

Members' Assembly Meeting 10-11 July 2018

UN City, Marmorvej 51, Copenhagen, Denmark

Day 2: 11 July 2018

Paper G.7: Narrative report on implementation of the Year 5 work plan

Introduction

Members approved a [two year budget](#) and [work plan](#) in June 2016, covering Year 4 (September 2016 - August 2017) and Year 5 (September 2017 - August 2018). The Secretariat provided a report on [progress in Year 4](#) at the October 2017 Members' Assembly. This report covers the period from September 2017 to the present day, with planned activities up to the end of Year 5 (August 2018).

The Governing Board approved a budget revision in March 2018 to reflect a number of changes in the work plan moving from Year 4 into Year 5, bringing the total budget for Year 5 to \$2,721,509, an increase of 14.8%, within the limit of delegated authority of 20%.

Activities in the [revised Year 5 work plan](#) have been completed or are ongoing where they relate to regular technical support, and details of specific progress can be found in the output areas below.

Workstream 1: Promoting Data Use

Output: Target data users are able to meet their IATI data needs through support, capacity building and tools

1A – Encourage use of IATI data; 1B – Enhance collaboration of technical experts on IATI; 1C - Improve guidance to data users

(1A, 1B) Under the leadership of the TAG Chair, a Data Use Task Force (DUTF) of technical experts from across the IATI community was established in October 2017 to guide implementation of the approved [Data Use Strategy 2017-19](#), updated under the leadership of the Governing Board to take account of feedback received at the Members' Assembly (MA). UNDP recruited a consultant **(1D)** to take forward its country-focused outreach responsibilities within the data use strategy and conduct procurement activities based on terms of reference developed together with the DUTF.

As foreseen in the strategy, a Data Use Fund (DUF) was established and procurement activities begun to disburse this fund. More than 30 organisations from 20 different countries responded to the initial call for expressions of interest following a broad marketing campaign, addressing the call for diversity and inclusivity (particularly gender, region, language and size of organisation) that was of particular importance to the DUTF. The issue of the first four contracts across three strategic objectives (raising awareness, improving tools and AIMS integrations) is anticipated around the time of the MA. The task force agreed to study the lessons learned from these initial procurements before issuing a further round of requests for proposal, and will proceed during the remainder of Year 5 to procure services to meet the remaining objectives.

The budget revision added data use activities at country level in support of the Data Use Strategy implementation and these have so far taken place in Ghana and Montenegro.

IATI participated in activities around UNESCO World Press Freedom Day (WPDF) in May 2018 in Accra, Ghana, bringing together 50 young journalists to receive comprehensive training on IATI data use for journalism as well as a prominent IATI booth at the venue. This event sparked keen interest and a number of further activities including webinars for professors and other teaching staff at journalists' schools and classroom trainings for journalists in other regions are under consideration in order to further promote IATI data use by journalists and other watchdog organisations.

IATI co-hosted an introduction seminar jointly with the Ministry of Foreign Affairs Montenegro and UNDP Montenegro in early June, bringing together over 35 participants from the region to share their experiences on development data policies and practices. The objective of the event was to discuss the requirements for data management systems that are specific to those countries and to advocate for the supporting role IATI can play in this regard. Interest is high in the region in which many countries are both beginning to have aid programmes they wish to publicise and working towards EU accession in the coming years.

(1C) Significant improvements were made to d-portal.org including the ability to download sub-national location data in CSV format, and updates to the way in which d-portal displays results which are clearer and simpler to read. A server upgrade in February has reduced costs, significantly reducing time for import and allowing d-portal.org to show more information.

Where this activity relates to new guidance, it is reported under workstream 3, communications the development of the new IATI website.

Workstream 2: Improving IATI data quality, breadth and depth

Output: Sustainable support services enable new and existing publishers to supply high quality IATI data that meets users' needs

2A – Contribute to good quality data supply with support to existing and new publishers; 2C – Improve support and guidance to publishers

(2A) The total number of publishers has increased to 787 as of July 1st with almost 1,015,000 activities published. Prominent new IATI publishers during the fourth quarter include the UN Environment Programme (UNEP), International Organisation for Migration (IOM) and Office for the Coordination of Humanitarian Activities (OCHA) Country Based Pooled Funds and Caribbean Development Bank. The International Monetary Fund (IMF) has registered and has made a start in publishing a few activities, and the [Multilateral Investment Fund](#) will be publishing shortly. The technical team is currently supporting the World Bank Trust Funds and UNIDO in preparing their IATI data for publication very soon.

(2C) Ongoing support to Grand Bargain signatories has resulted in a commitment from the International Federation of the Red Cross (IFRC) to publish in September 2018, as well as an overall increase in the number of Grand Bargain signatories publishing to Standard v.2.02 or later, from 20 in June 2017, up to 31 in March 2018.

The technical team provided support to over 20 organisations transitioning from CSV2IATI. In the lead up to the Belgian publishing deadline of 31 April for NGO partners, the Secretariat worked closely with Belgian federations in preparing training workshops in January and February, and authorised nearly 120 new IATI Registry publisher accounts to get all Belgian NGOs ready for publication.

The technical team dealt with an average of 92 new tickets per month and 462 email exchanges in Year 5, in addition to responding to 340 Discuss queries and comments. At the request of the UNDP country office in Romania, technical team representatives provided transparency training in Bucharest in May bringing together IATI publishers from the wider region.

2B – Building a pool of technical experts on IATI

This activity took place in the context of the Data Use Task Force reported within workstream 1.

Workstream 3: Maintaining and strengthening IATI systems

Output 3.1: IATI's technical infrastructure is maintained and developed to ensure long term sustainability and reliability

3A – Technical infrastructure

V2.03 of the IATI Standard went live in February and 22 publishers have transitioned to this version so far. The IATI Registry was successfully migrated from one service provider Viderum to a new provider, Derilinx at the end of March 2018, resulting in an improved service and significantly fewer reported issues.

Output 3.2: The IATI Standard continues to evolve to meet the needs of data users and publishers and reflects the changing open data environment

3B - Management of the Standard; 3C - Technical Advisory Group (TAG)

(3B) Nineteen members of the IATI community met for a developer workshop in Manchester, England in January to find ways to improve collaboration between the technical team and the IATI developer community. During the workshop, the participants mapped the existing IATI technical tools, starting with the 15+ tools managed by IATI's technical team, and worked to agree on a categorization of the tools that are core, support the standard, are useful to the development of the standard or are non-core.

(3A) On the basis of the advice of the technical team and the Manchester workshop, the Governing Board approved in January to outsource development and the first year's maintenance of the Datastore. Draft specifications were developed by the technical team and shared for consultation via IATI's community form Discuss in April. Terms of Reference (TORs) were finalised and UNOPS began procurement for the services in July, with development expected to begin in Year 5 and continue into Year 6 (September 2018 onwards).

In relation to Standard management and upgrades, a proposal conceived at the 2017 TAG has been presented to this MA on [deprecation of version 1 of the Standard](#). The Secretariat attends meetings of the Working Party on Statistics (WP-Stat) and reviews DAC published codelists and consultations to ensure that IATI remains aligned with updates made in the OECD DAC Creditor Reporting System (CRS).

(3C) No TAG meeting has taken place during Year 5 and this will instead take place in the first quarter of Year 6 (November 2018) in Kathmandu, Nepal. 2017 saw the introduction of the 'miniTAG' – a small-scale face-to-face meetup of IATI people to discuss a particular topic to increase, improve or use IATI data. The idea was developed in March, and since then members of the TAG community have hosted four miniTAG meetings in different countries and on various themes. Topics covered include traceability, machine learning, IATI data on agriculture and food security, geocoding and Creditor Reporting System (CRS) codelists.

Workstream 4 – Communications and Outreach

Output: IATI's new vision, strategy and brand is implemented, enabling it to achieve its political objectives and engage target audiences with clear information

4A – Outreach; 4B - Engagement; 4C – Communications; 4D – Website and 4E – Branding

For outreach and engagement updates, please also refer to activities reported under workstream 1.

(4A) IATI has been promoted by Secretariat and Board members in numerous events such as the Bristol Data Festival through d-portal demonstrations in the data bazaar, participation in a Global Partnership for Effective Development Cooperation (GPEDC) side-event and DI's Open House event. IATI was also represented by a Board member at a GPEDC Global Partnership Initiative workshop in Bonn, Germany, and during an informal Working Party on Statistics (WP-STAT) workshop on Total Official Support for Sustainable Development (TOSSD) in March, where the IATI Secretariat presented a proposal in which IATI could be used to carry out climate finance reporting at the Standing Committee on Finance (SCF17) in Bonn (a preparatory expert meeting before the UN Climate Change Conference COP23).

(4A) The Inter-agency Task Force on Financing for Development follow-up report launched at the ECOSOC Forum on Financing for Development (24 – 26 April) referenced IATI as technology that could increase transparency and accountability in development cooperation and help raise the general public willingness to provide support. During the same period, Secretariat staff participated in several formal sessions and side meetings with OECD and UN agencies in the margins of the UN Statistical Commission, advocating for the use of IATI in UN donor reporting as well as in any eventual TOSSD model.

(4B) With a strong commitment by the UN Secretary-General to increase transparency throughout the UN system, IATI Secretariat members have provided eight briefings to senior managers from UN agencies, funds and programmes and the UN Secretariat in January in New York, and addressed participants at a workshop for 25-30 UN and non-UN agency representatives organised by IOM in Geneva in March, focusing on IOM's experiences as a new publisher.

(4C) The Annual Report was launched in April 2018 in a new concise format and received a 10% increase tweet impressions on Twitter compared to the 2017 Annual Report. Monthly bulletins and fortnightly TAG newsletters were used as a means to keep the community systematically informed of IATI business, and Board minutes were shared through the website. Tools such as Discuss and Yammer have been used regularly by different groups across the IATI community to exchange and discuss matters of strategic importance and to keep a record of conversations, decisions and documents, and Zoom webinar capacity was added as a tool available to support increasingly frequent working group virtual meetings.

(4D) Based on detailed research carried out in 2017, the Secretariat has worked extensively with a new agency and technical editor to build an entirely new website that will contain updated content in all sections, drawing together all of IATI's different websites under a single url. A style guide was produced to guide the development of content, and early sections were shared with the IATI community for initial feedback. **(4E)** The new website will be launched during the 2018 MA and will feature all of the new branding revealed at the 2017 MA. The website project was delivered on time and on budget, in line with the revised Y5 work plan.

Workstream 5: Institutional arrangements

Output: IATI governing bodies are supported to make timely decisions and act efficiently in driving the initiative forward.

5A – Effective Governance; 5B – IATI Transition for hosting and new business model

(5A) Memberships have increased to a total of 90 with the addition of two CSOs (World Vision

International and Association of Freelance Journalists), one private sector member (Open Data Services), and one partner country (Sao Tome and Principe).

In line with the [IATI Standard Operating Procedures](#), regular meetings of the different IATI bodies have been taking place to ensure effective communication, governance and work plan delivery. The Secretariat meets weekly on a virtual basis to review progress against the work plan and maintains regular consultations and records using Skype and the online platform Yammer. The Members' Assembly slated for Year 4 took place in Rome in October 2017, early in the the Year 5 implementation period. The Governing Board meeting in the beginning of 2018, taking place in London, focused on setting the framework for Year 5 including implementation of the data use strategy, the website project and the institutional review.

The Secretariat oversaw elections in March, which resulted in Madagascar and Bangladesh, UNICEF and the Netherlands, as well as Oxfam Novib and Bond being elected (or re-confirmed) as Board Members. The new board met in New York in April and unanimously elected the Netherlands as Chair, with Bond and Bangladesh as joint Vice Chairs so that all constituencies are represented in the chair/vice-chair functions.

In April, members of the Secretariat and the Board attended a meeting in Washington DC hosted by the World Bank together with the African Development Bank (AfDB), European Investment Bank (EIB), Inter-American Development Bank (IDB) and the International Finance Corporation (IFC) to resolve outstanding questions around the membership status of multilateral development banks and resolved to continue working together to bring this matter to closure, including through the institutional review process.

(5B) IATI Secretariat extension papers were signed by the Board and Secretariat, allowing the current consortium to continue their roles until August 2019. Sincere thanks are extended to the governments of Ghana and Sweden for their work in the Secretariat to date as they step aside from these roles for the extension period.

A consultancy firm was hired at the end of March to conduct an independent review in support of the Institutional Review Working Group. Under the management of the Working Group on Institutional Arrangements, the selected consulting group [Universalia](#) carried out a diagnostic review of IATI's current institutional arrangements and developed a set of recommendations around the future institutional structure for IATI; these are presented under cover of a separate detailed paper for discussion at the MA.

Action requested of members: Take note.