Summary of the DATA Act Playbook

Making federal spending data accessible, searchable, and reliable provides opportunities not only to have an open, public-facing dialogue on how federal dollars are spent, but also to serve as a tool for better oversight, management decision-making, and innovation both inside and outside of government. When implemented, the DATA Act will provide the opportunity to better understand how federal programs and investments can improve the lives of the American public and make program delivery more effective.

To be successful, agencies should approach DATA Act implementation not as a compliance exercise, but rather as an opportunity to transform how agencies access, share, and use data. Treasury and OMB are taking a "data-centric" approach that helps to minimize system changes across all agencies to collect information and instead focuses on managing data in a more streamlined way. The "data-centric" approach differs from the traditional "system-centric" way of collecting, aggregating, and validating additional data from agencies via a bulk file or aggregating information in a central system, never to be reused by the agency. This approach leverages industry data exchange standards to share and utilize financial data.

To assist agencies with implementation, OMB and Treasury recommends eight key steps that can help agencies fulfill the requirements of the DATA Act by leveraging existing capabilities and streamlining implementation efforts.

1. **Organize Your Team**: Create an agency DATA Act work group including impacted communities within your agency and designate a Senior Accountability Officer (SAO);
2. **Review Elements**: Review the list of DATA Act elements and participate in data definitions standardization;
3. **Inventory Data**: Perform an inventory of agency data and associated business processes and systems;
4. **Design & Strategize**: Plan changes to systems and business processes to capture financial, procurement, and financial assistance data;
5. **Execute Broker**: Implement a "broker" at the agency. The broker is a virtual data layer at the agency that maps, ingests, transforms, validates, and submits agency data into a format consistent with the DATA Act Schema (i.e., data exchange standards).
6. **Test Broker Implementation**: Test broker outputs to ensure data are accurate and reliable;
7. **Update Systems**: Implement other system changes (e.g., establish linkages between program and financial data, and capture any new data); and
8. **Submit Data**: Update and refine process (repeat 5-7 as needed).

As agencies begin to implement the DATA Act, Treasury and OMB will continue to refine this playbook and will hold meetings and workshops with agencies to provide updates on DATA Act activities, encourage agency collaboration, and share important insights and information.