IATI Data Quality Index Consultation: Discussion 1 Follow-up

IATI Data Quality Index		
Measure	**You Said/Community Input:**	**We Will & Way Forward:**
Timeliness		
Frequency and Timelag	1. Support for keeping frequency and time lag measures. View expressed that transactions are not the only important update but that updates to other elements are important too. Some suggestions were made on additional elements to be included in this measure. However there was no clear agreement, with the argument being that a case for all elements can be made. Suggested approach forward is to include a measure of "active" publishers under the 'Timeliness' measure, which will capture **any changes** in IATI files. 2. Support expressed for closed activities being excluded from this measure.	1. Include **frequency** and **timelag** (new transactions considered as an "update"). 2. Exclude closed activities from 'Timeliness' measure.

Timely substantive updates
 	
Consistency of updates
 	
Active publishers
	1. Disagreement expressed on including a measure on the consistency of updates. This was because these measures are too complex for now and not all activities can have the same updates.
	
	2. Support for marking publishers, rather than files, as active or inactive. Suggestion to use "last-updated-datetime" for tracking changes under the active publishers measure.
		We will:
		    3. Include timely substantive updates.
		    4. Exclude measure on the consistency of updates.
		    5. Flag "active" publishers in green.

Data Completeness		
Mandatory & Recommended	There was no disagreement on including recommended elements. It was suggested to make the distinctions clear between what is currently 'mandatory' in the Standard and what is 'recommended'. It was also suggested that the name of this measure should be changed to "Mandatory & Recommended". It was suggested that different weights should be given to Mandatory & Recommended elements. It was also suggested that the measurement of 'Mandatory' should be used in the overall Data Quality Index score.	Change name of measure to "Mandatory & Recommended" elements. Give smaller weight in the methodology for the Recommended elements compared to the Mandatory elements (e.g. 30/70).
Location:	Support given for assessing inclusion of country and region data. **Sub-national location**: Concern was raised that location elements cannot be used by all publishers systematically: some publishers cannot include location data.	Include country and region. Incorporate specific methodology to reflect suggestions for sub-national location ensuring coordinates and location details are both reflected in the methodology.

	Suggestion was given to separate this measure by "type" of publishers due to relevance only to certain organisation types, but no detailed discussion on which types. It was suggested that the methodology checks either coordinates or location details; also recognise that we need to exclude location data when not safe to include it. Suggested to exclude locations of the capital and geographic center of countries and count these as 0. It was agreed that measuring the use of recipient language will be challenging and might not be the correct measure. The initial proposal was to include recipient language where an organisation publishes the title and/or the description elements in at least one of the official languages of the reported recipient country.	Exclude recipient language.
Classification	There was agreement that sector should be included and given the most weight. It was suggested to simplify the measure by removing the elements: Finance Type, Flow Type, Collaboration type, Disbursement Channel. It was also suggested to assess tied status as part of the methodology. Discussion was had on the rationale for only including gender policy markers. Mixed views were expressed for including only gender, recognising the importance of other markers too.	Give higher weight to sector. Exclude Collaboration type, Disbursement Channel. Keep Finance and Flow type (highlight importance for data use). We will not be adding tied status, given existing feedback on the complexity of classification measure and suitability for all.

		No agreement on which policy markers to include. Further details on this measure will be added in the methodology, recognising that assessment on only the gender marker is not feasible.
Sustainable Development Goals	General support for the inclusion of this measure. There was support for the inclusion of SDG Goals and Targets, with recognition that SDG reporting at indicator level is still complex. It was recognised that the SDGs are not as widely adopted by all types of stakeholders in IATI.	Measure the implementation of the IATI Standard SDG Publishing guidance.
Identifiers and traceability	There was recognition of the importance of this assessment area. **Correct organisation identifier:** Comments added for specific checks to be addressed in the methodology for Participating org identifier, with suggestion to not only look at the IATI Registry list but also org-id.guide. **Transaction provider and receiver activity id:** - There was recognition that these identifiers were important but not yet widely used at the moment. - It was suggested to include a check for specific activity identifiers and its validity. Different views were expressed here and this check can be considered for inclusion in the IATI Validator.	Keep all three assessment areas on IATI Organisation identifier; transaction provider and receiver organisation information and participating organisation role and type. Include a check that also uses org-id.guide. Ensure the methodology for transaction provider and receiver org account for transaction type and organisation role. Check on validity of activity id will not be included (this is proposed to be checked by the IATI Validator as a possible feature).

	Participating org - Views were given on the need to ensure that this check was not duplicated with Mandatory measure (as we include role and type there) Clarification was sought that organisations will not be penalised if their partners are not publishing.	
Financials **Transaction types** **Spend** **Transaction dates** **Forward-looking** **Budgets**	General support for including budgets with finances in the methodology. There was recognition that budgets and spend are separate. **Transactions and spend:** Further clarification was sought on which transaction types should be assessed. It was suggested to focus on transaction types 1,2,3,4 and 11. **Forward-looking budgets:** There were mixed views on measuring the inclusion of total budget in the organisation file. Concerns were expressed around the three year timeframe, being unrealistic for humanitarian organisations and lack of publishing of total budget currently in org files	Keep financials in one place, including both transactions and budgets. Specify in the methodology which transaction types will be assessed. Exclude organisation budget from financials, but look into methodology for coverage and possibly include there.
Humanitarian **Humanitarian flag** **Humanitarian scope**	There was general support for including a humanitarian measure. It was recognised that not all organisations publish humanitarian data, and several actors do not operate under the UN humanitarian	Keep the humanitarian flag as the main assessment for this measure. Keep the humanitarian scope and clusters as references

Humanitarian clusters Localisation	clusters or HRPs. As such, it will be unfair to assess and include the humanitarian scope and clusters for all publishers. The issue of measuring localisation requires more discussion. Some support was expressed by organisations for the proposed localisation measure with an additional suggestion to also include, National NGOs. However, other organisations did not see localisation as the right fit in the humanitarian assessment area.	only - not be included in overall measure so organisations are not penalised. Exclude localisation specific measures. In the traceability measure, users can identify the types of organisations involved in the activity.
Results	Including this measure was supported. It was suggested that the methodology should include baseline, target and actual measures to track 'progress'.	Include results measure using baseline, target and actual values.
Document Links	There was support to include the measures proposed. It was suggested to include these measures under "Additional information". It was also suggested to include the type of documents as part of the assessment as well as check on if the document URL is valid.	Include documents in the DQI and possibly rename as Additional measure. Further details will be added in the methodology.
Coverage	There was support for measuring total expenditure. It was recognised that it is not yet widely used and not frequently updated. Some examples were given that organisations add the sum of activity spend into their total expenditure. It was suggested to add guidance about what should be included in total expenditure by publishers.	Include total expenditure as a measure for coverage.

	It was also suggested that adding "total expenditure" might incentivise publishers to provide this data.	
Validator Measure	There was overall support for the inclusion of the Validator measure. There was some disagreement that it should be separate as the Validator focuses on the "how". Specific suggestions for improvements of the Validator were expressed. They were to include activity id Validation check and notification for publishers.	Include Validator measure. Specific suggestions on improvements to the IATI Validator are out of scope for the DQI but will be fed back as suggested features for the Validator.
Data Complementarity	The IATI Community was interested in gaining more detail on each measure, as the measures proposed were hard to understand, seemed complex and the reason for including them was unclear. It was also noted that complementarity as a term is abstract to understand. It was suggested to make it as an extension to the 'data completeness' category. On the specific sub-measures, there was support for assessing predictability and funds flowing into and out of an organisation. There were some concerns around the usefulness of budgets, given that not all organisations can provide budgets three years in advance. It was suggested to look at budgetary timeframes, recognising the added complexity.	We will explain the use cases for the importance and inclusion of these measures, clearly evidencing the examples. We will propose a simple methodology option to be included under financial and traceability, explaining clearly what change we want to drive with these measures. We will consider not including this measure in the overall score.

	Useful discussion on this measure took place, explaining the reasoning for the measure and multiple pieces of information is needed for the data to be useful i.e. it is good to have high quality in a certain area, but the data may not be usable if other key pieces of data are missing. Some participants suggested that this measure could be added at a later phase.	
Trust	Detailed discussion on this measure took place on IATI Connect, as well as during the consultation webinars. Concern was raised about calling a single measure "trust", as trust is interpreted in different ways and cannot be easily measured. It was suggested that trust needs to be a balance between transparency, sensitive data and data quality. It was also suggested that trust is cross-cutting and does not require a single measure as part of this Index. It was suggested that the specific proposed measures were seen as too narrow and further discussion was needed on each one. For example, how quickly organisations are expected to fix data. Some suggestions were made to assess whether publishers' data can be used by third party applications.	Exclude a separate measure of trust with the current methodology proposal.

| Overall measure - disaggregations | Discussion focused around the inclusion of a measure on the organisation **type/role.**

There were overall comments about the type of publishers (in response to comments on location, classification and traceability). For example, donors may not be able to identify precise location data, NGOs may not know the aid type classifications of their activities, and they should not be penalised for not publishing these. For some measures, distinctions needs to be provided to recognise the complexity of undertaking this task of providing specific data.

It was expressed that the DQI is about data quality and driven by a user perspective. There was a suggestion to focus on core requirements that apply for all, and others that are dependent on the org type and role. However it was acknowledged that this will be difficult to compute.

It was also expressed that the Index should focus on areas for improvement within the publisher's organisation - specifically on where improvements can be made? | Keep consistent measures across all organisations. Explain in methodology where we recognise why assessment is not relevant for specific groups.

Overall score and weight for each measure will be consulted on in the methodology phase. |