Members’ Assembly 2020
Session 9: Opening Day two, Chair’s review of agenda

Theo van de Sande
IATI Governing Board Chair
2 December 2020
Session 10:

Monitoring the Strategic Plan 2020-2025; IATI Results Framework

Joseph Barnes, IATI Governing Board / UNICEF

MA 2020; 2 December 2020
Monitoring the Strategic Plan 2020-2025

01 WHAT IS THE RESULTS FRAMEWORK?

02 EMERGING INSIGHTS

03 DATA COLLECTION AND ANALYSIS

04 NEW SOURCES OF DATA

05 DISCUSSION
Strategic Plan endorsed by MA with draft RF, 2019

Results Working Group writeshop, 2019

Revised RF endorsed by the Board with written comments from Members, 2020

Finalised RF shared with MA, 2020

Translates the IATI SP into a set of measurable targets that demonstrate how the initiative will prioritise efforts to deliver on its agreed mandate and vision through 2025.
WHAT IS THE IATI STRATEGIC PLAN (2020-2025) RESULTS FRAMEWORK?

- **Belongs to all members.** Progress reflects ‘everyone’s contribution’; members, Governing Board and the Secretariat.

- **Consultative approach to development,** including two rounds of comments from members (Working Group and written comments from wider membership).

- **An adaptive tool,** subject to adjustment by the membership on the basis of its utility for decision-making and learning over time.
  - Further discussion to be opened amongst members midway through implementation of the SP (2022 / 2023).

- **Available Baseline data was collected by the Secretariat in 2020.** Additional baselines will be collected in December 2020 and throughout 2021, as noted in the RF and methodological notes.
Outcome 1: Significant improvement in the quality of data published to IATI

- 66% of users satisfied with IATI technical tools
  (74% for Validator)

Outcome 2: IATI data is systematically used by development and humanitarian actors for decision-making

- 25,072 unique visits to d-Portal
- 10 publishers directly supported on how to use IATI data

Outcome 3: The IATI Community of members, data users and publishers are increasingly engaged to maximise impact

- 379,000 impressions and 671 mentions of IATI on Twitter
- 94 IATI members

- 95,346 unique visitors to the IATI website
- 63% of members attending the annual Members’ Assembly

- 26% of publishers publishing every quarter or more
SUCCESSES AND OPPORTUNITIES: EMERGING EXAMPLES

Successes

- Strong number of visits to d-portal show users attempting to access data.
- Good presence on social media and the IATI website demonstrate increasing knowledge about IATI.
- Percentage of members attending the MA is robust, demonstrating ongoing commitment to IATI and aid transparency.

Opportunities

- The recent launch of the IATI Validator and Datastore will allow us to track and correct our approach from the get-go.
- Room to improve on the number of partner countries systematically using IATI data for decision-making and including IATI data in AIMS.
- Publishers’ overall data quality metrics in the Dashboard need work.
DATA COLLECTION AND ANALYSIS

- Outcomes and Indicators chosen for their utility and feasibility.
  - ‘Aspirational indicators’ included; some indicators will only be measurable over time contingent on the development or maturity of relevant tools.
  - The IATI Secretariat will conduct an annual data collection process in the first quarter of the year following the year to be assessed (e.g. 2020 data will be assessed in Q1 of 2021).
  - Data will be made available to members in Q2 of the reporting year.

- Data on progress against targets should ideally be used as an input to annual work planning by the membership, Governing Board and Secretariat.

- Twin-Track Approach with Most Significant Change Stories.
NEW SOURCES OF DATA IN THE WORK PLAN

Overall
• Annual Survey

Outcome 1. Significant improvement in the quality of data published to IATI.
  ● IATI Validator
  ● Standardisation Working Group

Outcome 2. IATI data is systematically used by development and humanitarian actors for decision-making.
  ● Datastore list

Outcome 3. The IATI Community of members, publishers and data users are increasingly engaged to maximise impact.
  ● IATI Connect analytics
Session 11:

Financial overview 2020

Leo Stolk, Theo van de Sande
IATI Governing Board

MA 2020; 2 December 2020
FINANCIAL OVERVIEW

01 THE FIGURES

02 THE FACTS

03 THE OUTLOOK
01 The Figures

- **Income** 2020 - $2.4m received and $525k still to be received
- **Funds carried over** 2013-19 - $2.4m
- **Outgoing and committed** 2020 - $2.4m
- **Anticipated cash position** by 31 December 2020 $2.97m
  - Includes Contingency reserve $630k
- **Board approved a revision** reducing 2020 budget by $525k
- **Secretariat in-kind** contribution 2020 - $300k
02. The Facts

2020

Technical Stock Take
Partner country data access tool
Communities of Practice, WG & IATI Connect

2021

API Gateway
Semantic Data Layer (replacing d-portal)
Publishing Tool
03. The Outlook
ANY QUESTIONS
15 min break

Time for cup of:
Session 12:

Annual Work planning

Moderator, Theo van de Sande
Presenter Annelise Parr
Secretariat Coordinator

MA 2020; 2 December 2020
Step 1, step 2, step 3

- MA 2020: IATI Strategic Plan 2020-2025 in action
- Twitter: #IATI #IATIMA20
### Step 4 and more - the detailed work plan

<table>
<thead>
<tr>
<th>Activity Detail</th>
<th>2020 Activity ID</th>
<th>B: Budget holder</th>
<th>C: Responsible</th>
<th>D: Staff cost only</th>
<th>E: Q1 budget</th>
<th>F: Q2 budget</th>
<th>G: Q3 budget</th>
<th>H: Q4 budget</th>
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<tbody>
<tr>
<td>S: Strengthen the IATI Community</td>
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<tr>
<td>S.1: Support long-term planning and day-to-day management of the COPs (ongoing consultancy + intern)</td>
<td>UNDP</td>
<td>UNDP</td>
<td>Yes</td>
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<tr>
<td>S.2: COP Engagement Calendar and Strategy drafted and delivered. Focus on developing and expanding the IATI community, and ensuring the strengthening engagement with country teams (partnership civil society, etc) and reflecting their needs in IATI tools and processes.</td>
<td>UNDP</td>
<td>UNDP</td>
<td>Yes</td>
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<tr>
<td>S.3: Contingency fund to meet requests by COPs for small funds to support their work (per COP, funds disbursed only upon approval by Board)</td>
<td>UNDP</td>
<td>UNDP</td>
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<td>S.4: Hosting and maintenance fees for the IATI Digital Platform (annual)</td>
<td>UNDP</td>
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<td>S.5: 4 Consolodate Technical Core</td>
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<td>4.1: Validation: Hosting, maintenance and improvement of imputhost tool</td>
<td>4.8.1</td>
<td>DI</td>
<td>DI</td>
<td>Yes</td>
<td></td>
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<tr>
<td>4.2: Registry: Hosting, maintenance and improvement contract</td>
<td>4.8.3</td>
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<td>$11,250</td>
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<td>4.3: Dataset: Hosting and maintenance contract</td>
<td>4.8.4</td>
<td>UNOPS</td>
<td>DI</td>
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<td>4.4: 4-portal: Hosting and maintenance contract</td>
<td>4.8.9</td>
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<td>4.5: Technical server costs</td>
<td>4.8.7</td>
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<td>$2,500</td>
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<td>4.6: Additional outsourced developer/consultant capacity</td>
<td>4.8.6</td>
<td>DI</td>
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<td>4.7: Publishing tools: UX research, requirements, TOR, build if required; NB: Costs presented here are dependent on outcome of options analysis and these are speculative only</td>
<td>4.8.5</td>
<td>DI</td>
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<td>4.8: Scenario data layer: UX project, TOR, draft designs, scope, procurement if required</td>
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<td>4.9: API Gateway: consultation, design, build, launch; Budget TBC once designed</td>
<td>DI</td>
<td>DI</td>
<td>UNOPS</td>
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Twitter: #IATI #IATIMA20
1. Partner country support
   - Conclude 2020 research on data needs and barriers
   - Pilot work on import into AIMS
   - Training materials and support to use of 2020 Excel data access tool
   - Community meeting in late 2021 (deferred from 2020)

2. Improving data quality
   - Work with publishers using Validator
   - Implement 2020 recommendations on feedback mechanisms
   - Systematic review of how publishers publish, and strategy to bridge the gap between current publishing practices and data user needs
   - Update publisher guidance
   - New methodology for measuring data quality (relevant for DQ Index and Publishing Statistics)
   - Support donor harmonisation work by the Board
● 3. Promote Systematic Data Use
  ○ Data access / use guidance materials (2020 gap analysis)
  ○ Develop key user requirements for future data use tools
  ○ Increase direct support to different user groups to access, use and analyse data.
  ○ Data Use Working Group and Fund (Day 1)

● 4. Consolidate Technical Core
  ○ 2020 Technical stocktake follow up actions (Day 1)
  ○ Publisher tool project
  ○ Semantic data layer (future d-portal)
  ○ API Gateway
  ○ Determining policies around
    ● Publishing statistics,
    ● hosting of publishers’ XML and
    ● storing historical data
● 5. Strengthen the Community
  ○ COP management, engagement
  ○ IATI Connect, host, maintain and use; consultations
  ○ IATI Community event (two track planning)
  ○ Virtual community events in Q1 and Q3

● 6. Communications
  ○ Implement Communications and Social media strategies
  ○ New Annual Report as a flagship comms product
  ○ New awareness and guidance materials
  ○ Website review and refresh
● 7. Outreach and engagement
  ○ Targeted outreach to new partners (DFIs, Global South, and key networks)
  ○ Targeted messaging and information packages for different groups (UN, Grand Bargain signatories, different data standards)
  ○ Advocate with publishers for continuing investment in data quality

● 8. Institutional arrangements
  ○ Support Working Groups (substantive and logistic support) as key governance mechanism
  ○ Monitor Results Framework
  ○ Ongoing activities
    ■ Support Board
    ■ MA
    ■ Financial management
## Proposed budget 2021

<table>
<thead>
<tr>
<th>Activity / workstream</th>
<th>Budget</th>
<th>Activity / workstream</th>
<th>Personnel Budget</th>
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<tbody>
<tr>
<td>1. Partner country analysis and support</td>
<td>$50,500</td>
<td>1. Partner country analysis and support</td>
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<td>2. Improve the Quality of IATI Data</td>
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<td>2. Improve the Quality of IATI Data</td>
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<td>3. Promote Systematic Data Use</td>
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<td>5. Strengthen the IATI Community</td>
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<td>6. Communications</td>
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<td>7. Outreach</td>
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</table>

**Total Activities:** $1,369,139

**Total Personnel:** $2,096,730

- Total in kind: $291,308
- Total management fee 8%: $172,165
- UNOPS 1%: $24,288
- Annual budget with in-kind: $3,953,630
- Annual budget without in-kind: $3,662,322
- Reserve (Contingency, 15% of Y6 annual budget) for Y7 implementation: $631,249

**TOTAL annual budget with contingency reserve:** $4,293,571
Key points to note: Proposed budget 2021

● Activity budget has **decreased** by $257,762 in 2021;
● Personnel budget has **increased** by $361,820;
● In-kind contribution has **decreased** by $13,619;
● The management fee has **increased** by $9,825;
● Budget for 2021 is higher than for 2020 by $113,885.
Single Secretariat
Session 13:

Institutional Working Group

Joseph Barnes
IATI Governing Board

MA 2020; 2 December 2020
New Institutional Working Group - Discussion on Scope

1. Review of external evaluations referencing IATI, to understand where changes might be needed; apply findings to undertake a review of the Theory of Change 2016-23;

2. Institutional arrangements beyond December 2022;

3. Developing parameters for a mid-term review of the Strategic Plan (2022);

4. Membership costs and criteria as part of a longer term financial strategy.
ANY QUESTIONS
15 min break

Time for cup of:

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Session 14: Chair closes 2020 MA
Close of Day 2