

IATI Members' Assembly 2024

Wednesday April 24th (09:15-17:15 CET)
Bogotá, Colombia & online (Zoom Events Space)



MA Paper 5: Standard Management Proposal

Context

1. The IATI Standard (which encompasses the core schema, codelists and rulesets) has not been formally upgraded since version 2.03, [completed in February 2018](#);
2. Improved tooling such as the validator and datastore has surfaced a range of bugs, inconsistencies and issues since that time.;
3. The [Standard upgrade process](#) was revised during version 2.03, to encompass three change possibilities: patch; minor; major, laying the foundation for clearer, quicker and more responsive change control of the IATI Standard.

Issues

4. However, the revised change process is unclear as to where a “bug fix” is resolved, as *both* are cited in the patch and minor upgrade descriptions in the [IATI Standard documentation](#).

Risks

5. In this context, it is unclear how to *purposefully* make changes to the IATI Standard, and this lack of clarity results in the following risks:
 - a. Risk to the integrity of the IATI Standards, should changes be made outside any assumed scope;
 - b. Difficulty to chart a road map for future versions and community involvement;
 - c. Ability to safeguard the long term relevance of the IATI Standard to its stakeholders.

Proposal

6. The Governing Board proposes to establish a formal **IATI Standard 2.04 Working Group** to work on focus on IATI Standard change control, and specifically the following:
 - a. Agree and document the parameters for patch and minor upgrades;
 - b. Advise on the appropriate documentation, communication and consultation for both change processes.

Approach

7. To support this Working Group, the Secretariat will provide the following assistance:
 - a. Provide analysis of the current issues relating to the IATI Standard;
 - b. Provide example workflows and processes that exist in other open data standards.
 - c. Make recommendations to the Governing Board in terms of changes to the documented change process.

Outcome

8. This work will ensure the IATI Standard will benefit from the following:
 - a. A robust and realistic change management process;
 - b. A roadmap and associated material for any upcoming changes.

Timeframe

9. In line with IATI's Standard Operating Procedures, guidelines for establishing working groups, clear Terms of Reference will be prepared by the Secretariat, setting out the context, purpose, membership, timeframe and working methods.

<ul style="list-style-type: none">● Working Group established; Secretariat to collate and share analysis;	Q2 / 2024
<ul style="list-style-type: none">● Analyse data and processes; run through case studies;	Q3 / 2024
<ul style="list-style-type: none">● Draft recommendations to the Governing Board.	Q4 / 2024
<ul style="list-style-type: none">● Approval by members for Inclusion in Standard Operating Procedures	Q4 / 2024 - Q1 / 2025

Supporting material

- Draft [Terms of Reference](#) for Working Group
- Community Event session on the IATI Standard as the immediate next discussion on this topic