Montgomery County
Serious about Online Transparency since 1992

By Mark Mack

Montgomery County explains the elements that contributed to the success of its online financial transparency platforms.

Montgomery County, Maryland, has a lot of experience with online transparency, having gotten started back in 1992. (See the "Decades of Online Transparency" sidebar.) The county's latest strategy, spending Montgomery, was designed to better serve its residents, employees, and other partners. Spending Montgomery is housed within Data Montgomery, the county's centralized open data website. That platform provides interested users with a lot of information, and spending Montgomery is a guided view to complex financial information for stakeholders.

The finance department at Montgomery County attributes its success to the following:

- Having a leader to start the platform.
- Picking a platform that meets the county's needs and is cost effective.
- Standardizing and automating.
- Connecting to transparency beyond the finance office.
- Making the content usable for different kinds of users.
- Asking for feedback as you grow.

FIND A LEADER

Projects need a champion to help them succeed. For spending Montgomery, the Montgomery County Finance Department played that role. The department saw how valuable the platform could be, providing residents and local businesses with even more information than required and providing a better view of how the government spends public funds, including the programs the county invests in. In other words, the finance department saw the value of financial transparency.

The county appointed a dedicated leader to keep the project running smoothly while the platform was being built. This was the data service manager, who worked tirelessly to ensure that all participating parties were providing the data to the platform. Without a dedicated leader, a massive open data project can get lost in the weeds of everyday responsibilities. For many of the people involved, these open data projects are just one of many day-to-day tasks that need to be completed, so there must be a project leader to keep everyone on track, lest the entire project fall apart.

PICK THE RIGHT PLATFORM

At the beginning of this transparency initiative, county officials looked carefully at another implementation they hoped to emulate, but they realized that its scale and technology couldn't be reproduced and sustained in Montgomery County. They realized that they needed a different process, one that would be based on the rich data published on the county's open data portal and would feature a user interface that focused on the county's

defined user personas (based on the types of users who were most likely to use the tool).

STANDARDIZE AND AUTOMATE

The county had to face a fear of the unknown in developing the open data initiative. A crucial step in combating that fear was to standardize the methodology used to import data, which ensured consistency throughout the platform. This minimized the potential for human error — which is why the county wanted to automate the platform as much as possible. Spending Montgomery includes records that date back to the program's implementation in 2012, and to manually enter all that data into the program would have been quite an undertaking. With a highly automated system, the job of county employees is limited to (1) ensuring that all the data are accurate and (2) making sure that confidential information remains confidential.

Montgomery County, Maryland

Population: 422,331

Annual Budget: $5.6 billion

Number of Employees: 4,127

COUNTY-WIDE TRANSPARENCY

The online fiscal transparency project in Montgomery County is unique because it started with a policy change on the county level, the 2012 Open Data Act. The idea originally came from the finance office. Elected officials pursued a platform of transparency, and county legislation was the result. This means the finance office online transparency initiative goes beyond the finance office itself; it is connected to a countywide transparency effort that is supported by elected officials.

> Montgomery County worked to include different user personas when developing the platform, including residents, advocates, analysts, local businesses, the media, and county employees.

DIFFERENT USERS, DIFFERENT APPROACHES

County officials believe that it is their responsibility to provide answers when members of the community come to the open data platform with questions, but they do not want the data to lead users in a specific direction. The data needed to include context without bias, allowing users to formulate their own opinions on the information. That being said, Montgomery County worked to include different user personas when developing the platform, including residents, advocates, analysts, local businesses, the media, and county employees. The user personas provide these users — who have very different needs and levels of understanding — to visit the platform and find the data they need, along with answers to any questions they'd be likely to have. The platform is meant to be a guide to help answer questions, not a means of disseminating set ideas.

YOU NEED FEEDBACK

The county did not create its platform in a vacuum. While developing spending Montgomery, officials worked with residents, gathering and acting on their feedback. The county wanted to understand how the residents would use the data over time and learn how they would ask questions, making sure the information the county was providing would answer those questions and hit all the right notes. The county felt the responsibility to create and maintain a website that could accurately answer questions related to user's needs.

CONCLUSIONS

When Montgomery County was creating its online data platform, county officials wanted to ensure that it worked for county employees and all other users — and they took that ideal very

Decades of Online Transparency

What were you doing online in 1992? Browsers and web server software were available in 1991, and by 1992 they were being used by a few universities. That was also the year Montgomery County, Maryland, started its e-Government site. In 2010 and 2012, the county Legislature enacted two bills, one requiring online disclosure for payments of more than $25,000, and the other — known as the Open Data Act — requiring the county to identify public data (e.g., spending data) and publish it on one central site. That central site was called data Montgomery (montgomerycountymd.gov/open), and openMontgomery (montgomerycountymd.gov/open) followed that.

Key Takeaways

- **Have a Leader.** Any major initiative will fail unless it has a dedicated leader to keep the project organized. Start your online financial transparency project by finding a government official who is willing to take on the responsibility of making sure all the appropriate steps are being taken.

- **Create a Transparency Policy.** A policy outlining the government's approach to online financial transparency can help elevate the project to the next level. That's because it engenders support from multiple facets of the organization and sets the expectations of the government's constituency and staff.

- **Ask for Feedback.** As you begin the online fiscal transparency processes, ask potential users what they want to know about the government's finances.

- **Don't Copy Everyone Else.** When designing your open data platform, it's a good idea to look to other communities for inspiration, but don't try to create a carbon copy of another government's dashboard. It isn't likely to work because each government is unique. Let the needs of your constituents be your guide.

seriously during its development. The 2012 Open Data Act made the County responsible for sharing data with its constituency and changing the way citizens interact with the county's financial data, but the county went several steps beyond this mandate. It made sure the site not only contained data, but also made that data truly useful for anyone using the spending Montgomery portal. ▮

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