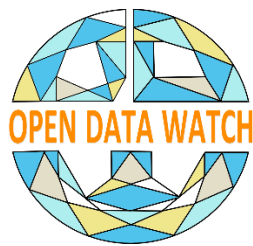


Final Report

# Inventory of IATI Training Materials and Data-use Tools

RFP/BPPS/2020/2509



**29 December 2020**

## Acknowledgements

This report was prepared by a research team from Open Data Watch comprised of Eric Swanson, Caleb Rudow, Amelia Pittman, Tawheeda Wahabzada, and Elettra Baldi, with support from Lorenz Noe. The IATI Secretariat reviewed this final report and supported the research process by providing feedback on the methodology and assisting with the survey and focus group outreach. The research team would like to thank the IATI secretariat for their support as well as the survey respondents and focus group attendees for their feedback and participation.

## Introduction and overview

This report is for contract – RFP/BPPS/2020/2509 – Inventory of IATI Training Materials and Data-use Tools. The contract is to create an inventory of available training materials on the use of IATI data and conduct a gap analysis to understand what materials could be created to supplement the available resources from a data user perspective. This project is a part of the work of the IATI Data Use Working Group’s strategy to promote the systemic use of IATI data. The results of this project will be used by IATI to better understand gaps in training materials and data-use tools that could be limiting data use. The inventory of training materials and data-use tools will be made public on IATI’s new community platform, [IATI Connect](#), to make training resources and data-use tools easier to find.

This document provides a gap analysis that integrates the results from multiple avenues of research, including the results from ODW’s inventory of training materials and data-use tools, research on IATI data use (through Google Analytics, Brand24, and query analyses), findings from Open Data Watch (ODW)’s survey on data use, and findings from subsequent focus groups that explored issues and suggestions raised by the surveys in greater depth. Each component is critical to substantiating and providing qualitative insight into the gap analysis.

## Inventory of training materials and data-use tools

### Overview of the inventory process

ODW scanned the internet using a search engine optimization (SEO) methodology for the relevant IATI training materials and data-use tools that appear most often and highest in search engine results using relevant keywords. As most traffic for websites comes from search engines, this allowed ODW to find the most visible—and likely most used sites—to identify available training materials and data-use tools. ODW used the following keywords in the search.

- **IATI training materials:** IATI Training, IATI Training materials, IATI methodology, how to use IATI data, and IATI tools.
- **IATI data-use tools:** IATI Data, International Aid Transparency Initiative data, transparency data aid, humanitarian resources aid data, and data on humanitarian assistance and activities.

ODW used Moz—an SEO software company—to perform the ranking analysis and used their keyword choice tool to find other related keyword combinations that could be useful to explore that were not included in the original list above. However, no additional relevant keywords were found using their keyword combination tool.

For the purpose of this exercise, the research team defined training materials as videos, guides, courses, or other training programs on how to use IATI data or tools for using IATI data. Data-use tools are portals, apps, or websites that use IATI data to provide a service or provide access to IATI data. The inventory of training materials and data-use tools will be made public on IATI’s new community platform, [IATI Connect](#), to make training resources and data-use tools easier to find and use.

The list of training materials and tools found through SEO was supplemented by training materials that the IATI Secretariat provided the ODW team to ensure that all available materials were covered. The survey also prompted users for any training materials that they knew of or had used. These were added

to the inventory if they were not already found in the initial search process. The findings are summarized below.

### Summary of inventory findings

The ODW team found 15 examples of IATI training materials and 27 IATI data-use tools. The inventory of training materials and data-use tools for IATI data is categorized by type, user group, and other relevant features. The outline of the inventory is available in the annex of this report. Of the 15 IATI training materials, 12 were user guides. The remaining three were an explanatory video, a webinar, and an online training course. Most of the user guides are in PDF or HTML format.

### Producers of training materials

The producers of the IATI training materials found in the inventory are international organizations or inter-governmental organizations, civil society or non-governmental organizations (NGOs), national donor agencies, or private organizations. Two of the fifteen training materials were developed by IATI.

Among the international organizations or inter-governmental organizations, the producers of IATI training materials include IATI, the United Nations Development Programme, European Commission/European Union, African Development Bank, and the UN Office for the Coordination of Humanitarian Affairs (Centre for Humanitarian Data). Civil society organizations or NGOs that are producers of IATI training materials include the School of Data, Publish What You Fund, DevResults, Development Initiatives, and Development Gateway.

The inventory findings show that the United Kingdom’s Foreign, Commonwealth & Development Office (formerly Department for International Development) is the only national donor agency that produced IATI training material. PNGK, a Dutch private company, is the only private organization that produced IATI training material.

### Topics covered in trainings

Different types of training materials were found, but the most common were guides to IATI data for a specific sector or region. The sectoral and regional materials were: two guides on how to use IATI data to analyze aid for COVID-19 projects; one on how to analyze DFID data (now known as the Foreign Commonwealth and Development Office); and the others were on how to analyze EU and AFDB IATI data.

Beginners guides to IATI data	3
Beginners guides to aid transparency data (including IATI)	2
Guides to IATI data use tools	2
Guides to IATI data for a sector or region	6
Technical guide for uploading and using IATI data	2

### Potential challenges accessing and using training materials

When searching for IATI training materials using Moz, the research team found that the search results often included duplicate training materials, and when searching for the term “training materials” some of the top results that appeared were the RFP advertisements for this project. This suggests that users searching for IATI training materials may not find many results. Improvements to the SEO and dissemination of training materials could make it easier for users to find them. These are discussed further in the gap analysis.

Beyond dissemination and SEO challenges, other barriers to access to training materials were:

- There are many examples of IATI training materials that have a copyright logo associated with them, but none of the available IATI training materials have a terms of use available. Terms of use are helpful for users to understand how they can legally use or reproduce a resource.
- The majority of the training materials (11 of them) were only available in English, which could be a further barrier to use.
- The research team wanted to evaluate the training materials based on how old they were but could not find accurate dates for many of the training materials. Of the training materials that the team could find dates for, three were published this year, three last year and three were from 2018 or earlier.

### Characteristics of data-use tools

Data-use tools were included in the inventory but not all of the inventory assessment questions and categories were applicable to them. Seven of the data-use tools were managed by national government offices while the rest were managed by NGOs or multilateral organizations. The majority of the data-use tools were transparency portals that displayed national, regional, or global aid flows, but three of the data-use tools were code repositories or other tools that could be used to help people use IATI data. There are also a few findings on data-use tools that are important to consider:

- More than half of the data-use tools had a terms of use (16/27). The contents of the terms of use were not reviewed, but from ODW's experience with the Open Data Inventory (ODIN) we have found that more open terms of use, such as a Creative Commons CC-BY 4.0 license, encourage greater use of data and tools.
- The vast majority of data-use tools only could be viewed in one language (23/27).
- One data-use tool (Aid Hedge) was behind a paywall.

### Process for maintaining the inventory

The inventory of data-use tools and training materials was created by reviewing IATI provided materials and searching the web using Brand24 and Moz to find references to IATI and training materials. This could be kept up by subscribing to those services or using Google Alerts for the keywords related to IATI that the team used in this research.

## IATI data-use research

### IATI Google Analytics

The ODW research team met with the IATI Secretariat to review the patterns of use of IATI websites. To facilitate analysis for this section a Google Data Studio Dashboard was created so that the ODW team could access the IATI website analytics. This dashboard is available [here](#). It can be used to perform other analyses of the data that might be useful for internal decision making. Website metrics data from the IATI website, D-Portal, and Query Builder can all be found through the dashboard. The dashboard is a copy of an ODW template so the summary text is intentionally left blank but could be filled in with periodic updates on the website, as the ODW team does for their organization's website. Further edits to the dashboard can also be made by the IATI Secretariat as they see fit for their internal use. The analysis below is for the 2020 calendar year, but the dashboard dates can be shifted to perform other

analyses that might be useful for the IATI team. Insights from this analysis will help provide more context on how people are using IATI data and some potential areas for improvement.

#### User summary of IATI's websites

The IATI website and D-Portal sites receive many similar amounts of web traffic, around 1,000 pageviews a day, while the Query Builder site averages many orders of magnitude less traffic. The top three countries of IATI users across the three websites studied were the United Kingdom, United States, and the Netherlands. English was the most common language of website users, but French was consistently the next most popular language.

#### Most popular IATI website content

The most popular page on the IATI website—besides the home page—is the page describing how to use IATI data (<https://iatistandard.org/en/using-data/>). This page outlines what kinds of data are available through IATI, how to use the data, and provides more contextual information. This could signify that there is significant demand for background information on IATI data and training materials on how to use IATI data.

#### Leveraging patterns of use of IATI websites to understand use cases for IATI

The above findings provide high-level insight on who is using IATI websites, but the analytics also hold other valuable information about who is using the websites and how. By mapping user journeys through the IATI websites and evaluating common queries and searches, the analytics could be used to define the top use cases for IATI data. These use cases could then be used to create training materials and facilitate design improvements to the platforms. While this kind of in-depth analysis is out of scope of this particular project, it would be a useful next step for the IATI Data Use Working Group.

#### IATI help desk queries

The ODW research team originally set out to review the help desk queries as a part of this analysis, but due to privacy concerns, this was not possible. However, in a meeting with the IATI Secretariat it was noted that an analysis of these queries was done last year and that this could be used to understand how help desk queries reveal patterns of IATI data use and challenges using the data. It was also noted that over time, the common issues that are brought up in these queries do not tend to change, so the analysis will likely still provide relevant insight on common challenges to the use of IATI websites.

#### IATI Brand24 and data-use mentions on the internet

Mentions of the keyword “international aid transparency initiative” were monitored through Brand24 to better understand how people are accessing and using IATI data. This tool scrapes mentions of keywords on social media, blogs, and websites and provides insight into who is using IATI data and how they are talking about it. The ODW research team tracked this keyword from the beginning of August to December. The majority of the mentions pulled were from aid organizations noting that they use the IATI standard. However, there was a sizeable spike in mentions of IATI when the Guardian released [an article](#) on the cuts to overseas aid to education. This article referenced an analysis by the Foreign, Commonwealth and Development Office (FCDO) that found—using IATI data—a 26 percent reduction in spending on education. Focusing on outreach to news outlets with information about IATI data might be an effective way to drive more use of IATI data. While a full strategy for media outreach is beyond the scope of this paper, it might be useful to work on facilitating access to high-level statistics to research

organizations and news outlets that might be interested in the findings. Publicizing examples of the use of IATI data through social media is another way to increase interest and broaden the base of IATI users.

## Survey of IATI data-users

### Overview of the survey process

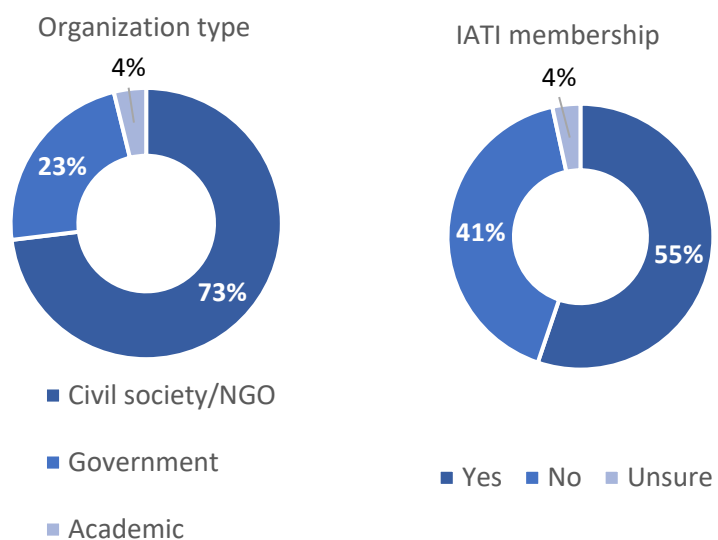
A short survey was sent to IATI data users and potential users for feedback on their experiences using data published to IATI and what barriers they have encountered accessing and using the data. In addition to sharing the link to the survey with recipients of the IATI Newsletter, the survey was shared across Open Data Watch’s networks to expand the outreach beyond the “usual suspects.” These included the Global Partnership for Sustainable Development Data (GPSDD) mailing list and the Sustainable Development Solutions Network (SDSN) TRenDS Expert mailing list. It was also shared with ODW’s 193 government contacts in national statistical offices; the ODW Twitter network, which includes over 15,000 followers; and LinkedIn Groups such as the Open Data Research Network and the Devex Group.

The survey was constructed using Google Forms and included 18 questions. The questions were kept simple with either a short answer or multiple-choice response. The time estimated to complete the survey was five to six minutes. The full list of questions can be found in the annex. Responses were collected over the course of two weeks, with reminders sent one week following the initial dissemination of the survey invitations. The survey was opened on November 3<sup>rd</sup> and closed on November 20<sup>th</sup>, 2020.

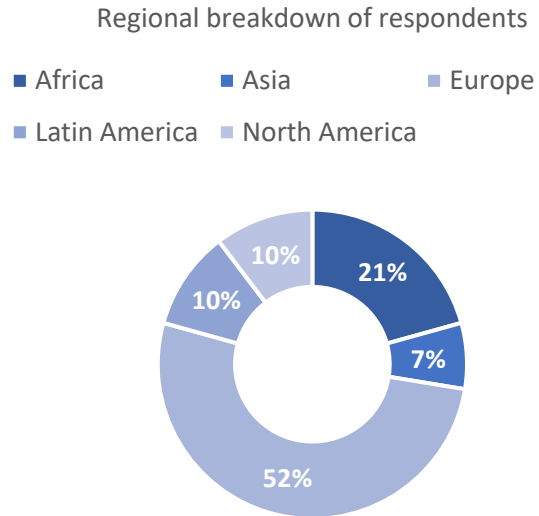
The findings and analysis from the survey are reviewed below. Recommendations were further explored in the focus groups and are discussed in the gap analysis.

### Overview of respondents

Thirty respondents responded to the survey. Three more responses were received from bots that included nonsensical text and were deleted. The initial questions collected background information about the respondents. Most respondents were from a civil society or an NGO organization, with others from government and one from an academic institution. Only about half of the respondents were indicated their organizations were [members of IATI](#), who fund and set the strategic direction for the initiative, which suggests that the universe of users may include many beyond the set of “usual suspects” that often provide feedback. The job positions shared by most respondents could be classified as senior level, with others mid-level and one entry level.



The greatest number of respondents came from Europe. The second greatest number of respondents came from Africa. Countries of the Global South accounted for 38 percent of respondents. Almost a quarter of respondents came from the United Kingdom. However, the distribution of responses across other countries was more even. Albania, Kenya, Netherlands, Sweden, and the United States each provided two respondents. And Bangladesh, Canada, Colombia, the Democratic Republic of Congo, Ecuador, Germany, India, Ireland, Mexico, Nigeria, and Togo each provided one respondent.

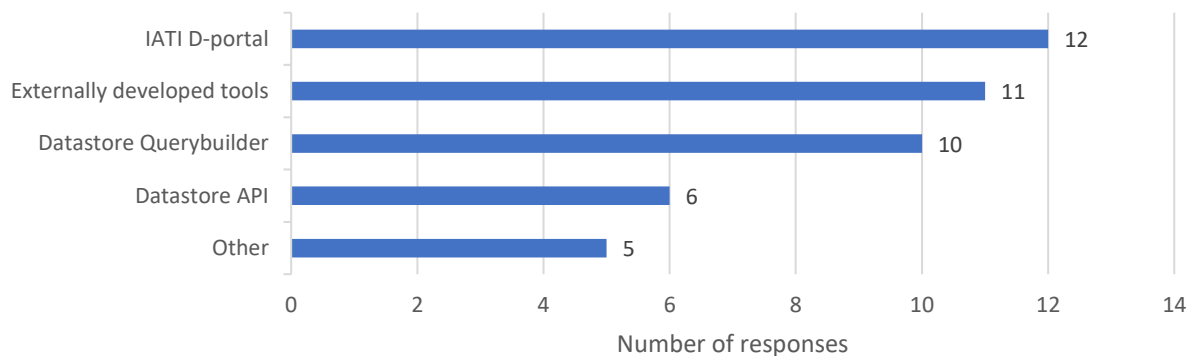


Most users accessed and used IATI data with a general focus, rather than a particular sectoral focus. Many were interested in transparency and monitoring financial flows of aid. However, health and education were specific sectors mentioned by a few users.

### Accessing IATI data

Three questions focused on user experiences in accessing IATI data, covering how users accessed IATI data, how frequently, and their challenges. The three most common ways respondents accessed IATI data were the IATI D-Portal, Datastore Query Builder, or externally developed tools (for example, dashboards). Two examples of dashboards mentioned: Somali AIMS and openaid.se (Sweden). Many respondents also highlighted that they worked directly with the raw IATI data through spreadsheets.

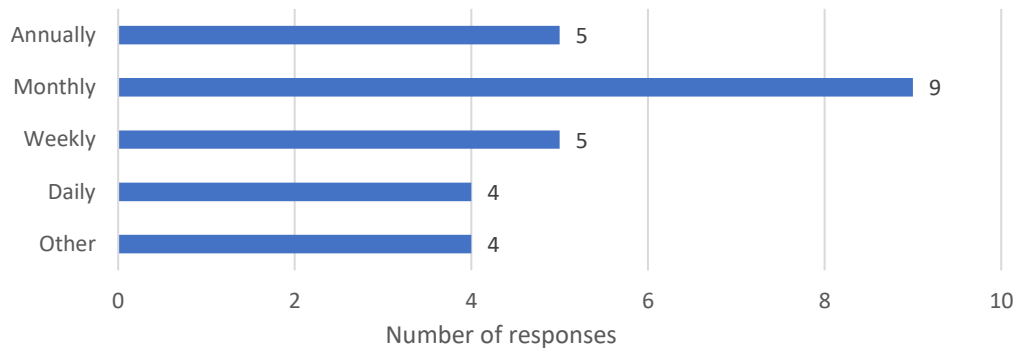
How do you access IATI data?



Most respondents stated that they access IATI data monthly. Some accessed data annually, while others used it weekly, and there were several that mentioned using accessing data daily. Additional responses included accessing IATI data as needed or frequently for a limited time for a specific research project.

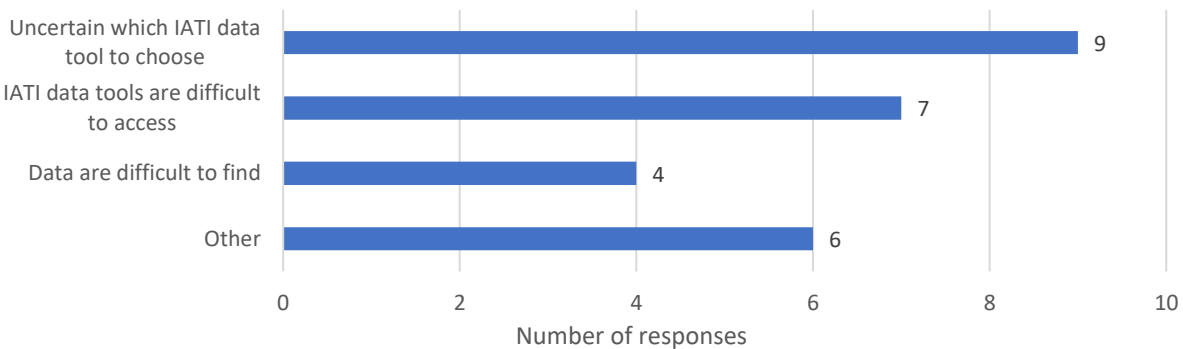


How often do you use IATI data?



The greatest challenge that most users faced was not knowing which IATI data tool would best fit their needs. And many users also highlighted having trouble accessing IATI data tools. Some users mentioned that IATI data were difficult to find. Technical difficulties with the output formats were cited as challenges. One user mentioned that the Query Builder had made bulk downloads easier, but that the format of some of the output data still produced challenges. Another user, who also participated in the focus groups, stated that the tool output formats required substantial work to reshape the data into a useable format: “Even to answer how much aid came to county X in period Y per donor. I have to export, merge columns, delete bits, do lookups, all in addition to knowing e.g. that some donors only report recipient country at the transaction level etc. - this is nothing I can give to someone who just wants an answer.”

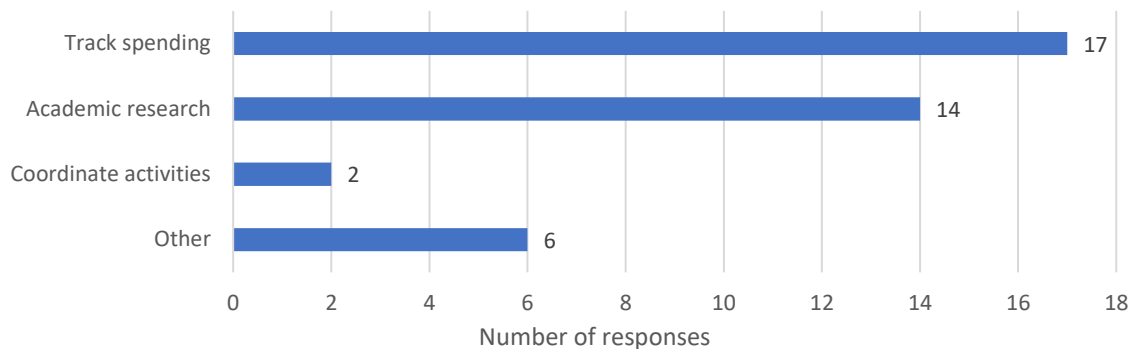
What are the main challenges encountered in trying to access IATI data?



### Using IATI data

Two questions asked about the experiences of respondents in using data published to IATI and the challenges that they encountered. Most respondents use IATI data to track spending and results of development and humanitarian activities to improve implementation and accountability, while many others stated that they use IATI data for academic research to track aid flows. As only one respondent identified themselves as working for an academic organization, we expect that many of the other respondents use IATI data for research while working for non-academic organizations. Only two respondents mentioned using IATI data for coordination purposes at the national level. One respondent from an NGO in the United Kingdom mentioned that they use “country-level near-real-time planning data.” Publishers of IATI data mentioned that they use IATI data for donor reporting or to check that their uploaded data were accurate.

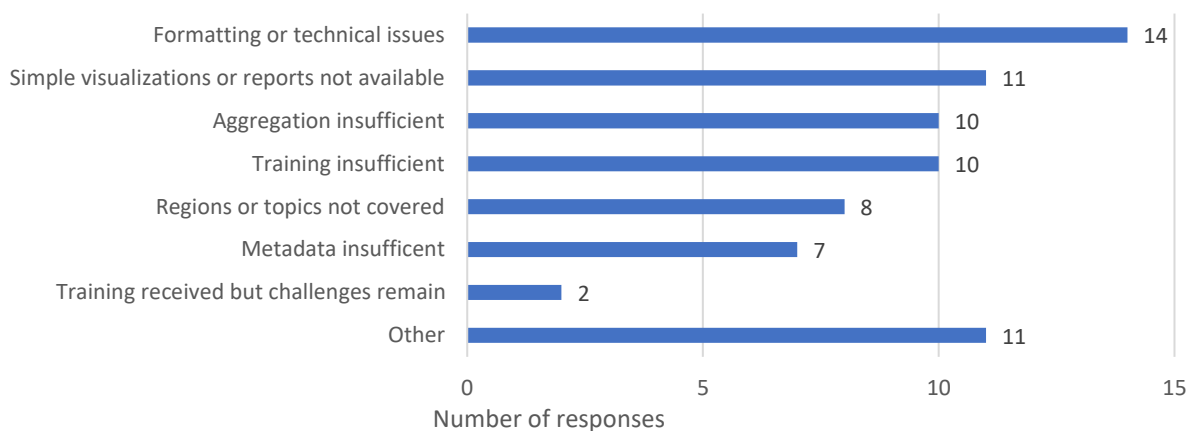
### How would you describe your use of data published to IATI?



The most common challenge in using IATI data that users selected in the survey was formatting or technical issues. Users cited inconsistencies between publishers that make the data difficult to process and use. One user stated, “Key details are missing from some datasets (e.g., name or type of organization, gender markers), or not used accurately (e.g., sector codes).” Another user said that the quality of the text descriptions varied a great deal. Variations in terminology were also cited as a challenge. As an example, a user reported difficulty identifying funds from private donors that did not go through the government.

The lack of data from important aid providers—IMF, China, and Japan were mentioned—was cited as limitation on IATI’s usefulness. One barrier to use of data at the country level was that often a donor’s country office could not recognize the data in IATI and therefore will not use it. Many users also mentioned difficulties due to not having access to simple visualizations or reports, not having the correct aggregation, and insufficient training. Some users mentioned that some regions or topics were not covered or that the metadata were insufficient. One user stated that there was a lack of information on the relations between publishers, especially in the data of multilateral organizations.

### What are the main challenges you have encountered in trying to use IATI data?



### Support needed to access and use IATI data

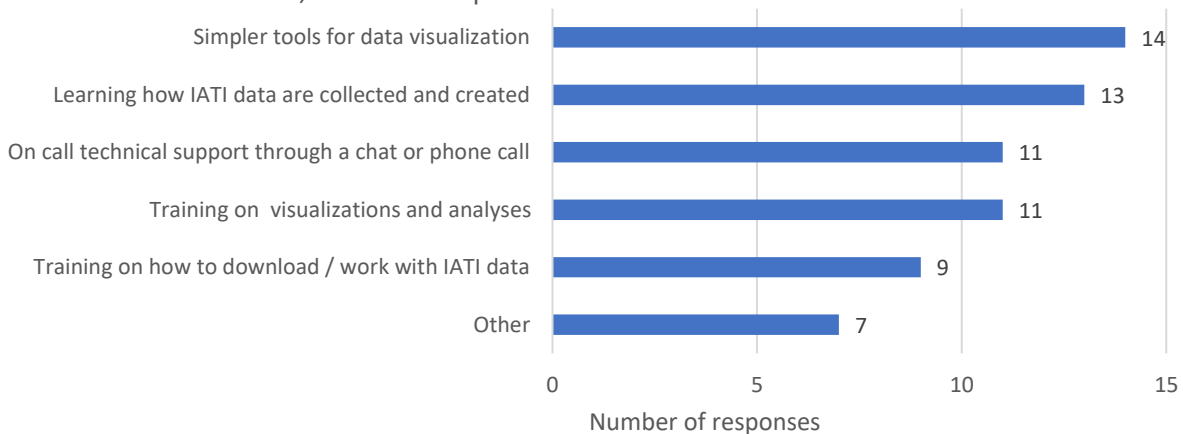
Respondents were interested in better tools and direct support as well as additional training in various areas. The greatest number of respondents highlighted a desire for simpler tools for visualizing and creating presentations with IATI data. Many also mentioned interest in receiving more support through a chat or phone call. One user suggested creating a community of practice to share ideas on data use.

Many users cited problems with data quality and one suggested building in feedback loops to improve this.

Regarding more technical issues, a user mentioned wanting to be able to use the IATI Datastore to download data from publishers that had published the datasets with validation errors. SOLR in the existing Datastore was mentioned by this user as a good tool for downloading IATI data.

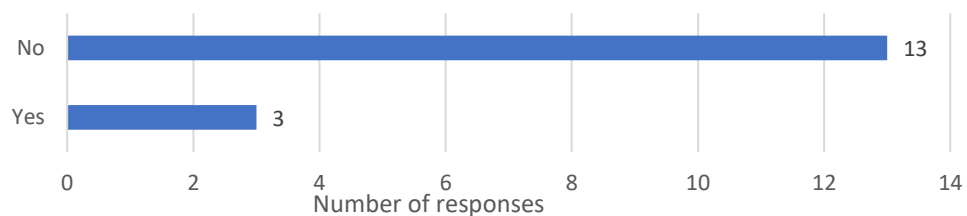
Asked about training, many users were interested in learning more about how IATI data are collected and created so that they could better understand how to use them for their work. Users were also interested in learning how to make visualizations and analyses with IATI data, and to a lesser extent, they were also interested in training for how to download, interpret, and work with IATI data.

What kinds of resources would be most helpful in helping you to access, understand, and use data published to IATI?



Only three users mentioned having accessed training materials. And the resources that they mentioned were information from the Datastore and Data Validator, [International Aid Transparency Initiative \(IATI\) Implementation Reports](#) by Development Gateway, and [How To Use Open Aid Data 101 – Free Webinar](#) by Publish What You Fund.

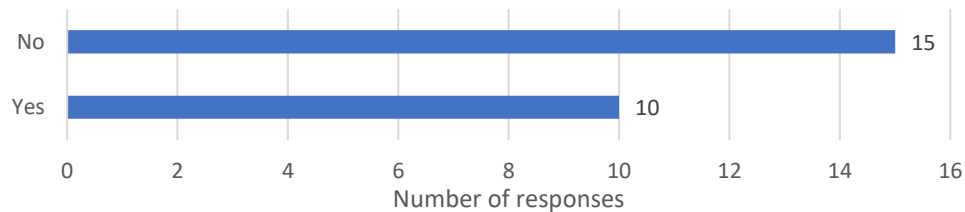
Have you used any training materials that help you to access, understand, or use IATI data - published by IATI or other organizations?



Although only three respondents mentioned having used training materials, ten respondents stated that their organizations produced training on IATI data. A few of the materials listed were publicly available, but most were only internal. The publicly available materials include [International Aid Transparency Initiative \(IATI\) Implementation Reports](#) by Development Gateway, [DFID IATI Guidelines](#) by the Foreign, Commonwealth & Development Office, and the [How To Use Open Aid Data 101 – Free Webinar](#) by

Publish What You Fund. Other users shared several internal training resources, which included how-to notes and direct training sessions.

Do you or your organization produce internal or external training materials on how to access, understand, or use IATI data?



### User recommendations

The final question of the survey was open ended and asked users to list their suggestions for improvements to help them make better use of IATI data. This question was designed to allow for users to highlight an issue that was not listed in their survey or make other suggestions that might not have been included in past questions. A summary of their responses is provided below.

#### Improve the quality of IATI data

This includes improving the clarity of the descriptions for online tools and downloadable data. Users recommended feedback loops to improve data quality. To help country offices understand what data are published to IATI, users would like to know which of the publishing government's internal systems they are pulled from, or which financial fields are mapped to IATI fields.

#### Improve connection between production and use

One user suggested better marketing to increase the awareness and understanding of IATI data. Another user stated that the importance of publishing IATI data was not clear. They feel that they are uploading data that do not get used because there is a gap between the political pressures to publish and incentives for technical people to use the data. A user-centered design was recommended in which IATI labeling was downplayed and more focus placed on the tasks users want to complete. Users would also like to know how donors use IATI and what decisions have been made based on it. Another suggestion was to integrate the publication and data-use and visualization tools.

#### Provide technical support

More tools for users with low technical capacity were also requested. Users also expressed interest in having direct technical support through chat or phone.

#### Make training materials available

It was suggested the IATI website could host a complete set of training materials, including videos on YouTube and e-learning modules. A user suggested that data query "recipes" be shared as many of the queries might be common: for example, what are the ten newest projects in a country, organized by sector? These could be shared as a Stata file or Python notebook.

#### Create more language options

Users asked that more data and resources be made available in Spanish and French.

## Focus groups of IATI data users

### Overview of focus group process

The ODW research team held four focus group sessions from December 8<sup>th</sup> to December 11<sup>th</sup> with a total of 14 participants. Each focus group lasted between 45 minutes and an hour. Participants for the focus groups were found by reaching out to survey respondents who indicated that they would be available for follow-up questions and by reaching out to some contacts provided by the IATI Secretariat. Participants in the focus groups had a range of experience with IATI data, with some having only used it a few times in the last year to others who have been using the data since the standard was established. Enthusiasm for the potential use and importance of IATI data was a common point made by many of the participants, but insights were also offered into the barriers they face.

The focus group questions followed the line of questions from the survey. The findings from the focus groups support many of the findings from the survey but also provide new insights, especially on issues of data quality and on providing potential solutions to some of the issues brought up in the survey. The list of prompts for the focus groups can be found in the annex of this document. The moderator used these as needed depending on the groups interest and level of feedback or experience with each question.

The first set of prompts were directed at how participants access and use IATI data and what challenges they had accessing and using the data. This section of the conversation addressed data quality and interoperability issues with the data and challenges users faced accessing IATI data on IATI or other platforms. The second set of prompts focused on what resources and trainings the participants have used or found useful and what trainings or resources they recommended creating. Each focus group ended with an open-ended question on any other feedback participants wished to offer.

### Accessing IATI data

The focus groups started by asking how users accessed IATI data, for what purposes, and if there were significant challenges with accessing the data. The largest group of participants in the focus groups were from NGOs that used the data to track aid spending. The other two most common user groups were using the data to work directly with countries to track their aid flows or using IATI data for monitoring and evaluation.

Most of the respondents used either the D-Portal or Query Builder to access IATI data. The use of D-Portal was particularly common for the users with lower technical capacity. A few accessed the data through the API and then reshaped the data on their own. Many users noted technical challenges with accessing the data or the formats for downloading the data that the IATI platforms provide. They use other tools to put the data in a more user-friendly format. These data-use tools that they mentioned were added to the inventory. One participant noted that by addressing some of the access and platform-use issues and making them both more intuitive, it may be possible to reduce the need for training materials. The feedback from the focus groups on how to improve access to IATI data are summarized below.

### More support for simple use cases of IATI data is needed

Many focus group members noted the importance of IATI data and the many different research questions that can be answered with IATI data. These different use cases all require different data formats and platform features. And some of the use cases may have contradictory needs. Where some

need greater simplicity, others seek more detailed analysis and requiring complex tools. However, across the focus groups, users noted that there was a need for the platform to at least be able to do the basics well. A platform was needed that could aggregate the data for countries in a flat file and without duplication or gaps. A few users with advanced technical capacity also noted that it is difficult to extract a flat file with all the data they needed, and some had trouble using the XML output files. Some users noted that the OECD CRS platform does this task well and might be a good place to look for an example of a platform to mimic.

### Using IATI data

The bulk of the discussion for the focus groups sessions focused on challenges they faced in using IATI data. Most highlighted technical and quality issues with IATI data but many also mentioned interoperability issues with data. While this section mostly focused on challenges using the IATI data, users in a few of the groups noted that one of the main benefits of IATI data is how timely they are. This has been particularly useful for those in our focus groups who were using IATI data to track COVID-19 spending. The main challenges to using IATI data are summarized below.

#### Users were unsure how much to trust the IATI data due to data quality issues

Participants in the focus groups who worked directly with countries and people familiar with country aid budgets noted concerns with the accuracy of the data. One person mentioned that in conversations with country representatives viewing the IATI data on their own projects, the representatives said, “this isn’t our data.” There appear to be inconsistencies between data that have been reported on a project and internal records used by county representatives. One of the biggest issues noted was the duplication of commitments between funders and implementing partners. One user noticed that D-Portal showed that Hewlett had only funded projects within the United States, and this did not account for the fact that the funding was further directed by their recipient institutions to projects in other countries. Others noted inconsistencies due to some countries publishing cumulative disbursements while others publish non-cumulative disbursements. Germany was specifically cited publishing cumulative numbers for their disbursements. During these conversations, participants noted the different methods partners use for filling in and publishing IATI data as a core issue.

#### Clear guidance for publishing and interpreting IATI data would help users

To address issues of quality stemming from inconsistent publication, respondents shared several suggestions. Among them: creating clearer guidance on how to publish IATI data; enforcing standards and providing support for the publication of the data; and implementing quality checks on the data. The respondents who had been using IATI data for longer seemed to know the quirks of the data, how to remove duplicates, and how to interpret different countries’ data. Understanding these quirks in the data are crucial to effective use and overcoming issues of quality. However, this information does not appear to be readily available to users who were new to the data. While streamlining implementation of the standard so that these differences do not occur might be a longer-term solution, providing guidance to users on how to interpret the data and understand some of these common issues would be a good near-term response before the underlying data issues can be addressed.

#### IATI is missing some data that could make it more useful

Gaps in the data were noted by some of the participants, particularly related to non-reporting organizations and countries. Some users also noted gaps in the data on the complete path of financing, from commitment to disbursement. One participant tries to use IATI data to track how aid money is

actually spent to investigate and understand corruption. But they noted that the information on aid use is weak and hard to use. One other user noted that Chinese, Japanese, Korean, and International Monetary Fund (IMF) data are not available. However, while these gaps pose significant issues for some users, most emphasized issues of quality over the gaps.

IATI data is most often combined with OECD data and work should be done to harmonize or make these data easier to combine

Users often noted the OECD DAC as an alternate source for aid data, although many said they preferred IATI when they needed more timely data. A few users noted that it was difficult to understand how to combine these data and or how the definitions fit together. Because these data are often used together, this may a good place to work on interoperability between the data or develop training material on how to combine the data or understand the differences between the data and their categories and implementation of the standards.

### Support needed to access and use IATI data

The final questions in the focus groups were about how participants learned how to use IATI data, what tools or training materials they found most useful, and what resources might be helpful. The majority of the participants described themselves as being self-trained and having learned how to use IATI data by trial and error. As was noted in past sections, a key challenge to effective use was confusion over how different stakeholders publish their data and how these differences affect analysis. And as this information changes over time, one participant noted that is also important to regularly update these materials. The main findings from this line of questions are provided below.

#### Provide targeted support for high-level and basic-level users

Training materials and other resources need to target users seeking to access IATI at a wide-range of technical levels. Many of the users described having to overcome a significant learning curve to be able to figure out how to access and use IATI data. And while most users that participated in the focus groups were self-taught, many had been involved with providing training and support to other colleagues. Some described providing a broad introduction to the IATI platform that included basic information on the importance and functionalities of IATI data. While other users needed to provide complex information to resolve technical issues related to inconsistencies in the data. Currently, guidance on some of the lesser-known quirks in the data is only available through participation in discussion forums or direct communication with the publishers or other high-level users.

#### Develop applied training materials for a wide-range of use cases

Users that had provided trainings to others noted that information about the platform only seemed to be absorbed when paired with concrete applications that applied to the user's work. While some users may be seeking access to detailed project level information, others may be looking to create a set of international country aggregates. Training materials need to be adjusted or developed to provide applied examples to serve the unique needs of various users. Guidance will be most valuable and easily absorbed by users with included with real-world context.

#### Support should be provided to the community of users creating tools to help improve access and use of IATI data

During the focus groups, participants spoke highly of the community of users who have created tools to support the use of IATI data and to put the data into different formats. These were often found or

shared informally by word of mouth or on Twitter. These tools helped to improve access by transforming the data into useable formats. An example includes [Stata code published by Liam Swiss](#). Further, IATI could provide a service to its members by creating a central location for these tools in the knowledge hub and disseminating information about these tools to users. Some in the focus group also suggested providing support to IATI users who created these tools.

## Gap analysis

The inventory, data-use research, survey, and focus groups together provide qualitative and quantitative insight into barriers to using and accessing IATI data and highlight gaps in training materials. The gap analysis section combines findings from each of these activities and discusses actionable ways to address the gaps and challenges. To provide the most relevant insight, the ODW research team only included issues in the gap analysis that appeared in multiple avenues of research. The gaps are organized into gaps in training materials to meet user needs; suggestions for reducing the barriers to access and use of IATI data; and miscellaneous suggestions.

### How to improve training materials to meet user needs

#### Create a knowledge hub for IATI training materials and data-use tools

Survey respondents and focus group participants noted that training materials were difficult to find. Some said they were discovered by word of mouth. Assessors looking for training materials for the inventory confirmed that materials are located in many different places and a centralized location for the materials would be useful. A knowledge hub that provides a curated list of IATI training materials would help users to find the materials and data-use tools they need. Although the scope of this work was not designed to include publishing guidelines, it may be useful to include these in the knowledge hub as well, as a few users noted that training materials for publishing IATI data were difficult to find and could be leading to data quality issues.

#### Improve the dissemination and search engine optimization of training materials

The available training materials were difficult to find through Google, and there not many training materials were found. The survey results also showed that only three people had sought out training materials for IATI, although a larger number said that their organizations provided some training. This could be due to lack of knowledge about the training materials or difficulty finding them. The focus group conversations substantiated this finding as participants noted difficulties finding IATI training materials. Having a knowledge hub of training materials and data-use tools will be useful on its own right and it may make it easier for IATI to do SEO for these materials. Instead of focusing on improving the SEO for many different materials, they could just focus on SEO for the knowledge hub platform. A full SEO evaluation is beyond the scope of this report, but using an SEO evaluation tool, like [Moz](#) to evaluate the IATI website could be a good place to start to find some areas for improvement.

#### Create more training materials that are available in other languages

The inventory assessors noted the lack of availability of training materials in other languages as did the survey respondents and focus group participants. Priority should be given to providing more resources in Spanish and French, as those were mentioned as the priority languages for translation. French might deserve a higher priority as it is consistently the most popular language for users on the site besides English, although this may be due the site already containing translations in French. Focus group participants also noted that translations for project titles and the IATI data themselves would be helpful,



although that is more of a data quality issue. If resources are an issue, translating the most in-demand training materials would be a good starting point. The most popular training resources hosted on the IATI website can be found through the Google Analytics [dashboard](#). The analysis for this project found that the [introductory page to using IATI data](#) was one of the most popular pages on the site and providing multilingual material on this subject might be a good place to start.

#### Create more relevant training materials for users

Many of the training materials that were found were sectoral guides to IATI data. However, survey and focus group participants noted that the need for other types of materials on the use of IATI data. The following issues came up as top priorities in both the survey and focus groups:

- **How IATI data are created and collected and how to interpret them** – users noted some difficulties in understanding how different publishers implement the standard. This information is critical to effective analysis of the data and the information does not appear to be readily available in current resources.
- **How to download and work with IATI data** – Users noted that there are often a few tricks that are needed to put the data in usable format. The most common issues mentioned were how to remove duplicates and put the data in a flat file. While priority should be given to making design changes in IATI platforms to accomplish these steps, in the meantime a guide on how to download and fix common issues with the data would be helpful.
- **Recipes and quick formulas to use with Query Builder** – Users noted that beyond providing training materials on how to use the data, more advanced users and for heavy users of Query Builder would find it useful to have a common source of formulas for Query Builder, especially on how to aggregate funds by country.

Creating a user's guide to IATI data that addresses these three common training challenges would address some of the most common issues with using IATI data.

#### What are the barriers to accessing and using IATI data?

##### Address IATI data quality issues and focus on the most basic use cases first

Training was listed as the third most common challenge encountered when trying to use IATI data.

While training might address a number of the issues mentioned in surveys, some solutions to improving IATI data use may be found in improving the quality of the data. Survey respondents noted (in order): formatting and technical issues; insufficient aggregation; lack of regional or sectoral focus; and lack of metadata as their top issues with IATI data. The focus group participants provided more information to support these data quality issues and noted that there are some trust issues with the IATI data and that some country partners have noted that the data are not correct. Many of these issues appear to stem from some confusion about how to implement the standard. Participants suggested that IATI should first focus on doing the basics well. Ensuring that users have the ability to obtain aggregate aid commitments and disbursements by country in a flat file would be the place to start. Addressing the issue of double counting of aid amounts in the data should also be prioritized.

##### Simplify and provide better training on the appropriate IATI data and tools for users

While the inventory of IATI data-use tools came up with 27 different tools, the survey found that many users were unsure of what tool they should use for their analysis. These data-use tools recorded in the inventory were selected because they were tools that were built for use with IATI data but not primarily

managed and run by IATI. Internal IATI tools have a slightly different use case and pose different challenges for users as it can be confusing for users to understand which tool to use: D-Portal, Datastore Query Builder, or the API. This may be a training issue and a design or tech issue. Trainings could be created to guide users on the appropriate tool. Guiding text and design nudges could also be implemented on the website to explain the differences between tools and guide users' selection. If IATI creates a repository of data-use tools, then listing the tools as well as their use cases and functions might be a good step to reducing confusion among users on what tool they should be using.

## What are other suggestions for improving the use of IATI data?

Focus on design and improvements to make the core IATI platforms easier to use

As data quality improvements should first focus on fixing the most basic data quality issues, so too should design improvements to the D-Portal and Query Builder focus on providing the basic calculations. One focus group user noted that users should not need training to use a platform. This may be a good mantra to aim for when addressing design challenges with the platform. As a model, many participants noted that the OECD CRS platform was easy-to-use and provided the calculations they needed in a flat file.

Simplify the tools for IATI data use

In addition to design improvements to the core IATI platforms to make them easier to use, users noted ways to make IATI data easier to use:

- Simpler data visualization and data search tools would be helpful for increasing data use.
- Because the majority of data queries are common, a query notebook or GitHub account of some common queries might make it easier for users to find the query that they need or adapt one for their use.

## Conclusion

The research process for the gap analysis was made much easier by the community of IATI users who volunteered their time and energy to provide their feedback. This evidence of the demand for IATI data and a sign that there is a passionate group of users who want to support the vision of IATI data to improve the transparency of development and humanitarian resources and their results for addressing poverty and crises. Further evidence for the demand for IATI data can be found in the thousands of visitors to the IATI websites. While this gap analysis points to areas of improvement to increase use of IATI data, it does not highlight all the areas of strength of IATI data and all the progress that the IATI team has made to date in encouraging data use.

## Annex

### Inventory of training materials

- Name of resource
- URL for accessing the training material or data-use tool
- Organization name of training material producer or data-use tool
- Source (from the SEO process or provided by IATI)
- Training material type (if applicable)
  - User guides
  - Explanatory videos

- Webinar
- Online training course
- Other
- Not applicable
- Topical coverage: As training materials are gathered, a taxonomy to categorize topics will be developed to enable an analysis of the contents of training materials
- Terms of use
- Cost (if any)
- Frequency of training (if applicable). Are the training courses continuously available; offered on demand; or provided on a fixed schedule?
- SEO ranking
- SEO notes (where did these materials appear in search results)
- Intended target user of training
- What language(s) are the materials available in?
- Usability issues (for example, browser or operating system limitations; website uptime; help desk available)
- Date of publication
- Date of last update or upload
- Notes

### Survey questions

1. What is your name?
2. What is your job title?
3. What is your organization?
4. What country are you located in?
5. What is your email address?
6. Do we have your permission to contact you about follow-up questions related to IATI data use?
  - a. Yes
  - b. No
7. Is your organization an IATI member? See a list of IATI members here: <https://iatistandard.org/en/governance/members-assembly/>
  - a. Yes
  - b. No
  - c. Unsure
8. How do you access IATI data? (Check as many as apply)
  - a. I use IATI D-portal
  - b. I use Datastore Query Builder
  - c. I use the Datastore API
  - d. I use externally developed tools (for example, donor dashboards) that provide IATI data
  - e. Other
9. How often do you use IATI data?
  - a. Daily
  - b. Weekly
  - c. Monthly
  - d. Annually
  - e. Other

10. What are the main challenges you have encountered in trying to access IATI data? (Check as many as apply)
  - a. Online IATI data tools are difficult to access
  - b. It is difficult to find the data that I need
  - c. I don't know which IATI data tool would work best for my needs
  - d. Other
11. Does your use of IATI data focus on a certain sector or topic? If so, please list below.
12. How would you describe your use of data published to IATI? (Check as many as apply)
  - a. I use IATI data to track spending and results of development and humanitarian activities to improve implementation and accountability
  - b. I use IATI data to coordinate activities in my country
  - c. I use IATI data for academic research to track aid flows
  - d. Other
13. What are the main challenges you have encountered in trying to use IATI data? (Check as many as apply)
  - a. The data are not available for some of the regions or topics that I care about
  - b. There are challenges using the data because of formatting or technical issues
  - c. The data are not presented at the level of aggregation that I need
  - d. The data lack sufficient metadata to facilitate analysis
  - e. The data are not available in simple visualizations or as reports that are easy to digest and understand
  - f. I don't have the training needed to use the data
  - g. I have had training on how to use the data but still have challenges using it
  - h. Other
14. What kinds of resources would be most helpful in helping you to access, understand, and use data published to IATI? (Check as many as apply)
  - a. Training on how to download, interpret, or work with IATI data
  - b. Training and more information on how IATI data are collected and created so that I can better understand how to use them for my work
  - c. Training on how to make visualizations and analyses with IATI data
  - d. Simpler tools for visualizing and creating presentations with IATI data
  - e. On call technical support through a chat or phone call
  - f. Other
15. Have you used any training materials that help you to access, understand, or use IATI data - published by IATI or other organizations? If so, please list below.
16. Do you or your organization produce internal or external training materials on how to access, understand, or use IATI data?
  - a. Yes
  - b. No
  - c. Unsure
17. If yes, please list below with links to online material. NOTE: The IATI team is not interested in publishing your internal training materials, but would like to better understand how organizations provide internal training on using IATI data.
18. Can you suggest other improvements that could help you make better use of IATI data?

## Focus group prompts

**Prompts: Using IATI data (15-20 minutes)** (the introductions may flow naturally into this without need for prompt)

- Could each of you share some examples of the types of data you have accessed and what projects you have used them for. How long? (extra time experiences using different platforms)
- Has anyone combined IATI data with other datasets? (Any challenges combining? Recommendations?)
- How do you usually access IATI data? What are advantages/problems of each platform?
- Through the surveys we have gotten a lot of feedback about challenges people were having with technical issues and problems with data quality. What are some of the challenges you have had in trying to use IATI data?

**Prompts: Resources and training (10 minutes)**

- Has anyone received or provided training to use IATI data? (If so, ask them to describe it.) How did they find it?
- What sort of training might have been helpful or would still be helpful to you? Topics? How would you prefer to receive training? User guides, video, direct training.
- Are there any other resources or tools that any of you found particularly useful in supporting your work with IATI data? Data visualization tools. Analytical tools – STATA, R, etc.

**Prompts: Suggestions for improvements (whatever time remains)**

- Before we wrap up this session, I was wondering if anyone had any general suggestions for improvements that would make it easier for you to access or use IATI data.
- Does IATI have the data that you need? If not, what more would you like to see in it.