood. The city realizes that this goal is shared by the Community Development Corporations (CDCs), the Neighborhood Business Association, homeowners, and the real estate community. Can city hall gather these partners through a public event like a data walk to discuss data supply, city strategic goals, and pressing community goals? Can the city frame the shared challenge of revitalizing abandoned property specifically by helping communities re-use city data? (see Chicago Large Lots)

This tactic will work well in places with:

- Specific strategic priorities relevant to external stakeholders
- Knowledge of external stakeholders with similar strategic priorities
- Desire to collaborate closely with these external stakeholders

## **Observe popular meetings:**

Cities and other governments regularly engage with the public for specific projects like neighborhood redevelopment plans or as part of ongoing meeting series' like city council meetings or zoning review. Open data is typically disconnected from these existing community engagement processes, but incorporating discussion about open data at these meetings help identify opportunities for community use of open data.

EX. The city planning department is holding a series of public meetings to discuss a proposed “complete streets” plan and streetscape improvement project. Neighborhood residents, as well as organizational stakeholders are attending these meetings to provide input, but are not currently using city data to inform that input. Can the city connect with attendees to identify, explore and frame opportunities to facilitate reuse of relevant city data—like accident data, street dimensions, traffic counts, bike infrastructure data, existing street amenities and locations, etc.—as part of this standing convening?

This tactic will work well in places with:

- Standing public meetings with regular, high attendance
- Existing communication channels where the city collects resident feedback
- Relevant data not currently shared at public meetings
- “Regulars” in attendance at council meetings, zoning meetings, etc.

- Department staff dedicated to community engagement or outreach

## Map impactful focus areas:

Sometimes, datasets held by data providers are already known to present a clear opportunity for driving impact on certain issues of interest because the data has been used publicly to address issues in other cities or places. If there are datasets that you hold that are not shared, or are shared but not used, but that have had demonstrated success in other places, examining those opportunities and aligning them with your goals may be a good first step in identifying a focus area for the community use of open data.

EX. The city purchasing office has an internal database that includes bid proposals and winning bids for all city contracts. Based on projects observed elsewhere the purchasing officer knows that contractors can benefit from access to this high-value information, ultimately improving the quality and pricing of goods and services provided to city hall (and the value to residents). The city identifies an open data reuse opportunity and frames a reuse scenario based on these existing examples.

This tactic will work well in cities with:

- Interest in replicating a successful project involving reuse of public data
- High quality public data relevant to a proven reuse scenario available for release or already released via an existing open data portal
- Internal data/tech capacity to nimbly adapt data to public needs

## What's Next?

Through 2017, Sunlight will be piloting these tactics with What Works Cities and recording best practices for how to implement TDE tactics, including adding to and refining this resource. If you're interested in learning more about how to get started with TDE, or have experience with one of these tactics and would like to reach out, drop us a line at [opencities@sunlightfoundation.com](mailto:opencities@sunlightfoundation.com) or find us on Twitter at [@sunfoundation](https://twitter.com/sunfoundation).

Page not working for you? Use this worksheet as a Google Doc [here](#).

# Refining an opportunity for Tactical Data Engagement

## A self-assessment tool and worksheet

This tool is an activity intended for city or other government staff looking to do an internal brainstorming around potentially impactful TDE opportunities. This worksheet will help not substitute for actually carrying out the refining step of the TDE method. Instead, it will help you self-assess what doing this process “for real” might look like in your city. For each step below, use the discussion questions to think through the details of your responses to each section of the outline at the end of this worksheet.

Having trouble with this page? Use another version in Google Docs [here](#).

**1. Choose a hypothetical focus area to move forward with the brainstorming process, or apply your chosen focus area.**

**2. Identify data you have or could collect that’s relevant to your focus area.**

What data do you currently collect?

What data could the city collect that relates to your focus area?

Which department/s own and/or maintain this data?

***Fill out the Data Supply box below.***

**3. Identify users in the community who frequently request or need data.**

Who are current and potential external users of the city data identified above?

Where are public data requests (within your focus area) often routed?

How can your data supply support community members/orgs’ work?

***Fill out the Data Requesters box below.***

**4. How have you met demand for data in the past?**

Does your city fill requests for this data through a public records request or similar system? If not, why?

In what forms are requesters receiving this data?

How has this data been used by residents in the past?

What gaps exist in meeting the external demand for this data?

***Fill out the Past Activities box below.***

### **5. How can you refine your understanding of your focus area?**

Which refining tactics (below) would you use to engage potential stakeholders in more specific conversations about your focus area?

Are you already aware of any information gaps or data needs among stakeholders for your focus area?

What context can stakeholders provide that might help you better understand your focus area?

***Fill out the Refining Tactics box below.***

### **6. Identify potential next steps**

Which external partners could help implement the tactics identified above?

Is the plan outlined through this exercise feasible? If not, why?

How can you encourage stakeholder participation in the plan outlined in this exercise?

Could your city pursue opportunities to facilitate re-use based on the feedback you will collect? How?

***Fill out the Next Steps box below.***

### **7. What are the potential impacts of addressing your refined opportunities?**

(Note: Impacts will be clearer once you talk to residents to narrow down a focus area, specific opportunity, and intervention that the city could implement to facilitate better open data use. This assignment is speculative.)

How could city officials and staff benefit from following up on data users' feedback?

Imagine how community members might benefit from the city's help with data to support those potential applications.

**Use this template fill out a pitch at the bottom of your action plan:**

My city's communities could use information from city hall to address [FOCUS AREA], which is important for [IMPACT]. When I go back to my city, I can use [REFINING TACTIC] to hear ideas and concerns from [DATA REQUESTERS] and identify specific opportunities for them to use [MY DATA SUPPLY]. Next, as the action phase of my city's Tactical Data Engagement effort, my city will carry out this plan to frame a TDE opportunity by [NEXT STEPS], with adjustments depending on the feedback collected in the framing stage.

## Refining tactics

Simple, lightweight tactics for engaging potential stakeholders in specific conversations about issues and opportunities for open data use in your focus area.

TACTIC	DESCRIPTION
Interview stakeholders individually	Survey or interview individuals who have interacted with the city around your chosen focus area. Individuals with relevant perspectives may include individuals who requested data (about your chosen issue), who work in relevant fields, who commonly interact with services, or who issues in your focus area most greatly affect. Mine their responses for details about their open data needs and the potential impacts of addressing those needs, and use that insight to generate one or more opportunity statements.
Host a "scope-a-thon"	Host an event where local nonprofits, researchers, civic hackers, government officials, journalists, and other stakeholders can gather to brainstorm what the most pertinent opportunities are for open data's use within your chosen focus area. Scope specific stakeholders' needs and find details about how better open data might generate impact. Collaboratively generate one or more promising, detailed opportunity statements.
Consult data users and experts	Convene a user group meeting with local "experts" to generate ideas for which opportunities within your focus area might be most pressing or feasible to address with data. Leverage local knowledge and data user feedback to find how open data can fit into solutions for residents. Collect subject matter detail on how addressing open data needs might play a role in community impact.
Consult the public	Attend meetings or plan a community meeting centered around your focus area. Collect detail on specific issues, for example by conduct low-tech, digital, verbal, or physical exercises and try to tailor activities to a wide range of experience levels for the general public. "Data days," "data walks," or similar events, where residents can see and comment on data in person, or other hands-on activities could help residents express specific details about opportunities for better data or information within a focus area.
Workshop with partners	Gather your trusted partners and brainstorm ways that each partner can reach out to their own community network and assess what specific needs within your focus area might benefit from the use of open data. Host workshops to come up with a specific opportunity statements based on expressed community needs.

## Finding and Refining outline

Ingredients to help me identify TDE opportunities in my city:

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<b>My Data Supply</b>	<b>Data Requesters</b>	<b>Past Activities</b>	<b>Tactic(s)</b>	<b>Next Steps</b>

My Tactical Data Engagement Pitch:

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