

Insights from Data Inventorying Efforts

From working with public sector organizations across the world and reaching out to seasoned data management professionals to surface best practices, the Center for Government Excellence at Johns Hopkins University has assembled this list of lessons learned.

- **Governments complete data inventories for a variety of reasons.** Data inventories serve many purposes: figuring out what data is being collected (and if there is any duplication among departments), determining what systems are in use, understanding what data is available for analysis, promoting transparency, developing data publishing plans, and learning about current challenges and opportunities within the organization that might affect its goals for data management and use. Because many inventorying efforts require participation from a wide variety of staff, inventorying is also a great opportunity to build relationships and convey the importance of inventorying and the data management program.
- **You don't need an open data policy to complete and find value in a data inventory.** GovEx surveyed municipalities with and without data inventories. Having an open data policy that calls for a data inventory is helpful in completing the inventory in a timely manner and demonstrating its importance across the organization, but it is not necessary.
- **There's no one size fits all approach for data inventories.** Inventories should be customized to fit the government's needs and open data goals. Some governments begin with a targeted approach to inventorying in one department, one IT system, or one strategic priority; other governments dive in attempting to inventory all their data systems and datasets in one project. Some governments have their open data coordinators complete the inventory; others hire third-party auditors. It's important to take time to determine what the right approach is for your organization. This includes exploring how familiar staff are with data management, how committed they are to your organization's data management goals, their capacity to assist in completing an inventory, any legislation that might deal with inventorying, and how you plan to share the results of the data inventory.
- **Inventorying works best as an organization-wide effort.** Inventorying data is a chance to connect with city staff, relay the importance of the city's data management program, and provide training around open data. Making this a citywide effort can be a unifying process that thoroughly addresses concerns about data, builds buy-in throughout the city, and generates conversation among frontline staff, managers, and senior leadership about data.

- **Training is the first step to creating a good inventorying experience.** Members of your organization undoubtedly have different understandings and knowledge about data and the importance of completing an inventory. Providing information about data in general, the city’s data management program, its goals, and why it’s doing an inventory ensures that everyone is on the same page and motivated to contribute to the inventorying process.
- **Develop a data inventory template that is accessible and easy to use.**
 - It might be good to have some checkboxes for common data types (e.g., census, inspection-related).
 - Keep the instructions short and direct. If additional information needs to be disseminated to participants, consider developing a Frequently Asked Questions guide that you will keep updated.
 - Add clear deadlines to your instructions.
- **Inventorying is a continual process.** Some municipalities have mandates which require them to update their inventories on an annual basis, but all public sector organizations should have a plan to update their inventory routinely and regularly.
- **A note about privacy.** Do not exclude any datasets based on privacy or confidentiality concerns. To make the data inventory as useful as possible, it should include data that may be sensitive, private, or unlikely to be released. Always include a description of the sensitivity concerns.
- **Don’t be afraid to innovate.** There are some established templates and methods for data inventorying, but if your needs or inspiration drive you to do things differently, that’s great. The result will be better customized for your organization, and may be a valuable new technique that other organizations could benefit from. If you have an innovative approach, we’d love to hear about it!