

IATI Secretariat Service Catalogue

Table of Contents

Document History	3
1. Introduction	3
2. Service Descriptions	6
Scope 1: Accountability Structure.....	6
Executive Services.....	6
Scope 2: Stewardship of the IATI Standard.....	7
Delivery and maintenance (of the IATI Standard).....	7
Change control (of the IATI Standard).....	7
Feedback (for the IATI Standard).....	8
Insights (on the IATI Standard).....	8
Research and Development (on the IATI Standard).....	8
Scope 3: Technical Infrastructure.....	9
Deployment and maintenance (of the IATI Technical Infrastructure).....	9
Monitoring and performance (of the IATI Technical Infrastructure).....	9
User engagement and satisfaction (of the IATI Technical Infrastructure).....	10
Software development (of the IATI Technical Infrastructure).....	10
Product planning (for the IATI Technical Infrastructure).....	10
Research and development (for the IATI Technical Infrastructure).....	11
Scope 4: Publisher and User Support.....	11
Helpdesk provision (for Publisher and User Support).....	11
Guidance and support materials (for Publisher and User Support).....	12
Outreach (for Publisher and User Support).....	12
Training (for Publisher and User Support).....	12
Research and Development (for Publisher and User Support).....	13
Scope 5: Advocacy, Community and Communications.....	13
Communications.....	13
Outreach and Advocacy.....	14
Community Engagement.....	14
Event Management.....	15
Scope 6: Policy and Planning Services.....	15
Policy Advice.....	15
Policy and Strategy Development.....	16
Secretariat Support to Governing Board.....	16
IATI Annual Work Plan.....	17
IATI Annual Report.....	17
Scope 7: Operational and Financial Management.....	18
Operational and Financial Management Services	18
IATI Membership Contributions Collection.....	18
Accounting and Financial Reporting.....	19
Fund Management and Fund Disbursement.....	20
Scope 8: Procurement and Contracts Management.....	21
Procurement.....	21
Compliance Data Protection Standards.....	22
Management Oversight.....	22

Document History

Version	Author	Date	Summary of Changes
1.0	Phil Drake	15 April 2023	Draft Service Catalogue
2.0 (here)	Sander Hees	10 May 2023	Draft 2.0 (consolidating SC with UNDP templates / aligning services with proposal for future delivery)
3.0	Sander Hees	22 May 2023	Draft 3.0 - consolidated inputs (version 2.0); added main areas of responsibilities under introduction (UNDP/UNOPS); sub-section UNOPS (e.g. on translation/interpretation); where applicable: rewording services / merge service owner and service focal point / delete beneficiaries
4.0	IATI Secretariat	31 May 2023	Draft 4.0 - inputs from ODS / UNOPS, comments addressed by team members;
5.0	IATI Secretariat	15 June 2023	Draft 5.0 Adding expected service outputs and estimated resources; UNDP, UNOPS, ODS finalising draft for onward transmission to TM for final review before Board approval

1. Introduction

This document aims to provide a central source of information on the services delivered by the IATI secretariat. In accordance with provisions outlined in UNDP's Engagement Facility project document and the Letters of Agreement (signed on 30 June 2023) between the IATI Governing Board and UNDP and UNOPS respectively, this document presents a catalogue of services to be provided to IATI and aims to provide an accurate, consistent picture of what constitutes each service for both service users and stakeholders.

This document will provide detailed information to both the providers and users of services with regard to service requirements and inputs & outputs. It shall make information available in a transparent way to support the expectations of all IATI stakeholders. Furthermore, it shall provide comprehensive information to IATI's management and Board on the portfolio of services to enable and support decision-making for further development of IATI's service portfolio.

The IATI Service Catalogue shall list all the services of IATI, with a level of detail for each service required to understand its purpose, requirement(s), outputs and resourcing. It shall define all of IATI's services, processes, tasks and responsibilities and outline in detail the resources involved to provide such service allowing for the clear provision of information with regard to such services to members, users and publishers of IATI data.

The services outlined in this document will form the blueprint for a future Secretariat Work Plan which will be regularly updated by the Secretariat through a consultative process with the IATI Governing Board, Working Groups and wider IATI Community. All services will be delivered by each organisation in accordance with their own organisational rules and regulations.

The service catalogue is a fundamental part of service delivery because it documents the relevant services that IATI provides to its users: relationships between providers and users are built upon how these services are defined and carried out. Each service definition will include the following characteristics:

- A description of the service;
- Information on who is providing the service (service owner / service responsible);

- Information on who benefits from the service (beneficiaries);
- A description of *tentative* service outputs and expected (human) resources;

This service catalogue encompasses the complete list of the responsibilities and services managed by a service provider. Some of these services are visible to service users, while others are not. It includes present contractual commitments, new service developments, and on-going service improvement plans. It is important to note that these Secretariat Services will be reviewed in Q3 of 2023 as part of the wider Secretariat Work Plan discussions and the service catalogue may be updated as a result. In particular the expected resources and outputs will be subject to change as these require additional consultations between the Secretariat and the Board.

The main areas of responsibilities by the service providers / hosting entities (UNDP and UNOPS) are listed in the table below. Do note that technical services will be implemented in partnership with ODS Cooperative (ODS), under supervision of UNDP.

This service catalogue is intended to clarify areas of responsibility. It should be clearly understood that delivery is as one Secretariat, with regular and frequent collaboration among service providers to achieve this objective.

Responsible entity	Main areas of responsibilities
UNDP	Accountability Structure (Executive Services)
	Stewardship of the Standard (<i>implementing partner ODS</i>)
	Technical Infrastructure (<i>implementing partner ODS</i>)
	User and Publisher Support (<i>implementing partner ODS</i>)
	Advocacy, Community and Communications
UNOPS	Operational and Financial Management (which includes Membership Services and Financial Reporting)
	Legal Services to the Members' Assembly and Governing Board (incl. receipt and management of membership fees)
UNDP / UNOPS (with some shared responsibilities, defined in the 15 March 2023 notification letter of the Governing Board to bidders)	<p><u>Policy and Planning Services</u>, split between substantive support and overall programmatic coordination (UNDP) and logistical support (UNOPS), in the following areas:</p> <ul style="list-style-type: none"> • Event Management; • Policy and Data Use Analysis; • Support to IATI Governing Board. <p><u>Financial management and operational services, incl. Procurement</u> in the following areas:</p> <ul style="list-style-type: none"> • <i>IATI Membership Contribution Collection and Management of Funds</i> <ul style="list-style-type: none"> ○ By default led by UNOPS, with an exception for those Members routing their contributions through UNDP; • <i>Travel and Mission services</i>: <ul style="list-style-type: none"> ○ UNDP: travel facilitation for UNDP and ODS personnel; ○ UNOPS: UNOPS personnel, Governing Board Members and other stakeholders (as requested); • <i>Procurement (non-technical)</i>: <ul style="list-style-type: none"> ○ UNDP: Operational, HR, Administration, and Procurement services in support of management of the Policy and Technology Secretariat; ○ UNOPS: Procurement in support of IATI events, as needed.

The detailed Secretariat Support Services to be provided in this catalogue will be structured around the following new Work Scopes:

Scope 1: Accountability Structure

Scope 2: Stewardship of the IATI Standard

Scope 3: Technical Infrastructure

Scope 4: Publishers and User Support

Scope 5: Advocacy, Community and Communications

Scope 6: Policy and Planning Services

Scope 7: Operational and Financial Management

Scope 8: Procurement and Contracts Management

Descriptions of services, functions and responsibilities of the parties involved will be categorised as follows:

Nr	Area	Description
1.	Service ID	
2.	Service name	
3.	Service owner	Responsible entity
4.	Beneficiaries	Service recipients - <i>if applicable</i>
5.	Description of service	
6.	Expected output	
7.	Estimated resources	FTE / Full-time Equivalent
8.	Point of Contact	Post title of primary responsible (for each organisation if more than one)

2. Service Descriptions

Scope 1: Accountability Structure

Nr	Area	Description
1.	Service ID	1.1
2.	Service name	Executive Services
3.	Service owner	UNDP
4.	Beneficiaries	IATI Management, Governing Board
5.	Description of services	<ul style="list-style-type: none"> ● <u>Governance services</u>: designing, implementing, operating, maintaining and further developing of governance capabilities for IATI; ● <u>Risk management</u>: service includes the annual collection of corporate risks for further handling, the monitoring of agreed corporate risks based on approved risk response plans, the increasing of awareness in the organisation for risk management, training of involved staff, the organisation and facilitation of a dedicated risk management event per year and the annual evaluation of the risk management process following a defined annual schedule. In addition, the service contributes to the annual planning process of the Initiative; ● <u>Development and maintenance of IATI KPI dashboard</u>: collation of high-level corporate indicators covering the main aspects of the performance of IATI's services and systems and production of the dashboard on a regular basis for MB and management team review; ● <u>Drafting and updating IATI's mid-term strategy</u>: the review and updating of IATI's mid-term strategy (2020-2025) includes the drafting and revision of IATI's strategic goals and objectives.
6.	Expected output	<ul style="list-style-type: none"> ● Organise 4 Board meetings a year, enabling continual review of strategic priorities as aligned with the Strategic Plan. ● Proposed adjustments feed into the Mid-Term Review (MTR) of the SP. (4/4 GB meetings on time and minutes approved and circulated within <21 days); ● Outline schedule for consultation and development of IATI SP 2025-30 agreed and published. ● 2022 Results published and used to inform MTR and 2024 work planning cycle. (Y/N) ● Register updated and Risk Management Plans outlining the risk approach which the organisation is taking towards risks, awareness for risk management in the organisation, communication on status of risks; ● Quarterly publication and presentation to the Board of the IATI secretariat performance dashboard by the ED; ● Training of support staff;
7.	Estimated resources	IATI Executive Director: 100%; IATI Manager, Policy and Technology: 25% IATI Operations Specialist: 20% IATI Specialist, Policy & Governance: 10% IATI Operations Associate: 20%

Nr	Area	Description
		UNDP Oversight: 10%
8.	Point of Contact	IATI Executive Director

Scope 2: Stewardship of the IATI Standard

Nr	Area	Description
1.	Service ID	2.1
2.	Service name	Delivery and maintenance (of the IATI Standard)
3.	Service owner	UNDP, implementing partner: Open Data Services (ODS)
4.	Description of service	<ul style="list-style-type: none"> Maintain ongoing availability of the IATI standard documentation and associated assets. Resolve identified bugs, synchronisation requests and approved change processes.
5.	Expected output	<ul style="list-style-type: none"> Quarterly uptime reports on the IATI standard; Incident log; Public changelog documentation on all aspects of the standard assets
6.	Estimated resources	<p>ODS</p> <ul style="list-style-type: none"> - Data Standard & Technology Lead (30%) - Schema Architect (80%) - Data Analyst (60%) - Systems Administrator (10%) - Product Manager (25%) - Software Engineer (30%) <p>UNDP</p> <ul style="list-style-type: none"> - IATI Specialist, Engagement - IATI Manager, Policy and Technology - IATI Specialist, Data Policy
7.	Point of Contact	<p>ODS: Data Standard and Technology Lead</p> <p>UNDP: IATI Manager, Policy and Technology</p>

Nr	Area	Description
1.	Service ID	2.2
2.	Service name	Change control (of the IATI Standard)
3.	Service owner	UNDP, implementing partner: ODS
4.	Description of service	<ul style="list-style-type: none"> Implement approved changes to the IATI standard following agreed processes and protocols. Publish and maintain all timescales, notifications and information products that describe change requests.
5.	Expected output	<ul style="list-style-type: none"> A rolling / annual published plan for the upgrade of the standard (even if none); Implementation plans, when a change is approved; Associated communication and notification materials

Nr	Area	Description
6.	Estimated resources	As per scope above 2.2.1
7.	Point of Contact	ODS: Data Standard & Technology Lead UNDP: IATI Specialist, Data Policy

Nr	Area	Description
1.	Service ID	2.3
2.	Service name	Feedback (for the IATI Standard)
3.	Service owner	UNDP, implementing partner: ODS
4.	Description of service	<ul style="list-style-type: none"> Provide and facilitate the agreed mechanisms and channels for feedback on specific change requests. Process all feedback received on the IATI standard in a timely and open manner.
5.	Expected output	<ul style="list-style-type: none"> Quarterly report on feedback and issues encountered and received; Quarterly status report for community engagement Quarterly community calls for discussion
6.	Estimated resources	As per scope above 2.2.1
7.	Point of Contact	ODS: Data Standard & Technology Lead UNDP: IATI Specialist, Policy and Governance

Nr	Area	Description
1.	Service ID	2.4
2.	Service name	Insights (on the IATI Standard)
3.	Service owner	UNDP, implementing partner: ODS
4.	Description of service	<ul style="list-style-type: none"> Assess and evaluate the IATI standard concepts and processes against best practice in other standards and initiatives Generate and provide access to statistics and reports around the take of the IATI standard
5.	Expected output	<ul style="list-style-type: none"> Quarterly "state of the standard" report to summarise usage and trends; Quarterly "deep dive" analysis reports around community-identified topics, taking into consideration best practice elsewhere
6.	Estimated resources	As per scope above 2.2.1
7.	Point of Contact	ODS: Data Standard & Technology Lead UNDP: IATI Specialist, Policy and Governance

Nr	Area	Description
1.	Service ID	2.5
2.	Service name	Research and Development (on the IATI Standard)
3.	Service owner	UNDP, implementing partner: ODS

Nr	Area	Description
4.	Description of service	<ul style="list-style-type: none"> Undertake user, impact and outcome research in relation to any prioritised areas of the IATI standard, where directed. Provide mechanisms to preview, test and evaluate potential changes or developments to the IATI standard, where needed.
5.	Expected output	<ul style="list-style-type: none"> In depth reviews and analysis documents on candidate changes to the standard; Associated prototype of the standard and relevant tooling, to assist with impact assessment and community engagement
6.	Estimated resources	As per scope above 2.2.1
7.	Point of Contact	ODS: Data Standard & Technology Lead UNDP: IATI Specialist, Data Policy

Scope 3: Technical Infrastructure

Nr	Area	Description
1.	Service ID	3.1
2.	Service name	Deployment and maintenance (of the IATI Technical Infrastructure)
3.	Service owner	UNDP, implementing partner: ODS
4.	Description of service	<ul style="list-style-type: none"> Ensure the ongoing availability of all defined components and services that constitute the IATI Technical Infrastructure. Maintain relevant documentation and code repositories through resolving relevant bugs, dependencies and updates in a timely manner.
5.	Expected output	<ul style="list-style-type: none"> Quarterly uptime reports on the IATI infrastructure; Incident log; Public changelog documentation on all aspects of the infrastructure assets
6.	Estimated resources	<ul style="list-style-type: none"> - Data Standard & Technology Lead (30%) - Software Engineer (70%) - Software Engineer (70%) - Software Engineer (70%) - Data Analyst (60%) - Systems Administrator (10%) - Product Manager (30%)
7.	Point of Contact	ODS: Data Standard & Technology Lead UNDP: IATI Manager, Policy and Technology

Nr	Area	Description
1.	Service ID	3.2
2.	Service name	Monitoring and performance (of the IATI Technical Infrastructure)
3.	Service owner	UNDP, implementing partner: ODS
4.	Description of service	<ul style="list-style-type: none"> Provide and maintain metrics and performance statistics on all relevant components of the IATI Technical Infrastructure.
5.	Expected output	<ul style="list-style-type: none"> Open / public dashboard on usage statistics of all infrastructure; Quarterly compendium of key trend; Quarterly community calls to discuss and review

Nr	Area	Description
6.	Estimated resources	As per scope above 2.3.1
7.	Point of Contact	ODS: Data Standard & Technology Lead

Nr	Area	Description
1.	Service ID	3.3
2.	Service name	User engagement and satisfaction (of the IATI Technical Infrastructure)
3.	Service owner	UNDP, implementing partner: ODS
4.	Description of service	<ul style="list-style-type: none"> • Solicit and collect user feedback on all IATI Technical Infrastructure in appropriate and relevant channels. • Curate and maintain access to use cases, user cases and functional requirements for stakeholder engagement and discussion.
5.	Expected output	<ul style="list-style-type: none"> • Quarterly report on feedback and issues encountered and received; • Quarterly status report on use cases and product roadmaps for community engagement • Quarterly community calls for discussion
6.	Estimated resources	As per scope above 2.3.1
7.	Point of Contact	ODS: Data Standard & Technology Lead

Nr	Area	Description
1.	Service ID	3.4
2.	Service name	Software development (of the IATI Technical Infrastructure)
3.	Service owner	UNDP, implementing partner: ODS
4.	Description of service	<ul style="list-style-type: none"> • Oversee the build, test and implement software for data tools and services, where requested. • Ensure open source practices in any software development project.
5.	Expected output	<ul style="list-style-type: none"> • Quarterly schedule of software development sprints; • Open software repositories and issues trackers; • Quarterly community calls for collaborative planning; • Protocol documents for engagement and community contributions
6.	Estimated resources	As per scope above 2.3.1
7.	Point of Contact	ODS: Data Standard & Technology Lead

Nr	Area	Description
1.	Service ID	3.5
2.	Service name	Product planning (for the IATI Technical Infrastructure)
3.	Service owner	UNDP, implementing partner: ODS
4.	Description of service	<ul style="list-style-type: none"> • Maintain and provide timelines, roadmaps and status updates on all aspects of the IATI Technical Infrastructure. • Ensure channels for feedback and stakeholder engagement in setting priorities and considering impact of any proposed changes.
5.	Expected output	<ul style="list-style-type: none"> • Open and public roadmaps and product plans; • Quarterly community calls for prioritisation;

Nr	Area	Description
		<ul style="list-style-type: none"> Quarterly retrospective calls for lessons learnt
6.	Estimated resources	As per scope above 2.3.1
7.	Point of Contact	ODS: Data Standard & Technology Lead

Nr	Area	Description
1.	Service ID	3.6
2.	Service name	Research and development (for the IATI Technical Infrastructure)
3.	Service owner	UNDP, implementing partner: ODS
4.	Description of service	<ul style="list-style-type: none"> Review and report on best practice in other initiatives and the wider landscape to help assess scope and suitability of the IATI Technical Infrastructure. Undertake, review and report on tests, prototypes and associated research into possible new features and products, where appropriate.
5.	Expected output	<ul style="list-style-type: none"> In depth reviews and analysis documents around techniques in other standards; Quarterly meeting of cross-standards forum to share best practice; Associated prototypes of relevant infrastructure, to assist with evaluation and community engagement
6.	Estimated resources	As per scope above 2.3.1
7.	Point of Contact	ODS: Data Standard & Technology Lead

Scope 4: Publisher and User Support

Nr	Area	Description
1.	Service ID	4.1
2.	Service name	Helpdesk provision (for Publisher and User Support)
3.	Service owner	UNDP, together with implementing partner: ODS
4.	Description of service	<ul style="list-style-type: none"> Provide and maintain access to a remote service to respond to actions, queries and requests from IATI users. Ensure the associated operational tools, services and documentation are maintained.
5.	Expected output	<ul style="list-style-type: none"> Performance framework/SLAs on Helpdesk service provision to users and publishers; Technical helpdesk resolves the issues of publishers and users of IATI data and IATI applications in a timely manner and within SLAs;
6.	Estimated resources	<ul style="list-style-type: none"> - Data Standard & Technology Lead (30%) - Learning Coordinator (80%) - Data Analyst (60%) - Data Analyst (60%)

Nr	Area	Description
		- Policy & Business Analyst (80%) - Policy & Business Analyst (80%) - Policy & Business Analyst (80%) - Product Manager (25%)
7.	Point of Contact	UNDP: IATI Manager, Policy & Technology ODS: Policy & Business Analyst

Nr	Area	Description
1.	Service ID	4.2
2.	Service name	Guidance and support materials (for Publisher and User Support)
3.	Service owner	UNDP, together with implementing partner: ODS
4.	Description of service	<ul style="list-style-type: none"> ● Provide and develop definitive use guidance and material. ● Ensure relevance and usability.
5.	Expected output	<ul style="list-style-type: none"> ● Analysis of the routes, channels and content of IATI support queries; ● Updates to current guidance and support materials; ● Development of new guidance and support materials
6.	Estimated resources	As above, 2.4.1 Scope
7.	Point of Contact	UNDP: IATI Specialist Data Policy ODS: Policy & Business Analyst

Nr	Area	Description
1.	Service ID	4.3
2.	Service name	Outreach (for Publisher and User Support)
3.	Service owner	UNDP, together with implementing partner: ODS
4.	Description of service	<ul style="list-style-type: none"> ● Provide specific and tailored support to identified and prioritised IATI users (publishers and users), as requested.
5.	Expected output	<ul style="list-style-type: none"> ● Outreach activities and support to key publishers and users
6.	Estimated resources	As above per scope 2.4.1
7.	Point of Contact	UNDP: IATI Manager, Policy and Technology ODS: Policy & Business Analyst

Nr	Area	Description
1.	Service ID	4.4
2.	Service name	Training (for Publisher and User Support)
3.	Service owner	UNDP, together with implementing partner: ODS
4.	Beneficiaries	Audiences / purposes include: <ul style="list-style-type: none"> - Data Use Support, Training, and Guidance Resources; <ul style="list-style-type: none"> ○ Including tailored support for partner country governments; - Publishing Support, Training, and Guidance Resources;
5.	Description of service	<ul style="list-style-type: none"> ● Develop curricula and content for training activities for IATI users. ● Prepare, implement, monitor and follow-up on scheduled training activities, where requested.

Nr	Area	Description
6.	Expected output	<ul style="list-style-type: none"> • Inventory of guidance and training materials; • Creation of online courses (IATI Academy); • Targeted support to key publishers and data users provided;
7.	Estimated resources	As above per scope 4.1
8.	Point of Contact	UNDP: IATI Specialist Engagement / IATI Specialist Data Policy ODS: Learning Coordinator

Nr	Area	Description
1.	Service ID	4.5
2.	Service name	Research and Development (for Publisher and User Support)
3.	Service owner	UNDP, implementing partner: ODS
4.	Description of service	<ul style="list-style-type: none"> • Monitor and analyse best practice in support practices and mechanisms from other peer initiatives • Provide recommendations for changes to process and workflows, where appropriate.
5.	Expected output	<ul style="list-style-type: none"> • In depth reviews and analysis documents around support practices in other standards
6.	Estimated resources	As above per scope 2.4.1
7.	Point of Contact	UNDP: Specialist, Policy ODS: Policy & Business Analyst

Scope 5: Advocacy, Community and Communications

Nr	Area	Description
1.	Service ID	5.1
2.	Service name	Communications
3.	Service owner	UNDP
4.	Description of service	<p>Increase visibility and raise awareness of IATI, incl. public relations and media management, including:</p> <ul style="list-style-type: none"> • Prepare communication plans, managing the delivery of content across all IATI comms channels; • Implement awareness events and publications; • Maintain and manage IATI's brand assets such as logos, style guide etc.; implementing IATI editorial policy; • Media management, including compiling limited media-monitoring overviews and preparing and coordinating media and public relations activities;
5.	Expected output	<ul style="list-style-type: none"> • Communication plans; • Updated IATI branding guidelines; • Newsletters and other communication briefings; • Social media content and coverage;
7.	Estimated resources (Scope)	IATI Specialist, Communications & Advocacy 75%; IATI Specialist, Engagement 90% IATI Operations Associate 10% IATI Manager, Policy and Technology 25%

Nr	Area	Description
		IATI Specialist, Data Policy 20% Interns (4) 100%
8.	Point of Contact	IATI Specialist, Communications & Advocacy

Nr	Area	Description
1.	Service ID	5.2
2.	Service name	Outreach and Advocacy
3.	Service owner	UNDP
4.	Description of service	<ul style="list-style-type: none"> • Advocacy efforts with agreed stakeholders to ensure IATI is represented in all key global policy meetings. Talking points and briefs available to members in advance of in all settings where IATI may be discussed; • Engage regularly in international development and humanitarian fora to raise the profile of IATI, establish a seat at the table, and advocate for increased engagement in the initiative; • Conduct proactive outreach to new and priority publishers to increase the coverage of IATI data and to potential data users to raise awareness and build capacity to use IATI data; • Develop necessary resources to support outreach and advocacy efforts. • Outreach to IATI Members including through regular communications on the work of the initiative;
5.	Expected output	<ul style="list-style-type: none"> • Participate in outreach activities and visibility events at international fora to raise the profile of IATI; • Provide talking points and briefs to members taking part in upcoming IATI-relevant activities; • 'IATI Offer Briefings' delivered for each target stakeholder group (targets in IATI Policy 2023), showcasing what IATI can offer and what steps the stakeholders need to take to benefit from the initiative;
6.	Estimated resource	See 5.1 above (Scope)
6.	Point of Contact	IATI Specialist, Communications and Advocacy

Nr	Area	Description
1.	Service ID	5.3
2.	Service name	Community Engagement
3.	Service owner	UNDP
4.	Description of service	<ul style="list-style-type: none"> • Proactively grow and support the IATI community to engage with each other and in the work of the initiative; • Lead community engagement activities, such as managing and streamlining existing IATI community platforms (website / IATI Connect); • Make use of established governance and working mechanisms to further develop consultative processes, incl. Working Groups and Communities of Practice (in collaboration with other colleagues);
5.	Expected output	<ul style="list-style-type: none"> • Community and Membership Engagement Strategy (2023-2025); • Establishment of / support to IATI WGs; • Setting-up and coordinating IATI Community internship; • Managing IATI Connect, including online Consultations;

Nr	Area	Description
6.	Estimated resource	See 5.1 above (Scope)
7.	Point of Contact	IATI Specialist, Engagement

Nr	Area	Description					
1.	Service ID	5.4					
2.	Service name	Event Management					
3.	Description of service	Organising IATI events, such as Members' Assembly, Community Exchanges (virtual and in-person) and practical workshops.					
4.	Service owner	UNOPS (logistical support)					
		<ul style="list-style-type: none"> Logistical activities (Travel facilitation, hotels, DSA payment etc.) Practical arrangements / Meeting organization e.g. (support to participants, including invitations, visas, preparation of meeting budget, liaising with the external contractor for conference room, technical equipment, translation/interpretation, main focal point for venue;) 					
4.	Service owner	UNDP (substantive support and coordination);					
		<ul style="list-style-type: none"> Coordinate programme, incl. Sessions and speakers; Lead Secretariat preparatory meetings (together with ODS and UNOPS); Monitor event-planning, including oversight over DoL; Share regular updates with the IATI Governing Board and wider IATI Community (incl. follow-up activities and circulation of the minutes); Draft annual IATI Events Calendar; 					
5.	Expected output	<ul style="list-style-type: none"> Draft IATI Events Calendar that includes relevant external events and upcoming IATI Events and milestones (e.g. Board meetings); Organise an annual in-person / hybrid Members' Assembly and Community Exchange, a Virtual Community Exchange and other practical workshops; Follow-up from meetings via post-meeting survey 					
6.	Estimated resource	<table border="1"> <tr> <td>IATI Project Assistant 33%</td> <td rowspan="2">See 2.5.1 above (Scope)</td> </tr> <tr> <td>IATI Project Manager 33%</td> </tr> <tr> <td>Temporarily Support for the Event Management 100% (further assessment needed)</td> <td></td> </tr> </table>	IATI Project Assistant 33%	See 2.5.1 above (Scope)	IATI Project Manager 33%	Temporarily Support for the Event Management 100% (further assessment needed)	
IATI Project Assistant 33%	See 2.5.1 above (Scope)						
IATI Project Manager 33%							
Temporarily Support for the Event Management 100% (further assessment needed)							
7.	Point of Contact	IATI UNOPS Project Manager					
		IATI Engagement Specialist					

Scope 6: Policy and Planning Services

Nr	Area	Description
1.	Service ID	6.1
2.	Service name	Policy Advice
3.	Service owner	UNDP
4.	Description of service	<ul style="list-style-type: none"> Staff with expertise in development cooperation and humanitarian assistance provide technical advice to inform the implementation of all services and to inform the strategic direction of the initiative.

Nr	Area	Description
		<ul style="list-style-type: none"> • Leverage relevant expertise from within UNDP on key areas, such as south south cooperation, climate finance, private sector support, etc., to inform services and strategic direction where relevant. • Policy staff engage in relevant international fora and initiatives to ensure IATI is learning from current research and policy discussions and sharing IATI's offer in those spaces.
5.	Expected output	<ul style="list-style-type: none"> • Briefing and speaking notes • Policy advice documents • Inputs to strategic planning documents • Any other policy documents that requires input from Initiative
6.	Estimated resource (Scope)	IATI Specialist, Policy & Governance 90% IATI Specialist, Data Policy 50% IATI Manager, Policy and Technology 25% IATI Specialist, Communications & Advocacy 25% IATI Operations Associate 25%
7.	Point of Contact	IATI Specialist, Policy & Governance

Nr	Area	Description
1.	Service ID	6.2
2.	Service name	Policy and Strategy Development
3.	Service owner	UNDP
4.	Description of service	<ul style="list-style-type: none"> • Undertake policy research and development, to provide policy advice on programme and project delivery support and policy positioning and representation for IATI. • Research and develop policies to ensure IATI remains relevant in the changing development cooperation context. • Undertake policy research and development in different thematic areas for consideration as part of future updates to the IATI Standard. • Develop policies and strategies to guide the work of the initiative, for both development and humanitarian actors and for a range of data publishers and users. • Undertake analysis of IATI data on specific sector or policy themes, to inform IATI policy/strategy and promote its usefulness via blogs, webinars and other media. • Implement strategy to enable progress towards integrating IATI with national data systems and processes.
5.	Expected output	<ul style="list-style-type: none"> • Research on programme and project delivery support, e.g. on future updates to the IATI Standard; • Analysis of IATI data;
6.	Estimated resource	Per scope above 2.6.1
7.	Point of Contact	IATI Specialist, Policy / Governance

Nr	Area	Description
1.	Service ID	6.3
2.	Service name	Secretariat Support to Governing Board
3.	Description of service	<ul style="list-style-type: none"> • Maintain open and regular communication with the GB and relevant Board focal points;

Nr	Area	Description	
		<ul style="list-style-type: none"> Practical facilitation of the IATI Working Groups; 	
4.	Service owner	UNOPS (<i>logistical support</i>) <ul style="list-style-type: none"> Logistic activities (travel facilitation including DSA payment, Visa support); 	UNDP (<i>substantive support and coordination. UNOPS / ODS to input within relevant areas</i>) <ul style="list-style-type: none"> Board meeting preparation - quarterly or as needed; Scheduling, documentation and record-keeping, developing of agenda, preparatory discussions, minuting, recording and following up on all decisions, other input as requested to facilitate effective Board functioning and decision-making; Communication of decisions externally; UNOPS / ODS to input within relevant work areas;
5.	Expected output	<ul style="list-style-type: none"> The effective preparation of meetings (practical arrangements, including the venue, travel, catering); Effective running of meeting logistics; 	<ul style="list-style-type: none"> Substantive preparation of board meetings (preparation of the documents); Effective running of board meetings; Follow-up from board meetings
6.	Estimated resources	100% Project Assistant	Per scope above 2.6.1
7.	Point of Contact	IATI Executive Director	

Nr	Area	Description
1.	Service ID	6.4
2.	Service name	IATI Annual Work Plan
3.	Service owner	UNDP-coordinated, UNOPS / ODS to input within relevant work areas.
4.	Description of service	<ul style="list-style-type: none"> Deliver IATI's Annual Work Plan, with annual activities tied to stated strategic goals and objectives. Budgets, FTEs to be included, and monitoring of implementation through appropriate KPIs. Monitor and report on the implementation of the Work Plans and track progress against the Strategic Plan Results Framework.
5.	Expected output	<ul style="list-style-type: none"> Production of Annual Work Plan; Report on implementation of WP versus Strategic Plan Results Framework;
6.	Estimated resources	Per scope above 6.1
7.	Point of Contact	IATI Manager, Policy & Technology

Nr	Area	Description
1.	Service ID	6.5
2.	Service name	IATI Annual Report
3.	Service owner	UNDP (UNOPS / ODS to provide inputs)

Nr	Area	Description
4.	Description of service	Deliver annual report on the yearly record of IATI to be published by the end of Q1 of the following year. It contains detailed information about the yearly financials, activities and performance.
5.	Expected output	<ul style="list-style-type: none"> Production of IATI Annual Reports
6.	Estimated resources	Per scope above 2.6.1
7.	Point of Contact	IATI Manager, Policy & Technology

Scope 7: Operational and Financial Management

Nr	Area	Description	
1.	Service ID	7.1	
2.	Service name	Operational and Financial Management Services	
3.	Beneficiaries	IATI Members	
4.	Service owner / Description of service	UNOPS	UNDP
		<ul style="list-style-type: none"> Manage Due diligence Process to conduct a compliance and reputation analysis of the partner, particularly if it is not a member of the UN family or a UN member state; Manage UNOPS Engagement Acceptance Process for new IATI Members prior to signing UNOPS contribution agreement; Drafting , negotiation and signature of agreements with each individuals donor Negotiation Management and follow-up on the contribution agreement 	<ul style="list-style-type: none"> Manage sub-set of members routing their contributions to UNDP instead of UNOPS
5.	Expected output	<ul style="list-style-type: none"> Signed Contribution Agreements with IATI members 	
6.	Estimated resources	IATI Project Assistant 25%	IATI Project Manager 25%
7.	Point of Contact	IATI UNOPS Project Manager	Operations Specialist / Associate

Nr	Area	Description	
1.	Service ID	7.2	
2.	Service name	IATI Membership Contributions Collection	
3.	Service owner / Description of service	UNOPS	UNDP
		<ul style="list-style-type: none"> Management and follow-up of all membership contribution issues Collect revenue from IATI members, issue, record and 	<ul style="list-style-type: none"> Manage sub-set of members routing their contributions to UNDP instead of UNOPS; Fiduciary responsibility and accountability by UNDP on

Nr	Area	Description	
		implement waivers where approval has been granted by the Governing Board and monitor overall levels of membership contribution payments by members; <ul style="list-style-type: none"> • Fiduciary responsibility and accountability for the receipt, and custody of all contributions provided by donors under any engagement agreements signed by UNOPS; • Recording of all membership contributions including those received by UNDP (exception above), as part of overall Trust Fund management; 	funds received from this sub-set of members. <ul style="list-style-type: none"> • Reporting to the IATI Governing Board through quarterly financial reports compiled by UNOPS ;
4.	Expected output	<ul style="list-style-type: none"> • Collection and recording of Membership Contributions 	
5.	Estimated resources	IATI Project Assistant 25% IATI Project Manager 25%	IATI Operations Specialist 20% IATI Operations Associate 25%
6.	Point of Contact	100% IATI Project Manager	IATI Operations Specialist

Nr	Area	Description
1.	Service ID	7.3
2.	Service name	Accounting and Financial Reporting
3.	Service owner	UNOPS
4.	Description of service	<ul style="list-style-type: none"> • Record keeping and accounting in line with UNOPS financial rules and regulations, under the IPSAS regime, and subject audit conducted by the UNOPS' internal audit and investigation unit, as well as the annual audit of UNOPS accounts, conducted by the independent UN Board of Auditors • Monitoring, managing and delivering reports for financial management, auditing, and accounting purposes • Quarterly Financial Reports including information on financial details of received funds transferred to UNOPS, UNOPS expenses for the period; • Annual Financial Statements on the previous calendar year, detailing the contribution, expenses incurred, commitments and accrued interest (if any) as on 31 December each year after closure of the books; • Certified Final Financial Statement after project's operational and financial closure certifying the total funds received and actual total expenses incurred within the period of 18 months after the project closure; • Produce IATI financial report, which contains detailed information about the IATI yearly financials (include the income, expenditure and financial statement position

Nr	Area	Description
5.	Expected output	<ul style="list-style-type: none"> • sound financial management of resources in accordance applicable UNOPS finance rules and regulations • providing support in the coordination, planning, reporting and management of budgetary and financial activities • Contributing to the production of financial reports on budget utilization and financial matters for IATI Governing Board
6.	Estimated resources	IATI Project Assistant 25% IATI Project Manager 25%
7.	Point of Contact	IATI Project Manager

	Area	Description
1.	Service ID	7.4
2.	Service name	Fund Management and Fund Disbursement
3.	Service owner	UNOPS
4.	Beneficiaries	Implementing Partners and IATI Members
5.	Description of service	<ul style="list-style-type: none"> • Manage IATI's accounts, transactions and cash flows, ensuring that funding is utilized in line with UNOPS rules and procedures, donor agreements and IATI Members' Assembly and IATI Governing Board decisions; • Timely (within 14 working days) disbursement of funds to Secretariat partner UNDP in accordance with approved and agreed work plan and the budget subject to the necessary contract arrangements and approvals • Provide guidance and support to IATI Governing Board and IATI partners - with reference to the interpretation and implementation of the applicable UNOPS Financial Rules and Regulations; • Assist in the enforcement of the sound financial management of resources that is in accordance with the UNOPS rules and regulations • Providing support in the coordination, planning, reporting and management of budgetary and financial activities • Contributing to the annual report on budget and financial matters for management. • Managing IATI assets in accordance with UNOPS asset management policies
6.	Expected output	<ul style="list-style-type: none"> • Disbursement of funds • Advice, support and coordination of the IATI financial activities
7.	Estimated resources	IATI Project Assistant 25% IATI Project Manager 25%
8.	Point of Contact	IATI Project Manager

Nr	Area	Description
1.	Service ID	7.5
2.	Service name	Travel and Mission services
3.	Beneficiaries	IATI personnel; experts; IATI Governing Board; Working Group members and others required to travel by organizational needs;
4.	Description of service	<ul style="list-style-type: none"> • Coordinating matters relating to travel and accommodation planning, reservations and bookings for non-UNOPS/UNDP/ODS IATI staff and

Nr	Area	Description	
		GB members when travelling on duty. Monitoring and follow-up of travel reimbursement claims. Monitoring travel budgets and reporting on the execution of mission budgetary allocations; <ul style="list-style-type: none"> Travel arrangements; payments of allowances (DSA/terminals); and travel closure in compliance with UNDP/UNOPS travel policies for official business travel. 	
5.	Service owner	UNOPS <ul style="list-style-type: none"> Travel facilitation for UNOPS personnel, Governing Board Members and other stakeholders as requested; The travel facilitation is managed in accordance with existing UNOPS rules; This does not include the Travel Facilitation of UNDP or ODS personnel unless otherwise requested and approved by the GB or IATI Executive Director; 	UNDP <ul style="list-style-type: none"> UNDP will provide travel facilitation for UNDP and ODS personnel including for the IATI Executive Director. A separate Budget will be used for travel services
6.	Expected output	<ul style="list-style-type: none"> Timely Travel facilitation and DSA disbursements to the IATI GB Members 	
7.	Estimated resource / Point of Contact	UNDP: Operations Specialist / Associate UNOPS: IATI Project Manager UNOPS: IATI Project Assistant	

Scope 8: Procurement and Contracts Management

Nr	Area	Description	
1.	Service ID	8.1	
2.	Service name	Procurement	
3.	Description of service	<ul style="list-style-type: none"> Performing direct operational, human resources management, administrative and procurement requirements for the operation of the Policy and Technical Secretariat, as agreed through the work planning process. The service consists of end-to-end management of the procurement process including formal solicitation process, selection and evaluation and award criteria; evaluation procedure; Contract Management and Payment disbursement. Managing the relationship with suppliers. 	
4.	Service owner	UNOPS <ul style="list-style-type: none"> Procurement activities related to for example: translation and interpretation services (through available LTA), catering, procuring the venue and other support required for the logistics of 	UNDP <ul style="list-style-type: none"> Procure and manage interpretation and translation services (with the exception of those required for the annual Members' Assembly and included within Member Services, which are provided by UNOPS; Appoint IATI Executive Director to provide overall direction to the Secretariat, leadership of work planning and accountability for results.

Nr	Area	Description
		<p>the Members' Assembly and other IATI Events</p> <ul style="list-style-type: none"> Procurement of goods and services, which do not fall under the scope of Policy and Technology host, when requested by the GB and possible to undertake subject to the UNOPS rules and regulations and subject to available capacity to perform evaluation and contract management . <ul style="list-style-type: none"> Secure a long-term agreement with ODS for the provision of technology services for IATI as agreed through the work planning process and undertake or support procurement of services and contracts by ODS for delivery of all technical requirements for the initiative. Establish and manage IATI Secretariat 2.0 as a new project at UNDP in compliance with applicable UN and UNDP operational strategies and policies. Manage the IATI Secretariat through an Engagement Facility modality as a global project, to include financial and budgetary management, human resources management administration, recruitment and procurement.
5.	Expected output	<ul style="list-style-type: none"> Procurement processes run in compliance to the UNOPS / UNDP procurement policy and procedures; Managing the contractual relationship with the supplier;
6.	Estimated resource / Point of Contact	UNDP: IATI Operations Specialist 60%; IATI Operations Associate 20% UNOPS: IATI Project Manager 40% and IATI Project Assistant 60%

Nr	Area	Description
1.	Service ID	2.8.2
2.	Service name	Compliance Data Protection Standards
3.	Service owner	UNDP, by implementing partner: ODS
4.	Description of service	Provide recommendations to achieve data protection compliance.
5.	Expected output	<ul style="list-style-type: none"> Regular reports on compliance with data protection standards and legislation, including risk analysis; Advice and guidance to IATI publishers Advice and guidance to the Secretariat on relevant documentation and agreements between organisations and with staff
6.	Estimated resource	As above, 2.4.1 Scope
7.	Point of Contact	ODSC Professional Support

Nr	Area	Description
1.	Service ID	2.8.3
2.	Service name	Management Oversight
3.	Service owner	UNDP/ UNOPS
4.	Description of service	Board is satisfied that the services provided by the Secretariat are in line with expectations

Nr	Area	Description
5.	Expected output	<ul style="list-style-type: none"> ● Agree on adjustments within provided tolerance levels; ● Assess the achievement of results in the context of the Strategic Plan Results Framework; ● Assess risks to the programme or project, agree on management actions and resources to address them effectively; ● Identify and address operational issues of programme and project implementation, including those that could lead to revisions of the project if required.
6.	Estimated resources	In-kind: Senior Management and UNDP Corporate Operations (Bureau Director - 5%, HR - 5% and Corporate Operations Chief - 5% + Chief - 10%) UNOPS Head of Portfolio (5%)
7.	Point of Contact	Chief, Effectiveness Group, BPPS Head Of Portfolio, UNOPS