



# Members' Assembly 2020

Session 9: Opening Day two, Chair's review of agenda

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Theo van de Sande  
IATI Governing Board Chair  
2 December 2020



## Session 10:

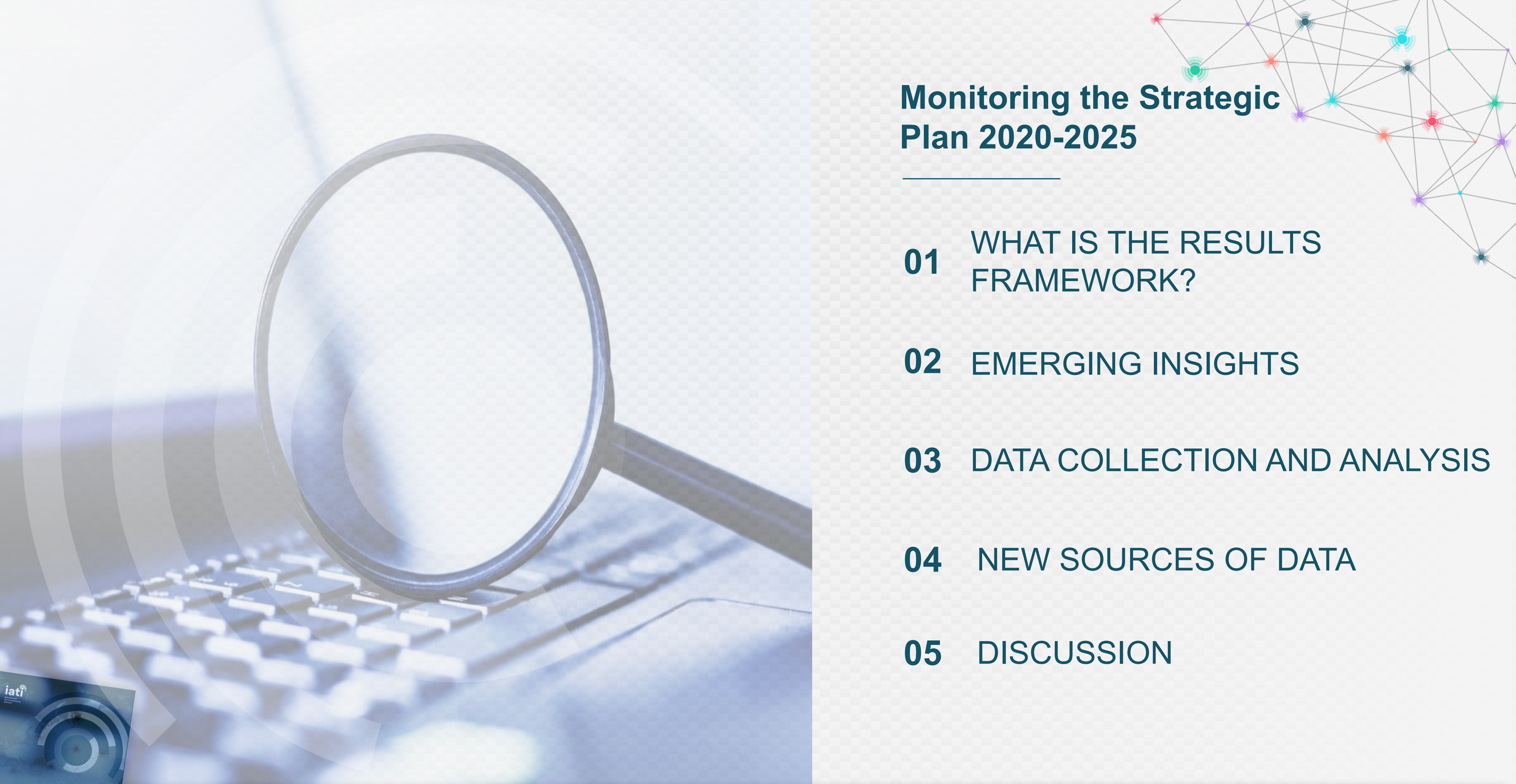
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# Monitoring the Strategic Plan 2020-2025; IATI Results Framework

Joseph Barnes, IATI Governing Board / UNICEF

*MA 2020; 2 December 2020*





## Monitoring the Strategic Plan 2020-2025

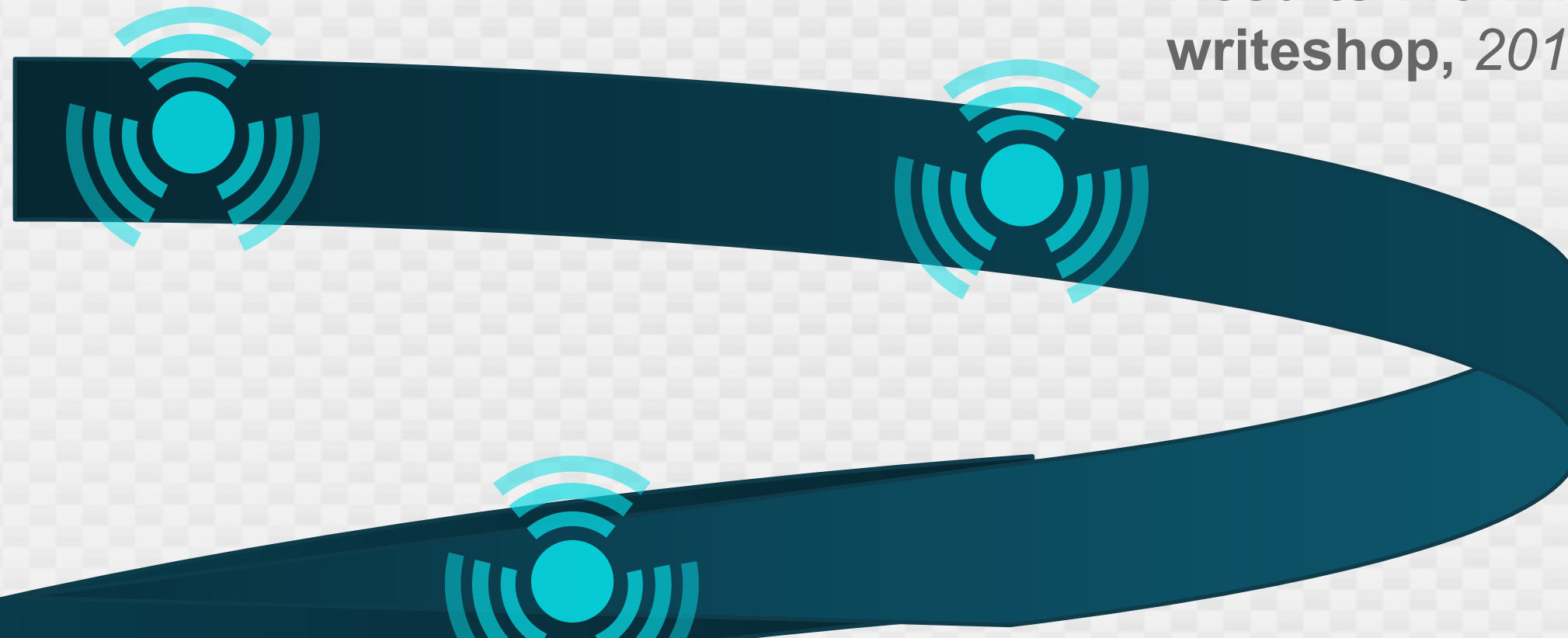
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- 01** WHAT IS THE RESULTS FRAMEWORK?
- 02** EMERGING INSIGHTS
- 03** DATA COLLECTION AND ANALYSIS
- 04** NEW SOURCES OF DATA
- 05** DISCUSSION



Strategic Plan endorsed by MA with draft RF, 2019

Results Working Group  
writeshop, 2019



Baselines  
developed, 2020

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

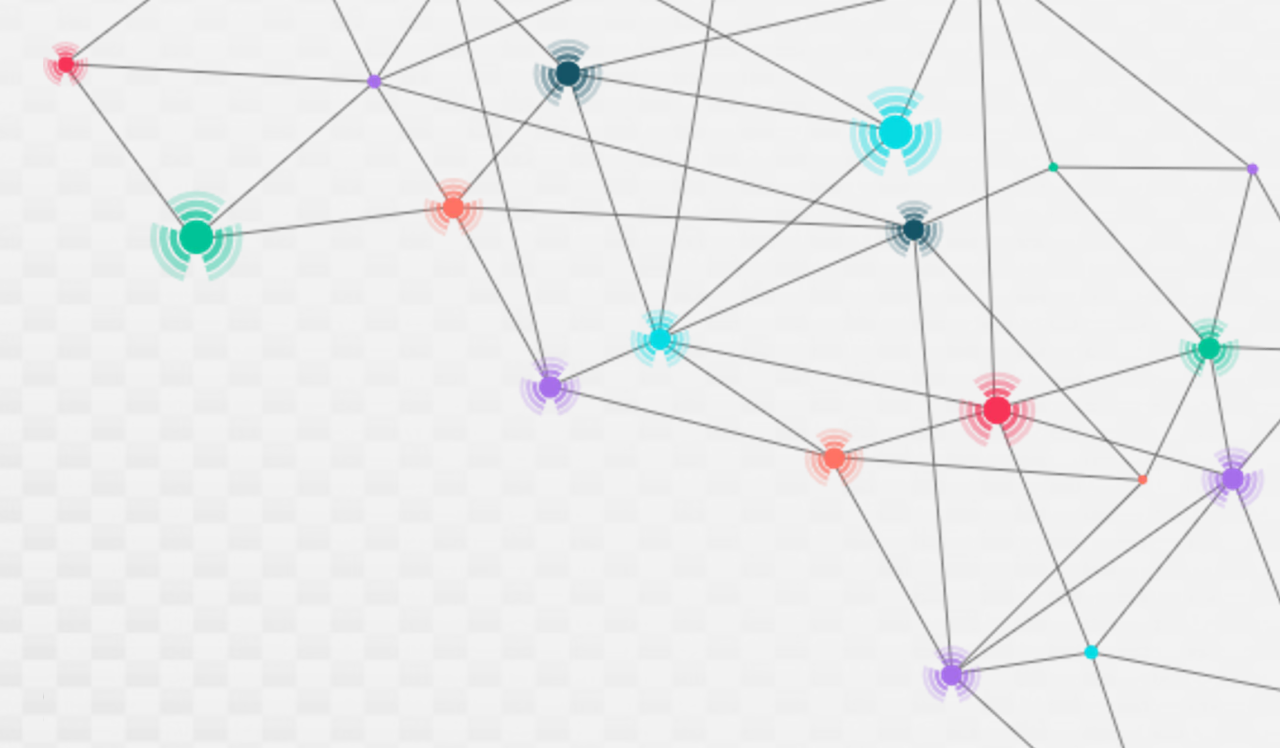


Finalised RF shared with MA, 2020



# 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).

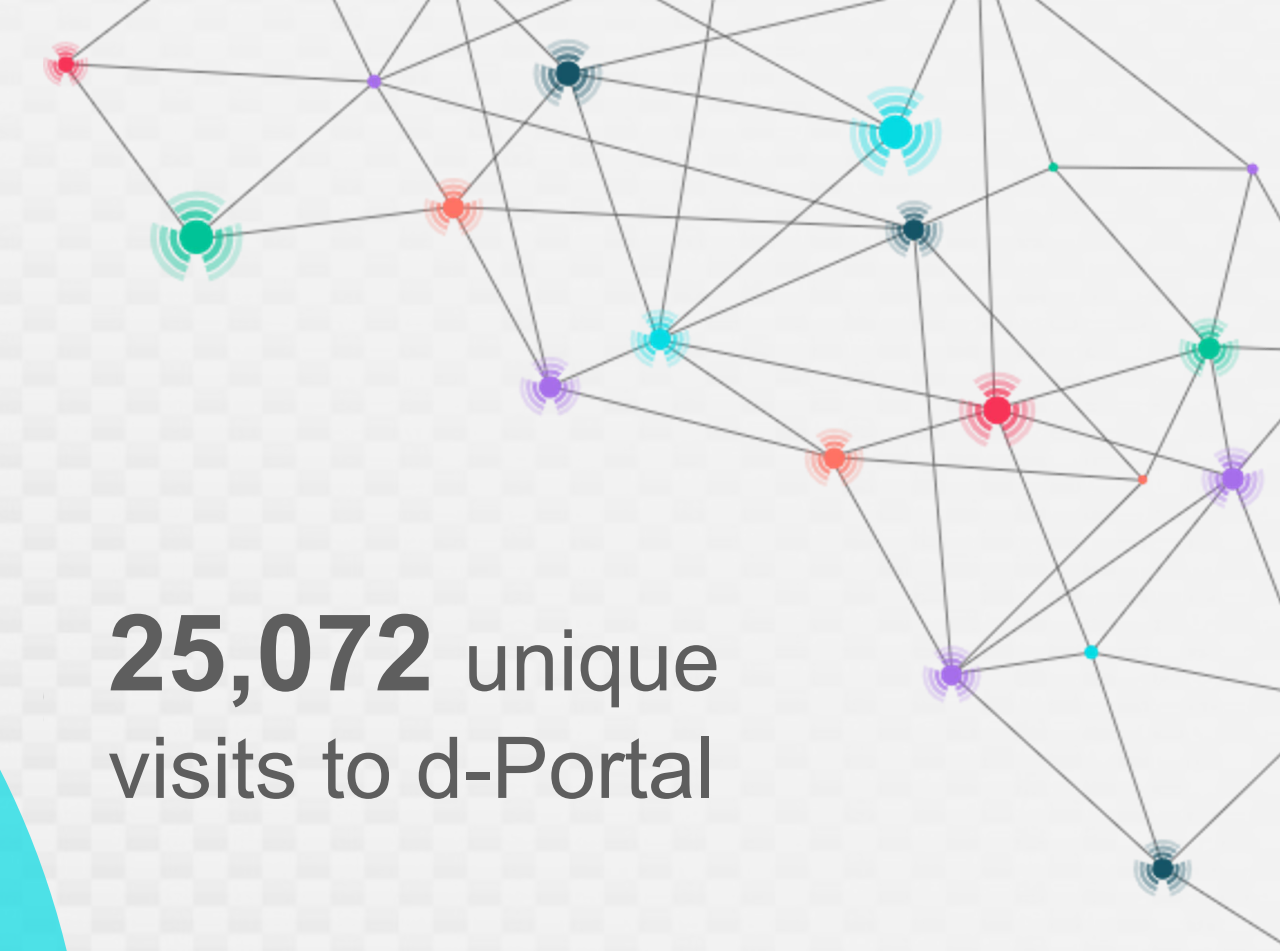


## Section 2: Results Framework Table

Outcome 1: Significant improvement in the quality of data published to IATI								
Outcome Indicator	Data source	Baseline	Target 2020	Target 2021	Target 2022	Target 2023	Target 2024	Target 2025
<b>Outcome Indicator 1.1</b> Percentage of publishers whose Data Quality Index score increases above baseline.  <i>The results from monitoring of this indicator will be disaggregated by metric assessed (e.g. timeliness, comprehensiveness, coverage) and also by publisher annual total spend<sup>1</sup>.</i>	Data Quality Index to be developed by mid-2021 through a consultative process with IATI community members. The index should include revised measures for timeliness, comprehensiveness and forward-looking data quality. It may also include measures for coverage and traceability, among others, and will attempt to quantify data users' level of trust in published data and utilisation of the gender marker, as feasible.	TBD in 2021	N/A	Baseline	20% above baseline	30% above baseline	40% above baseline	50% above baseline
<b>Outcome Indicator 1.2</b> Percentage of publishers whose scores in the current IATI Dashboard increase above baseline, or that maintain a score of 100% once achieved (based on timeliness, comprehensiveness and forward-looking nature as currently assessed). <sup>2</sup>  <i>The results from monitoring of this indicator will be disaggregated by</i>	IATI Dashboard	Overall 0%	Overall 20%	Overall 36.0%	Overall 48.8%	Overall 59.0%	Overall 67.2%	Overall 20%
		Timeliness 4.5%	Timeliness 23.6% <sup>3</sup>	Timeliness 38.9%	Timeliness 51.1%	Timeliness 60.9%	Timeliness 68.7%	Timeliness 23.6%
		Comprehensiveness	Comprehensiveness	Comprehensiveness	Comprehensiveness	Comprehensiveness	Comprehensiveness	Comprehensiveness

- **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.





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

**Outcome 1: Significant improvement in the quality of data published to IATI**

**26%** of publishers publishing every quarter or more

**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

**379,000** impressions and **671** mentions of IATI on Twitter

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

**95,346** unique visitors to the IATI website

**94** IATI members

**63%** of members attending the annual Members' Assembly



# SUCCESSSES 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

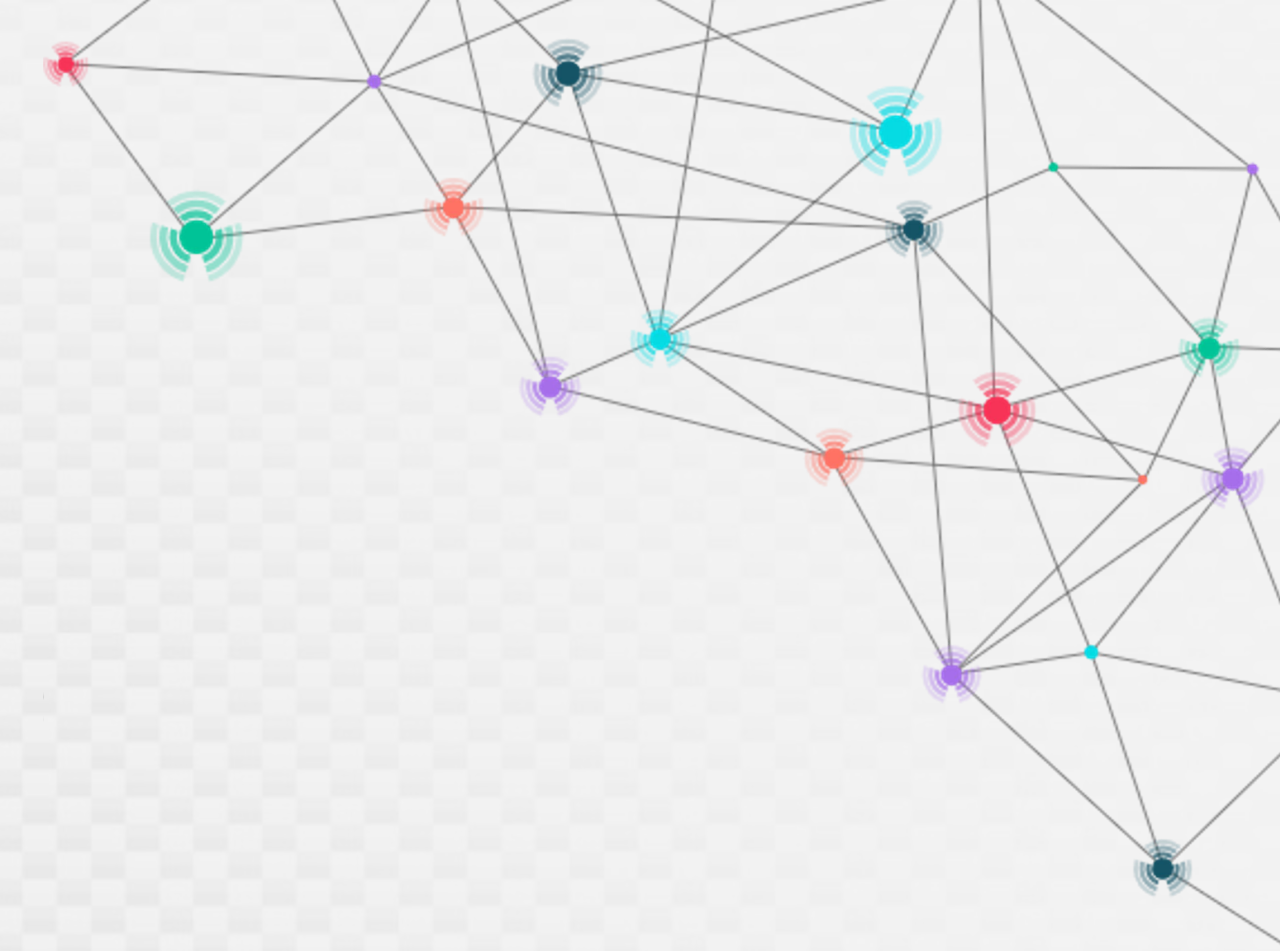


- Outcomes and Indicators chosen for their **utility and feasibility**.
- **‘Aspirational indicators’** included; some indicators will only be measurable over time contingent on the development or maturity of relevant tools.
- The IATI Secretariat will conduct an **annual data collection process** in 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.



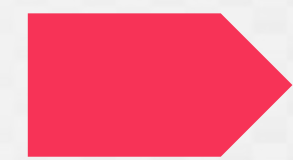


# NEW SOURCES OF DATA IN THE WORK PLAN



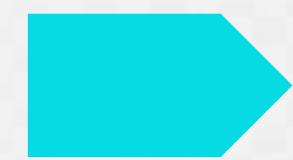
## Overall

- 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





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Discussion &  
Q&A



Session 11:

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# Financial overview 2020

Leo Stolk, Theo van de Sande  
IATI Governing Board

*MA 2020; 2 December 2020*





# FINANCIAL OVERVIEW

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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



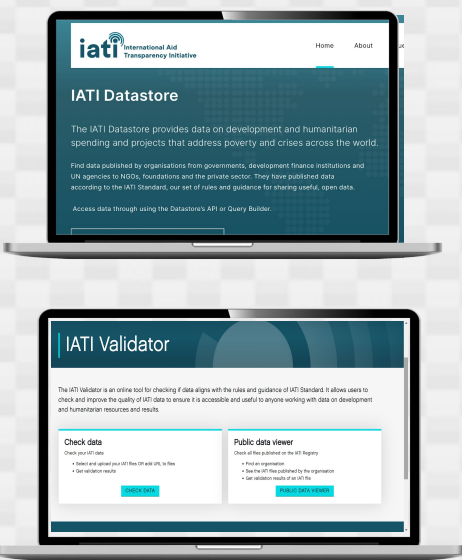
# 02. The Facts



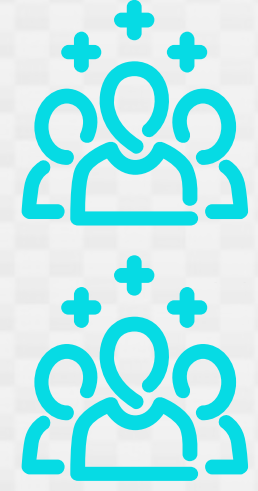
Technical Stock Take



Datastore and Validator



Partner country data access tool



Communities of Practice, WG & IATI Connect



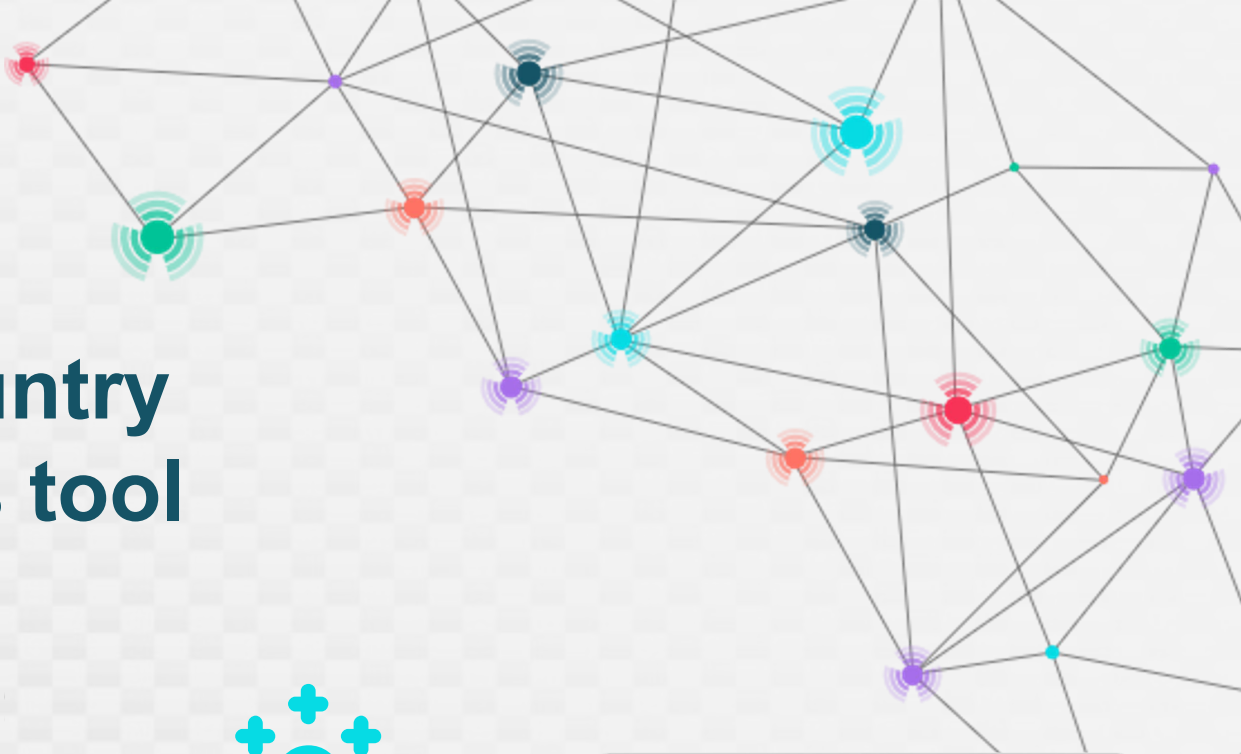
API Gateway



Semantic Data Layer (replacing d-portal)



Publishing Tool



# 03. The Outlook





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**ANY QUESTIONS**

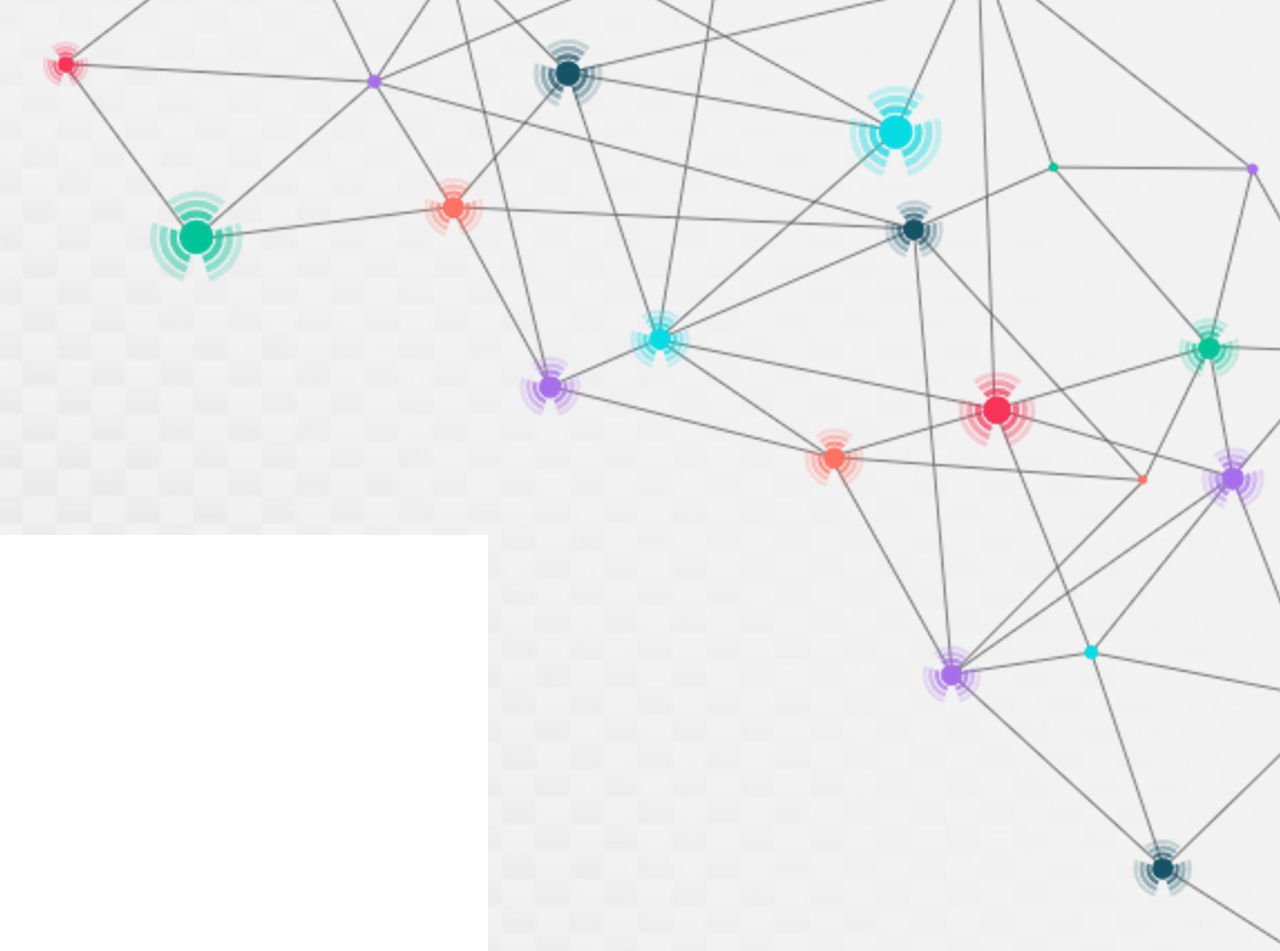


# 15 min break

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Time for  
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Session 12:

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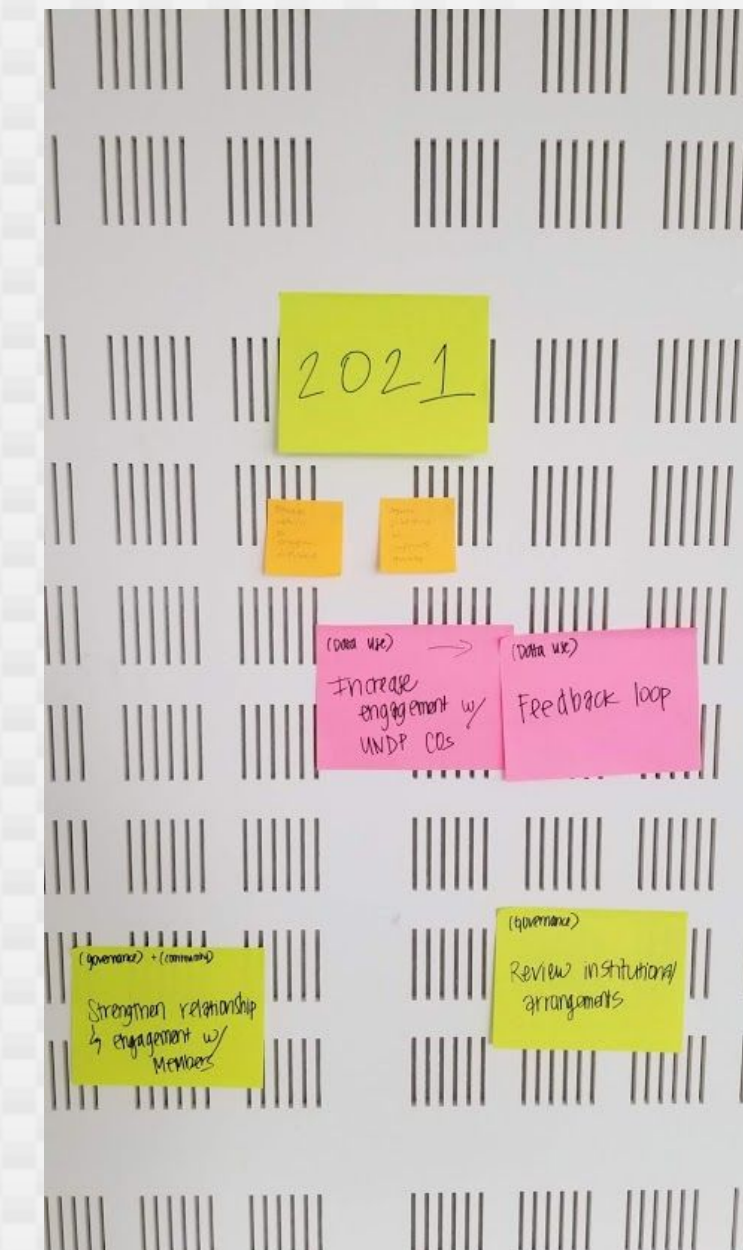
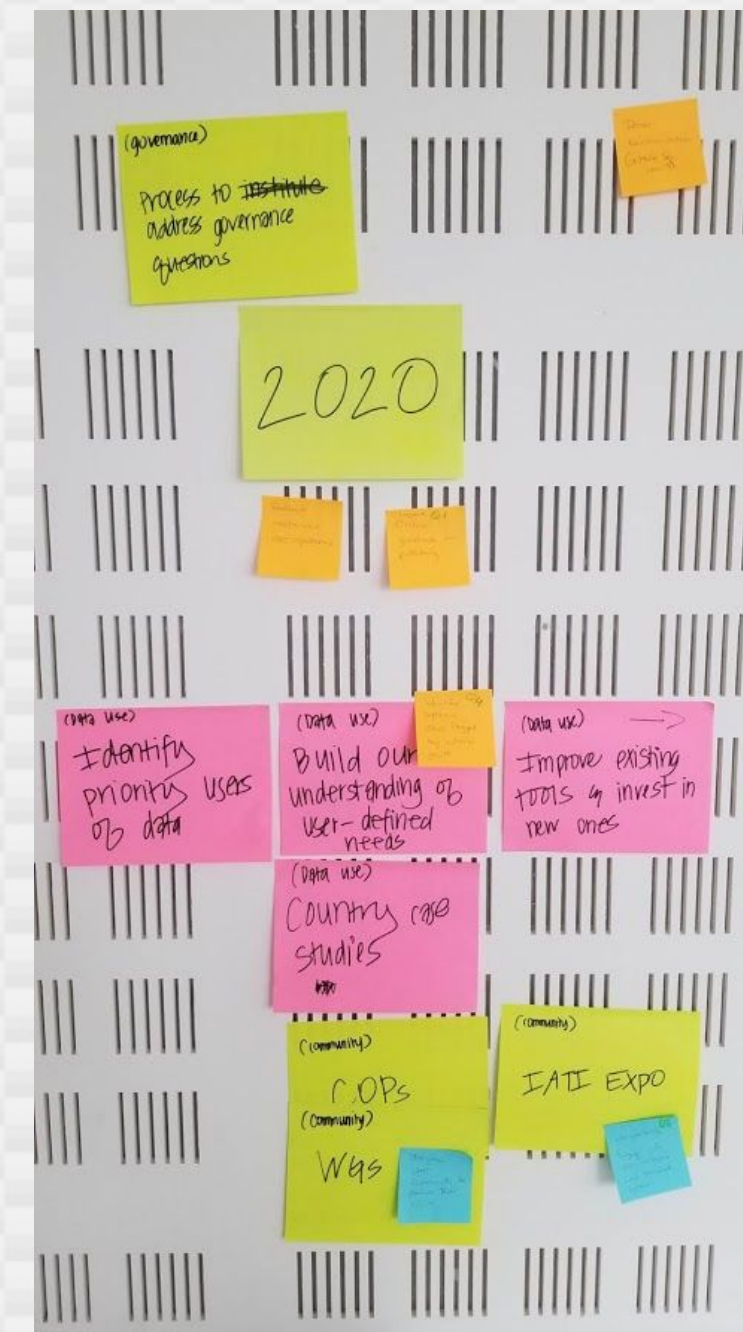
## Annual Work planning

Moderator, Theo van de Sande  
Presenter Annelise Parr  
Secretariat Coordinator

*MA 2020; 2 December 2020*



# Step 1, step 2, step 3



Task Name (from Strategic Plan)	Start	Finish	2020				2021				2022				
			Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
and work proactively with stakeholders to identify approaches to eliminate those barriers. (COUNTRY CASE STUDIES)															
Work with data users from national governments at country level to identify and address systemic issues with the quality of published data;	01/01/20	31/12/20		█											
Increase engagement with UNDP Country Offices	01/01/21	31/12/21						█							
Invest in identifying real use cases and challenges, promoting a demand-led approach to improving data quality by establishing direct feedback loops between data users and data publishers;	01/01/21	31/12/21						█							
<b>Capacity building</b>	01/01/22	30/12/22											█		
Establish partnerships with organisations that have existing networks and programmes in capacity development, as a way to extend and multiply our own efforts to strengthen data literacy.	01/01/22	30/12/22											█		

# Step 4 and more - the detailed work plan



Activity Detail	2020 Activity ID	B. Budget holder	C. Responsible	D. Staff cost only	Non-recurrent cost (one-off expenditure)	E. Q1 budget	F. Q2 budget	G. Q3 budget	H. Q4 budget					
<b>5 Strengthen the IATI Community</b>														
5.A.1: Support long-term visioning and day-to-day management of the COPs (Ongoing consultancy + intern)		UNDP	UNDP	Yes	<input type="checkbox"/>	\$20,325	\$20,325	\$20,325	\$20,325					
5.A.2: COP Engagement Calendar and Strategy drafted and delivered. Focus on developing and expanding the IATI community, and especially on strengthening engagement with country-level partners (government, civil society, etc) and reflecting their needs in IATI tools and processes.		UNDP	UNDP	Yes	<input type="checkbox"/>	\$0	\$0	\$0	\$0					
5.A.3: Contingency fund to meet requests by COPs for small funds to support their work (Per SOPs; funds disbursed only upon approval by Board)		UNDP	UNDP		<input type="checkbox"/>	\$5,000	\$5,000	\$5,000	\$5,000					
5.B: Hosting and maintenance fees for the IATI Digital Platform (annual)	5.B.2	<b>4 Consolidate Technical Core</b>				-	<input type="checkbox"/>	\$52,750	\$95,250	\$72,750	\$86,250			
5.C.1: Trialing a new IATI Community Event (Slated for in-person in November 2021, TBD based on COVID-19 situation); venue and facilitation costs, travel fund, branding costs. Parallel planning will continue to respond in case there is no possibility for in-person travel; budget revision will be carried out as needed.	5.D.1	4.A.1: Validator: Hosting, maintenance and improvement of in-house tool				4.B.1	DI	DI	Yes	<input type="checkbox"/>	\$0	\$0	\$0	\$0
		4.A.2: Registry: Hosting, maintenance and improvement contract				4.B.3	DI	DI		<input type="checkbox"/>	\$11,250	\$11,250	\$11,250	\$11,250
		4.A.3: Datastore: Hosting and maintenance contract				4.B.4	UNOPS	DI		<input type="checkbox"/>	\$0	\$22,500	\$0	\$22,500
5.C.2: Showcasing COPs at IATI Community Event (promotional materials, signage etc.) if in-person event is		4.A.4: d-portal: Hosting and maintenance contract				4.B.9	DI	DI		<input type="checkbox"/>	\$5,000	\$5,000	\$5,000	\$5,000
		4.A.5: Technical server costs				4.B.7	DI	DI		<input type="checkbox"/>	\$2,500	\$2,500	\$2,500	\$2,500
		4.A.6: Additional outsourced developer/consultant capacity				4.B.6	DI	DI		<input checked="" type="checkbox"/>	\$25,000	\$25,000	\$25,000	\$25,000
		4.B: Publishing tool options: UX research, requirements, TOR, build if required; NB: Costs presented here are dependent on outcome of options analysis, and these are speculative only				4.B.5	DI	DI		<input checked="" type="checkbox"/>	\$0	\$20,000	\$20,000	\$20,000
		4.C: Semantic data layer: UX project, TOR, draft designs, scope, procurement if required					DI	DI/UNDP		<input checked="" type="checkbox"/>	\$9,000	\$9,000	\$9,000	\$9,000
		4.D: API Gateway: consultation, design, build, launch; Budget TBC once designed					DI	DI	Yes	<input checked="" type="checkbox"/>	\$0	\$0	\$0	\$0
		4.E: Publishing statistics: Undertake community												
		6.A.3: Develop, design, and translate biannual (2x/year) communications products outlining progress on implementing the IATI SP					UNOPS	DI/UNDP		<input checked="" type="checkbox"/>	\$0	\$3,000	\$0	\$3,000
		6.A.4: Develop regular bulletins and newsletters, content on social media and other necessary communications channels.					DI	DI/UNDP	Yes	<input type="checkbox"/>	\$0	\$0	\$0	\$0
		6.B: Deliver IATI Annual Report 2020; engage external drafter to help conceptualise IATI Annual Report as a flagship comms product; design and translation services					UNOPS	DI/UNDP/UNOPS		<input checked="" type="checkbox"/>	\$0	\$25,000	\$25,000	\$0
		6.C.1: Website: Ongoing translation of website into French.					DI	DI		<input type="checkbox"/>	\$2,750	\$2,750	\$2,750	\$2,750
		6.C.2: Website: Redesign Data Use Section of website and translate into French. Also contingency for unforeseen website design updates.					DI	DI/UNDP		<input type="checkbox"/>	\$5,000	\$5,000	\$5,000	\$5,000

	\$10,250	\$48,250	\$45,250	\$23,250
	\$0	\$0	\$0	\$0
	\$0	\$0	\$10,000	\$10,000





- **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

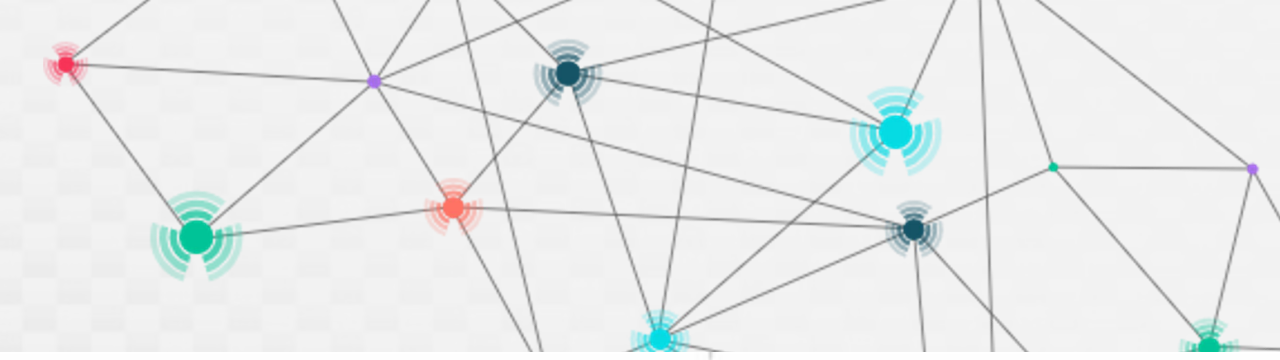
- **8. Institutional arrangements**

- Support Working Groups (substantive and logistic support) as key governance mechanism
- Monitor Results Framework
- Ongoing activities
  - Support Board
  - MA
  - Financial management





# Proposed budget 2021



## Proposed Y8 budget

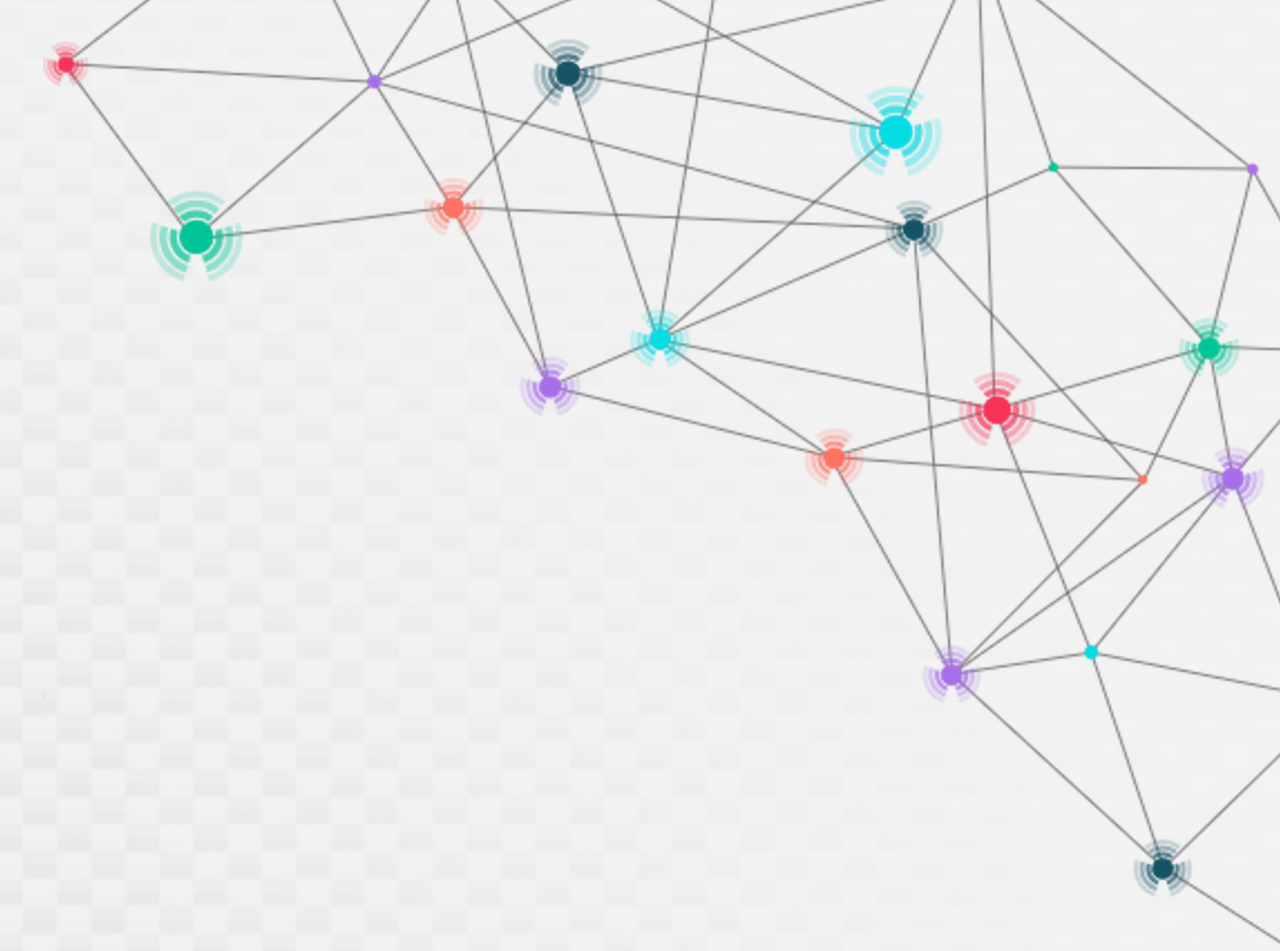
Summary: Activity / workstream		Summary: Personnel / workstream	
1. Partner country analysis and support	\$50,500	1. Partner country analysis and support	\$117,318
2. Improve the Quality of IATI Data	\$0	2. Improve the Quality of IATI Data	\$205,652
3. Promote Systematic Data Use	\$218,200	3. Promote Systematic Data Use	\$241,429
4. Consolidate Technical Core	\$307,000	4. Consolidate Technical Core	\$668,224
5. Strengthen the IATI Community	\$486,200	5. Strengthen the IATI Community	\$242,210
6. Communications	\$127,000	6. Communications	\$253,595
7. Outreach	\$25,000	7. Outreach	\$124,878
8. Institutional Arrangements	\$155,239	8. Institutional Arrangements	\$243,424
	<b>\$1,369,139</b>		<b>\$2,096,730</b>
<b>Total Activities</b>	<b>\$1,369,139</b>	<b>Total personnel</b>	<b>\$2,096,730</b>
		<b>Total in kind</b>	<b>\$291,308</b>
		Total management fee 8%	\$172,165
		UNOPS 1%	\$24,288
		Annual budget with in-kind	\$3,953,630
		<b>Annual budget without in-kind</b>	<b>\$3,662,322</b>
<b>Reserve (Contingency, 15% of Y6 annual budget) for Y7 implementation</b>	<b>\$631,249</b>	<b>TOTAL annual budget with contingency reserve</b>	<b>\$4,293,571</b>

## 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



<https://pngtree.com/so/ambitions> ambitions png from pngtree.com





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**ANY QUESTIONS**



Session 13:

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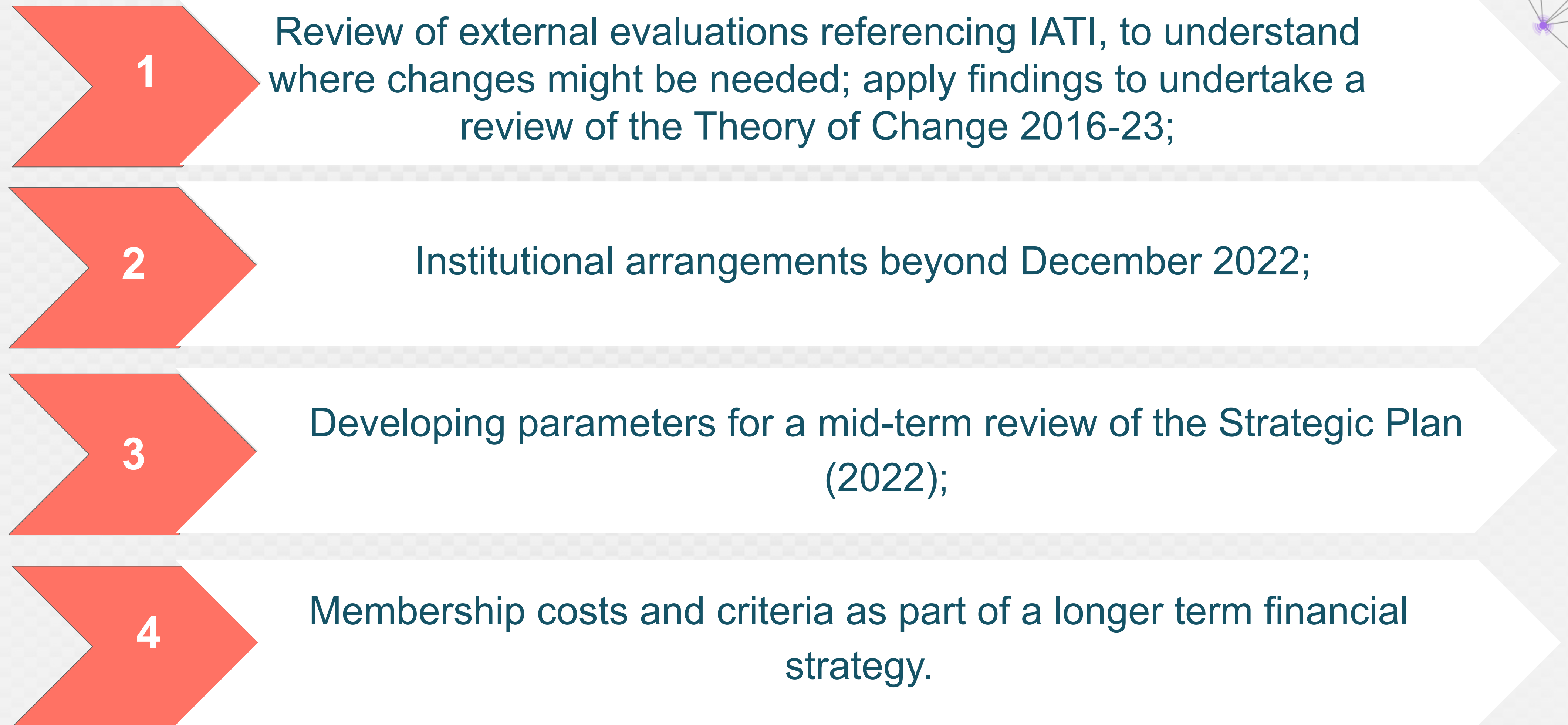
# Institutional Working Group

Joseph Barnes  
IATI Governing Board

*MA 2020; 2 December 2020*



# New Institutional Working Group - Discussion on Scope





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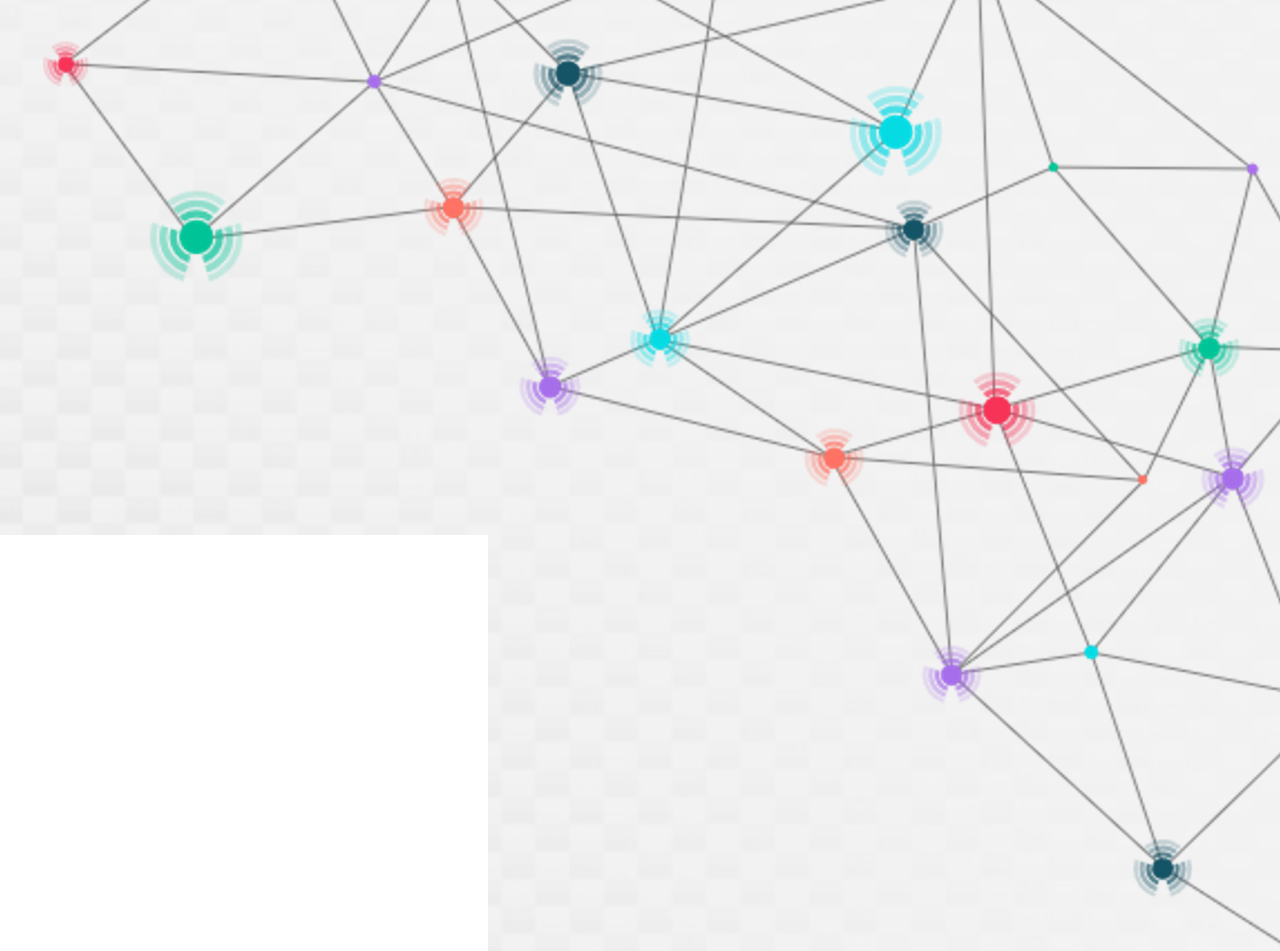
**ANY QUESTIONS**

# 15 min break

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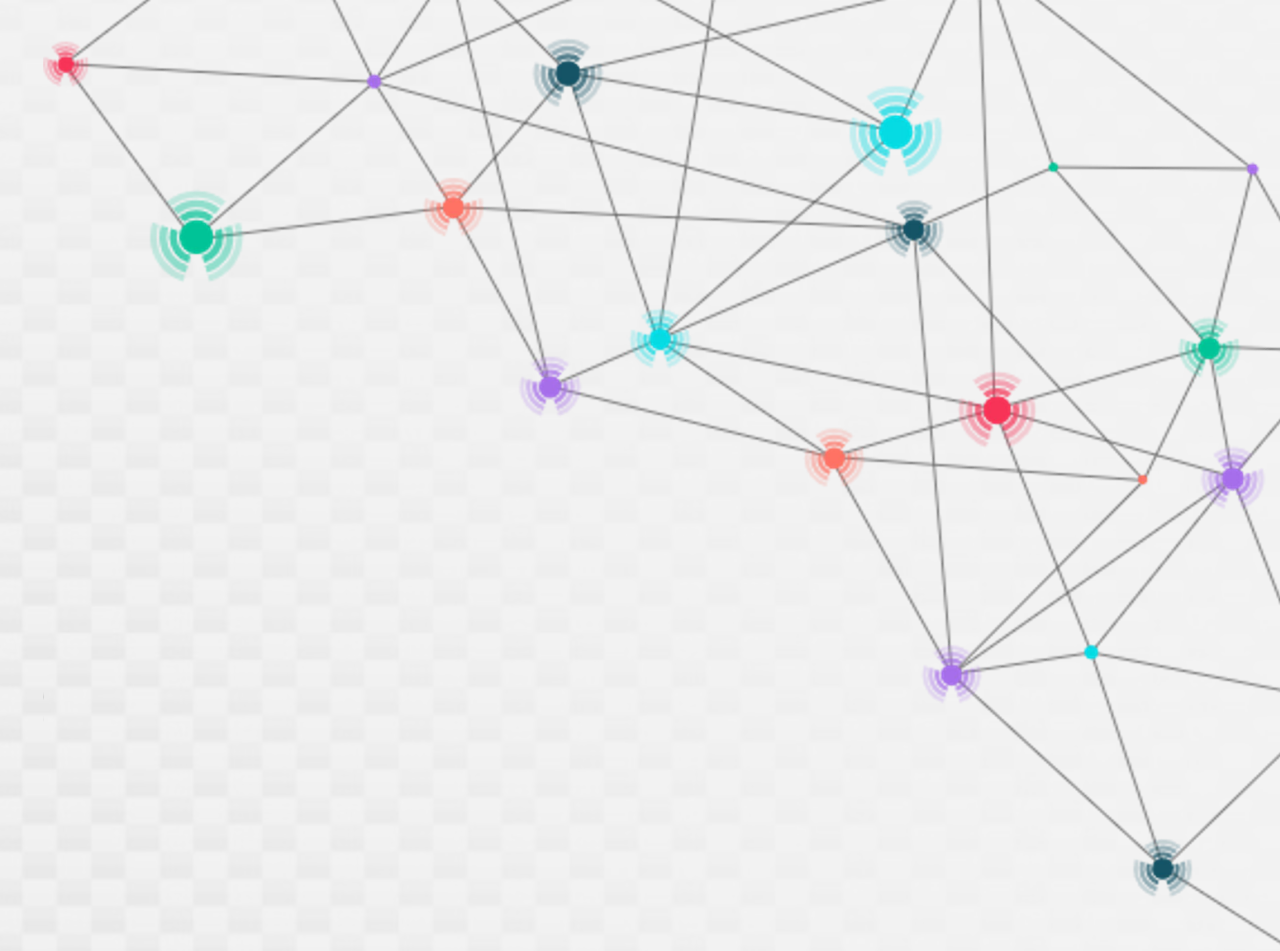
# Session 14: Chair closes 2020 MA

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# FINAL REFLECTIONS



# Close of Day 2

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