

Annual Members' Assembly 8-9 December 2021

Paper 5: IATI Implementation Update 2021

This paper and its annexes provide an overview of activities delivered within the [IATI Work plan 2021](#) contributing to the achievement of the three objectives of the [IATI Strategic Plan 2020 - 2025](#) (ES / FR). It draws together factsheets recently published by the initiative, and provides updates on additional activities since the factsheets were issued.

Together with IATI's formal annual report, newsletters and regular communications from the Governing Board Chair, community space IATI Connect and two Virtual Community Exchanges, members are regularly updated on progress throughout the year.

The Governing Board reviews implementation of the work plan on a quarterly basis together with the Secretariat and provides advice on adjustments as required.

No formal presentation of this paper will be made during the 2021 MA, which will focus exclusively on matters requiring a strategic steer by members. This is in line with Standard Operating Procedure adjustments to the shared accountabilities and responsibilities of Governing Board and Members' Assembly¹.

Objective one: Drive a significant improvement in the quality of data published to IATI

The information below provides highlights from the Secretariat's 2021 Workplan towards achieving this objective. For a more detailed overview of activities delivered up to September 2021, see:

- [Paper 5 Annex 1: Update series: Strategic Plan 2020-2025: Improving the quality of IATI data.](#)

Review of how publishers are using the IATI Standard

¹ https://iatistandard.org/documents/846/SOP_Rev_7_IATI_-_March_2020.pdf (FR version) Section 4 updates accountabilities and division of labour between Board, Members' Assembly and Secretariat, implementing recommendations of the Institutional Review Working Group

- In 2021 the Secretariat conducted a systematic review of how 100 organisations are currently using the IATI Standard to publish data.
- A [summary report](#) with initial findings was shared in September.
- The Secretariat led a session at the IATI Virtual Community Exchange 2 (12-13 October), and also [scheduled group](#) and 1:1 calls with publishers in November.
- Findings from this review, together with insights from data users, will inform a strategy to bridge the gap between current publisher practices and data users' needs.

IATI Data Quality Index consultation

- IATI led a consultation to inform the development of a new Data Quality Index (DQI).
- The Secretariat published proposals for a new index to measure the components of IATI data that matter most to the IATI community.
- The first phase of the consultation (September - November 2021) invited written comments on [IATI Connect](#). Two virtual consultations were also held to allow for discussion within the community. The second phase of the consultation which will focus on the development of the technical methodology for the DQI is set to [be launched in January 2022](#).
- Once the two phases of the consultation have been concluded, implementation of the Data Quality Index will begin, replacing the current publisher statistics pages, and resulting in an accessible measure of data quality available to all IATI publishers and data users.

New guidance for using the IATI Standard

- In 2021, the IATI Secretariat consulted the IATI Community to develop new IATI Standard guidance including:
 - [Humanitarian guidance](#): finalised in February to help align and import IATI humanitarian data into UN OCHA's Financial Tracking Service, as well as meeting Grand Bargain transparency commitments.
 - [Traceability guidance](#): aims to improve IATI data for tracking development and humanitarian funds and activities throughout complex delivery chains.

IATI Helpdesk and support using IATI Validator

- Since January 2021, the Secretariat has received and addressed 790 diverse requests for support to publish IATI data. Average customer satisfaction is 98%.
- In 2021, the IATI Technical Team continued to provide one-to-one support to publishers to use the IATI Validator tool.
- Through the support provided, increasingly, publishers are now using the Validator independently to check the quality of their data and are taking steps to eliminate errors.

Collaborating with other open data standards and initiatives

The Secretariat is collaborating widely with relevant open data standards and initiatives to promote the interoperability of IATI with other development and humanitarian data. This year,

IATI has continued to participate in meetings of the OECD Development Assistance Committee (DAC) Working Party on Development Finance Statistics (WP-STAT). The Secretariat also engaged with the Grand Bargain Transparency workstream, Bern Network on Financing Data for Development, IFR4NPO - International Financial Reporting for Non-Profit Organisations, UN System Chief Executives Board, the UN Transparency Task Force, and Open Contracting Partnerships by providing input into key discussions, from IATI's perspective.

Objective two: Promote the systematic use of IATI data by development and humanitarian actors

The information below provides highlights from the delivery of the 2021 work plan towards meeting this objective. For a comprehensive overview of activities delivered up to September 2021 to achieve this objective, see:

- [Paper 5 Annex 2: Update series: Strategic Plan 2020-2025: Enabling the use of IATI data](#)

IATI's Country Development Finance Data tool

- The new [Country Development Finance Data](#) tool was launched in March 2021.
- Guidance (FR, ES, PT) on understanding and analysing the data and Excel Analysis Dashboard was launched in July 2021.
- Based on user feedback, improvements to the tool were launched in October/November 2021. This includes making the data, website, Guidance, and Excel Analysis Dashboards available in [French](#), [Portuguese](#) and [Spanish](#), and changes to the spreadsheets to improve their usefulness.
- So far, data users in almost 100 countries have downloaded the spreadsheets to support their analysis and decision-making.
- The results achieved through the availability of the CDFD tool have been to enable improved support to almost daily data queries, along with learning that continues to inform work across the Secretariat on data quality, improving data access tools, etc.

Data use training and support

- Monthly Data Use Drop-In Sessions were launched in May 2021, for data users to bring their questions and receive on-the-spot support from the IATI Secretariat and other data users.
- Virtual training sessions on using IATI's Country Development Finance Data tool and understanding IATI data were delivered to more than 20 partner country governments in June and July 2021, followed by 1:1 support to individual governments.
- Virtual training was delivered on how to access and analyse IATI data to journalists from Democratic Republic of the Congo, Ghana, Kenya and Zimbabwe in October 2021.
- The Data Use Query Corner was launched on IATI Connect in August 2021. It includes suggested approaches for answering specific data queries, space to ask questions to the IATI Community and links to additional resources.

d-portal and new data portal research

- The number of new users of d-portal increased in 2021 by 414% - from 36,245 between January - November 2020 to 186,351 between January - November 2021.
- An assessment of user requirements for the new data portal was conducted. This involved a desk review by the Secretariat to list and analyse existing research on user needs, in order to confirm user requirements for the new data portal (planned for 2022). The Secretariat reviewed and carefully documented user issues and needs from more than 80 items, including research, inputs on Github, Discuss, Connect, the Helpdesk, and recommendations from the 2020 Technical Stocktake.

Data Use Working Group

- Developed a joint Data Use Action Plan with the Secretariat and has continued to hold biweekly meetings which have featured a series of knowledge sharing presentations on how community members are using IATI data.
- Supported IATI Datastore Classic (a version of the original IATI Datastore updated/improved by Code for IATI) to enable data users to search data by a set of key filters and download activities with all data fields.
- Launched development of CSO Training Course and training videos for Datastore Classic and the Country Development Finance Data tool.

Objective three: Strengthen the IATI Standard to support objectives (1) and (2) by consolidating its technical core, maintaining its infrastructure and reinvigorating its community of publishers and members

The information below provides highlights from the delivery of the 2021 work plan towards achieving this objective. For a comprehensive overview of activities delivered up to September 2021, see:

- [Paper 5 Annex 3: Update series: Strategic Plan 2020-2025: Strengthening IATI technical infrastructure, tools and services](#)
- [Paper 5 Annex 4: Update series: Strategic Plan 2020-2025: Reinvigorating IATI's Community](#)

IATI Unified Platform Launched

In September 2021, the Technical Team launched IATI's Unified Platform, fulfilling the Stocktake recommendation to deliver an integrated system architecture. Features include:

- A robust, scalable and performant Cloud-based system, utilising a microservice architecture.
- Documents treated individually, and offering transparency as to the exact time when each new or changed document was identified, validated and (eventually) available in the IATI Datastore.
- The second version of the IATI Validator, along with its public API.

IATI API Gateway and Developer Portal Launched

An API (application programming interface) Gateway offering technical users a single point of access to all IATI public API services was launched simultaneously with the IATI Unified Platform, along with a Web application, the [IATI Developer Portal](#). Features include:

- Detailed and dynamic documentation of public APIs, allowing users to build and run queries within the interface.
- Detailed analytics of API usage
- Extensive service-protection features

Version 2 of the IATI Validator Launched

- The IATI Technical Team worked to bring the IATI Validator in-house on IATI's Unified Platform. They also delivered enhanced Validator services including:
 - [New public IATI Validator API](#): for organisations to integrate IATI validation into their internal data systems and external tools.
 - The Validator was rebuilt from the ground up to allow on-demand, simultaneous and scalable validation of IATI documents, both via the API and via the Web application, at greatly increased speed.
 - Improved user experience for the [online tool](#): the IATI Validator tool received important technical updates and now delivers faster checks of data files. Users can also more easily identify and prioritise different error types with clearer messaging and use of different colours.

Version 3 of the IATI Datastore developed

Since the launch of the Unified Platform in September the IATI Technical Team has utilised the platform to re-implement the IATI Datastore for Version 3 with an entirely new codebase. The first release of the API is scheduled to be launched in January 2022, offering:

- Close integration with the IATI Validator
- The inclusion of new and altered IATI documents swiftly and dynamically on a per-document basis
- Detailed technical documentation and discovery tools via the IATI Developer Portal.
- The Version 3 API will offer an additional route to allow users to return results as valid IATI XML documents

User experience projects to inform new and existing tools

As part of delivering IATI Technical Stocktake 2020 recommendations, two user experience projects were conducted in 2021:

- ***IATI-Supported Publishing Tool:*** The IATI Technical Team worked with ThresholdWorld to capture user requirements for an IATI-supported publishing tool. Their work informed the IATI Governing Board's decision to launch an open procurement for the provision of a free IATI publishing tool.
- ***Registry improvements:*** ThresholdWorld's project also made key recommendations on improving the user experience of the IATI Registry, which are currently being undertaken.
- ***Semantic Data Layer (SDL) project as research for d-portal v2:*** The Technical Team worked with Ventures Consulting to learn more about how users who are not familiar with IATI use and access IATI data. Their findings will help inform development requirements for d-portal v2.0.

Progress on the Technical Stocktake

The IATI Technical Team has made considerable progress in implementing the recommendations of the 2020 Technical Stocktake. (Green ticks represent recommendations that have been delivered; orange is for those underway.) Most of these are described above and in *Annex 3*; further details are available in the Technical Team's quarterly [updates](#):



Reinvigorating IATI's Community

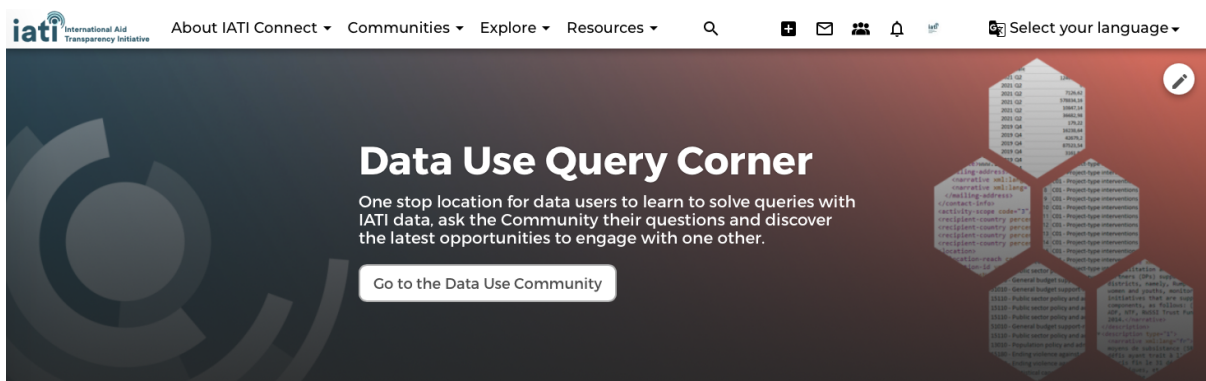
To strengthen IATI's diverse global community, in 2021 the following activities were undertaken:

- **IATI Connect:** in 2021 IATI's community platform rapidly expanded from 392 (January) to now nearly 1000 users and 14 dedicated Community Groups covering a wide range of thematic areas. Over the course of 2021 IATI Connect provided a virtual space where all IATI community members can exchange valuable resources and engage across borders and organisations.
- Main community-wide discussions launched on Connect in 2021:

- Communities of Practice Charter - Consultations (October 2020 - January 2021)
- [Help Shape IATI Standard Traceability Guidance](#) (March - April 2021)
- [Data Quality Index Consultation \(part 1\)](#) (September - October 2021)
- [Responsible Transparency Discussion](#) (September - November)

Stay tuned for any new community-wide Discussions via [this Consultations page](#).

- New features were added on Connect, including customised dashboards such as the [Data Use Query Corner](#) and the [IATI Standard Publishing Guidance page](#). To improve the usability of the platform and new extensions were released, such as a co-editing tool (Connect Collaborate) and cross-posting feature (Cross Connect).



- [Monthly video interviews](#) with organisations engaged in IATI's community were delivered along with the monthly, [IATI Connect Snapshot](#), to update members on progress and share engagement opportunities.
- IATI Virtual Community Exchange (1 and 2): IATI's first Virtual Community Exchanges (VCE) were held in April and October. The first VCE meeting attracted the highest number of attendees of any previous IATI event, at 398. Both VCEs attracted large numbers of relative newcomers to IATI, and at the VCE2 over 70% of the VCE2 registrants indicated that it was their first IATI event.
- Both Virtual Community Exchanges covered a lot of different thematic areas, from inspiring opening remarks at VCE1 by Jenna Slotin (Global Partnership for Sustainable Development Data) to a key-note speech by Ulrika Modeer (UNDP) on transparency in a post-COVID world. In total 29 VCE-sessions were (co-)hosted by existing and new partners; These included presentations led by the Bern Network Secretariat, and more technical sessions such as IATI's new integrated system architecture.
- In case you've missed the Virtual Community Exchange you can check all sessions of the VCE1 [here](#) and VCE2 [here](#). Stay tuned for our next VCE3 in 2022!