**Global Initiative for Fiscal Transparency**

**Fiscal Openness and Public Participation**

**Work plan 2020 – January 20, 2020**

This workplan was prepared for discussion and approval with the Lead Stewards in early 2020. The plan covers and highlights the most significant activities, processes and engagements programmed for year 2020, and follows GIFT’s [Strategy](http://www.fiscaltransparency.net/projects/) 20-22, *Accelerating Engagement for Better Public Finance*. The budget information for year 2020 is attached.

The main goal is to continue creating effective opportunities for inclusive citizen engagement in the budget process with emphasis on inclusiveness, and disclosure of fiscal information in accessible and usable formats for users. This workplan describes specific activities planned to achieve these outcomes and presents an additional table with a calendar of the activities programed in 2020 by the GIFT Coordination Team.

The priority activities of the work plan are:

1. Fiscal openness through peer-collaboration, training and technical assistance
2. Promoting inclusive public participation along the budget cycle
3. Using digital tools for publishing user-centered and meaningful fiscal transparency
4. Promoting government/civil society coalitions for the utilization of fiscal data for budget efficiency and social monitoring

At the same time, GIFT will continue working on the normative discussions around the GIFT principles on global standards and the systematization of the Stewards transparency and participation commitments, in order to identify opportunities for stronger peer learning and collaboration.

1. **Peer learning, training and technical assistance for greater fiscal openness**

This stream of work refers to the peer-learning and technical collaborative activities of the GIFT. In 2020, we will continue helping countries understand both the standards on fiscal transparency, as well as how they can improve their proactive publication practices by modeling the efforts of their peers in other countries that have achieved good levels of fiscal transparency, taking into consideration the users’ needs. As part of the OGP World Bank Multi-donor fund grant, activities will include webinars, in-country trainings, expertise sharing and technical assistance, using the fiscal transparency portals tutorial (videos and handbook), the public participation guide and other learning tools developed by the GIFT network and based on a users’ centered approach.

In the framework of our regular activities, we will continue providing targeted technical assistance with peer-learning for improving fiscal openness happens upon partners request. This type of support requires more in-depth and specific support to a government or civil society organization from inside or outside of the GIFT Network. It also entails engaging fiscal openness experts and peer practitioners, including opportunities for discussions with international peers on how to improve fiscal openness and overcome barriers. In this line, we will continue supporting Mongolia and will soon begin supporting Croatia, Iraq and Sudan, in partnership with the World Bank country teams. As part of the US State Department project support on fiscal transparency improvements, Benin, Liberia and Nigeria will also benefit from the network to increase their results in the Open Budget Survey (a section of the public participation pilots project).

1. **Promoting inclusive public participation along the budget cycle**

As part of the IBP-GIFT cooperation on public participation, eight government stewards and two government partners will be supported to pilot tailored designed mechanisms of public participation along the budget cycle. For that, GIFT-IBP have developed alliances with ministries of finance in different countries who are willing to step up efforts to implement public participation. Each mechanism of participation will be country specific, although there will be three peer-exchange workshops for government and civil society to take stock of the lessons along the process. The participant countries will receive technical assistance in design, monitoring and documentation of cases (phase by phase) and synthesis of knowledge to facilitate progress. The technical assistance will provide insights and lessons-learned on best practices and experiences from other countries through peer exchange workshops in participating countries, will help participant governments to identify next steps. Technical assistance will come from consultants with extensive experience and knowledge in fiscal transparency and participation.

This workstream will include:

* 1. peer-exchange workshops for government and civil society;
  2. technical assistance in design, monitoring and documentation

Other governments will be part of the public participation and transparency project, engaging from different perspectives. The ministry of finance of Colombia will continue benefiting from the network knowledge sharing while developing budget trackers that are responsive to gender, minorities and marginalized communities, as part of the implementation of an OGP action plan. With the support of UNICEF, Egypt will be getting support for budget reforms towards the Sustainable Development Goals, and the subnational government of Guanajuato, in Mexico, will be also joining network activities related to citizen engagement and transparency improvements.

Finally, the Ministry of Finance of Chile and a newly created Independent Commission for Fiscal Transparency and Impactful Spending (integrated by independent civil society experts), have asked GIFT to provide international peer learning experience and technical collaboration on public participation in the budget process at national level. They are particularly interested in the creation of impact indicators that actually reflect people's needs. As social justice, redistributive policies and budget reallocation are at the center of Chile's national debate, GIFT international experience on informed debates on budget allocation, and citizen engagement in budget execution, come timely for a country seeking concrete examples on the matter.

Tax project in collaboration with the World Bank

Public participation is also a key component of the tax project with the World Bank, which seeks to increase revenue transparency knowledge resources and tools for government, development partners, and civil society practitioners. This project includes the development of a scoping study reflecting the experience of half a dozen CSOs that have worked on tax issues in their countries, exploring the specific limitations that governments currently face in publishing revenue and tax information, describing the context in which civil society advocacy work was feasible, viable and impactful from an independent civil society standpoint, with emphasis on constructive dialogue and discussion with the government.

Another objective of the tax project is to enhance the understanding of the revenue transparency thematic area by government, development partner and civil society actors at the country and local levels that are developing and implementing reforms, through sharing of lessons, tools, and technical expertise. GIFT will organize a workshop, in collaboration with the World Bank, to enhance the understanding of disclosure of meaningful and relevant information, and informed engagement of expert CSOs, in a setting of openness and trust.

The scoping paper, the consultations, dialogue and meetings with CSOs on tax data needs for civil society engagement, will eventually provide the elements for the formulation and discussion at a global level of a draft on global principles on tax transparency in order to contribute to the global discussion on the minimum standards to guide governments (in 2021).

1. **Digital tools for user-centered fiscal transparency**

The adoption targeted digital tools has been constantly in GIFT agenda. In 2020, GIFT continues seeking to generate worldwide gains in user-centered fiscal transparency that uses digital tools in a strategic way, built from the experiences and lessons learned in several country members. Achieving a user-centered requires understanding the audience and adapting contents considering the format, granularity and structure that will enable use and decision-making. It also requires that an environment in which technological innovation is embraced and enabled.

After several years of working with government stewards in building digital platforms to provide fiscal information that addresses the users’ needs, the GIFT Coordination team has produced an online tutorial with a basic guide to concepts and actions to consider in the process of publishing budget information with a user-centered approach. The tutorial allows participants to understand the importance of publishing budget information, take into account the target audience, and recognize the different steps to develop a budget transparency portal or platform with a user-centered approach. The tutorial also helps governments identify potential users and segment the audience of a budget transparency portal, discover innovative tools to take full advantage of the possibilities that current technological progress offers, and acquire techniques to monitor the results of the publication. In 2020, originally produced in Spanish, will be produced in English and will be disseminated in both languages, and produced in short videos.

Regarding the Open Fiscal Data Package, GIFT will continue supporting members and partners through three activities:

1. GIFT will broaden the spectrum of public financial management while developing financial schemas for revenue and cross-cutting subjects, such as environmental finances, non-financial performance, and gender-responsive budget.
2. Guidance and technical support to structure and clean the data. From experience in previous years, we are aware that publishers face the biggest challenges in correctly structuring the data before publication. Providing proper guidance and follow up will stimulate, not only more publication, but better data quality.
3. Tech to publish and use open data. Tools for packaging different data schemas will be part of the Open Fiscal Data Package Structure to enable publication, while we will further include tools for developers and data scientists to promote reuse.
4. **Government/civil society coalitions for budget efficiency and social monitoring**

Since 2017, the coalitions organized by the GIFT network have modeled two types of coalitions that countries can adopt and adapt for their specific context, considering their position, opportunities and challenges. Both processes bring together ministries of finance and civil society organizations, in an environment of trust and innovation, taking advantage of the publication of digital tools, including the better collection of data, user-centered publication, open data, and last but not least, the international setting for learning and cooperation. The coalitions also encourage the adoption of public participation mechanisms by helping break barriers related to questions about the possible effects of participation, while simultaneously establishing bases for trust and collaboration among stakeholders of different sectors, Finally, the coalitions benefit from the comparative and international experience, as practitioners from the different countries from civil society and government co-create the mechanisms and share their specific focus, methods and lessons learned.

The rallies on your street: monitoring public infrastructure works in local communities. Ministries of finance, Public Works or similar, and one or more CSOs, launch an open invitation to participate in the Rally #DataOnTheStreets. People register to the event and go through the construction projects dataset or mapping platforms published and select the ones they want to visit. Knowing the location and coordinates they go out to check out the projects, comparing what they see on the dataset and what they see on the streets. In 2020, GIFT is engaging the following countries in the rally: Chile, Colombia, Costa Rica, Mexico, Nigeria and South Africa.

In 2019, the Better Budget Dataquest for Sustainable Development was introduced to encourage collaboration in evidence-based policy analysis. The Dataquest typically takes the form of a day event, where teams explore certain dataset(s) to provide context and better understanding of a particular subject. The outcomes of the participants can be, for example, a multimedia piece, the start of a research project or a human story among others that provide useful insights to improve a certain policy or process. Teams of up to five individuals explore the spending dataset and by contextualizing it with other data they should come up with findings for one of the following categories: gender, inequality or environment. Argentina, Brazil, Colombia, Costa Rica, Croatia, Indonesia, Mexico, South Africa and Uruguay, are expected to participate in the data quest in 2020.

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| **GIFT Calendar of Activities – 2020** | | |
| **Timeline** | **Summary of Activities** | **Outcome Area** |
| 1st Quarter | -On-line peer learning and collaborative support activities  -Stewards coordination and governments /civil society coalitions for the use of fiscal data at the community level in public infrastructure  -FODP and spending data webinar for citizen engagement workshop  -Kick-off meeting in South Africa of the public participation pilot project  -Dissemination of the tutorial on fiscal transparency platforms for citizens engagement  -Technical collaboration on crosscut budgeting issues (gender responsive green, inclusion) | -Learning  -Coalition  -Advocacy  -Learning  -Knowledge  -Learning |
| 2nd Quarter | -Fiscal Transparency workshop on IT tools for citizens engagement (users’ centered approach)  -Fiscal Transparency webinar on IT tools for citizens engagement (users’ centered approach)  -Assessment on fiscal transparency and inclusiveness conditions for citizens engagement  -Technical collaboration on fiscal transparency (US State Dpt.)  -Workshop on tax transparency with the World Bank | -Learning  -Learning  -Knowledge  -Learning  -Learning |
| 3rd Quarter | -Fiscal Transparency webinar on IT tools for citizens engagement (users’ centered approach)  -FODP and spending data workshop  -Public participation pilot case studies webinar  -Five videos of the fiscal transparency portals  -Technical collaboration on fiscal transparency (State Department) | -Learning  -Learning  -Learning  -Knowledge  -Learning |
| 4th Quarter | -Comparative analysis of public participation in the field of fiscal policy  -Technical collaboration and practical assistance on crosscutting budgeting  -In country training on public participation  -Technical collaboration on fiscal transparency (State Department) | -Knowledge  -Learning  -Learning  -Learning  -Learning |
| Throughout the Period | - Provide tailored technical collaboration and practical assistance on IT and open data | -Learning |