![IATI - International Aid Transparency Initiative]

Annual Members' Assembly
11-12 September 2019
European Commission VM-2 building
Brussels, Belgium

IATI Secretariat Technical Update 2019

Technical Audit (August 2018)

As mandated by the Members' Assembly 2018, a panel of experts was appointed by the Governing Board to undertake a Technical Audit of the products that underpin IATI. The audit resulted in an agreed set of priorities for the Technical Team's work; these are detailed in the full report with recommendations summarised in this blog.

Technical Team staffing

The Technical Team has been strengthened in line with the recommendations of the Technical Audit and several new staff have been appointed since the last Members' Assembly: A new developer joined the team in August 2018, followed by a new Senior Developer in September, a new Business and Data Analyst in January and Senior Developer in February who resigned before the end of the probation period. Wendy Thomas joined as the full-time Technical Lead for IATI in March 2019, consolidating functions previously carried out by Bill Anderson and other team members. The Technical Team is currently exploring interim and longer term options to resource additional developer capacity. Full Technical Team staff profiles are available here.

Improved accountability

One of the new approaches introduced following the Technical Audit has been a quarterly meeting between the Technical Team and the Board's technical focal points. This provides an opportunity to review progress against the agreed work plan for the previous quarter and to agree priorities for the next quarter. The outcome of these meetings has been shared via a quarterly blog (view the most recent publication) as a means of keeping the wider community informed about progress.

Datastore

The Datastore had already been identified as a top priority before the Technical Audit and at the Technical Advisory Group (TAG) meeting in November 2018, it was announced that Zimmerman and Zimmerman had successfully bid and signed a contract to deliver IATI's new Datastore. The Technical Team has been working closely with Zimmerman and Zimmerman to manage the build of the new tool, which will provide timely and standardised access to all

data published to the IATI Standard. The Technical Team has performed rigorous testing of the datastore's API and engaged with the IATI community to manage implementation of the new API. The team is currently working with the supplier to design a user-friendly query builder interface which will enable non-technical users to undertake simple queries of IATI data. The Datastore API was soft-launched in August for public testing by users; the query builder will follow shortly.

IATI Validator

The Technical Audit prioritised improving IATI's validation service to improve the quality of IATI data. The Technical Team investigated the different validation options already available to provide advice to the Board on whether a new tool should be built in-house or outsourced. Based on the outcome of this review, the decision was made to outsource the build of a new validator tool. Following UN Financial Rules, the Secretariat secured a vendor for the new validation service, selecting Data4Development in March. The Technical Team has been managing the outsourced build of the tool, which will check data against all rules in the IATI Standard and offer API endpoints so that the service can be easily linked to other IATI tools. The team also met with vendors of both the Datastore and Validator to discuss the integration of these two products, which involved some changes to the original specification.

The Technical Team is working closely with Data4Development to ensure that all IATI rulesets are correctly implemented in the new tool, and to help design the tool's front-end. The Team has also devised a communications plan including a detailed Q & A document to help IATI publishers and users understand what to expect with the introduction of improved validation. The Validator will be available soon after the Members' Assembly 2019.

IATI Standard guidance review

New content has been added to existing IATI Standard guidance. This work has included researching and consulting with the community on previous gaps and reporting issues, for example, security concerns around the publication of location data. Over 30 IATI community members have provided feedback on the guidance via webinars with the Technical Team and suggested new areas in which guidance was needed. Once finalised, these guidance pages will be made public for IATI publishers and data users to use.

IATI Sustainable Development Goals (SDG) guidance

The Technical Team supported the IATI SDG working group to develop guidance on how to report and use data SDG data published to IATI. Following a broad community review, the guidance has been finalised and the necessary codelists have been added to the IATI Standard. The guidance includes 'tagging' SDGs at both activity and results level, to reflect incoming resources as well as their outputs. This guidance is now available for use, and members are encouraged to consult and use it.

Supporting IATI publishers and data users

The Technical Team continues to provide support to organisations publishing IATI data. From July 2018 to July 2019 the team received 1875 new queries via the IATI support helpdesk and resolved on average 146 tickets per month, with a 97% satisfaction rating. An important milestone was achieved this year, when IATI publisher numbers reached and exceeded 1000.

Enhancing d-portal

In response to requests from users at the last Members' Assembly, the Board approved a budget revision to significantly increase the amount available for improving d-portal.org. Major enhancements have been undertaken in addition to regular updates, fixes and cosmetic changes throughout the site. These include the addition of a humanitarian 'flag' marking activities related to a particular humanitarian crisis, the improvement of transaction types for use by reporting organisations, and the provision of graphs of different transaction types within a given activity.

Improving visual aspects across the site, new bar graphs have replaced pie charts to show an activity's sector and country information, making it easier to visualise the data. Changes have been made to the CSV data download feature, allowing users to extract data specifying the sectors and sector groups of activities. The unique identification codes of organisations and their organisation types are now more clearly displayed across d-portal.

Website improvements

Following significant investment in the launch of the new website in 2018, the Technical Audit recommended lower priority to improving the website in 2019. It was nonetheless a clear requirement of members to move ahead with offering a French version of the iatistandard.org site, and this was launched in February and is updated at least twice per month to ensure the content remains aligned with the English version. Translated codelists have been added to reference.iatistandard.org, providing publishers with codes to represent data about their organisations and activities.

A project is underway to migrate the content currently held on IATI's reference site to IATI's main website iatistandard.org to consolidate information about the IATI Standard itself, alongside other key details about the initiative. The first step involves understanding user experiences of navigating across iatistandard.org, reviewing iatistandard.org information architecture and designing new pages within the main IATI website to host the IATI Standard guidance.

Dashboard improvements

Following the recommendation of the 2018 Technical Audit, IATI developers have been working on moving the IATI Publishing Statistics section from dashboard.iatistandard.org/ onto a separate website, in order to better meet the different needs of internal and external users

and to improve the tool's performance. The code has now been split, enabling the launch of the Dashboard and Publishing Statistics as two separate platforms:

- The IATI-Dashboard
- The new Publishing Statistics portal

For users, the viewing and browsing experience will not change; all links have been updated to point to either portal's pages and a redirect system has been provided to automatically redirect existing bookmarks to the new Publishing Statistics url's version of the pages. This work has led to a significant improvement in the performance, and now both tools can aggregate, crunch and rebuild the pages on a daily basis.

Deprecation of IATI Standard version 1

At the 2018 Members' Assembly, members agreed to deprecate version 1 of the IATI Standard, and at the TAG meeting in November agreed a date of 30 June 2019 for this to be completed. The deprecation of version 1 of the IATI Standard was concluded on 1 July 2019 following engagement with over 200 organisations to support them to publish to version 2; the majority of organisations using version 1 have now made this transition. This improves the usability of IATI data, enabling greater standardisation between datasets and the ability to publish more comprehensive information.

Updating the Single Source of Truth (SSOT)

The Technical Team continued to work on updating the SSOT, the collection of rules and descriptions about elements of the IATI Standard. Starting from version 2.01, the Team identified all rules contained within the IATI Standard, and ensured that these are captured within the SSOT ruleset. This work has included increasing the number of rules that are considered as 'machine readable', which can be checked and enforced by code. The same process has been applied for version 2.02 and 2.03 of the Standard.

Kathmandu TAG and Copenhagen Technical Workshop

As part of its continuing work with the IATI community and in support of major events, the Technical Team prepared and led a number of sessions in November 2018 (TAG, Kathmandu, Nepal) and in June 2019 (Technical Workshop in Copenhagen, Denmark).