



International
Aid Transparency
Initiative



IATI Strategic Plan

(2020-2025)

Foreword

Open and freely accessible data is a cornerstone for reinforcing trust and improving coordination among all partners to achieve more effective development outcomes and increase impact. If, as we have committed, we aim to realise the ambitious Sustainable Development Goals by 2030, multi-stakeholder initiatives such as the International Aid Transparency Initiative (IATI) are essential to present a holistic view of development and humanitarian efforts. In addition, IATI is essential in ensuring that data-driven policy formulation and partnership-building are at the forefront of sustainable development conversations.

In just over a decade since its founding in 2008, our initiative has grown from 14 founding signatories to a global membership of over 90 governments, multilateral institutions and civil society and private sector organisations, with over 1,000 organisations having published more than one million activities according to the IATI Standard.

Our members, data users and publishers support IATI because they recognise that better transparency is not an end in itself, but an essential step towards improving the coordination, accountability and effectiveness of resources to maximise their impact on the world's poorest and most vulnerable people.

This five-year Strategic Plan (2020-2025) anticipates and prepares us for the next generation of partnership and data needs, ensuring that IATI responds to rapidly-evolving development, open data and transparency agendas, and supports all partners to increase their use of development and humanitarian data. Stakeholders from governments, civil society, multilateral organisations, the private sector and others were consulted in the formulation of this bold and forward-looking document, which aims to help IATI capitalise on its strengths, address its weaknesses and maximise its contribution to achieving sustainable development outcomes.

In my capacity as Governing Board Chair, I look forward to working with the wider IATI community to implement this ambitious strategy and to deliver on its goal of supporting better decisions and better development outcomes through the publication and use of good quality data on development and humanitarian resources.



Theo van de Sande
Chair of the IATI
Governing Board

Contents

Acronyms	4
The story so far.....	5
The challenges ahead for development resourcing and humanitarian response	7
The challenges ahead for IATI	9
Next generation IATI	11
Cross-cutting action areas to achieve our objectives	18
Annexes	25
Theory of Change (2020-2025).....	25
Annex A: Updated Theory of Change diagram	26
Annex B: Monitoring of 2016-2023 Theory of Change as part of the 2020-2025 Strategic Planning process.....	27
Draft Results Framework*	31
Acknowledgements.....	32

* Please note that the Strategic Plan's Results Framework is to be further discussed with members at 2019 Members' Assembly. Once finalised, it will be included here as an annex.

Acronyms

AI	Artificial Intelligence
AfDB	African Development Bank
AMP	Aid Management Platform
AIMS	Aid Information Management System
COP	Community of Practice
CSO	Civil Society Organisation
ECHO	European Commission's Civil Protection and Humanitarian Aid Operations
EDRIS	European Commission's Emergency Disaster Response Information System
FTS	Financial Tracking System
GPEDC	Global Partnership for Effective Development Co-operation
GPSDD	Global Partnership for Sustainable Development Data
MA	Members' Assembly
IATI	International Aid Transparency Initiative
NGO	Non-governmental Organisation
SDGs	Sustainable Development Goals
SOPs	Standard Operating Procedures
TAG	Technical Advisory Group
ToC	Theory of Change
TOSSD	Total Official Support for Sustainable Development
UN	United Nations
UNDP	United Nations Development Programme
UNOPS	United Nations Office for Project Services
USAID	United States Agency for International Development
WG	Working Group

01

The story so far



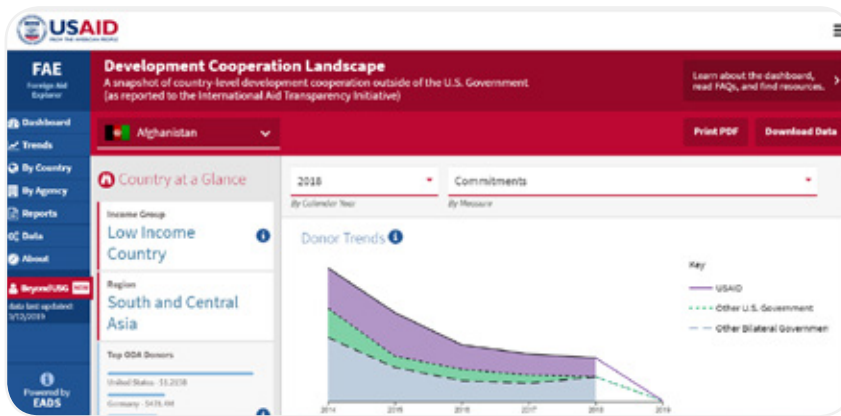
← Oxfam uses IATI data in their online portal Oxfam Atlas to map development and humanitarian activities across the world.

<https://atlas.oxfam.org>

The International Aid Transparency Initiative (IATI) was established by the development community to enable organisations to publish structured and timely data on their activities to improve their effectiveness and impact. The initiative has grown from a statement of intent by 14 donor signatories at the Third High Level Forum on Aid Effectiveness in Accra, Ghana in 2008 to become a global initiative and an open data standard with more than 1,000 publishers and over 90 members. It has become established as a key standard and recognised language for the exchange of information between development and more recently also humanitarian actors.

The availability of such detailed information has enabled greater cooperation, allowing organisations and governments to make more informed policy decisions, and collectively, to achieve more.

Since IATI was launched in 2008, the world has changed significantly, and so has IATI. The initiative has exceeded expectations in many areas, and the Standard has expanded to meet the needs of new types of publishers, such as those in the humanitarian community, through successive updates to the Standard.



← USAID’s Development Cooperation Landscape tool uses IATI data to improve its collaboration with other organisations working in the same country.

<https://explorer.usaid.gov/donor>

The number and range of publishers has grown well beyond those originally envisaged, and many other stakeholders including publishers themselves are using IATI data for purposes that had not been anticipated.

For example, publishers have used their IATI reporting to build transparency portals to communicate about what they do with their partners and the outside world, while governments of partner countries have used IATI data to identify and establish partnerships with organisations running projects in their countries but not known through formal channels. Publishing by UN agencies has shed light on a great deal more information than previously shared, showing in detail their use of assessed contributions and the kinds of activities they are engaging in.

Growing out of the aid effectiveness agenda, beginning with the Paris Declaration on Aid Effectiveness in 2005 and the Accra Agenda for Action in 2008, IATI initially focused on promoting greater transparency of aid flows for management and accountability purposes.

IATI’s theory of change foresaw an environment in which the more good quality data that was made available, the more users would wish to access and use it to coordinate activities and avoid duplication, ultimately contributing to the achievement of sustainable development outcomes. While the original analysis identified a range of potential uses, there was a strong emphasis on data use by partner country governments and an assumption that most publishers would be traditional aid donors.

In reality however, publishers have in many cases also become primary users of the data, and the original intended beneficiaries of IATI data continue to look for the information they need through other channels. IATI’s intended outcomes have yet to be fully realised, and there is further work to do towards meeting its original mandate, while preparing to address key challenges ahead.

02

The challenges ahead for development resourcing and humanitarian response



↑ UN Photo

The challenges ahead for development resourcing and humanitarian response are increasingly diverse and at the same time closely linked. Through its efforts to ensure the Standard offers the fields necessary to underpin the work in each of these sectors, and to bring development and humanitarian publishers together as members of the same initiative, IATI has a unique opportunity to contribute concretely to the efforts of stakeholders in both sectors.

At the global political level, while significant progress was made in reducing poverty during the Millennium Development Goals era, the Sustainable Development Goals (SDGs) agreed in 2015, set out a much more ambitious and universal agenda for change.

The overall level of resources available for development remains well below the estimates required to meet the SDGs. Domestic resources are the main drivers of development, however, aid remains a key international resource in many countries where poverty remains high, and capacity to mobilise domestic resources is weak. Private sector resources are becoming increasingly important as drivers of change in the overall envelope of funding for the 2030 Agenda for Sustainable Development, as evidenced within the Addis Ababa Action Agenda (Third International Conference on Financing for Development, 2015).

The development landscape is becoming ever more complex, involving a multiplicity of actors including public and private, international and domestic. Achieving the global goals requires greater coordination at national, regional and global levels, with data-driven policy formulation and implementation.

Multi-stakeholder efforts such as those of IATI are essential to present a holistic view of all resources available for development, in order to build the partnerships necessary for lasting success.

Collective and concerted efforts will be needed, although in the context of IATI publishing, it will be important to ensure continued accountability of publishers for their individual performance as well.

Development and humanitarian interventions are increasingly linked in more and more complex ways, and providing development support most effectively requires a shift from an individual to a more networked approach.

In the context of growing fragmentation, it is still challenging for development actors to access and use data from different sources and combine it to build an overall picture of the resources available. This kind of information supports accountability efforts, and is essential in guiding decisions by partner country governments and providers of development support alike. It contributes to maximising the impact of individual and collective interventions in addressing an increasingly complex range of development and humanitarian activities dealing with climate change, migration and similar global challenges.

03

The challenges ahead for IATI

Data *quality* remains a challenge. Publishing to IATI is, and will always remain, voluntary and has been recognised by initiatives such as the Global Partnership for Effective Development Co-operation (GPEDC) and the Grand Bargain of the World Humanitarian Summit. Quality assurance of IATI data, as with all other open data, lies in the commitment of publishers and feedback from users. There has been a significant increase in the numbers of organisations publishing as a result of the introduction of mandatory reporting requirements by some government funders. While this has had a hugely beneficial impact on visibility for IATI, and significant increases in numbers of publishers, it has also brought new challenges in terms of harmonisation among those government funders, each of whom have mandated slightly different requirements according to their own priorities.

Additionally, when the focus is on meeting accountability requirements, the result is that publishers often report the bare minimum required fields, and fail to provide good quality comprehensive datasets and the specific information necessary to link their data with that of others and contribute meaningfully to achieving collective outcomes. It remains challenging therefore to find key information such as which organisations are operating in which locations, which resources are being

used and with which partners and what results are being achieved as a result.

While there are many examples of data *use* by partner country stakeholders, IATI data is not being used systematically by partner country governments in the way that the early architects of the Standard imagined. Despite the increasing availability of data showing location and sector-level information, the awareness and use of data by line ministries beyond key finance and planning portfolios has not yet become widespread nor systematically used in Aid Information Management Systems (AIMS), with anecdotal evidence that lack of use is due to the uneven quality of some data. Factors cited that would improve data quality include use of geolocation wherever possible, availability of multilingual documents, use of local language project names, making use of the humanitarian extension when appropriate and reporting on results by making use of the SDG results framework.

In addition, as more humanitarian actors began publishing to IATI since the Grand Bargain agreement at the World Humanitarian Summit in 2015, new challenges have arisen around the sensitivity of some of the data that is expected to be published.

The IATI community will need to consider how to deal with data sensitivity by different communities, not only in relation to humanitarian aid, human rights and women’s rights, but also in matters concerning the establishment of population policies and provision of support to NGOs. As a community and a platform that brings together both producers and users of data, IATI is well-positioned to address some of these issues and should learn not only from partner country governments but also from UN country teams and CSOs to understand why some data is considered more sensitive than others.

Whilst the challenges are significant, they are not insurmountable, and many IATI members are making impressive efforts to improve their own publishing and to use available data.

A renewed commitment by government donors and other organisations to publish more complete data from their development and humanitarian portfolios, together with a collective push towards using available data for better insight, will give IATI real impetus during the next five years.



UN Photo - Amanda Voisard

04

Next generation IATI

It is against the background of these challenges of data quality, data use and the need for a collective rather than an individual approach, that IATI sets out this clear strategic direction for its next

five years, aimed at capitalising on the initiative's strengths, addressing its weaknesses and maximising its contribution towards achieving sustainable development outcomes.



Our Vision

Development and humanitarian communities share good quality information on their activities and results, and use the information to work together more effectively towards achieving sustainable development.



Our Mission

To amplify efforts across the development and humanitarian communities by making the connections between organisations, their financial flows, programmes and results more visible, enabling them to manage international development efforts effectively and efficiently to contribute to the 2030 Agenda for Sustainable Development, and monitor the actual progress achieved on the ground against original intentions.



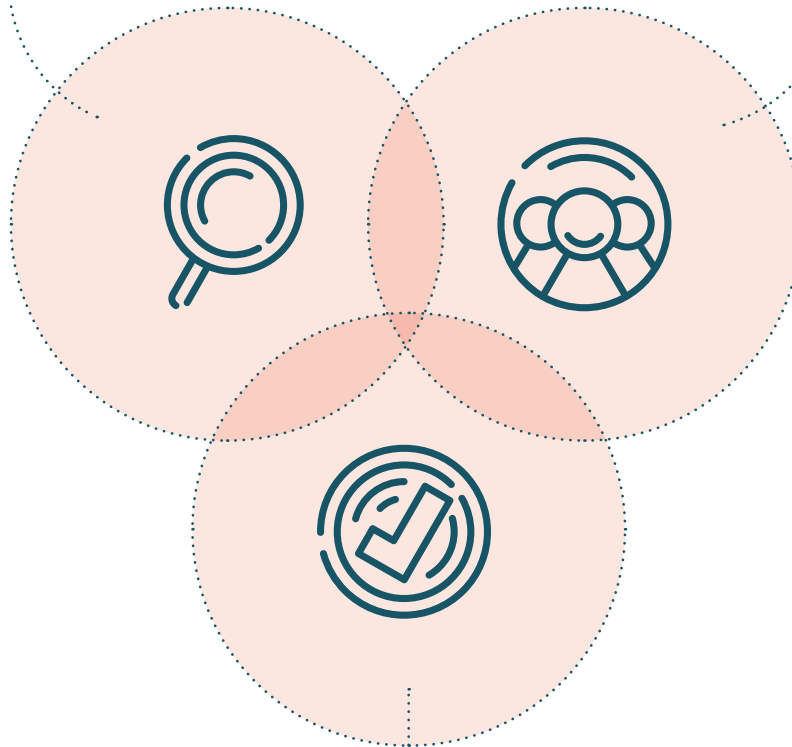
Our Goal

To support better decisions and better development outcomes through the publication and use of good quality data on development resources, activities, pledges and results.

Our three objectives

Drive a significant improvement in the **quality of data** published to IATI

Promote the **systematic use of IATI data** by development and humanitarian actors



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

These objectives are of equal importance, and are mutually reinforcing. Good quality data is a prerequisite for data use, while feedback from data users helps to drive improvements in data quality. The technical core provides an essential foundation to address both of these challenges, ensuring their interdependency. While these objectives aren't new for IATI, the level of ambition is significantly higher.

During this five-year period, IATI must move beyond gradual, linear progress to make a significant leap forward in order to maximise its impact, particularly in the context of contributing to the 2030 Agenda for Sustainable Development.

Objective 1

Drive a significant improvement in the quality of data published to IATI.

While the responsibility for data quality rests with publishers, IATI has, over the years, provided central support in many different ways to help publishers improve the quality of their data. Nonetheless, the quality of published data remains uneven and this affects the perceptions of reliability across the board, undermining IATI's broader efforts to increase awareness and use.

The existence of tools such as Publish What You Fund's Aid Transparency Index has had a beneficial effect among those organisations assessed, but work is still needed to fully understand what 'good quality data' means to different stakeholders, and put measures in place to raise the level of quality generally. Over the next five years, IATI will rely on having strong core tools such as its new Datastore and Validator to underpin efforts towards improving the quality of publishing.

By 2025, we will support current and new publishers to meet the highest standards of data quality through improved tools and guidance, establish our own metrics and use the IATI Dashboard to measure progress more effectively and assist publishers to publish better data.

Specifically, we will:

- Work intensively with publishers to assist them with increasing coverage, improving

frequency of publication and including all necessary strategic elements in their data;

- Based on a technical core in which publishers and users share the same interpretation of data quality, establish a set of metrics that strengthen IATI's Dashboard to stimulate improved quality of publishing and greater ease of use of data;
- Explore and exemplify good quality data for different types of publishers, based on actual user needs, to build a stock of sharable best practices;
- Identify quality issues that can be addressed through changes to publisher tools, and work with providers of those tools towards implementing such changes;
- Work with data users from national governments at country level to identify and address systemic issues with the quality of published data;
- Ensure there is a single source of clear, unambiguous online guidance on publishing and present it in different ways for different audiences;
- Develop feedback mechanisms so users can alert publishers to issues with their data, and promote the growing market for direct publisher support;
- Renew advocacy efforts with our key publishers seeking their commitments for internal investment in making data quality improvements;
- Work with the community to address challenges of donor harmonisation that have resulted from introduction by those donors of mandatory reporting requirements, so that partners may continue to 'Publish Once, Use Often' using IATI.

Objective 2



Promote the systematic use of IATI data by development and humanitarian actors.

In common with other open data initiatives, IATI's original theory of change assumed that once data was published openly, the users would come, and on this basis central investment in promoting data use was not considered to be essential. Instead, efforts focused on the supply side of the equation, working to encourage publishers to provide good quality data. Country experience has shown that data use depends on a more complex set of questions around data quality, accessibility and availability through country systems such as Aid Information Management Systems. Encouraging use of data requires proactive measures to support it, and understanding the barriers to data use and overcoming those barriers will be an important step for many in the data community.

The 2016-2018 IATI Data Use Strategy underscored that promoting data use should be a collective responsibility, and attempted to take this principle forward through the Data Use Task Force and Data Use Fund. Funded projects such as hackathons and group training for journalists and CSO networks achieved some small-scale success, although the reach of activities undertaken was often limited and the impact difficult to measure. The lack of robust and reliable data limited the kinds of projects that could be undertaken and therefore constrained progress in delivering the Data Use Strategy.

While the number of examples of ad hoc use of IATI continues to increase, progress has fallen short of the step-change in data use that is required in order to support partner countries to maximise IATI's contribution to sustainable development.

As publisher numbers and types increase and more and more groups of development actors become aware of IATI data, it is increasingly bringing value to a wider range of users than originally foreseen.

IATI data offers advantages to both publishers and users through its timeliness, traceability and comprehensiveness. It provides a basis for the essential integration of data on development and humanitarian finance and activities with budget and expenditure and other data in partner countries. It also strengthens financial management and accountability for how the funding is spent and what it delivers. By ensuring the Standard is robust, and tools to publish and use it are simple and accessible, IATI can continue to benefit many more different groups of users across the development community.

By 2025, we will work with our members, publishers and partners to strengthen data literacy and capacity for use of aid data, ensure that IATI data is readily accessible for all users and that simple, effective tools are freely available for all users to access and use IATI data.

Specifically, we will:

- Identify priority users of data, keeping in mind that these extend beyond government officials and include civil society organisations, human rights activists, journalists, parliamentarians and others, and expand support to meet their specific data needs, through IATI's core technical products;
- Work with stakeholders to undertake careful reviews of previous research by partners into the specific barriers to data use, such as availability of accessible tools, limited data literacy, current habits around data retrieval and handling, and trust in data generally, and work proactively with stakeholders to identify approaches to eliminate those barriers;
- Build our understanding of defined user needs through in-depth studies with selected partner countries and be clear about the extent to which IATI data can meet those needs;
- Ensure all users can access data by improving existing tools such as the IATI Datastore as well as d-portal.org or its successor, and invest in new tools that deliver data in the formats and levels of detail users need;
- 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;
- 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.

Objective 3



Strengthen the IATI Standard by consolidating its technical core, maintaining its infrastructure and reinvigorating its community of publishers and members.

With organic growth from the relatively narrow set of requirements of the early aid effectiveness agenda, successive updates to the Standard have made it richer and more complex. The addition of new fields and code lists to support the particular needs of diverse new user groups such as humanitarian stakeholders, and Development Finance Institutions and latterly UN System entities, has expanded publisher numbers and led to the recognition of the IATI Standard as one that is flexible and interoperable. However, adding further fields has arguably also made it more complex, impacting the usefulness, relevance and comparability of the data.

In addition to the Standard itself, IATI's core technical infrastructure comprises a number of tools, rules and systems including the **registry** which acts as a directory of publishers' datasets; a **Datastore** of all published data; and a **Validator** which serves to assist publishers in understanding whether their data meets the rules for publication.

External service providers also offer a range of tools to assist publishers of different sizes to publish their data. These tools are all interdependent and support different needs of IATI members. A vibrant **community** of technical experts contribute to maintaining the integrity of this ecosystem of tools and the rules that underpin them.

As user numbers expand and purposes of publishers diversify, it is important to maintain a strategic portfolio overview and rigorous governance of the Standard in order to meet the diverse needs of new stakeholders whilst ensuring the Standard remains fit for its original purpose. Key principles in this work will be to strengthen the technical core of both Standard and infrastructure, retain flexibility for new stakeholder groups and ensure maximum utility for all users.

By 2025, IATI will standardise the Standard by working with an empowered community of experts to define a core set of data fields that meets the needs of all users.

Specifically, we will:

- Undertake a review of the Standard with the community to collectively define a core set of fields as those which are universally relevant to all publishers and data users. This review shall respect the principle that other fields remain relevant within different data domains, and continue to be of importance to specific constituents or user groups;
- Implement required fixes to the core set of fields, removing inconsistencies and updating guidance, with a view to making the data more useful based on actual user needs, whilst avoiding placing any onerous additional burden on publishers;
- Continue to encourage greater use by publishers of added-value fields, not simply those which are mandatory;
- Strengthen and empower the IATI community to provide advice on adjustments to the Standard that benefit IATI collectively;
- Review, consolidate, streamline and maintain IATI's technical tools and core products, determining which of these need to be in-house and which ones out-sourced, to ensure that our technical infrastructure is fit for the achievement of IATI's strategic objectives;
- Enable the interoperability of IATI data with selected tools, standards and systems.

05

Cross-cutting action areas to achieve our objectives

The following cross-cutting action areas will help IATI meet its objectives and deliver on its vision and mission:



Maintain momentum for IATI as a political initiative

Interoperability

Publishers face demands to provide more data for an increasing array of purposes and it will be important for IATI to offer a solution to publishers seeking to meet different reporting requirements, rather than being seen as the imposition of an additional burden.

IATI envisages a future in which the interoperability of IATI with other data standards and initiatives will be a key determining factor in the usability of its data, and will allow different stakeholders to address shared challenges through linked datasets.

The UN System, Grand Bargain, Financial Tracking System (FTS), European

Commission's Civil Protection and Humanitarian Aid Operations (ECHO) and Emergency Disaster Response Information System (EDRIS), Total Official Support to Sustainable Development (TOSSD), Global Partnership for Sustainable Development Data (GPSDD) and the 2030 Agenda for Sustainable Development are among those with which we will work to support access and use of IATI data for development and humanitarian purposes. Our outreach and communications work will accordingly prioritise those partnerships.

Beyond alignment of the data itself, IATI will also seek to strengthen strategic alliances with standard-setting bodies so that publishing in IATI becomes more broadly recognised as a measure of good governance.

Outreach

In its early days, IATI successfully aligned itself with key global processes (Busan, FFD, Grand Bargain) and benefitted from the support of a number of high-profile champions to secure specific political commitments. These links played an

important role in raising IATI's profile and driving progress by increasing membership, publisher numbers and the range of data published. Alignment with the 2030 Agenda for Sustainable Development provides a further opportunity, and to capitalise on this IATI needs to demonstrate its value to the key stakeholders at national and global levels. The Standard already enables publishers to flag both their spending and results against the SDGs.

Communications and user experience

The IATI website will remain a key tool for promoting IATI and extending awareness of the Standard, the data and the tools available to access it, and to attract new members and data experts. In addition to the French website launched in early 2019, we will further review ways to provide better multilingual support to publishers and users including by making more guidance available initially in French and later also Spanish if there is sufficient demand.

In order to fully capitalise on the opportunities through the use of the IATI website, we will improve the Secretariat's internal capacity for using IATI data, so they they become experts in analysing, using and sharing IATI data in different formats for different purposes. In this way, IATI's core support team will be able to articulate more clearly to others the richness of IATI data and thereby strengthen the value proposition for using it.

Through partnerships and through our members we will continue to explore new technologies as they emerge, to learn where these may intersect or support IATI's work. These may include using Artificial Intelligence (AI) and language tools for analysing our data to develop new uses and promote the value of the data with new communities of users.

During the next five years IATI will:

- Focus on improving the overall user experience of IATI including by promoting d-portal.org or successor tools. We will use our website as a starting point, with clear signposts and explanations for existing and new users to quickly understand what IATI is and find the information, tools and guidance they need;
- Showcase IATI's work from global to country level, highlighting the increasing examples of successful use and sharing learning and best practice;
- Maximise engagement with our members and partners, capitalising on their connections to extend outreach efforts and bring in new members, publishers and data users;
- Identify and mobilise new champions as ambassadors of transparency to raise awareness and promote use of IATI data;
- Ensure IATI's presence at relevant development and open data events to secure new political commitments, raise awareness, explore new technologies, promote data use and share learning;
- Establish links with other relevant data standards and initiatives and promote interoperability across datasets as a means of addressing shared challenges;
- Clarify the value proposition for different categories of stakeholders and develop tailored informational materials to support outreach;
- Support IATI communities of practice using multiple approaches including regional meetings, webinars and online spaces to amplify reach, paying particular attention

to reaching partner country communities and going beyond central government to reach civil society and other development and humanitarian actors.

Strengthen the IATI community to maximise impact

Delivering on the ambitions of this strategic plan will require concerted actions by all IATI members across the IATI community.

The model of establishing ad hoc working groups of IATI community members to work on clear objectives within agreed timeframes has been successful in the past and has led to greater ownership of the outcomes of these groups. This model of joint learning and sharing will be continued, under the leadership of the Governing Board, as a means of strengthening the IATI Community and creating an environment of sharing and learning.

We recognise that across the IATI community, different constituencies have specific needs, and some need central support whereas others are self-organising. The Strategic Plan (2020-2025) sets out two different kinds of community groups to meet the needs of IATI's different constituencies and objectives.

Technical Advisory Group transition

The original IATI Technical Advisory Group (TAG) has evolved from a small group of experts appointed to develop the original Standard, to a large and vibrant community that includes technical experts, data users, publishers and newcomers. With the change

in composition of the TAG, the character of the TAG meeting has also changed from a technical meeting among experts on the Standard into a more general information and learning event for a broad and diverse IATI community. Whilst these learning and information needs are important and must be met, the current approach of trying to address all needs through a single body has resulted in a gap in the role of providing thorough and detailed advice on specific matters relating to technical questions around governance and management of the Standard. Governance of the Standard remains within the authority of the Members' Assembly which must be supported to make key decisions based on high quality technical advice.

It is increasingly clear nonetheless that a strong and engaged technical community sits at the core of IATI and will play a central role in realising the 2020 - 2025 strategy.

The focused and technical input of diverse members of the community is recognised as particularly important for the development of the IATI Standard, guidance and associated tools. These questions are fundamental to the long-term evolution of the IATI Standard, and must be kept under the purview of members through their existing governance mechanisms. Nevertheless, in order to ensure that the Board and members receive the technical input they need to formulate and approve key decisions and thereby maintain vital oversight of IATI's technical future, means of engagement with the community should be strengthened.

As we look towards the future development of technical advisory mechanisms and how they change to support their participants to work together better, we will work with the Board and members as a priority to explore a model that may include:

- Creating a model of ad-hoc, focused working groups (WGs), chartered by the Members' Assembly and overseen by the Governing Board. with clear Terms of Reference and operating procedures, and formal links with IATI governance bodies;
- Noting that participation in WGs will be voluntary, and involves self-selection of members, but would also need processes in place, including budget support, to ensure representation of different constituencies and allow strong voices from partner countries;
- Recognising that community members remain free to self-organise community groups, and to request space on IATI platforms and at IATI events in order to meet, discuss and share their insights and findings with technical focal points, or with the community at large;
- Establishing Communities of Practice (COPs) and ensuring knowledge generated by these groups is captured and preserved in shared spaces promoting transparency, openness and learning;
- Trialing a new type of main event on the IATI calendar, in place of past TAG events, to bring together the whole IATI community. This would not replace the formal Members Assembly, which should remain and maintain its structure.

Partner country caucus

In order to be successful in its delivering on its objectives, IATI must prioritise the particular data needs and challenges of partner countries, Recognising that there is no 'one size fits all' solution.

From the data user's perspective, emphasis has in the past been placed on the 'follow the money' needs of governments (particularly ministries of finance) of partner countries, whereas the equally important perspectives of civil society organisations, private sector and others at national and sub-national level have not always been taken sufficiently into account, nor provided the levels of detail they required to support their particular functions. Strengthening engagement with partner country stakeholders is critical, to understand the extent to which initial assumptions around data needs have changed, to showcase positive examples of data use and to highlight and address challenges faced with using data.

In order to achieve this, we will:

- Determine through country case studies whether any changes are required in the Standard itself to resolve systemic challenges to making data more useful;
- Renew capacity-building efforts, ensuring these are available to sub-national levels of government as well as to civil society and others;

- Strengthen our outreach with civil society organisations from the global South to better understand their specific needs with respect to access to data, data tools and capacity strengthening.
- Explore the potential for partner countries to become publishers, as a means to extend traceability further throughout the chain;
- Work with development partners at country level to extend and improve data literacy;
- Develop a clear on-boarding process and package for all new members and focal points to enable them to engage meaningfully in their respective roles in the community;
- Identify partner country champions and share experiences and learning.



Organise for success

Membership

Historically, IATI's membership has been organised along constituency lines, distinguishing between providers of aid cooperation, partner countries, CSOs and others, and recently a new private sector constituency. This distinction has proven valuable for ensuring balanced composition within the Governing Board and assessing membership contributions. However, as membership has grown, these descriptions have become increasingly anachronistic; the UN agencies classed as 'providers' are in many cases implementing agencies for bilateral donors and in that sense have more in common with larger NGOs; in the

CSO category of members, there is a vast difference between international NGOs and small national organisations.

At the same time, the binary division between publishers and users has become increasingly redundant as many publishers are also users of IATI data. While different stakeholders have different needs as publishers and users, there are still good reasons to retain the constituency basis for membership and governance purposes. Nevertheless, the Governing Board has committed to keeping this matter under review and will consult with members in relation to any proposed governance changes.

During the next five years, we will:

- Pay greater attention to assessing the needs of individual publishers and users and support them to contribute to collective goals;
- Review financial and other contributions of members based on principles of value, support and ability to contribute to suit an evolving membership profile;
- Establish clear criteria for membership or other form of association, aligned with our values.

Governance

In order to achieve the goals set out in this plan, IATI will maintain the agreed governance structure in which the Members' Assembly makes strategic decisions based on recommendations from the Governing Board; the Governing Board will set and monitor annual work plans and budgets, with careful attention to ensuring the Secretariat is appropriately resourced and equipped to deliver all of the activities mandated to it.

The Board will continue to meet on a quarterly basis to provide guidance to the Secretariat on annual work planning, resourcing and budgeting. The Secretariat will support all governing bodies in policy and technical advisory matters. Institutional arrangements will remain under review to ensure firm foundations are in place to deliver on this plan.

During the next five years, we will:

- Review institutional arrangements to ensure these continue to adequately reflect the needs of an expanding initiative;
- Institute a process to address outstanding and newly emerging governance questions such as the inclusion of private sector and representation of the IATI technical community in the Governing Board;
- Keep the funding structure and level under careful scrutiny through regular review by the Governing Board which will propose updates to the funding model as necessary to respond to the budgetary needs of an ambitious programme of work.

Our values

The consultative processes successfully followed in developing the early iterations of the IATI Standard, and community contributions to working groups on different subjects, have proven a good model for building a strong and engaged community within IATI.

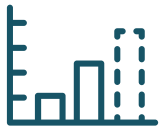
Membership has expanded beyond a small group of publishers, users and technical experts to include groups of development finance

institutions, humanitarian publishers, private sector actors, providers of technical solutions and smaller regional and national NGOs.

As a standard that offers benefits to different categories of actors and as the community grows further and different priorities emerge, conflicts on particular approaches are likely to emerge, making it increasingly important to agree and observe a set of values across the community. Standard Operating Procedures are in place to codify IATI's processes, and similarly, we will codify our values.

These will include:

- Listening and respecting the opinions of all others in the community;
- Respecting due process and addressing issues as they arise, escalating issues as necessary through appropriate established channels;
- Proactively avoiding potential conflicts of interest by declaring relevant interests (particularly financial) before taking part in working groups or accepting governance roles;
- Recognising that the primary accountabilities of the Secretariat, staff and technical team of IATI are to the Governing Board, and delivering on the work plans set out for them based on decisions by members;
- Undertaking our own work transparently.



So what?

By 2025 the world will be just five years away from its commitment to deliver on the SDGs.

IATI's contribution to achieving the SDGs will be measured by the ability to map international development efforts to contribute to sustainable development through IATI data,

to support more informed decision-making and enable course corrections and coordination necessary to achieve the SDGs in developing countries.

If we are successful, in five years' time:

- Collective success will be valued above the individual performance of publishers;
- All key providers and all implementing organisations will have received the support and guidance they need to provide good quality data that is interoperable with other standards, and update it frequently so that can be relied upon for decision-making;
- Activities can be traced throughout the chain, and simple tools ensure that the data can be accessed easily and used systematically by everybody involved in development;
- When results are achieved in one country or humanitarian emergency, the successful enabling actions can be attributed to particular interventions and applied elsewhere, and conversely, costly

or ineffective mistakes can be avoided elsewhere;

- IATI will serve as an effective network and a platform for learning and exchange between different actors and partners.

Implementation and monitoring of progress to ensure success

This Strategic Plan will set the framework and parameters for activities between January 2020 and December 2025. In accordance with the process set out in the Standard Operating Procedures, the Governing Board will draw from the Plan to develop annual work plans and budgets, basing its financial assumptions on the trend of growth of the initiative and its membership over previous years. The Board will work closely with the Secretariat and seek input from members in establishing priorities for delivery particularly during the first year of the Strategic Plan, examining opportunities that arise and retaining flexibility to address them through careful prioritisation. Annual plans will be published through the IATI website and shared with members through regular communications channels. In order to measure progress and remain on track towards successfully delivering the strategic plan within the five-year timeframe, we will:

- Work with members to develop SMART indicators which help the governing bodies to monitor progress regularly;
- Report annually to all stakeholders on progress and challenges;
- Seek input of members through Members' Assemblies serving as an annual internal review process;
- Carry out a mid-term evaluation of progress in order to determine and implement any course corrections that may be required.

06 Annexes

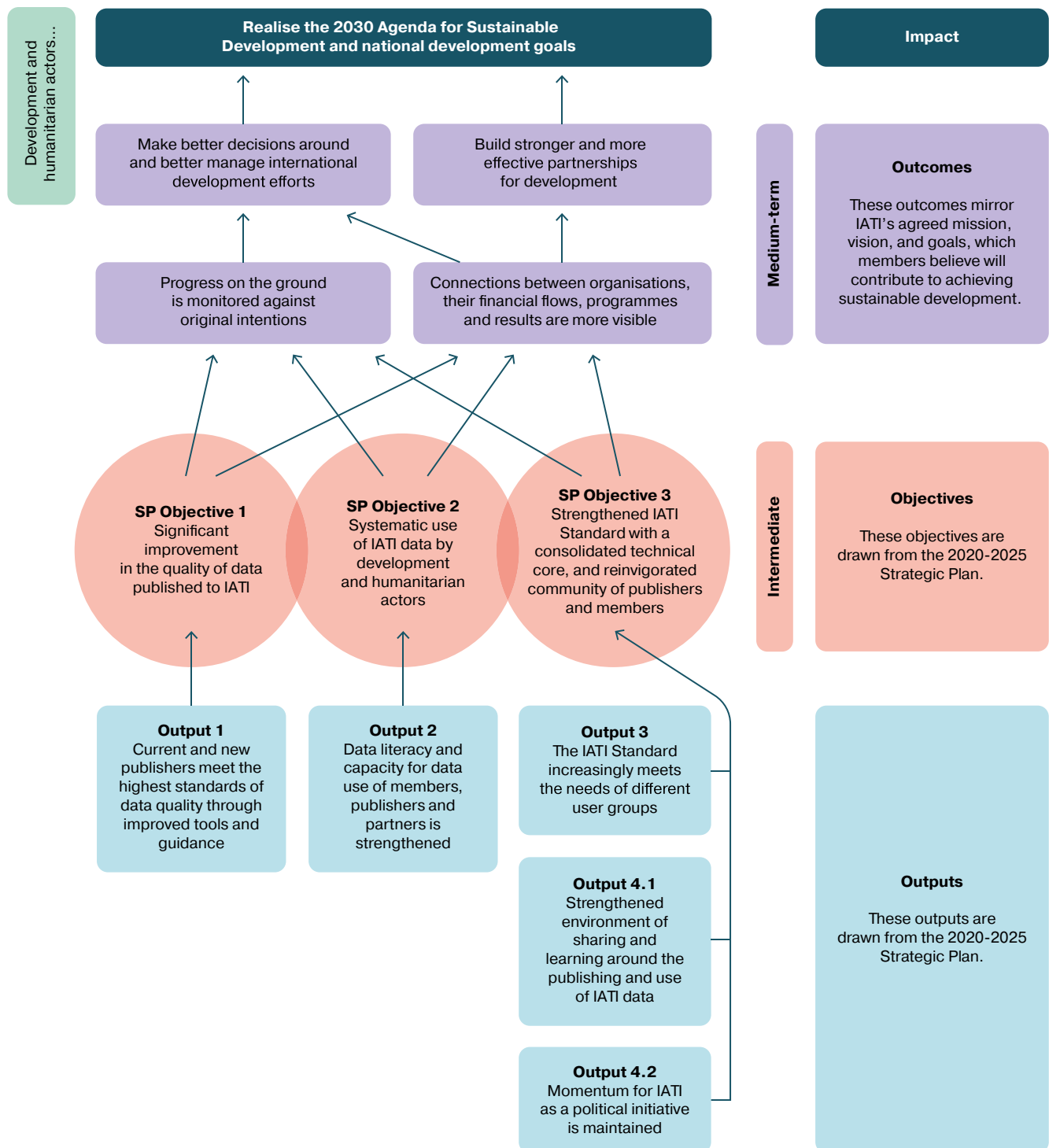
Theory of Change, 2020-2025

IATI members reviewed and endorsed a detailed **Theory of Change (ToC)** at the 2017 Members' Assembly. The hybrid UNDP / DFID approach to Theories of Change drew upon in-depth studies of IATI including the **2015 Independent Evaluation**, and set out a number of **assumptions** associated with the ToC, outlining the evidence to be considered for measuring progress during the five-year period 2016 - 2023.

In developing the IATI Strategic Plan (2020 - 2025), the Secretariat has drawn upon evidence gathered to monitor progress in the Theory of Change, using this evidence to review and retest IATI's initial assumptions. Where assumptions were considered to be no longer valid, the new Strategic Plan has proposed changes.

Annex A is the graphic representation of the updated Theory of Change as it is reflected in the new Strategic Plan, and **Annex B** presents a detailed list of outputs and evidence reviewed as part of the process of monitoring of the 2016 Theory of Change.

Annex A: Updated Theory of Change diagram



Annex B: Monitoring of 2016-2023 Theory of Change (ToC) as part of the 2020-2025 Strategic Planning process

Output from 2016 ToC	Evidence (report, anecdote, news story)	Status and any proposed adjustment
<p>Output 1: IATI's future is on a secure financial, governance and institutional footing.</p>	<ul style="list-style-type: none"> → Recommendations of the Institutional Review (conducted in 2018) have been successfully implemented. → Shift towards financial model of full funding of annual budget through membership contributions. → Relations between the governing and administrative bodies of IATI are guided by Standard Operating Procedures (SOPs). → Financial resources are efficiently managed. 	<ul style="list-style-type: none"> → Membership numbers and income are increasing. Discussion on potential revision of membership fee tiers may be needed in the long-term. → Membership value proposition needs to be revisited and increased to maintain political momentum for IATI membership. → SOPs need to be regularly reviewed and updated.
<p>Output 2: IATI governing bodies are supported to make timely decisions and act efficiently in driving the initiative forward.</p>	<ul style="list-style-type: none"> → IATI Governing Board and Members' Assembly meet regularly (as per SOPs) and meetings are well documented. → TAG community no longer considered fully 'fit-for purpose' due to the altered nature of the group and different technical advisory needs. → IATI governing bodies, Working Groups and administrative units are internally and externally accountable. 	<ul style="list-style-type: none"> → For future Governing Board elections, IATI must ensure the willingness of suitable candidates to take up their roles and allocate adequate time and resources to the role. → TAG community should be reconfigured and empowered to provide targeted community guidance on specific issues. → Robust conflict of interest policy should be established and all potential conflicts of interests brought promptly to the attention of the Governing Board.

<p>Output 3: IATI's new vision, strategy and brand is implemented.</p>	<ul style="list-style-type: none"> → New vision and strategy, providing a new focus on data use (implemented through the creation and implementation of the IATI Data Use Strategy and IATI Data Use Fund). → IATI branding has been redesigned and launched, including a newly-designed website. → New IATI brand was implemented across IATI channels, including IATI website, social media, reports and publications. 	<ul style="list-style-type: none"> → Monitoring progress on strategy implementation and especially on data use needs to be further institutionalised and become 'SMART'-er. → IATI as a brand needs to be further established and promoted. IATI needs to be more prominently and more systematically represented in the international community, especially when it comes to open data and transparency discussions and fora. → Website work on consolidating different IATI tools, products and web pages needs to be taken forward to better serve IATI well as first 'point of contact' and serve members, non-members and new users equally.
<p>Output 4: The IATI Standard continues to evolve to meet the needs of data users and publishers and reflects the changing open data environment.</p>	<ul style="list-style-type: none"> → The Standard has been successfully stewarded and continuously adapted to meet the needs of emerging users (e.g. Grand Bargain Agreement and resulting increase in humanitarian publishers; IATI v2.03 goes live; deprecating v1). → Guidance material for publishers has been improved (dedicated guidance for reporting SDG data has been developed; guidance section on website improved, etc.). 	<ul style="list-style-type: none"> → The Standard needs to be 'standardised' through a core set of fields which are universally relevant to all publishers and data users. → Interoperability with other open data standards, national systems and platforms needs to be improved to make IATI data more widely used and accessible to different stakeholder groups. → Needs of new IATI users (humanitarian community, climate financiers, private sector entities, etc.) need to be continuously evaluated and integrated into IATI policies.

<p>Output 5: Sustainable support services enable new and existing publishers to supply high quality IATI data that meets users' needs.</p>	<ul style="list-style-type: none"> → IATI Tech Team has served / provided support and guidance to 4,095 users since January 2016. → A growing number of new publisher tools and other support systems is available online. → The IATI website is available in French including IATI publisher guidance and French codelists. 	<ul style="list-style-type: none"> → Tech team capacities need to be maintained and enhanced based on increasing need. → Feedback mechanisms between data publishers and users need to be developed and promoted. → SMART metrics for the IATI Dashboard need to be agreed on to improve guidance / feedback to publishers. → Targeted guidance for publishers on use of new Datastore and Validator needs to be provided. → Targeted support to publishers to improve their data through direct technical support and provision of good examples, etc. needs to be made available.
<p>Output 6: IATI's technical infrastructure is maintained and developed to ensure long term sustainability and reliability.</p>	<ul style="list-style-type: none"> → Technical audit conducted in 2018 and recommendations have been addressed. → Accountability of IATI has been improved through targeted communication with the tech community (quarterly blogs). → New Datastore and Validator are launched. 	<ul style="list-style-type: none"> → Upgrades to the IATI tech infrastructure (Datastore and Validator) need to match the needs of the community. → IATI works to develop a clear policy on which tools and services are considered 'core' (in addition to registry, Datastore and Validator) and which are going to be outsourced, e.g. developed and maintained by the community. → D-portal, as the most used interface to access IATI data, needs an urgent update or replacement, once the new Datastore is in use.

Output 7: Target data users are able to meet their IATI data needs through support, capacity-building and tools.

- IATI has established a Data Use Fund and a number of projects have been implemented to support the objectives of the Data Use Strategy 2017 - 2019 (see: [Data Use Fund activities report](#); D-portal stats; Stocktaking report of Data Use Strategy implementation).
- New data user groups (such as journalists) have been identified and trained on how to access and use IATI data.

- The Data Use Fund needs to be replenished and administrative burden for bidders and fund manager (UNDP) need be better streamlined.
- Research on data user groups and respective data, tools and support needs is crucial and needs to be conducted in regular sequences.
- Community efforts towards capacity-building and tool development need to be supported and guided by IATI.

Draft Results Framework – IATI Strategic Plan (2020-2025)

NOTE: This Results Framework has been developed by the IATI Secretariat for discussion at the 2019 Members' Assembly (MA) in Brussels. Following comments from members, this document will be revised. As such, this version should be considered as draft.



IATI Vision

Development and humanitarian communities share good quality information on their activities and results and use this information to work together more effectively towards achieving sustainable development.



IATI Mission

To amplify efforts across the development and humanitarian communities, by making the connections between organisations, their financial flows, programmes and results more visible, enabling them to manage international development efforts effectively and efficiently to contribute to the 2030 Agenda for Sustainable Development, and monitor the actual progress achieved on the ground.



IATI Goal

To support better decisions and better development outcomes through the publication and use of good quality data on development resources, activities, pledges and results.

Acknowledgements

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