IATI Work Plan and Budget 2027

Cover note for the Governing Board

Figures reflect work plan version 1.6 updated following 6 Oct board.

I. 2027 Work Plan and Budget

This cover note presents the IATI work plan and budget for the 2027 calendar year for approval by the Governing Board during the Q3/2026 meeting. It is the second annual plan under the Strategic Plan 2026 to 2030 and the first to be prepared from the outset under the Minimum Viable Service Product (MVSP), which the Board adopted in 2026 as the fiscally conservative footing for the initiative. The plan takes the MVSP 2026 work plan as its baseline and carries that discipline into 2027, while setting out a defined path to conclude MVSP status by mid-year.

Approval is requested for a total 12-month budget for 2027 of $3,216,236 including fees, which breaks down as follows:

$ 2,980,989 for activities, personnel and service contracts;
$ 235,247 in management fees applied by UNOPS and cost recovery (UNDP GMS)[1],

Of the total, $2,723,639 is funded from IATI Core resources: core-funded activity envelopes of $414,373, all personnel and service contracts of $2,074,018, and all fees. This is the figure to hold against projected MVSP income of $3,223,285 , calculated as 90% of $3.58m total projected income, and the plan is built so that it does not exceed that income. The **remaining $492,598 of activity envelopes is non-core: $97,838 confirmed, $329,760 provisional which is being discussed with partners, and $65,000 not yet funded**. Every non-core line is marked as such in the plan and proceeds only when its funding is confirmed.

Personnel and service contracts remain the largest cost, at 70% of the pre-fee total. The Board has recognised that personnel are the foundation of the initiative and that the Secretariat entities carry contractual obligations under the hosting arrangements agreed by members. The 2027 personnel figures reflect the 2027 pro forma for UNDP posts, the UNOPS project team, and the ODS service contract envelope, with one UNDP post held vacant.

Resource mobilisation efforts are already underway, the increase in membership contributions that takes effect during 2027, and new memberships in the pipeline give the Secretariat a credible path to exit MVSP status by June 2027. The Board will receive a scenario-based assessment at its first quarter meeting to support that decision. Once MVSP status is concluded, the Secretariat would bring a mid-year revision that activates deferred elements in a defined order, described in section IV.

In line with previous years, the Secretariat remains fiscally responsible and has ensured that annual expenditure has not exceeded cash availability at any time during its operation. 2027 will be no exception. The budget is conservative, while efforts to raise additional funding are intensified.

The summary by cost category is set out below, with the detailed tables in section V.

[1] Fees charged on IATI Core lines only and made up of UNDP General Management Support (GMS) for cost recovery at the standard rate of 8% on lines implemented by UNDP or its technical delivery partner and on UNDP and ODS personnel ($153,791), UNOPS management fees at 3.95% on lines implemented by UNOPS ($7,347), and a UNOPS fee of 3.95% on the funds it transfers to UNDP, estimated at $1,876,182 ($74,109).

2027 budget by cost category (USD)	2026	2027	Change	Change %
Personnel (UNDP and UNOPS)	1,559,375	1,381,618	-177,757	-11.4%
Consultancy / Third Party Service Contracts	1,241,411	964,226	-277,185	-22.3%
IT Applications / Subscriptions	231,445	124,961	-106,484	-46.0%
Travel	181,498	102,833	-78,665	-43.3%
Others (meetings and events, research)	33,500	335,092	301,592	
Print / publications	10,000	72,259	62,259	
Grand Total (Core + non-core)	**3,257,229**	**2,980,989**	**-276,240**	**-8.5%**
Management fees (UNDP GMS and UNOPS)	349,231	235,247	-113,984	-32.6%

In accordance with the process set out at sub-paragraph 4.5 of the IATI Standard Operating Procedures v.8, the Board is requested to **approve** the 2027 work plan and budget and **confirm** that it can be shared with members for their information ahead of the 2026 Members' Assembly.

Board members will find the following contents and tables below:

I. 2027 Work Plan and Budget

II. Context for the 2027 work plan and budget, with priorities and the plan by Action Area

III. Comparison with prior years budgets and work plans

IV. Resource envelope for 2027 and the path out of MVSP status

V. Work plan annexes: Table 2 Action Area / workstream / budget; Table 3 Action Area / cost category / quarter; Table 4 cost category / quarter; Table 5 workstream outputs and key deliverables

II. Context for the 2027 work plan and budget

2027 is the second year of the Strategic Plan 2026 to 2030. The first year has been delivered under the MVSP. Secretariat work planning sessions in August 2026 reached a consistent set of conclusions that shape this plan: the Strategic Plan remains valid but the delivery model has changed; engagement with members, publishers and partners has generated the most significant gains of the year; interoperability and data quality have become core parts of IATI's value proposition; strategic communication needs fundamental improvement; and annual plans need to support adaptation during the year rather than fix a list of activities in advance.

The 2027 plan is therefore presented in a greater detail than 2026. The 2026 work plan listed 71 activities. The 2027 plan sets out 24 **workstreams**, one IRRF result area and primary indicator, a statement of what will be true by December 2027, a small number of dated deliverables, and a non-personnel budget envelope marked confirmed, provisional or unfunded. Personnel and service contracts are presented once, by Action Area. The Board will see results by indicator and spend by Action Area, as the IRRF provides, and will receive quarterly reports generated directly from the plan: expenditure against budget by cost category and by Action Area, including fees and delivery rate, and the status of each workstream and its deliverables. The Secretariat manages the tasks beneath each workstream.

The outline has not changed and remains aligned with the approved 2026-30 Strategic Plan and Integrated Results and Resources (IRRF) framework. The two Outcomes, the four Action Areas, Institutional Performance and the IRRF result areas and indicators are those approved with the Strategic Plan.

Priorities for 2027

In line with the MVSP, the Secretariat has set the following goals for 2027:

- Hold the MVSP line in the first half of the year: spend only against confirmed resources, keep the standing services to publishers and users as the first call on core funds, and mark every dependent line so that the Board can see what is and is not funded.
- Conclude MVSP status by June 2027 by capitalising on resource mobilisation under way, the membership contribution increase that takes effect in 2027, and new memberships in the pipeline, and bring the Board a scenario-based assessment to support that decision.
- Protect and advance the areas that are visibly delivering value: data quality (the redesigned Dashboard and State of the Data work), interoperability with the OECD CRS, TOSSD and humanitarian standards, and change control of the IATI Standard.
- Move delivery towards partner-led, remote and peer-learning models for country engagement and capacity support, so that the Action Areas most affected by the MVSP remain active at lower cost and can build back in the second half of the year.
- Strengthen strategic communication and positioning with existing staff capacity, so that the value of the initiative is understood by members, funders and the wider development finance community.

A. Strengthening country data-use systems through IATI data (Action Area A)

Action Area A was the area most affected by the MVSP in 2026. Travel, in-person workshops and dedicated capacity-building consultancies were paused, and several planned country engagements did not take place. The 2027 plan keeps the Action Area active through three workstreams that are deliberately lower cost and partner-led, and positions it to build back in the second half of the year.

Regional engagement on country-systems integration continues with two convenings: a Middle East and Africa workshop in the first quarter, which proceeds only if the associated voluntary contributions are confirmed, and a Pacific programme delivered with regional partners. A targeted country data use accelerator provides virtual technical assistance to an initial cohort of four partner countries to operationalise fit-for-purpose use of IATI data in national planning, budgeting, reporting or digital systems, building on the 2026 country mapping. Data-use capacity support moves to a remote, peer-learning model with a feedback channel that records changes made to tools or guidance as a result.

Compared with 2026, the ambition on paper is lower in the first half of the year and the delivery model has changed: partner-hosted and remote engagement replaces Secretariat travel for in-person support as the default. IRRF targets for this Action Area that were written to 2026 will be updated with 2027 milestones through the separate targets process. The non-personnel envelope for Action Area A is $180,838, of which $55,000 is not yet funded.

B. Enhancing IATI infrastructure for data quality and usability (Action Area B)

Action Area B is the largest area of the plan and the one where 2026 delivery was most protected, since the Standard, the publishing tools, the data services and the support desk represent the initiative's standing commitments to publishers and users. The 2027 plan restructures this area into eight workstreams: Standard Custodianship, Publishing, Data Services, Data Access, Data Quality, Interoperability, and two cross-cutting service areas, Support and Platform Operations and Continuity. Each has one output statement and the same three standing lines beneath it: maintain the service, develop the agreed improvements, and consult users to inform the next round.

The 2027 commitments are specific. Two rounds of Standard change proposals go through the Standard Oversight Committee and the Gazette. Third-party publishing tool producers receive published integration guidance. D-portal moves onto the unified data pipeline in the first quarter and a machine-readable access layer for AI applications follows in the second half. Data access routes are consolidated so that every activity and dataset has one stable route. The redesigned IATI Dashboard launches by the second quarter with its methodology published, and the top 20 per cent of publishers by volume are engaged on quality through it. An IATI to CRS crosswalk is agreed with the OECD and published.

Building on 2026 work, interoperability and platform operations are expected to gain momentum in 2027, with interoperability now seen as a strategic asset, and running the services reliably is a commitment that will be upheld.

The work plan and budget presents the ODS service contract as a single capacity envelope of $692,400, accountable through outputs and service levels rather than split across activities. The non-personnel envelope for the area is $202,628, lower than in 2026 following a line-by-line review of IT costs.

C. Championing transparency & accountability for development effectiveness (Action Area C)

Action Area C carries the initiative's relationships: with members, with partners, with the wider community, and increasingly with organisations able to provide voluntary contributions where their priorities align with IATI's strategic objectives. Engagement throughout 2026 generated some of IATI's most significant gains, including new members, stronger donor relationships and a growing voice in international processes. The 2027 plan responds with five workstreams and a particular emphasis on strengthening strategic communication, using existing staff capacity.

Strategic advocacy and partnerships maintains presence in at least four global or regional platforms, largely through partner-hosted engagements, and secures at least two new or deepened partnerships.

Resource mobilisation becomes a workstream in its own right for the first time: it implements the philanthropy strategy developed in 2026, renews and where possible increases existing contribution agreements, including with the European Commission, and aims for at least one new funding relationship, supported by a virtual roundtable series emerging from philanthropy analysis work undertaken in 2026. Membership growth and relationship management targets net growth of at least two members with attention to retention of UN agency and civil society members. Communications and positioning delivers an agreed narrative of IATI's value, the Annual Report and at least two further products. Community engagement continues on the lower-cost community platform, with a Community Exchange alongside the in-person Members' Assembly.

Relative to 2026 the change is one of coherence rather than scale, and the non-personnel envelope is modest at $67,957. Executive travel for bilateral meetings is not funded in the first half.

D. Promoting the use of IATI data to inform policy dialogues (Action Area D)

Action Area D was largely on hold under the MVSP in 2026, with the important exception of global policy engagement, where IATI's contribution to the Financing for Development follow-up and its work with the OECD, TOSSD and UNCTAD raised the initiative's visibility. The 2027 plan maintains three workstreams, aligned with priorities of partners and proposals for voluntary contributions.

National dialogues and research partnerships support at least two national or subnational dialogues that use IATI data and establish at least one research partnership with a published output, with dialogues taking place only where a partner hosts. Global policy engagement and interoperability continues the Sevilla Platform for Action (SPA) pilots on bridging data systems, engagement with the OECD and TOSSD, and EU Transparency Day, and publishes a curated evidence brief. Insight products and convenings publishes at least one thematic or country-focused product in partnership and co-hosts one convening on data-use learning.

Relative to 2026 the area is reduced and more dependent on partners. The non-personnel envelope is $121,500, of which $97,500 is provisional where discussion with partners is ongoing and $10,000 unfunded. The plan is candid that some of these workstreams are placeholders until funding is confirmed, and where it does invest - it invests in the interoperability and global policy work seen as delivering the greatest return.

E. Institutional Performance

Institutional Performance covers the governance, financial, legal and operational functions that make the rest of the plan possible, delivered jointly by UNDP and UNOPS. Five workstreams cover governance (four virtual Board meetings, an in-person Members' Assembly with Community Exchange, and working group support), membership agreements and legal advice, financial management and reporting, operations and procurement, and institutional strategies. The Members' Assembly is the largest single non-personnel item in the plan at $210,000 and is the flagship event of the year.

Governance work may expand where it relates to the two institutional working groups established in 2026. The first was set up to examine and update the Standard Operating Procedures; the second to examine institutional arrangements for the period after the current hosting arrangements, agreed in 2023, draw to a close in mid-2028. Depending on the initial review to be presented to members at the 2026 Members' Assembly, the hosting workstream may require additional budget lines in 2027 that are not yet included. Where the work on updating Standard Operating Procedures is not concluded by the Working Group in 2026, the plan anticipates its continuation.

Institutional Performance is also where the plan's financial pathway is anchored. The financial management workstream sets the objective that cash flow is managed to the agreed coverage threshold

every month and that MVSP status is concluded during the year. Its elements are already in motion: contribution agreements under renewal or increase, membership fee adjustments that take effect in 2027, and prospective new members. Section IV sets out the resource envelope and the sequence for activating deferred work.

F. Risks

The principal risk to the 2027 plan is that funding does not arrive on the timetable assumed, and the plan is built so that this changes the pace of delivery rather than its direction.

In Action Area A, country engagement depends on voluntary contributions and partner hosting: if these are not confirmed, in-person workshops move to virtual formats and the depth of country support is reduced, with the fuller programme deferred rather than abandoned.

In Action Area B, the standing services (the Standard, publishing, data services, support and hosting) are the first call on core resources; the risk sits with the Standard development commitments, where a reduction in the technical delivery envelope, or in the UNDP capacity that works alongside it, would delay the Dashboard, the consolidation of data access and the IATI to CRS crosswalk, and could lose the momentum gained on interoperability during 2026.

In Action Area C, constrained travel and event budgets limit the in-person engagement on which membership growth and resource mobilisation partly depend, so that outreach continues largely through virtual and partner-hosted channels, and communications products would be reduced to the Annual Report.

In Action Area D, national dialogues, research partnerships and convenings proceed only where partners host or co-fund, and insight products draw on existing analysis.

Institutional Performance functions are core and continue in all scenarios, with institutional strategies scoped rather than drafted if funds are short. Membership sustainability is a further strategic risk: retention of UN agency and civil society members matters as much as growth, and the plan includes a retention review to the Board in the second quarter.

Across all areas the mitigation is the same: spend only against confirmed resources, review at each quarter, and bring a mid-year revision that activates deferred work once MVSP status is concluded.

III. Comparison with prior years budgets and work plans

The 2027 budget continues the downward trajectory of the past three years. The 2025 budget approved by the Board in December 2024 was $3,905,819 before fees; the 2026 work plan was $3,257,229 later reduced through MVSP to 90% (applied on the core budget); the 2027 proposal is $2,980,989. Management fees have changed from $288,102 (2025) to $349,231 (2026) and $235,247 (2027); the 2026 figure reflects a higher UNOPS share of implementation and the 2027 figure the narrower base on which UNOPS fees are charged, since fees fall on IATI Core lines only.

IATI Secretariat finances by cost category (USD)	2025 revised	2026	2027 proposed
Personnel	1,771,584	1,559,375	1,381,618
Consultancy / Third Party Service Contracts	1,479,100	1,241,411	964,226
IT Applications / Subscriptions	296,300	231,445	124,961
Travel	276,835	181,498	102,833
Others	10,000	33,500	335,092
Print / publication / workshop	72,000	10,000	72,259
Grand Total	**3,905,819**	**3,257,229**	**2,980,989**
Management fees	288,102	349,231	235,247

Note on source figures: 2025 as approved by the Board (revision of 20 December 2024). 2026 as reported by finance by cost category. The 2027 "Others" line contains the in-person Members' Assembly and Community Exchange, budgeted under meetings and events.

By Action Area (USD, before fees)	2026	2027 proposed	Change
Action Area A. Country data-use systems	467,970	284,402	-183,568
Action Area B. Infrastructure, quality and usability	1,256,551	1,051,085	-205,466
Action Area C. Transparency and accountability	357,653	265,743	91,910
Action Area D. Data use in policy dialogues	177,637	229,102	51,4657
Institutional Performance	997,418	1,150,657	153,239
Grand Total	**3,257,229**	**2,980,989**	**-276,240**

Action Area totals include personnel and service contracts allocated by Action Area. The 2025 plan used a different structure (Strategic Plan objectives and scopes) and is not directly comparable by Action Area.

IV. Resource envelope for 2027 and the path out of MVSP status

The budget will be funded through membership contributions and voluntary contributions. The plan distinguishes the part of the budget that must be carried by IATI Core resources from the part that depends on non-core funding, so that the Board can hold the core budget against projected MVSP income.

Resource envelope 2027 (USD)	Amount	Basis
IATI Core: activity envelopes	414,373	Lines with funding source IATI Core, all confirmed
IATI Core: personnel and service contracts	2,074,018	UNDP posts at 2027 pro forma, UNOPS project team, ODS service contract envelope
IATI Core: management fees on the above	235,247	UNDP GMS 8% ($153,791), UNOPS 3.95% management fee ($7,347) and UNOPS 3.95% fee on transfers to UNDP ($74,109)
Total core budget	**2,723,639**	**To be held within projected MVSP core income**
Projected MVSP core income 2027	3,223,2850	Membership contributions at 2027 rates plus confirmed voluntary contributions; headroom of 496,361 against the total core budget
Non-core activity envelopes	492,598	Confirmed 97,838; provisional (329,760); unfunded 65,000
Grand total including fees	**3,216,236**	

The path out of MVSP status rests on three elements that are already in motion: contribution agreements under renewal or increase, including with the European Commission; membership fee adjustments agreed by members during the 2025 Members' Assembly that take effect in 2027; and prospective new members. The plan does not spend against these before they are confirmed. Unfunded and provisional lines are visible in the plan and in the Dashboard views. When the position is confirmed, expected during the Q2/2027 Board meeting, the Secretariat would bring a mid-year revision that activates deferred elements in a defined order: country engagement and capacity support first, then in-person convening, then the technical development items in Action Area B that have been held.

V. Work plan annexes

Table 2. Action Area / workstream / budget (USD)

Action Area	Workstream	Non-personnel envelope
Action Area A	A-01 Regional engagement on country-systems integration	152,838
	A-02 Targeted country data use accelerator	28,000
	A-03 Data-use capacity support and feedback loop	0
	Personnel and service contracts	103,564
Action Area A total		**284,402**
Action Area B	B-01 Standard Custodianship	0
	B-02 Publishing	20,000
	B-03 Data Services	0
	B-04 Data Access	0
	B-05 Data Quality	75,000
	B-06 Interoperability	10,564
	B-07 Support	13,064
	B-08 Platform Operations and Continuity	84,000
	Personnel and service contracts	848,457
Action Area B total		**1,051,085**
Action Area C	C-01 Strategic advocacy and partnerships	41,760
	C-02 Resource mobilisation	0
	C-03 Membership growth and relationship management	12,736
	C-04 Communications and positioning	12,441
	C-05 Community engagement	1,020
	Personnel and service contracts	197,786
Action Area C total		**265,743**
Action Area D	D-01 National dialogues and research partnerships	72,500
	D-02 Global policy engagement and interoperability	24,000
	D-03 Insight products and convenings	25,000
	Personnel and service contracts	107,602
Action Area D total		**229,102**
Institutional Performance	IP-01 Governance: Board, Members' Assembly and Working Groups	216,000
	IP-02 Membership agreements and legal	60,000
	IP-03 Financial management and reporting	32,000
	IP-04 Operations and procurement	26,048
	IP-05 Institutional strategies	0
	Personnel and service contracts	816,609
Institutional Performance total		**1,150,657**

Action Area	Workstream	Non-personnel envelope
Grand Total (before fees)		**2,980,989**
UNDP GMS 8%		153,791
Management fees UNOPS 3.95%		7,347
UNOPS 3.95% fee on transfers to UNDP		74,109
Grand Total including fees		**3,216,236**

Table 3. Action Area / cost category / quarter (USD)

Action Area	Cost category	Total	Q1	Q2	Q3	Q4
Action Area A	Consultancy (UNDP)	47,778	10,000	10,000	27,778	0
	Meetings / Events	45,832	0	5,832	40,000	0
	Publications	27,259	4,000	4,000	19,259	0
	Travel (UNDP)	54,969	0	0	54,969	0
	Personnel (UNDP)	103,564	25,891	25,891	25,891	25,891
	Other categories	5,000	0	0	5,000	0
Action Area A Total		**284,402**	**39,891**	**45,723**	**172,897**	**25,891**
Action Area B	Consultancy (ODS)	0	0	0	0	0
	Consultancy (UNDP)	75,000	7,500	22,500	22,500	22,500
	IT Applications / Subscriptions (ODS)	98,000	24,500	24,500	24,500	24,500
	IT Applications / Subscriptions (UNDP/UNOPS)	16,000	4,000	4,000	4,000	4,000
	Publications	7,500	0	0	7,500	0
	Travel (ODS)	3,064	0	0	3,064	0
	Personnel (UNDP)	156,057	39,014	39,014	39,014	39,014
	Service Contracts (ODS)	692,400	173,100	173,100	173,100	173,100
	Other categories	3,064	1,532	0	1,532	0
Action Area B Total		**1,051,085**	**249,646**	**263,114**	**275,210**	**263,114**
Action Area C	Consultancy (UNDP)	0	0	0	0	0
	IT Applications / Subscriptions (UNDP)	5,961	1,920	900	2,241	900
	Meetings / Events	41,760	0	12,000	19,760	10,000
	Publications	7,500	0	7,500	0	0
	Travel (UNDP)	12,736	0	0	6,375	6,361
	Personnel (UNDP)	197,786	49,446	49,446	49,446	49,446
	Other categories	0	0	0	0	0
Action Area C Total		**265,743**	**51,366**	**69,846**	**77,822**	**66,707**
Action Area D	Consultancy (UNDP)	25,000	0	8,000	8,500	8,500
	Meetings / Events	27,500	1,250	8,750	8,750	8,750
	Publications	30,000	1,250	9,250	9,750	9,750

Action Area	Cost category	Total	Q1	Q2	Q3	Q4
	Research / Data Collection	10,000	0	4,000	3,000	3,000
	Travel (UNDP)	29,000	7,000	5,000	12,000	5,000
	Personnel (UNDP)	107,602	26,900	26,900	26,900	26,900
	Other categories	0	0	0	0	0
Action Area D Total		**229,102**	**36,400**	**61,900**	**68,900**	**61,900**
Institutional Performance	Consultancy (UNDP)	0	0	0	0	0
	Consultancy (UNOPS)	18,000	0	0	0	18,000
	Meetings / Events	210,000	0	0	0	210,000
	Support Services (UNOPS)	86,000	20,000	23,000	23,000	20,000
	Personnel (UNDP)	436,609	109,152	109,152	109,152	109,152
	Personnel (UNOPS)	380,000	95,000	95,000	95,000	95,000
	Other categories	20,048	5,012	5,012	5,012	5,012
Institutional Performance Total		**1,150,657**	**229,164**	**232,164**	**232,164**	**457,164**
Facilities and Administration - Implementation	Management Fees - UNOPS 3.95%	7,347	1,837	1,837	1,837	1,837
	UNOPS 3.95% fee on transfers to UNDP	74,109	18,527	18,527	18,527	18,527
	UNDP GMS 8%	153,791	38,448	38,448	38,448	38,448
Facilities and Administration - Implementation Total		**235,247**	**58,812**	**58,812**	**58,812**	**58,812**
Grand Total		**3,216,236**	**665,280**	**731,560**	**885,806**	**933,589**

Table 4. Cost category / quarter (USD)

Cost category	Total	Q1	Q2	Q3	Q4
Personnel	1,381,618	345,404	345,404	345,404	345,404
Consultancy / Service Contracts	964,226	215,612	241,612	259,890	247,112
IT Applications / Subscriptions	124,961	30,420	29,400	35,741	29,400
Travel	102,833	8,532	5,000	77,940	11,361
Other (meetings and events, research)	335,092	1,250	30,582	71,510	231,750
Print/Publications	72,259	5,250	20,750	36,509	9,750
Grand total before fees	**2,980,989**	**606,469**	**672,749**	**826,994**	**874,778**
Facilities and Administration (GMS and UNOPS fees)	235,247	58,812	58,812	58,812	58,812
Grand Total including fees	**3,216,236**	**665,280**	**731,560**	**885,806**	**933,589**

Table 5. Workstream outputs and key deliverables 2027

Workstream	Result area / indicator	What will be true by December 2027	Key deliverables (quarter)
A-01 Regional engagement on country-systems integration	A.1 / A.1.1	Priority countries have been engaged through two regional convenings (Middle East-Africa, subject to confirmation of non-core funding for an in-person event, and Pacific/Lowy, delivered virtually) to promote the integration of IATI data into national systems, resulting in documented follow-up requests for further support and engagement.	Middle East-Africa workshop delivered (Q1, if funded); Pacific virtual workshop with regional partners (Q2/Q3); follow-up support offers issued to participating governments (Q3)
A-02 Targeted country data use accelerator	A.1 / A.1.2	Delivered targeted virtual technical assistance to an initial cohort of four partner countries to operationalise fit-for-purpose use of IATI data in national planning, budgeting, reporting or digital systems; developed and disseminated practical reconciliation guidance and peer-learning examples.	Country action plans prepared and validated by four governments (Q1-Q2); Practical toolkit developed on reconciliation of IATI data with national data (Q2); Two transferable country examples of new or routine use of IATI data in an AIMS, DCR, budget/planning process or analytical product published and used through virtual peer exchange (Q3)
A-03 Data-use capacity support and feedback loop	A.2 / A.2.1	A low-cost, remote model of capacity support is operating: briefings and peer sessions for national and local actors, with a feedback channel that records changes made to tools or guidance as a result.	Remote briefing series designed and launched (Q1); post-support feedback survey running (Q2); ≥5 feedback-informed changes documented (Q4)
B-01 Standard Custodianship	B.1 / B.1.1	The IATI Standard is actively maintained through transparent change control.	Maintain: SOC support; implementation documentation current (continuous). Develop: SOC change-management protocol agreed (Q1); round 1 in Gazette (Q2); round 2 in Gazette (Q4). Consult: community and technical consultations ahead of each round (Q1, Q3).
B-02 Publishing	B.2 / B.2.1	Any organisation, including those with no budget or prior experience, can register and publish IATI data.	Maintain: IATI Account, Register Your Data, IATI Publisher and publishing guidance (continuous). Develop: third-party tool integration guidance and validation criteria published (H1); first tool-producer convening (H2). Consult: publisher survey (Q2, Q4).
B-03 Data Services	B.3 / B.3.1	All published IATI data is held complete and current, and served as open bulk data and a stable, documented API.	Maintain: Bulk Data Service, Datastore (API and refresh), public register of datasets (continuous). Develop: d-portal onto the unified pipeline (Q1); MCP (Model Context Protocol) layer live (H2). Consult: data services user survey (Q2, Q4).
B-04 Data Access	B.4 / B.4.1	Users have one clear, reliable way to see, search and download IATI data.	Maintain: d-portal, CDFD, IATI Tables (continuous). Develop: consolidated access routes live with older routes redirected (Q2); adoption by third-party systems promoted (H2). Consult: in-tool feedback live (Q1); quarterly usage analysis across all tools.
B-05 Data Quality	B.5 / B.5.2	Publishers and data users have a trusted, published account of IATI data quality, and the highest-volume publishers improve against it.	Maintain: Validator and Dashboard (continuous). Develop: redesigned Dashboard launched, methodology and quality-tier logic published, baseline recorded (Q2). Consult: outreach and tailored support to top-20% publishers, prioritised quarterly from Dashboard diagnostics.

Workstream	Result area / indicator	What will be true by December 2027	Key deliverables (quarter)
B-06 Interoperability	B.6 / B.6.1	IATI data can be combined with the other major standards for development and humanitarian finance, through published, current mappings and active partner arrangements.	Maintain: published mappings and crosswalks, organisation identifier ecosystem, standing liaison with OECD, TOSSD and FTS (continuous). Develop: IATI-CRS crosswalk scope agreed with OECD (H1) and published (H2). Consult: partner standard bodies and users on priorities, feeding B.1 rounds (Q1, Q3).
B-07 Support	B.7 / B.7.1	Publishers and data users receive timely, effective help, from first query to long-term accompaniment.	Maintain: Support Desk for all queries; dedicated publishing and data-use support engagements (continuous, tracked monthly). Develop: support scope agreed (Q1); AI-agent self-service deflection baselined (Q1) and up 10 points (Q4); targeted support to technical staff as funding allows. Consult: quarterly analysis of support logs feeding guidance and other areas.
B-08 Platform Operations and Continuity	B.8 / B.8.1	Core services run reliably, securely and at agreed cost, and the initiative has transitioned smoothly from old to new website.	Maintain: host, monitor, secure and maintain IATI Account, Register Your Data, Dashboard, Validator, Datastore, Bulk Data Service, IATI Tables, d-portal, CDFD (continuous). Develop: service catalogue with costs and service levels published (Q1); continuity review of code, accounts, domains and data (H2). Consult: monthly availability, incident and cost reporting; quarterly service-level review with the Secretariat.
C-01 Strategic advocacy and partnerships	C.1 / C.1.1	IATI is present in ≥4 global or regional advocacy platforms, largely through partner-hosted engagements, and ≥2 high value partnerships are new or deepened with documented agreements.	Named events attended or co-hosted (per quarter); partnership agreements or MOUs signed (Q2, Q4)
C-02 Resource mobilisation	C.1 / C.1.2	The philanthropy/HNWI strategy developed in 2026 is in implementation, contribution agreements with existing donor members are renewed or increased, and at least one new funding relationship is agreed.	Donor agreement renewals incl. European Commission (Q1-Q3); one new contribution agreement (Q4); virtual philanthropy roundtable series, two sessions (Q1, Q3), builds on the 2026 New York virtual event (did not run as a hybrid with MVSP).
C-03 Membership growth and relationship management	C.2 / C.2.1	Net membership grows by ≥2 with diversification by type and region; the CRM stakeholder relationship system is maintained and used for member engagement; UN agency and CSO retention risks are actively managed.	Targeted prospect engagements (per quarter, virtual unless funded); membership retention review to Board (Q2); CRM in routine use (Q1-Q4)
C-04 Communications and positioning	C.2 / C.2.1	A simple, compelling narrative of IATI's value is in use across channels; the Annual Report and ≥2 further products are published under the 2025-2028 Communications Strategy.	Positioning narrative and key messages agreed (Q1); 2026 Annual Report published (Q2); ≥2 one-pagers or thematic products (Q3, Q4)
C-05 Community engagement	C.2 / C.2.2	The community platform (post-IATI Connect) is active; ≥2 community events are held. Community Exchange alongside in-person MA	Community platform subscription renewed and moderated (Q1); community events (Q2, Q4); Community Exchange 2027 in person / hybrid (Q4)
D-01 National dialogues and research partnerships	D.1 / D.1.1	≥2 national or subnational dialogues have used IATI data with Secretariat support, and ≥1 research partnership using IATI data is active with a published output.	Research partnership agreed (Q1) and output published (Q4); dialogues supported (Q2, Q3)

Workstream	Result area / indicator	What will be true by December 2027	Key deliverables (quarter)
D-02 Global policy engagement and interoperability	D.2 / D.2.1	IATI has contributed to ≥2 global policy processes (FfD4 SPA 'Bridging Data Systems', OECD/TOSSD, EU Transparency Day) and published ≥1 curated evidence product for global audiences; interoperability pilots undertaken under the SPA are documented.	SPA pilot report (Q2); EU Transparency Day and OECD/TOSSD engagements (Q1-Q3); curated evidence brief (Q3)
D-03 Insight products and convenings	D.3 / D.3.1	≥1 thematic or country-focused insight product is published in partnership (GPEDC) and ≥1 convening on data-use learning is co-hosted.	Online publication (Q3); convening co-hosted (Q4)
IP-01 Governance: Board, Members' Assembly and Working Groups	IP.1 / IP.1.1	Four Board meetings (virtual) and the Members' Assembly (in-person) are prepared and run on time with full documentation; decisions document updated for Board reference; SOPs reflect decisions; working groups are supported as required. Institutional (hosting) decision on post-2028 arrangements has been made	Board meetings (Q1-Q4); Members' Assembly (per calendar); SOP update (following MA); working group support as required (Q1-Q4); Institutional Working Group work concluded (Q2) leading to clear decision on future hosting beyond June 2028 current arrangement
IP-02 Membership agreements and legal	IP.1 / IP.1.4	All membership and contribution agreements, amendments and waiver requests are processed and monitored, and legal advice is provided within agreed timelines.	Agreements and amendments processed (rolling); Membership fees collected; Financial Monitoring Dashboard updated (monthly); monthly, quarterly and annual financial reporting.
IP-03 Financial management and reporting	IP.2 / IP.2.1	Cash flow is managed to the five-month coverage threshold every month, and all quarterly and annual financial reports and audits are submitted on time. MVSP status has been concluded.	Monthly, quarterly and annual financial reports to the Board; audit (per calendar); Financial Monitoring Dashboard monthly updates.
IP-04 Operations and procurement	IP.3 / IP.3.1	Procurement, translation and interpretation, and operational support are executed compliantly and on time for all workstreams.	Translation, interpretation, air tickets, venue, catering, etc. procured for the MA in-person meeting (per calendar); procurement actions on request.
IP-05 Institutional strategies	IP.4 / IP.4.1	-Approved Infrastructure Roadmap work in 2026 has informed technology planning for 2028. The Engagement and Partnerships Strategy is extended or revised by Board decision. A phased plan is in place to establish post-2028 institutional arrangements.	Partnership strategy extension decision (Q1); technology strategy for 2028 based on infrastructure roadmap (Q4); institutional arrangements for 2028 agreed and implementation planning in place (Q3)

Extracted from work plan version 1.5 (Workstreams sheet).