**Draft strategic direction for IATI 2016-2018**

**Purpose of this document**

The evaluation synthesis report identified as 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), this document presents the key elements of IATI's proposed strategic direction over the next two to three years.

This paper is meant to support consultations with members as preparation 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**

For IATI to achieve its vision and deliver on its mission will require a greater number and range of development cooperation actors publishing to IATI, together with further improvements in data quality, and critically, greater use of the data, especially at country level. IATI must also maintain and develop the Standard to better respond to user needs. Finally, IATI needs institutional arrangements that cost-effectively support its vision and mission while clarifying the benefits offered to members.

Five key areas for action in support of these strategic directions are outlined below, with potential actions identified. Given resource constraints, it will be necessary to prioritize among them (while continuing to try to expand IATI’s resources). The Board would also recommend developing specific targets for each area for monitoring and accountability purposes.

**1) Promoting data use**

Expanding use of IATI data is critical**.** Improving data quality is necessary, but it is not sufficient to promote use - this will require additional and specific 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 Secretariat should play in this, as it is clearly impossible to support individual data users.

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 (e.g. D-Portal) meet these needs.
* Improving the IATI tools to support data use, especially the Datastore and D-Portal [or working with service providers to foster the development of tools that IATI members can use?]
* Working with AIMS providers to support use of data by partner country governments (including automatic import of 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).
* Developing an evaluative approach to prepare a future assessment of the impact of IATI on development effectiveness.
* Supporting interoperability between IATI and other open data standards that could be used to track financial flows (e.g. EITI, open contracting, open budget).

**2) Improving IATI data quality, breadth and depth**

As of April 2016, over 400 organisations publish data to IATI, including donors representing about x% of Official Development Assistance. This figure is high enough that further efforts to expand IATI coverage of ODA are likely to have diminishing returns. To better meet the needs of data users, the highest value would come from expanding the number of implementing organisations (rather than funders) that publish data, and from ensuring that IATI data can be aggregated across IATI publishers and with data from compatible standards.

Adhesion and adherence to the IATI Standard are mostly voluntary. As a result, data quality varies hugely between publishers. Missing and/or poor data quality limits its use and undermines IATI's credibility. While increasing data use (especially by publishers themselves) is expected to lead to improvement in the completeness and quality of the data, dedicated efforts are nevertheless necessary to accelerate this process and ensure the availability of data of sufficient quality to support user needs.

Potential elements in this action area include:

* Conducting detailed data quality assessments to identify and prioritize issues most effecting data users (including aggregation across publishers).
* Assessing the effectiveness of the current model of technical support to individual publishers.
* Considering alternative models of technical support, 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.
* 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, 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.
* 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 (eg a maximum of one decimal upgrade per year and one integer upgrade every 3-5 years).

**4) Communication and outreach**

[Note: this was a strategic direction in the MAG paper; however, it could be seen rather as an element supporting the achievement of the other elements of the strategy e.g. increasing use.]

IATI’s new strategic direction must be supported by a communications and outreach strategy. This strategy should identify the priority audiences for increased publication and use of IATI data, taking into account both new and existing members and publishers. It should generally seek to increase awareness of IATI as the main source of data on development cooperation, especially in the context of Agenda 2030 and the Addis Ababa Action Agenda.

In doing so, 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 communication with these various audiences, including for instance:

* Improved website, guidance materials and tools;
* 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-months 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 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 present 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.