

Paper 3: Board recommendations on Strategic direction for IATI 2016-2018

The evaluation synthesis report identified a “*critical requirement for IATI to define and communicate clearly its vision and strategic direction*”. Taking note of members' guidance at the December 2015 Steering Committee meeting, and building on the initial work of the Members' Advisory Group (MAG), the Board prepared a draft strategic direction paper outlining the key elements of IATI's proposed strategic direction over the next two to three years. This draft paper was circulated to members for consultation.

Having reviewed feedback received from members during this online consultation process, the Board puts forward this paper for discussion and approval at the Members' Assembly in June 2016. It complements the draft statements on IATI's vision and mission also submitted to members for discussion prior to members' approval in June.

Key elements of IATI's strategic direction

Since its inception, one of IATI's main priorities was to increase the number and range of development cooperation actors publishing to IATI. With over 460 publishers, from a great variety of backgrounds, IATI has been largely successful in this respect. Further growth in the number of publishers is most likely to be achieved by increased focus on encouraging implementing organisations (rather than funders) to publish IATI data about their activities.

For the coming years, the priority for IATI to achieve its vision and deliver its mission should shift towards a focus on the key strategic goals of **promoting data use and improving data quality**. These twin goals should be promoted through IATI's **outreach and communications** strategy. IATI must also maintain and develop **the Standard** to better respond to the needs of all stakeholders. Finally, IATI needs **institutional arrangements** that cost-effectively support its vision and mission, while delivering clear benefits to members.

Key areas for action are outlined below, with potential activities identified. Given resource constraints, it will be necessary to prioritize among them (while recognising the linkages between them and continuing to try to expand IATI's resources). The Board would also recommend developing specific targets for each area for monitoring and accountability purposes, as well as to help with prioritization of activities.

1) Promoting data use

Expanding use of IATI data is critical to the sustainability of the initiative. Improving data quality is a necessary, but not a sufficient condition for the use of IATI data. Promoting the use of IATI data will require additional and specific well-targeted action by the IATI community. The key strategic questions to consider are what would be the most effective means to increase use, and what role the IATI hosting consortium should play in this.

The provision of user-friendly tools that enable the integration of IATI data in everyday work regarding the planning, implementation, monitoring and evaluation of development cooperation activities should be a priority. A dedicated effort to identify the potential user communities and their respective needs

would help service providers develop services and tools responsive to these needs, and develop sustainable ecosystems around IATI data.

Potential actions in this area include:

- Exploring the needs of various types of data users (e.g. partner country officials, local CSOs, donor offices, etc) and assessing the extent to which existing tools meet these needs.
- Improving existing IATI tools, especially the Datastore and D-Portal, to support data use within and beyond the technical community or alternatively working with service providers to foster the development and maintenance of tools that IATI members can use.
- Creating interactive self-help tools and online presentations on using IATI data.
- Working with AIMS providers to support use of data by partner country governments (including automatic import of IATI data), and also by CSOs.
- Working through development partners' forums and with other publishers in one or two partner countries to encourage collaboration and provide proof of concept for use of IATI data at country level.
- Considering a "train the trainer" workshop for IATI focal points to help build the technical skills needed to access and use IATI data.
- Developing partnerships with organisations providing technical assistance to integrate IATI data in their own work (e.g. GIFT, International Budget Project, CABRI, etc).
- Supporting interoperability between IATI and other open data standards that could be used to monitor development flows and progress on Agenda 2030 (e.g. EITI, Open Contracting Partnership, Open Budget Initiative).
- Develop an evaluative approach to prepare future assessment of the impact of IATI.

2) Improving IATI data quality, breadth and depth

Improving the quality of IATI data is critical, and currently it varies hugely between publishers. Missing and/or poor data quality severely limits its use and undermines IATI's credibility. While increasing data use is expected to lead to improvement in the completeness and quality of the data, dedicated efforts are necessary to accelerate improvements and to ensure the availability of data of sufficient quality and relevance to support user needs. Efforts are also required to continue to extend the number of publishers, especially further down the delivery chain, and to address issues of traceability and double-counting.

Potential elements in this action area include:

- Conducting detailed data quality assessments to identify and prioritize issues most affecting data users (including aggregation across publishers) and sharing the results with publishers.
- Improving the effectiveness of the current model of technical support to individual publishers in terms of quality control, and considering additional models of technical support relying on the broader IATI community, including market-based solutions and formal peer-learning mechanisms.
- Focusing outreach efforts on implementing organisations (ie moving closer to beneficiaries).
- Encouraging more donors to include IATI publishing in their requirements for funding and to provide support for publication by their implementing partners, whilst ensuring adequate steps are taken to promote traceability and avoid the risk of double-counting.
- Establishing communication mechanisms between partner countries and publishers on data quality issues.

3) Maintaining and improving the IATI Standard

The IATI Standard should be dynamic and respond to the demands and constraints of both publishers and users of data. Following important changes to the Standard in the last few years, including an integer update in early 2015, version 2 of the Standard should be allowed time to settle before further significant changes are made. This would allow publishers to maximise their use of the existing version of the Standard, with minor upgrades to improve functionality. The priority should be to ensure proper technical support is provided and to develop a clearer sense of IATI's role in the broader ecosystem of data standards related to development.

Potential elements in this action area include:

- Clarifying the roles of the TAG and the Secretariat in driving Standard improvement, as well as the frequency of TAG meetings and consultations.
- Assessing publisher and user feedback to identify further development needs of the Standard.
- Collaborating with the DAC (e.g. with regard to codelists), with a particular focus on changes aimed at better reflecting the needs of data users.
- Collaborating with other data standards to maximise the inter-operability with the IATI Standard in order to maximize the usefulness of IATI data.
- Establishing a timetable for future upgrades that enables essential changes to the Standard whilst minimising disruption to existing publishers and users (e.g. a maximum of one decimal upgrade per year and one integer upgrade every 3-5 years).

4) Communication and outreach

IATI's communications and outreach efforts in supporting its new strategic directions, playing a pivotal role in connecting good quality data, potential users of these data and improvements of the standard. A communications and outreach strategy should identify the priority audiences and purposes for increased publication and use of IATI data. It should generally seek to increase awareness of IATI as a major source of quality data on development cooperation, especially in the context of Agenda 2030 and the Addis Ababa Action Agenda. In support of this work and to better position IATI within the new international architecture, external advice on branding should be considered. This would build on the vision, mission and strategic direction to ensure that we are much better equipped to communicate what IATI is, what we are trying to achieve and how IATI complements other initiatives. Updating the visual representation of IATI including the logo would be one small element of this overall project. IATI's communications and outreach should clearly highlight the inter-linkages between the supply and use of IATI data. It should emphasize the potential contribution of IATI data to the needs of various audiences (e.g. development planning for partner government, business intelligence for CSOs, coordination for local donor representatives, internal information management) in order to create a pull factor for publishing and using the data.

The strategy should also make recommendations on the most efficient means of interaction between IATI and various audiences, including for instance:

- Improved website, guidance materials and tools, based on updated branding;
- Promotion at key regional and international conferences;
- Promotion through members and interested stakeholders;
- Direct engagement where appropriate.

The strategy should be ready by Summer 2016 and include a more detailed 12-month communication/ outreach plan to support the priorities outlined in the previous action areas.

5) Institutional arrangements

The IATI evaluation confirmed that institutional reforms must underpin a clearly articulated strategy. Changes to the governing structure agreed in December 2015 and implemented since then were key steps in this direction, enabling the Secretariat to receive more timely strategic direction to deliver its work. However, further work is required on the governance, funding and hosting model to put IATI on a longer-term sustainable path.

Initial steps have been taken towards hiring outside experts to help the Board assess potential models, with a view to presenting the membership with recommendations in 2017. The Board will be guided by the following principles for the recommended arrangements:

- The model should ensure that IATI is on a long-term sustainable financial path.
- If retained, the concept of membership in IATI should have clear benefits and requirements.
- The governance structure should ensure fair representation of all IATI stakeholders and provide sound accountability mechanisms.
- The legal and institutional status of IATI should be clear.

Action requested

This paper is presented to members by the Governing Board for discussion and approval. Once approved, it will be used to guide IATI's work over the next two years.