Budget Data Transparency Toolkit

Using Municipal Budget Data to Build Community Power

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Introduction

Welcome to this workbook created by People's Budget Birmingham to help you transform complex municipal budget data into compelling stories that drive community action. Whether you're an organizer, community member, or advocate, this workbook will take you from identifying the story you want to tell to implementing the tools and techniques needed to tell it effectively.

Today's Journey:

1. **Beginning:** Define your story and purpose and then explore the technical needs
2. **Middle:** Explore the deployment of your project
3. **End:** Gauge capacity for long-term maintenance and impact

SECTION 1: THE STORY YOU WANT TO TELL

Numbers Mean Nothing Without A Story

What is the Story You Want to Tell?

Every powerful campaign starts with a clear story. Your story about municipal spending isn't just numbers—it's about justice, equity, and community.

🔑 **KEY CONCEPT**

Key Questions to Consider:

- **Why this story?** What injustice or opportunity are you highlighting?
- **Why now?** What makes this urgent for your community?

Common Story Types:

- Exposing inequitable investment patterns
- Making the case for budget reallocation (e.g., from policing to public goods)
- Demonstrating long-term disinvestment in certain communities

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DEFINE YOUR STORY

Take 5 minutes to brainstorm and answer these questions:

My story is about:

This matters because:

The change I want to see:

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INVESTIGATION QUESTIONS

What questions could guide your investigation?

- When does the budget need to be passed?

- How much of our budget goes to...

- How has spending changed over time in...

- Which neighborhoods receive the most/least...

- What are the requirements for...

Who is Your Audience?

Remember: Everyone is not your audience. Different people need different narratives related to the same data.

Three Example Archetypes:

Elected Official	Community Member	Campaign Volunteer
Wants to feel informed	Wants to feel heard	Wants to contribute
Responds to political pressure	Responds to personal impact	Responds to clear direction
Needs formal reports	Needs accessible visuals	Needs actionable data

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IDENTIFY YOUR AUDIENCE

Take 5 minutes to identify 2-3 specific people who represent your audience:

Person 1:

- Role:
- What they care about:
- How they consume info:

Person 2:

- Role:
- How they consume info:

Person 3:

- Role:
- What they care about:
- How they consume info:

How Do You Plan to Tell the Story?

Your medium shapes your message. Choose formats that match your audience and capacity.

Format Options:

- **Written:** Op-eds, reports, blog posts, zines
- **Visual:** Maps, infographics, social media graphics, protest posters
- **Interactive:** Dashboards, websites, tools
- **Audio/Video:** Podcasts, videos, presentations
- **Something else**

Distribution Speed:

- Rapid deployment (social media, instant sharing)
- Planned rollout (reports, presentations)
- Long-term resource (dashboards, websites)

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CHOOSE YOUR FORMAT

Check all that apply and star your top priority:

- ☐ Social media graphics
- ☐ Community report
- ☐ Interactive dashboard
- ☐ Protest materials
- ☐ Council presentation
- ☐ Podcast/video
- ☐ Op-ed/blog
- ☐ Other: _____

My distribution timeline:

_____

My reach goal:

_____

SECTION 2: DATA EXTRACTION AND PREPARATION

The Technical Process

What Data Do You Need?

To construct your story effectively, you need the right data. Think strategically about what will make your case.

Common Data for Budget Storytelling:

- **Budget Data:** capital improvements, department spending, Line items
- **Geographic Data:** Neighborhood geographic boundaries, capital improvement project locations
- **Demographic Data:** Census information, population statistics
- **Historical Data:** Multi-year budgets, amendments, voting records
- **What else?**

💡 **REAL WORLD EXAMPLE**

Birmingham: We believed our community! We wanted to prove they were right!

We wanted to prove that community feelings about inequitable investment were correct. We needed:

- *10 years of capital improvement budgets*
- *Neighborhood shapefiles (geographic boundaries)*
- *Project addresses to map spending locations*

We created a map plotting the specific capital improvements projects, their locations, and how much they cost. The intuitive and experiential knowledge that our neighbors had was right! They were being neglected by city government!

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DATA INVENTORY

List the specific data you need:

Essential Data:

1. _____
2. _____
3. _____
4. _____
5. _____

Nice to Have:

1. _____
2. _____
3. _____
4. _____
5. _____

Where Can You Find the Data?

Data lives in many places, in many formats. Knowing where to look is half the battle.

Common Sources:

Source	What You'll Find	Format
City Website	Budgets, reports	PDF 😤
Census	Demographics	CSV 😊
Open Data Portals	Various datasets	Mixed
FOIA/Open Records	Internal government data	It's always a surprise
Council Minutes	Amendments	PDF/Video

🔑 **KEY CONCEPT**

Format Reality Check:

- 🥇 **Gold Standard:** Spreadsheet (CSV, Excel)
- 🥈 **Workable:** Database exports, APIs
- 🥉 **Challenging:** PDFs, scanned documents
- 😱 **Nightmare:** Inconsistent PDFs, images

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DATA HUNT

Spend 10 minutes searching for your data online. Document what you find:

Source 1:

- URL:

- Format:

Source 2:

- URL:

- Format:

Source 3:

- URL:

- Format:

How Do You Extract the Data?

Getting data out of its source format is often the biggest challenge. **Remember: Sometimes volunteers with spreadsheets beat fancy code!**

💡 **REAL WORLD EXAMPLE**

Birmingham: Extracting the Data

We thought code would save us time extracting budget PDFs. It worked for some years where PDFs were consistent. But for capital improvements? Every year was different. We ended up having volunteers manually enter the data—and it was actually faster and more accurate!

Extraction Methods:

Method	Best For	Pros	Cons
Download	CSV, Excel files	Instant, accurate	Rare for budgets
Code/Scripts	Consistent PDFs	Fast for large datasets	Breaks with format changes
Manual Entry	Inconsistent formats	100% accurate	Time-intensive

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EXTRACTION PLANNING

My data is in: _____ format

I will extract it using:

- ☐ Direct download
- ☐ Code/scripts
- ☐ Manual entry
- ☐ Combination: _____

People I need:

- Technical help:

_____

- Volunteers:

_____

- Quality checkers:

_____

Where Do You Store the Data?

Storage isn't just about having a place for your data, it's about accessibility and collaboration.

🔑 KEY CONCEPT

Storage Philosophy:

Create multiple entry points for different skill levels

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STORAGE SETUP

I will store my data in:

- ☐ Google Sheets (recommended for collaboration)
- ☐ Excel files
- ☐ Database
- ☐ Other: _____

Who needs access:

- Full editing:

_____

- View only:

_____

- Analysis tools:

_____

What Preparation Does the Data Need?

Raw data is messy. Cleaning and standardizing it is essential for accuracy.

Data Prep:

1. Cleaning	2. Normalizing
• Fix typos and errors • Remove extra spaces • Verify accuracy against source • Consistent capitalization	• Standard date formats • Uniform department names • Address formats • Phone numbers • Currency formatting

💡 REAL WORLD EXAMPLE

Birmingham: Quality Control

We worked with data experts to produce code that could extract data from operating budgets, but EVERY department had errors. We had to go line-by-line comparing the spreadsheet to the PDF source. It took weeks, but we needed to ensure that our data was right. And even then, we may have made mistakes! So our dashboard asks people to send us an email if they notice an error.

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PREP CHECKLIST

My data needs:

- ☐ Typo correction
- ☐ Format standardization
- ☐ Address cleaning
- ☐ Date formatting
- ☐ Phone Number formatting
- ☐ Other: _____

Quality control plan:

SECTION 3: CAPACITY & SUSTAINABILITY

Making It Real and Keeping It Alive

How Do You Prepare Data for Your Audience?

Transform your clean data into compelling communication tools that match your story and audience.

Examples of Translating Data:

Complex Idea	Community Translation	Visual
33% budget allocation	One in three dollars	Pie chart
Decreasing percentage over time	Getting a smaller piece every year	Shrinking slices
$0 in capital improvements	If you don't see your neighborhood, you got nothing	Blank map areas

💡 **REAL WORLD EXAMPLE**

The Power of Interaction

We built our dashboard to let organizers explore the data themselves. We added explanations and starter questions. An example is our capital improvements map! When users hover over a neighborhood, they see the name and dollar amount. Darker colors = more money. Missing neighborhoods = zero investment in 10 years. We designed it to agitate and inform.

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MESSAGE TRANSLATION

Technical finding:

Community translation:

Visual representation:

My preparation needs:

- ☐ Write explanations
- ☐ Create visuals
- ☐ Design interactions
- ☐ Test with audience
- ☐ Simplify language

What Technologies Do You Need?

🔑 KEY CONCEPT

K.I.S.S. Principle: Keep It Simple, Silly!

Only add complexity if it serves your goal. Start simple, build as needed.

Technology Ladder:

Level	Tools	Best For	Capacity Needed
Simplest	Pencil, paper, calculator	Quick protests	1 person
Standard	Google Sheets, Canva	Reports, graphics	2-3 people
Advanced	Looker Studio, Tableau	Dashboards	3-4 people
Complex	Database, custom code	Interactive tools	5+ people, technical skills

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TECH ASSESSMENT

My current tech capacity:

- Tools I know:

- Tools I need to learn:

- People who can help:

The tools I will use:

1.
2.
3.

This is realistic because:

Maintenance & Sustainability

The work doesn't end at launch. Plan for the long haul.

Key Questions:

- How often does the data change?
- Who will update it?
- What skills do they need?
- What happens if key people leave?

💡 **REAL WORLD EXAMPLE**

Birmingham: Amendments after Amendments!

Birmingham has budget amendments EVERY WEEK during City Council meetings. Do we update weekly? Who would care? Is it worth the effort? These are real questions about sustainability.

Maintenance Planning Matrix:

Frequency	Effort	Impact	Do It?
Daily	High	Low	No
Weekly	Medium	Medium	Maybe
Monthly	Low	High	Yes
Annually	Medium	High	Yes

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UPDATE & CAPACITY PLANNING

Update frequency:

- My data changes:

- I will update:

Capacity assessment:

- Current volunteers:

- Technical skills:

- Time available:

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SUCCESSION PLANNING

- Documentation needs:

- Training needs:

- Handoff plan:

WRAP-UP

Your Data Action Plan

📝 FINAL COMMITMENT

Commitment Card

I commit to:

Story & Audience

- [ ] Finalize my story focus
- [ ] Identify 3 key audience members
- [ ] Choose my format

Data & Technical

- [ ] Locate my data sources
- [ ] Extract initial dataset
- [ ] Clean and prepare data
- [ ] Create first visualization

Capacity & Launch

- [ ] Recruit volunteers/partners
- [ ] Build/design my output
- [ ] Launch to community
- [ ] Plan maintenance schedule

My accountability partner:

_____

Check-in date:

_____

Resources & Support

🔑 KEY CONCEPT

Remember:

- Perfect is the enemy of done
- Start simple, iterate often
- If you see an error, fix it and share
- Make your data public when possible to promote collective power!

Key Takeaway: You don't need to be a data scientist to tell powerful stories with data. You need clarity about your purpose, commitment to accuracy, and connection to your community.

💡 REAL WORLD EXAMPLE

Birmingham: Final Wisdom

It took 20 people over a year to build our dashboard. But it also could have been 3 people with spreadsheets and markers making powerful posters. Choose the complexity that serves your goal and matches your capacity.

Notes Section

Use this space to capture ideas, connections, and insights from discussions