

### **MA Paper 11: Terms of Reference for the IATI Standard Oversight Committee (SOC)**

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# Terms of Reference

## IATI Standard Oversight Committee (SOC)

### **1. Introduction**

The IATI Standard Oversight Committee (SOC) is a new strategic advisory body established to enhance the governance of the IATI Standard, ensuring that its evolution is driven by principles of transparency, inclusiveness, and responsiveness to the needs of its diverse stakeholder groups.

As international development cooperation becomes increasingly complex and dynamic, the need for open standards that are agile, relevant, and user-focused has never been greater. The IATI Standard plays a central role in enabling transparency and accountability in development and humanitarian finance. However, its governance structures must evolve to ensure that updates to the Standard are grounded in real-world implementation challenges and data user requirements.

The establishment of the SOC is a critical step in reinforcing community ownership of the Standard and improving the accountability and transparency of how changes are made. It ensures that revisions to the Standard are not only technically sound but also contextually relevant and reflective of the changing needs of stakeholders across the aid ecosystem.

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### **2. Background / Context**

Since its launch in 2010, the IATI Standard has undergone a series of structured updates. Version 1 (v1) was developed between 2010 and 2014 and later deprecated in 2019. The current Version 2 (v2), introduced between 2014 and 2017, includes releases 2.01, 2.02, and the most recent 2.03. Each version introduced changes to the schema, rulesets, and codelists, supported by community consultation and formal approval processes. However, since the last update in 2017, no new version or formal revision has been implemented, despite growing



technical needs and user feedback indicating areas for improvement and alignment with global development cooperation drivers.

Version control has always been an essential governance feature of the IATI Standard, ensuring clarity and predictability for both publishers and data users. It allows IATI to maintain the integrity of its data model while providing a changelog for transparency and accountability. Yet, the current change management process has lacked a structured oversight body and has not been activated in recent years.

In 2024, the [IATI Standard Stewardship Working Group](#) was convened to examine challenges with the IATI Standard's existing upgrade procedures. The group explored both **risks** (which included integrity and coherence of the Standard; lack of legitimacy and uptake of changes resulting from insufficient stakeholder engagement; inflexibility and lack of clarity of governance processes; irrelevance of the Standard if it fails to respond to emerging areas of development cooperation); and **challenges** (lack of procedural clarity around upgrades leading to lack of consistency; ambiguity around upgrade language such as patch / minor upgrade, leading to confusion and ultimately delay; lack of standing mechanism for technical and community oversight; insufficient coherence with broader policy considerations). The group identified a need to clarify governance processes, resolve procedural ambiguities, and ensure that change management systems were fit for purpose. They developed a core set of principles to guide future Standard upgrades, laying the groundwork for a more structured and community-driven revision process.

Based on the recommendations of that working group, the SOC is established to serve a key strategic advisory and oversight mechanism which will play a central role in ensuring that changes to the Standard are transparent, inclusive, and well-aligned with the principles and priorities set by the community.

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### 3. Purpose

The **SOC** is established to serve the following functions:

- a. Provide diverse strategic and policy guidance to the IATI Secretariat and Board on proposed Standard changes;
- b. Ensure that change proposals are user-informed, evidence-based, and aligned with IATI's guiding principles;
- d. Recommend improvements to documentation, stakeholder consultation, and revision control processes;

e. Safeguard the technical integrity, inclusiveness, and long-term relevance of the IATI Standard.

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#### **4. Approach**

To deliver on its purpose, the SOC will undertake the following functions:

- Provide oversight to Secretariat reviews of proposed Standard changes;
  - Promote inclusive consultation processes, including gathering community feedback via all appropriate forums supported with targeted outreach. Actual consultation shall be facilitated by the Secretariat;
  - Collaborate with the Secretariat to ensure timely documentation and public dissemination of recommendations;
  - Promote adherence to the change principles developed by the 2024 Stewardship Working Group.
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#### **5. Outcome**

The work of the SOC will ensure the following outcomes:

- a. A transparent and accountable governance process for IATI Standard upgrades;
  - b. Increased stakeholder ownership and trust in the Standard;
  - c. Improved technical quality and clarity of revisions;
  - d. Clear purpose and relevance of the IATI Standard to contemporary challenges
  - E. A foundation for long-term institutional mechanisms for managing Standard evolution.
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#### **6. Membership and Functioning**

The SOC will consist of up to 12 members, with two representatives from each of IATI's constituencies. At least one of each profile listed below must be present in every meeting to ensure quorum:

- Bilateral donors
- Multilateral organisations
- Partner country governments
- Civil society organisations



- Private sector and foundations
- Other IATI Members or development experts may be seconded or consulted for specific proposed changes that are within their specialism
- Non-IATI Members, including independent technical experts with knowledge of data standards, open data architecture, and/or humanitarian/development systems.
- Technical experts from the Secretariat (non-voting).

### **Responsibilities:**

- Review proposals and documentation in advance of meetings and engage ad-hoc as necessary.
  - Provide timely, constructive input to ongoing upgrade processes.
  - Uphold IATI's values of transparency, inclusiveness, and technical excellence.
  - Join annual MA meetings
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### **7. Working Methods / Ways of Working**

- Meetings will be held virtually.
- Meeting notes, decisions, and key recommendations will be recorded and made publicly available with the support of the Secretariat.
- Collaboration will be facilitated through all appropriate forums including GitHub and dedicated mailing lists.
- Reports and recommendations will be submitted to the Board (if required) and summarized annually for the Members' Assembly.



### **Time Frame and Level of Commitment:**

The SOC will aim to be operationalized according to the following timeline:

<b>Q1/Q2 2026</b>	Outreach and establishment of the Committee
<b>Q2 2026</b>	First convening of the SOC; orientation; alignment with the Secretariat-led Standard Revision Process.
<b>Q3/Q4 2026</b>	Active technical review of proposed changes under the Pilot as necessary, including publication of notices, community engagement, and oversight of a 30-day objection window.
<b>Q4 2026 onward</b>	Institutionalization of the SOC as part of the long-term Standard governance model, incorporating lessons from the Pilot.

SOC members may be expected to attend meetings, dedicating approximately 1–2 hours per month, and to contribute to online discussions; higher engagement may be anticipated during the initial phase of establishment.

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