



Inception Report

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IATI

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PHILANTROPIA

*Prepared under contract RFP/2021/19683
for designing of Virtual training for CSOs and national-level actors
in partner countries on how to access, understand and use IATI data*

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1. Acknowledgements

This inception report has been developed with critical input and support from the IATI Secretariat team – particularly Sander Hees, IATI Knowledge Management and Digital Community Specialist; Sarah McDuff, IATI Project Analyst; and key Data Use Working Group (DUWG) members, especially Leo Stolk and Anna Petruccelli. They have all shared relevant information and materials that created a roadmap for completion of this phase of the project.

2. Introduction

The purpose of the consulting assignment is to support IATI in countries where development and humanitarian activities take place to develop an online training course that will help to increase uptake of IATI's services, especially among civil society organizations (CSOs). The virtual training course will have three main aims:

- To introduce civil society in countries where development and humanitarian activities take place to the conversation around transparency of development cooperation resources, including through an overview of national and global sources for development cooperation data.
- To familiarize civil society in countries where development and humanitarian activities take place with IATI, what types of IATI data are available, how they can access and use it, and for what purposes it can be used.
- To familiarize civil society in countries where development and humanitarian activities take place with IATI's data access tools (TBD in consultation with the Secretariat) and provide a basic understanding of how to access, analyze, interpret and understand the (local) data for their own needs

This inception report outlines how the project deliverables will be achieved and measured. It summarizes the results of an online survey and key informant interviews; provides a suggested strategy and outline for the course modules; and a proposed outreach strategy. A timeline and workplan of the project has also been attached as Annex 1.

The report provides a set of recommendations for the development of a CSO-focused training course on IATI data, including:

- A clear focus on the importance and benefits of using open data on development and humanitarian resources, and by extension IATI data will draw CSOs to the course
- Utilizing use-cases relevant to CSO mission and goals will help create demand
- The course outreach strategy requires participant incentives and the use of partner network marketing
- Access challenges in the countries where development and humanitarian activities take place necessitate alternative distribution channels
- The course curriculum and platform need to be easily adaptable to integrate new learning materials and create new complementary courses

3. Project Methodology and Activities

Phase 1: Pre-training development survey & assessment phase

Philantropia developed and promoted a survey (using SurveyMonkey) that was shared with a wide group of IATI and non-IATI community members from civil society organizations. There were 554 respondents to the survey, 90% of whom were based in countries where development and humanitarian activities take place.

Seven complimentary key informant interviews were also conducted with select partners and DUWG members. In depth discussions with key IATI Secretariat members will also feed into the development of the course outline and content. Key questions to answer during this phase include:

- The level of capacity and understanding of open data among proposed participants
- Interest levels in key course topics
- Potential time, capacity, and IT constraints
- Critical participant learning needs and gaps
- Key roadblocks to successful course participation
- And additional questions to be formulated in close collaboration with the Secretariat

A desk study of documents and related sources provided by IATI has been conducted in order to support the survey and interviews, including:

- IATI 2020-2025 Strategic Plan
- Inventory of IATI Training Materials and Data-use Tools
- Presentation entitled “Understanding Access and Use of IATI Data”
- Report entitled “Evaluation of IATI as a Political Initiative”
- Qualitative feedback from IATI users
- Report from Venture Consulting on current and potential IATI user data
- Training presentation entitled “Accessing and analyzing IATI data using the Country Development Finance Data tool”

Phase 2: Inception report and proposal for the course outline

In this inception report, the results of the survey, key informant interviews, desk research, and team discussions will be collated and analyzed. The findings will feed into the finalization of the training modules, a draft outline of which is included as Annex 4.

Phase 3: Finalization of online course content for IATI

In this phase Philantropia will develop and prepare the training modules and tailored training resource material for the online course. The materials will be prepared following the outline presented below and submitted for final review and approval by the IATI Secretariat and DUWG.

The materials will consist of an overview page for each module containing:

- A general outline of the module
- An overview of content or the suggested text to be included for each course component

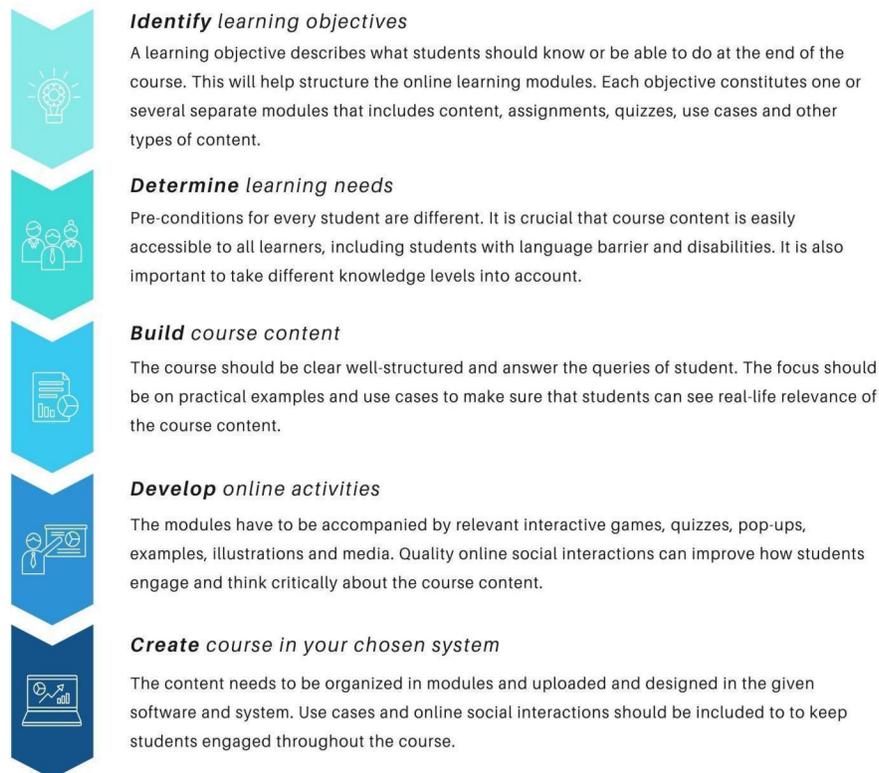
- Descriptions of suggested assignments with real-world relevance like case studies and “use cases”
- Guidance for the vendor who will design/implement the course as to how to use the provided materials

The topics covered are outlined in Annex 4, and will be further discussed with the IATI Secretariat members, but core topics will include:

- What is open data?
- Which tools and resources are available?
- Which kind of data is available and how to search key data on development and humanitarian activities
- How to use the available data
- How to motivate potential IATI partners to use the databases
- How to ensure stakeholders can get maximum benefit out of the existing tools
- How to eliminate roadblocks to widespread use of the IATI tools and services

Case studies and assignments will be developed to have real-world relevance for the participants and their working environment but will not require the active involvement of the secretariat. The understanding and learning of participants will be tested through automated tests and quizzes that will extend to the assignments.

An overview of the steps used to design and develop the CSO training is reflected in the chart below.



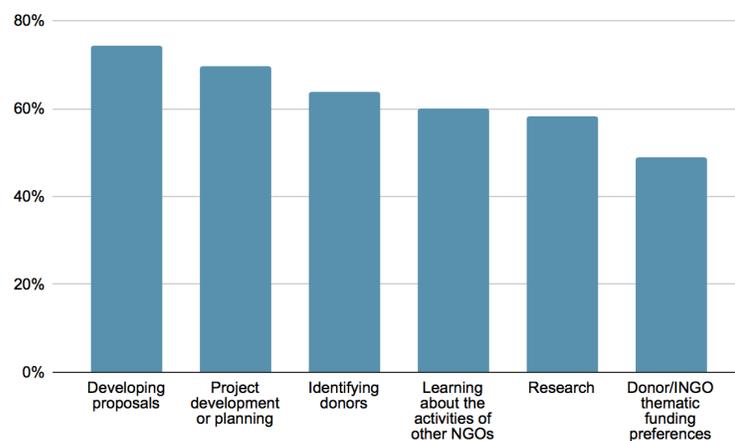
4. User Survey

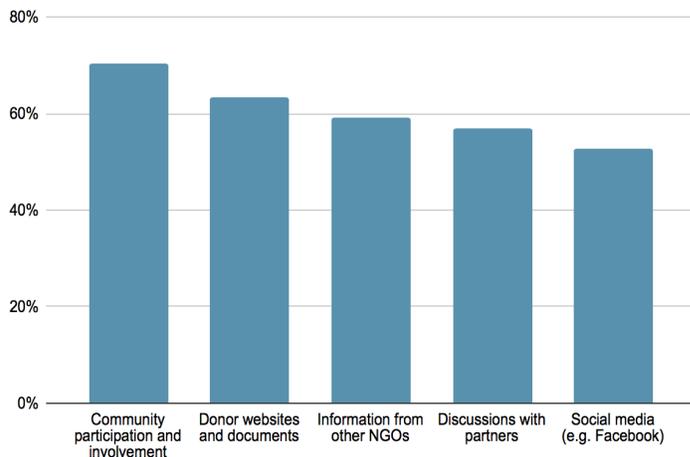
Philantropia conducted a survey in English with potential IATI users and civil society actors to gain a better understanding of their knowledge of IATI and its work, as well as their potential training needs. Within a week of the survey's launch, some 554 people had responded with a 100% completion rate. Interest in the survey was high, and it has been shared on social media more than 1000 times within the outreach campaign. Some 90% of respondents are based in countries where development and humanitarian activities take place. To ensure a high completion rate, the identity, place of work, and location of respondents was not requested in the survey. As the bulk of respondents were reached through the Philantropia newsletter and social media channels, however, we can roughly assume that some 70% work for a grassroots or national NGO working in development. The remainder likely work for INGOs, the UN, multilaterals, embassies, or foundations. The target group for the training is thus likely well represented in the survey results.

Summary of Survey Results & Observations:

Some 70% of respondents have not previously heard of IATI, with almost 90% working in countries where development and humanitarian activities take place. When asked how important online information on development and humanitarian funding and activities is for your work, the majority rated this as “very important”, and the average respondent indicated they use this data just below “very often”, underscoring the value CSOs give to open data (OD) in their work. This indicates there is a lot of unmet demand for the use of IATI data. Making IATI more known through a coordinated outreach strategy in combination with the proposed online training course would be an important step in increasing its user base. These results are supported by other researchers (i.e. [Publish What You Fund 2021](#)) who have also indicated that a lack of knowledge about IATI and usage of the services is an issue, particularly in countries where development and humanitarian activities take place. Results of the interviews indicate similar conclusions.

As illustrated in the bar chart on the right, the many CSOs that use development data often use it for proposal/project development and donor research. As funding needs cut across all CSOs, this may highlight a clear benefit that can draw potential users to the course. Respondents and subsequent key informant interviews highlight that the demand for OD in other areas is also expected to be significant, e.g. in academia and media/journalism. The curriculum, outreach and “use cases” should fully reflect this.





When asked what information sources and tools CSOs used in their work, CSOs responded they use a broad variety of information sources. The top five sources used are outlined in the chart on the left. IATI, being a one-stop solution for data about development and humanitarian funding, has the potential to fill these data gaps and offer CSOs tools that can save time and resources.

Around 80% of respondents use online data on development and humanitarian funding and activities to find out where and how donors have

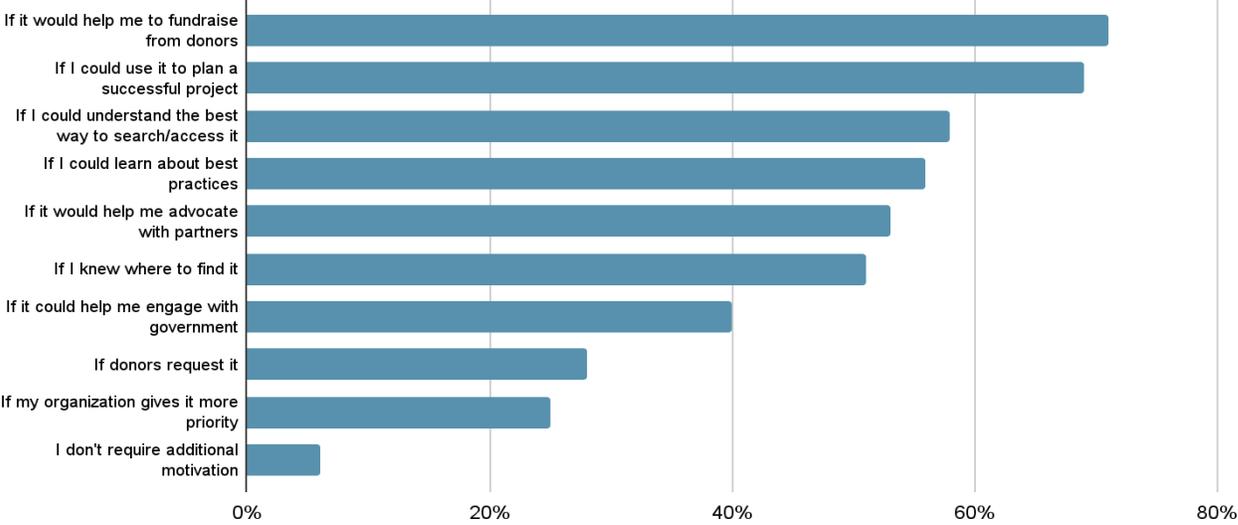
funded in the past, and IATI could potentially offer valuable data in this area to CSOs. This presents a clear use case that can be used as a “hook” for the outreach strategy and training.

When asked why in the past CSOs have not used online information on development and humanitarian funding and activities, nearly 50% responded that they do not know how to find and use such data. This limited use highlights the importance of educating CSOs about the role of open data and its potential uses. Some 25% of respondents said their internet is too slow and around 20% indicated that their organization does not give it priority. 15% stated that they did not know what to use it for. This indicates that a responsive and engaging online course informing CSOs about the potential uses of online information on development and humanitarian funding is an important step towards increasing use rates of the data. A robust outreach strategy is also crucial to ensure that CSOs understand the IATI value proposition. The course may also require strategies - such as offering downloadables or off-line access - that are useful in low-bandwidth/high access-cost environments.

Over 70% of respondents indicated that they would be more motivated to use online information on development if it would help them to fundraise from donors, with a similar number indicating they would use it to plan successful projects. Understanding the best way to search and access information and best practices are important to some 55% of respondents. Some 50% indicate it would help them advocate with partners. The information used by CSOs in their work is fragmented, coming from many different sources. IATI's potential lies in emphasizing its role as a one-stop solution for a broad range of data needs. Instead of having to collect data from donors, NGOs, governments and other sources to develop evidence driven projects, CSOs could save time and resources by using IATI data. IATI courses can thus in turn become a one-stop location for official training in how to use the available tools in order to meet these data needs.

Developing use cases around topics that are in high demand - such as resource mobilization, project planning, research, advocacy, and media - has high potential to increase IATI use among CSOs. It is important to note that not all topics were included as survey answers which may skew results, but many of these were highlighted during the key informant interviews.

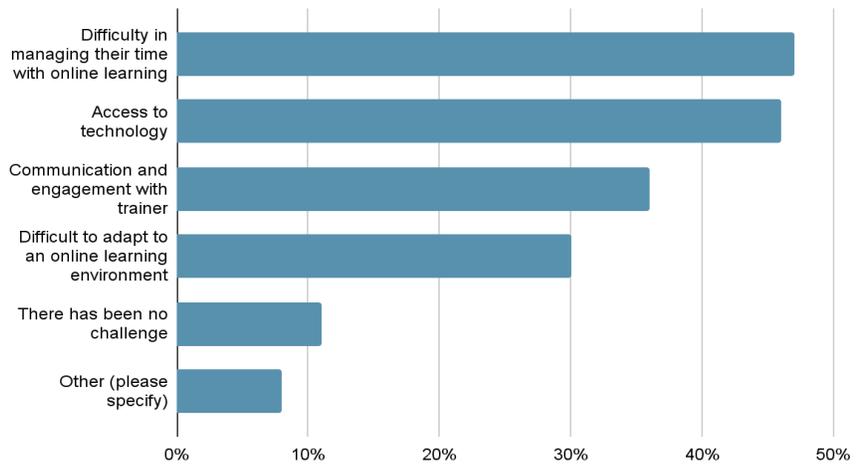
Clear case studies – e.g. on how to use IATI data for fundraising or donor research - would be beneficial for increasing uptake. Many respondents do not know about the benefits of development data, opening a gap that IATI could fill with the proposed online course.



Almost 80% of respondents have participated in online training before, indicating the familiarity with and usefulness of virtual training as an outreach and capacity building tool. CSOs can likely easily transfer previous experience in taking up and absorbing the IATI course. While many respondents have participated in online learning, they still rate their level of experience with online training as average. This may show that participation does not necessarily lead to confidence in the ability to learn. Ensuring the course is produced at the capacity level of CSOs in countries where development and humanitarian activities take place, has clear instructions, time commitment required, and including engaging components that create a positive learning experience are important. Content should be kept relatively simple to maximize accessibility, uptake and completion of the course.

With regard to the tools used to deliver online training, respondents indicated that they found downloadable resources (70%) and video lectures (60%) to be the most useful. This might reflect the difficulty many countries where CSOs have in accessing online training, either because of bandwidth or cost. This is also supported by information gathered in the interviews, where it was made clear that online courses are a good tool to raise capacity and awareness about the importance of aid transparency, but issues with connectivity and cost have to be considered when working with actors from countries where development and humanitarian activities take place.

As the chart on the right shows, nearly 50% of respondents have cited time available and access as main challenges for online learning. Other issues not captured by the survey may also be important, including data literacy, the capacity to use software (e.g. Excel), and online search tools. The course components need to be adapted to this reality.



5. Key Informant Interviews

Several key informants (secretariat staff & DUWG members) were interviewed to ensure broad input during the development of the deliverables. Interviews were semi-structured using a question template to guide discussions, with significant opportunity for interviewees to provide additional feedback. This guide and a complete list of interviewees has been attached as Annex 3. Some common observations raised in the interviews include:

Demand & Outreach

- There is high potential for CSOs to use IATI data in their work
- Awareness about available services needs to be raised
- The main advantage of IATI is that it offers real time data in one place, giving the opportunity to analyze entire portfolios instead of single projects
- Potential new users need to be made aware of the direct benefits of using IATI data in their work
- Incentives will help with course uptake and completion rates

Access

- Internet access can be a barrier in some countries
- Languages can be a barrier in some countries and offering a multilingual approach will improve access. IATI Connect offers multi-language functionality which can be used for this purpose.

Course Content

- There needs to be a clear use case for new users
- Online courses are a great tool to convey information, but must be adapted to local and regional contexts

- Materials should be light and engaging

6. Training Delivery

Course Platform

The training course will be set up and delivered through the existing IATI Connect platform as this will have several advantages:

- The course will be available from the IATI community platform directly and thus have few access barriers for users.
- It will decrease the risk of loss of control or user data privacy, as IATI will not have to depend on an external provider with their own set of rules.
- Using the platform reduces the digital fragmentation of IATI's overall digital footprint, making it more accessible to its users.
- While the design of course videos would still incur a cost, the use of the IATI Connect platform will save on the costs of hosting a training course externally, as all platforms that host online courses charge for this service. These amounts usually increase with the number of participants, so by setting up the structure internally, IATI also protects itself from unexpected cost increases.
- The platform offers the standard elements for online courses such as videos (currently under development and expected to be available by early 2022), text materials, downloads and quizzes. If further elements need to be added, IATI can review the cost/benefit of adding such functionality.
- Using the platform will also allow for the integration of follow-up support to the training. This could in turn further incentivize training participants to engage in the IATI community beyond the scope of the course itself.
- The IATI CSO-training could serve as a proof-of-concept and template for any future IATI-trainings developed and hosted on IATI Connect.

There are other platforms available such as Teachable, Moodle, and MOOC (Massive Open Online Course). While these offer a greater variety of built-in features for the online courses, these positives do not outweigh the negatives.

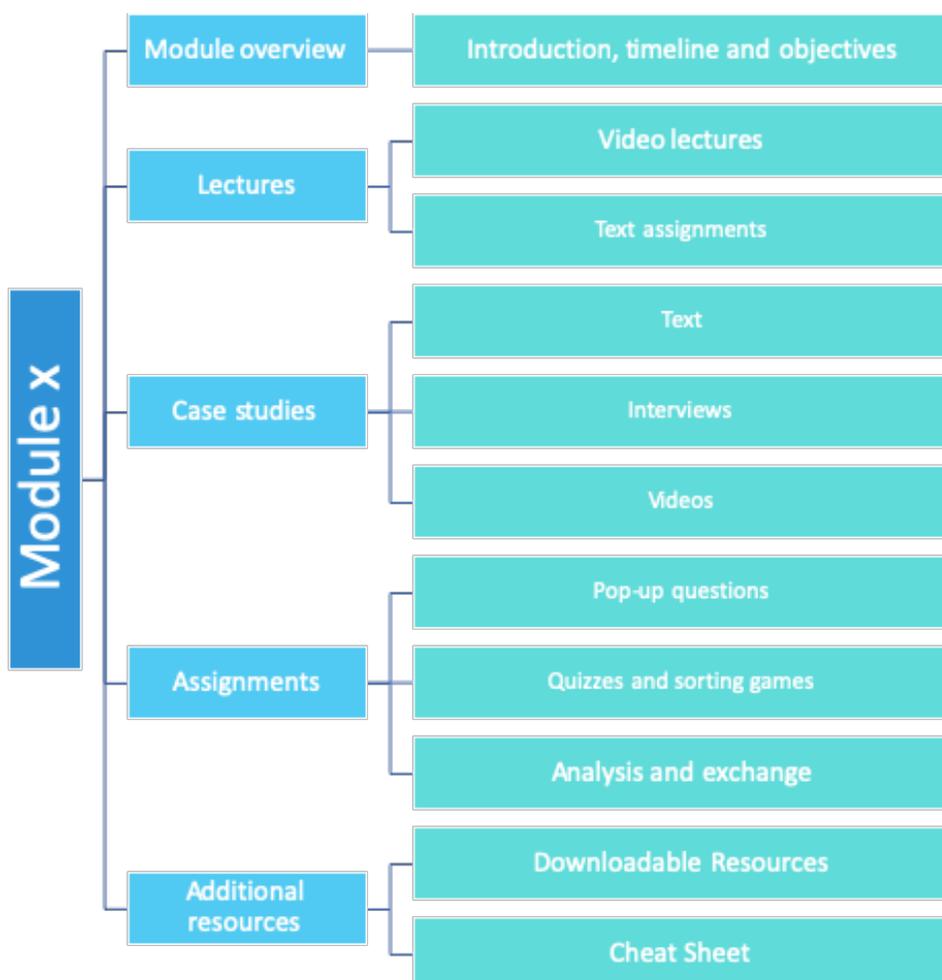
Course evaluation

Options for robust course evaluation will also be included in the curriculum in order to ensure the highest possible completion rates by allowing participants to supply continuous feedback. For example, using SurveyMonkey; including comment & suggestion boxes in course modules; and organizing feedback sessions with key informants can provide a source of on-going evaluation during course roll-out and delivery. This feedback can in turn act as important real-time input for any required adjustments to course modules and resources.

Quick evaluations in the form of pop-up windows can also be used to get immediate feedback on specific lectures of the course to make sure participants enjoyed that segment. This intermediate evaluation will be distributed throughout the course.

Elements of the training

With any training, but with online training specifically, it is crucial to keep participants engaged. Extra attention is required the tools used in training delivery. While the exact tools need to be designed for the curriculum at a later stage, this section will highlight some general considerations. An overview of the elements and tools suggested are reflected in the chart below.



Prior to beginning the training, participants should be provided with a brief outline of the contents and timescale of the course. This will help participants have clear expectations of the course and understand what exactly they are going to learn, which in turn will demonstrate the value of completing the entire course.

An introductory video by a prominent leader in development, senior IATI staff, or senior staff within a partner CSO will show the importance given to the course. If possible, senior staff of other

organizations that work with IATI could also give video statements that could be used in the introduction and give even more legitimacy to the course.

Desk research as well as information gathered in both the survey and interviews indicate that course completion depends on how relevant the course content is to the participants' reality. This stresses the importance of working with storytelling and use cases to make sure that the course content reflects real life situations that actors of civil society find themselves in.

Use cases and case studies also show the real-life benefit of using open data in a much more practical way. The survey and interviews have indicated that the knowledge about use-scenarios amongst CSO actors is low. For potential participants to invest time and resources (i.e. high cost of internet), they have to see a clear benefit of doing so and have to be able to convey this to senior level management as well. Use cases with elements of storytelling are the best way to convey this point.

Reflecting local contexts and realities is not only important for the content, but also for the delivery. While it is definitely important to have a figure of respect and authority as a trainer, representation is also crucial. While parts of the curriculum could be narrated by experts from the field, parts could also be narrated by people from the respective partner countries to ensure that participants can see themselves in the course and feel represented. These local stakeholders could also be introduced through interviews throughout the training.

Another point raised in the interviews is the importance of an entertaining curriculum with different types of content and short videos. The more engaging and interactive the content is, the better. If possible, games and in-course competitions could be designed to ensure high motivation amongst participants.

Exchange and feedback can be crucial for student motivation as well. As the course will be hosted internally, IATI Connect can be used as a platform for exchange and discussion. This way participants can give each other feedback on classwork or ideas without IATI having to take on an active role. At the same time, this will increase users of IATI Connect and stimulate more lively discussions.

If part of the audience is based in countries where development and humanitarian activities take place, it is also crucial to keep in mind the aforementioned limitations concerning bandwidth and internet access. Low data literacy may also present a challenge. While it goes beyond the scope of this specific project, offering short courses in data literacy (e.g. how to use Excel) could improve uptake and utilization. A key challenge in delivering online courses in some parts of the world is access to technology. In order to mitigate this, there should be downloadable alternatives for people who cannot access videos and more complicated content, such as an e-book or the use of off-line technology (e.g. making the course available on a memory stick).

In the interviews, it was also suggested that in some cases, one-on-one training might be the preferred option. While countries where development and humanitarian activities take place the course curriculum, IATI could also design content to be used in one-on-one training (i.e. a simple training manual) that could be provided to partner NGOs and members if training in the field is an option and necessary.

Once the training is live, IATI could also think about offering it in different languages (i.e. French, Spanish, Portuguese) to make sure there are no language barriers to accessing the information. This observation was also made in the ODW report 2021.

Recommended elements to include in IATI CSO training:

- Short training videos (lectures), available in low resolution and with the possibility to download when bandwidth is an issue
- Case studies, use cases, and best practices
- Worksheets
- Dialogue and interview videos
- Short texts
- Quizzes
- E-books and downloadables
- A forum for exchange
- Whenever possible, materials should be relatable and relevant to local situations.

Incentives

Since the training is voluntary, certain incentives could be used to encourage people to take part in and complete the course. For many potential participants, taking the training is not only an investment concerning their time, but a monetary investment as well due to the cost of accessing the internet. There have to be incentives to justify this investment, either to the student themselves or their senior management.

Research shows that using incentives to enhance online course uptake, improve learning behavior, and maintain user engagement and enthusiasm is a valuable and effective strategy. Interviewees have emphasized the same patterns, explaining that in their past experiences with online training, incentives played a key role in uptake and completion.

Such incentives could be as follows:

- Certificates of completion
- Offering additional free downloadable materials
- A competition offering modest prizes such as a small grant scheme
- A competition for journalists or academics to develop use cases
- A hackathon where web/app developers showcase different IATI data uses that could both draw new types of users as well as be included as “use cases” in the course

7. Outreach

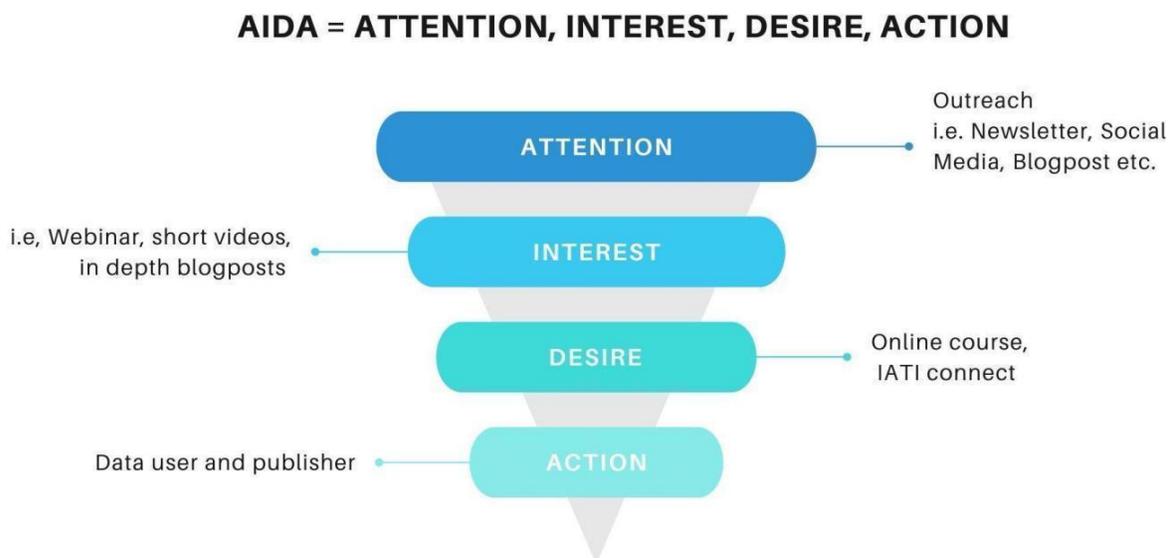
As indicated by survey results and interviews, one of the main reasons the use of IATI data is not yet at the desired level in countries where development and humanitarian activities take place may be the fact that many CSO actors are not aware of it. Developing an online course to enhance knowledge about how to use the data is an important step, but it should be accompanied by an outreach strategy to disseminate this knowledge so that more people become aware of the opportunities IATI provides.

Additionally, a typical challenge in course delivery is ensuring high participation and completion rates. Marketing and incentivizing such participation require proper strategic planning and execution and the launch of the course should be accompanied by an outreach strategy to inform and motivate potential participants to join.

Outreach materials can be developed alongside the training. If outreach is included in the development of the curriculum (i.e. multiple uses of every piece of content), there will be a two-fold benefit: new users will get to know IATI while simultaneously learning how to use the data.

The proposed outreach strategy must be accompanied by solid evaluation of sources of traffic and conversion rates. The final goal should not only be to raise awareness and increase course participation, but also to convert people into users of IATI. Every action during the outreach process should be tracked either through internal options in IATI Connect, social media, or tracking links to get a clear picture of what works and what does not. Pop-Up questions could also be used to understand the user-journey within the different resources of IATI.

Even though IATI is not aiming to sell products, the funnel strategy from digital marketing based on the AIDA model provides a useful approach for outreach. AIDA stands for Attention, Interest, Desire and Action. Cold contacts (here: new users) are channeled through the funnel to turn them into users as reflected in the illustration below.



Social Media

Social Media is a great way to encourage new users to engage with IATI. Content with the potential to be shared on different platforms should thus be developed alongside the course material.

IATI currently has 8,576 followers on Twitter, 367 on LinkedIn, and 238 on YouTube. Facebook was recently started (Nov 2020) and has 42 Likes. IATI could use these followers to drive traffic to the online course and to spread information on the uses of IATI data.

As expanded upon below, IATI could also partner with other online resources and networks to utilize their mailing lists and social media presence. Not only would this push traffic and awareness, but it could also increase IATI's own followers on social media and enhance visibility.

Newsletter

The newsletter can be used to attract attention to the online course and to share information about it with people who have already signed up and are familiar with IATI, as there are likely many members who would like further information on how IATI data can be used. Additionally, reach can be increased by asking newsletter subscribers to share the course and other content with their own network.

Video platforms

Even though the course itself will be hosted on IATI's own platform, it is worth considering publishing small videos and pieces of content on other platforms like Youtube, Udemy, LinkedIn or Idealist. There are also video platforms specific to the development sector that could be used, such as Agora by UNICEF. This way, new users can find the content and then be directed to the IATI platforms once they have developed an interest. These pieces of content should be enticing, for example use cases or a clear showcase of the benefit for individual users.

Other networks

There are many organizations with a high number of followers working with CSOs, including Devex, DevAid, Reliefweb, Bond UK, WANGO, and the Resource Alliance. Philantropia will also share IATI content with its 23,000 newsletter subscribers and over 23,000 social media followers. These organizations could be asked to share information about IATI, the course and the opportunities. In some cases, they could provide and/or sponsor content. The clearer the benefit for potential users, the higher the probability that content will be shared. Philantropia will develop a short two-page outreach strategy as part of this project. The two-pager will include a list of key regional and international CSO networks.

Interviewees also indicated that regional networks could be used to share and distribute information about IATI, its potential uses and the online course itself. It would be useful to use incentives to encourage sharing content within these networks. When possible, regional meetings

and networking events could also be held to increase the distribution of information. As previously indicated, Philantropia will survey and include suggestions for key regional networks in the outreach strategy.

Organizations that require their grantees to upload data to IATI, e.g bilateral donors such as the UK, Belgium, and the Netherlands, can also help in promoting IATI data usage.

These networks could also include journalists, media, and/or CSO and academic researchers to educate them about the value proposition and possibilities of using IATI data.

Live sessions and webinars

The use of live expert sessions (e.g. using Zoom professional) for interested participants can also create a sense of engagement and community. The [IATI Data Use Drop-in session](#) could provide a template for these. Participation in expert sessions can potentially be used as an incentive to increase course sign-up. These sessions can be organized around specific topics, countries/regions, types of users, and capacity level.

Webinars that introduce the content could also be used to stimulate interest in the course. In our own experience, free webinars that present a clear picture of the benefits of a more in-depth course are often successful in driving traffic and sign ups. This method was also mentioned by interviewees as a potential way to enhance course uptake. Webinars do not have to be live and could also be pre-recorded.

Blog posts

Blog posts hosted on IATI and other websites could present a useful way to inform and drive traffic. Interest in reading blog posts - for example about the uses of data and its benefits - is very high and, with the right SEO strategy, it is possible to make them highly visible on google very quickly.

We have run a test article with the title “Transparency data - the secret of successful NGOs” on our website [ProposalsforNGOs.com](#). This article got almost 90% more clicks than others in its first week online. Readers also stayed longer on the page with an average read time of 5.5 minutes, indicating a high level of interest in the topic. The bounce rate was lower than average, and the article was ranked on the first page of google within a week.

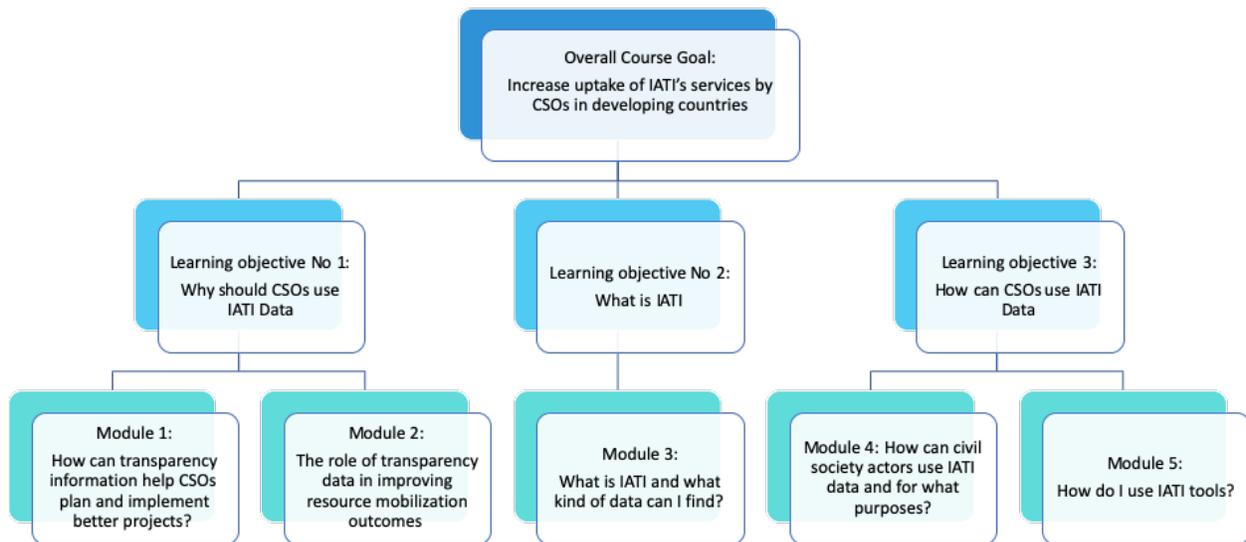
IATI could also reach out to other blogs and websites within the sector to place articles backlinking to their own platform. This would not only enhance website traffic, but also uptake of the course itself.

10. Contents of the training

IATI is the only source of real-time data where NGOs and civil society actors can find consolidated data that can give them an effective overview of the funding portfolio in a specific area. As explained above, while challenges remain relating to data quality and the user friendliness of tools, resolving these goes beyond the scope of this project. The core challenge that the training

developed in this project seeks to address is the overall lack of knowledge surrounding IATI and the uses for the data it provides.

The course outline is organized along the overall course goal and three learning objectives as outlined in the chart below:



As emphasized throughout this report, the results of the desk research, the survey and the key informant interviews indicate that specific emphasis should be put on highlighting the benefits of using IATI data for NGOs and civil society actors. If IATI is able to convince participants of the benefits of investing time in learning about the data available and how to use it, they will be much more likely to become regular users following the completion of the course. This is why the first learning objective of the course should be “Why should CSOs use IATI data”.

Having a clear picture of why using IATI data is beneficial will also help potential participants to make time for the training, as their senior management might not be on the same page. In the survey, a substantial number of participants indicated that their organizations do not recognize the work with development data as crucial, pointing towards a need for education about its benefits on an organizational level as well.

For these reasons, we suggest focusing the first two modules more on the questions of why instead of how. In a general sense, potential participants first need to understand exactly what IATI data can be used for before they go into the details of what IATI is and how to use it. Because the course is not mandatory, it is crucial that the contents are designed in a way that clearly lays out the direct benefits for participants. The first module will also situate IATI in the more general landscape of development cooperation, which will in turn help to indicate to participants the value of progressing in the course to the IATI specific modules.

The survey and interviews indicate that a potential draw for some CSOs may be the use of development data in donor/partner research and identification, and the course will contain sections on these topics. As indicated above, recently Philantropia published an article about the same topic on our blog that received nearly 90% more clicks than a typical new blog article, highlighting the interest in this topic. While a great draw for many, some CSOs, including journalists and researchers may not be motivated by the resource mobilization angle, and the flexible nature of how CSOs can engage with the course and pick and choose those topics most valuable to them, and possibly opting to skip module 2, reflects this.

While the usefulness of IATI data for partner identification and resource mobilization should be one aspect to be highlighted, others include the possibilities to hold governments and bigger donors accountable and to see how they spend and receive money. Particularly for members of civil society, this information is crucial to identify potential ineffective spending, corruption or other issues. The ways in which the IATI data can be used for advocacy and research (academic and journalistic research) should also be clearly emphasized.

An important aspect to consider in the development of both the curriculum and the outreach strategy is that a lot of current users of IATI data are also data publishers themselves. It may be that currently the primary motivation for publishing data to IATI is compliance with donor requirements, but it seems to follow that those publishers then become the primary users of IATI data. If potential new users can be encouraged to also publish data to IATI, they may be more inclined to become more consistent and continuous users following the training. A component of both the curriculum and the outreach strategy should thus involve highlighting the value of publishing to IATI.

Whenever possible, use cases should be included in the curriculum. As the Data Use Working Group has identified “Document real use cases” as one of their Data Use Objectives for 2022, these use cases could be continuously updated once the course is up and running. During the IATI Virtual Community Exchange, case studies were also discussed and highlighted that could be used in the course.

Additionally, [Bond](#) UK has previously offered in-house and online training for IATI publishers. It could be useful to revisit components of that training to see how they could be relevant in the development of this course. For example, at the Bond training, representatives from civil society organizations including the IRC gave presentations on how they have used IATI data in the past. Reaching out to those who presented could be a useful step in gathering success stories and use cases for this training.

As an example, the course could highlight which questions users can and want to answer with IATI data. These questions are examples of real questions that users mentioned in the [Data Use COP](#) on IATI connect.

- How much **new** humanitarian spending is there for a country, humanitarian cluster, both?
- How much **new** COVID-19-related spending is there for a country (and humanitarian-only vs all)?
- Who is doing what, where, especially in humanitarian contexts?
- What are local actors doing (vs donors, INGOs, and multilaterals)?

Another use case that could be used would be the development of highly researched articles by journalists using IATI data. One example for this could be the winning essay of the [IATI research challenge for journalists](#) 2018 by Farai Matiashe from Harare, Zimbabwe with the title “*Through empowerment World Vision Zimbabwe is tackling barriers that hinder progress in women and young girls*”.

One more example of a use case would be the Development Initiatives (DI) report on “[What IATI data can tell us about how aid is changing during the Covid-19 pandemic](#)”. The report was able to show which kinds of support increased and decreased and which specific sectors received more or less money.

To be able to work with IATI data, users must have a clear understanding of what IATI is and what kind of data can be found on the platform. Also, as has been pointed out in previous research (ODW report), users find it useful to understand how the data is collected and uploaded. This is why learning objective 2 - “What is IATI?” - should address these topics.

Prior research such as the ODW report has highlighted that working in the IATI database can be a challenge. Thus, it is crucial to design lectures that clearly show how the database and tools can be used so that participants have clear guidance and do not get discouraged by technical issues. These modules are equally important but should come after participants have clearly understood the value of IATI data. This should be addressed with learning objective 3 - “How can CSOs use IATI data?”.

In addition to covering the many benefits of using and publishing IATI data, some attention should be paid in the training to understanding and mitigating the potential risks of doing so for human rights organizations in possibly volatile regions, for example.

In general, the course will be designed in a way that is highly adaptable. Participants will have very different skill levels at the beginning of the training, so it is crucial that they can also pick modules if they feel like these would be more beneficial. In our experience from training more than 10.000 people online, we have also learned that giving the option of sampling parts of a full training enhances signup and completion rates. Often, participants who sign up for only one specific module progress to other course modules later.

Annex 1: Workplan with Timeline for Deliverables

Activity	Summary	Deadline	Roles
Kickoff meeting with the IATI project team	Introductory call with team-members involved in this activity. Get a better sense of first planning for the activity (and the different roles).	27 September (Monday)	Team with IATI staff
Draft a survey questionnaire	Philantropia will develop and promote two different surveys (using SurveyMonkey aka Momentive) to be shared with a wide group of IATI and non-IATI community members from civil society organizations in countries where development and humanitarian activities take place.	1 October (Friday)	Eva Wieners /Priti Thapa
Meeting re: Community Platform with Sander	Community platform will be reviewed as a viable option to upload course content.	4 October (Monday)	Eva Wieners
Pre-training development survey & assessment phase	Series of survey will be sent out to IATI and non-IATI community members from civil society organizations in countries where development and humanitarian activities take place and complementary desk research to understand and outline the most relevant course content (i.e. what are the most critical learning needs for civil society in partner countries in regards to the main aims outlined). The surveys will be shared with: <ol style="list-style-type: none"> 1. Members of IATI (Including DUWG and 900 active members of the community platform) 2. Subscribers of IATI newsletters/IATI social media channels 3. IATI will request key organizations that publish data to IATI to share the survey with partners/grantees 4. Over 25,000 subscribers and users of Philantropia services and newsletters Promotion period: 25 October- 1 November	25 October (Monday)	Eva Wieners /Priti Thapa
Survey Report presentation	A draft report will be presented to IATI secretariat and select members of the DUWG	2 November	Erik Detiger/Eva Wieners
Inception report and proposal for the course outline (First Draft)	Inception report presentation detailing outcomes and proposal for the course outline for review by the IATI Secretariat and Data Use Working Group.	8 November (Monday)	Erik Detiger/Eva Wieners

	<p>The inception report will detail what was learned from the desk review/ survey results and interviews with select IATI stakeholders in regards to CSO learning needs. It will also include</p> <ul style="list-style-type: none"> • An assessment of any anticipated challenges with delivering the training, given current availability of IATI data access tools¹, • Analysis of and recommendation for the most appropriate format for delivering training • A proposal for the most relevant course content • The proposed outline for the course and details of what would be covered under each module 		
IATI CSO-training-meeting	<p>During this meeting Philantropia will present their (first) findings based on the survey and key-informant interviews. A more detailed agenda incl. 'guiding questions' will be circulated before the meeting.</p>	9 November (Tuesday)	Philantropia & IATI team https://undp.zoom.us/j/86992356178
Final course content	<p>Final course content will be delivered in a word document in English or other easily shareable format in English, as a vendor will be engaged to design/implement the course.</p> <p>The comprehensive document will include</p> <ul style="list-style-type: none"> • The course outline, comprehensive course text and other content (e.g. quizzes, assignments, readings etc.) • Overview pages for each module that outline all readings, tasks and assignments required. • Course design will incorporate activities that connect real world relevance and content knowledge (e.g. examining case studies, creating problem-based scenarios in which the participants research the problem and create solutions or address gaps within the problem, etc.) <p>Note: the IATI project team may request up to four revisions to the course content and will facilitate sign off from the DUWG.</p>	8 December (Wednesday)	Erik Detiger/Eva Wieners

Annex 2: Company Profile

About Philantropia

Philantropia specializes in training, advising, and supporting UN agencies, (I)NGOs, CSOs, and social enterprises on development and resource mobilization. Philantropia offers a wide range of tools and training to help partners achieve impact - quicker, more effectively, at lower cost.

Based in Amsterdam and New York with staff in Europe and Asia, Philantropia provides valuable expertise to organizations looking for development success. Most of the organizations we work with share a single notion: to work better and maximize impact. But they may not know where to begin. Or they may not have the best processes in place. Or they may simply want to work smarter to achieve their goals. Philantropia believes anyone can be a changemaker.

Philantropia achieves these goals by offering direct services as well as capacity development and training – mostly digital – for interested organizations. Our students can choose from a variety of courses and organizational clients can opt for the development of bespoke courses and training materials. Philantropia also offers additional expert sessions, feedback seminars and any other requested formats of interaction. Philantropia has trained more than 8000 students through its training platform.

Team Member Bios

Erik Detiger, CEO

Erik is a professional with over two decades of experience working in the field of international development. As a highly successful international project manager and fundraising professional, he has raised over US\$250 million in the non-profit and development field for numerous international projects from a wide variety of government agencies, foundations, and institutions.

Dr. Eva Wieners, Senior Associate

Eva is based in Germany and has worked for nearly a decade with NGOs in Nepal in the field of capacity development and promotion of sustainable agricultural practices. Before that, she worked in South America and Europe. She holds a Ph.D. in geography and her field of research was sustainability and inclusion in development projects.

Priti Thapa, Associate

Priti is a Development Professional with over five years' experience as a Director of Operations for an American humanitarian organization in Nepal after her time with the British Council. She is a published writer and researcher focusing on international development funding and grassroots NGOs. She holds a master's degree in Business. She leads Philantropia's Nepal all-female team of four.

Amrita Tamang, Research Officer

Amrita is dedicated to doing research, posting opportunities, and editing the posts. She holds exemplary knowledge of proposal writing, report writing, data analysis, translation, and transcription. She is responsible for data collection and handling social media for marketing. She received a B.A. in Social Science with a major in Social Work and an M.A. in International Relations and Diplomacy from Tribhuvan University.

Annex 3: Key Informant Interview Bios and Guide Questions

Interviewees:

- **Anna Petruccelli**: CRM Workstream Lead & Senior Data and Transparency Specialist at ActionAid UK. Member of the Data Use Working Group (DUWG), as well as the Data Publishing Community at IATI.
- **Doris Sichiri (Interviewed with Anna Petruccelli)**: Senior Accountant at ActionAid International in Kenya.
- **Tanaka Nyamadzawo**: Global Advisor for Aid Transparency at the Danish Refugee Council and a member of the Data Use Task Force at IATI.
- **Julio López**: Co-founder and current Director of Projects and Innovation at Datalat. Recently spoke at a session entitled "IATI's (missing) links in Latin America: outreach opportunities" at the IATI Virtual Community Exchange
- **Leo Stolk**: Project Manager on Open Data at Oxfam Novib. Member of the governing board of IATI and the DUWG
- **Charlie Martial Ngounou**: Founder and President of Afroleadership, an IATI member organization. Active in the IATI Data Publishers Community as well as the Technical Community.
- **Wisdom Donkor**: President & CEO at Africa Open Data and Internet Research Foundation (AODIRF) & Africa Geospatial Data and Internet Conference (AGDIC)

Interview Guide Questions

- What has been your engagement/role with IATI?
- Can you share examples/use cases of IATI data success stories?
- How important do you think IATI data is for countries where development and humanitarian activities take place country civil society actors?
- What could motivate civil society actors to use IATI data?
- What challenges are there in using IATI data?
- What other sources of online data similar to IATI do you know?
- Are there examples of / best practices of training worth emulating?
- One idea was to use incentives to enhance uptake of the training. Do you think this would be a good idea and do you have ideas for the kind of incentive that could be used?
- Which tools have you found to be the most useful for online learning (i.e. use cases, stories, etc.)?
- Do you have any additional comments or suggestions?

Annex 4: Proposed Outline of Course Curriculum

The course format is purposely adaptable, and all elements can be moved, deleted, or re-used. Course content is presented in five modules with the following headings:

- How can open data help CSOs succeed and increase impact?
- The role of open data in improving CSO partnership and resource mobilization
- What is IATI and what kind of data can I find?
- How can civil society actors use IATI data and for what purposes?
- How do I use IATI tools?

Module 1: How can open data help CSOs succeed and increase impact?			
Learning Objective: Training participants will better understand the importance and need for open data			
Key Topic	Description	Format	Status
Welcome Video	2-minute welcome video featuring senior executive welcoming participants to the course	Video	Not available
A clear outline of the contents and duration of the course.	3-minute video explaining the logistics of the course	Video	Not available
What is open data?	Matching game requiring trainees to match the right answer to a question	Online matching game	Not Available
What is open data and why do I need it?	4-minute video outlining the importance and usefulness of OD	Video	Partially Available (Text)
Why is OD important for Civil Society?	Video outlining the importance of transparency for the CS sector <ul style="list-style-type: none"> - holding governments accountable - understanding funding landscape - research - accountability for donors - coordination 	Video	Partially Available (Text here & here)
Knowing what others do helps to hold others accountable	Short interview with an NGO detailing how they used OD to hold others accountable	Interview (video/audio)	Not available
Case study	Example case of how an NGO can use OD to enhance project quality	Text	Available

Using OD: 5 common mistakes even great NGOs make	A short text with bullets	Text	Not Available
Success stories: How 3 NGOs use OD to grow	Videos that show short sequences and pictures with a narrator	Video	Partially Available (Text here , here & here)
3 Habits of successful data users	A short text with bullets	Text	Not Available
Where can I learn more?	List of resources that could be used to learn more about OD and availability of OD resources	Downloadable PDF	Not Available
5 things I can do with OD	Worksheet that lets trainees develop their own priorities and needs	Downloadable worksheet	Partially Available (Text)
Summary	Summary of all Module 1 materials for future reference and for participants with low bandwidth	Downloadable PDF	Not Available
Quiz	Short assessment for participants to demonstrate and reiterate what they have learned	10 question quiz requiring 70% pass rate	Not Available
Cheat Sheet	Summary of the most important points covered in Module 1	Downloadable PDF	Not Available

Module 2: The role of open data in improving CSO partnership and resource mobilization			
Learning Objective: participants will have a better understanding of how to use open data in the context of partnership and resource mobilization			
<i>Note: This module can partially or fully be skipped by CSOs with limited interest.</i>			
Key Topic	Description	Format	Status
Welcome Video	2-minute welcome video introducing Module 2	Video	Not Available
How can OD help me mobilize more resources? What are its limitations?	3-minute video Why real-time knowledge about donor allocations is key to succeeding in resource mobilization?	Video	Not Available

The role of OD in the fundraising cycle	Matching game requiring trainees to match the right answer to a question	Online matching game	Not Available
What is donor research?	Text and downloadable sample donor research template	Downloadable template	Available
How OD saved this NGO time and money in researching donors	Case study	Downloadable	Not Available
What other sources of open data are there that could be used for donor research?	List of resources that could be used to learn more about donor research	Downloadable resource guide	Not Available
5 common fundraising mistakes even great fundraisers make	Short text with bullets	Text	Available
Is it important to understand the donor before writing a proposal?	5-minute video presentation	Video	Partially Available (Text)
5 common mistakes organizations make researching donors	Multiple choice quiz	Quiz	Partially Available
3 habits of successful fundraisers	Short text with bullets	Text	Available
Use cases - CSOs that have used OD for resource mobilization	Success stories: E.g. <ul style="list-style-type: none"> - Identifying donors - Funding trends (i.e. Covid 19) - Finding partners 	Text/interview/video	Partially Available (Text)
Why is networking a key part of resource mobilization?	Role play video – Meet the donor	Video	Partially Available
5 Ways CSOs can leverage OD with donors	Text with bullets	Text	Not Available
Using OD to win donor trust	3-minute video presentation	Video	Not Available

Link between transparency and donors trust	Interview with a representative of a major donor, explaining why transparency is important for them and how it helps applicants	Interview (Video and audio)	Not Available
Using OD to understand the funding landscape	Worksheet that answers the following questions: <ul style="list-style-type: none"> • Which donors fund my country? • Which donors fund my area of work? • How much money? • Which CSOs have received funding? • What are the funding trends? 	Downloadable worksheet	Not Available
Summary	Summary of all Module 2 materials for future reference and for participants with low bandwidth	Downloadable PDF	Not Available
Quiz	Short assessment for participants to demonstrate and reiterate what they have learned	10 question quiz requiring 70% pass rate	Not Available
Cheat Sheet	Summary of the most important points covered in Module 2	Downloadable PDF	Not Available

Module 3: What is IATI and what kind of data can I find?			
Learning Objective: participants will have a clear understanding of what IATI is and what it can be used for			
Key Topic	Description	Format	Status
Welcome Video	2-minute welcome video introducing Module 3	Video	Not Available
What is IATI?	Text: Introduction to IATI. History, background, types of data, etc..	Text	Available (Additional sources here and here)
How does IATI differ from other platforms providing data?	Fact sheet that includes info on: <ul style="list-style-type: none"> • Data aggregation • Real time data • Overview of donor portfolios • AIMS • INGO networks/databases 	Downloadable	Not Available

Where does the data come from?	3 minute video (possible animation)	Video	Not Available
Who is part of IATI?	Text with bullets: <ul style="list-style-type: none"> • Members and their role? • Funders? • How to get involved? • Role of CSOs? 	Text	Not Available
The benefits of IATI membership?	Text	Text	Partially Available
The benefits of publishing to IATI?	Matching game requiring trainees to match the right answer to a question	Online matching game	Not Available
OD and IATI vocabulary	Definitions and terms for non-native English speakers <ul style="list-style-type: none"> • Technical terms e.g. disbursement vs. commitment 	Downloadable PDF	Available
Using IATI: Limitations	5 minute video outlining limitations e.g.: <ul style="list-style-type: none"> • Some donors missing • Data quality • Consistency • No external review • Limited visualization tools available currently 	Video	Not Available
Summary	Summary of all Module 3 materials for future reference and for participants with low bandwidth	Downloadable PDF	Not Available
Quiz	Short assessment for participants to demonstrate and reiterate what they have learned	10 question quiz requiring 70% pass rate	Not Available
Cheat Sheet	Summary of the most important points covered in Module 3	Downloadable PDF	Not Available

Module 4: How can civil society actors use IATI data and for what purposes?			
Learning Objective: participants will have a clear understanding of how and why civil society actors could use IATI data			
Key Topic	Description	Format	Status
Welcome Video	2-minute welcome video introducing Module 4	Video	Not Available

Why should you use IATI data?	Matching game requiring trainees to match the right answer to a question	Online matching game	Not Available
10 benefits of using IATI	Text with bullets	Text	Not Available
Case in point: The use of real time data	Text (e.g. Afghanistan case study)	Text	Partially Available
Using IATI to ensure donor accountability	4-minute video or resource guide	Video or resource guide	Not Available
Use cases of CSOs using IATI data	Success stories of how CSOs have used IATI data, e.g.: <ul style="list-style-type: none"> • Developing a project • Donor reporting (Oxfam Novib) • Media & journalism (Zimbabwe) • Academic research • Government accountability and advocacy (Ecuador) • Gaining visibility • Gaining donor trust and donor accountability • Understanding funding in a country (Madagascar) 	Text/Interviews/Videos	Partially Available (Text here , here , and here)
How to analyze IATI OD to reach my goals?	Worksheet covering the basics of data analysis & data visualization.	Worksheet	Not Available
Challenges in using IATI data	Text, e.g: <ul style="list-style-type: none"> • Datasets might contain double counting of data • Datasets may not be clean • Using the tools • Basic understanding of handling datasets 	Text	Not Available
How can CSOs use IATI data safely if they are working in fragile contexts?	A “best practices” downloadable fact sheet	Download	Not Available
Summary	Summary of all Module 4 materials for future reference and for participants with low bandwidth	Downloadable PDF	Not Available
Quiz	Short assessment for participants to demonstrate and reiterate what they have learned	10 question quiz requiring 70% pass rate	Not Available

Cheat Sheet	Summary of the most important points covered in Module 4	Downloadable PDF	Not Available
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Module 5: How do I use IATI tools?			
Learning Objective: participants will learn how to use different tools available to them through IATI			
Key Topic	Description	Format	Status
Welcome Video	2-minute welcome video introducing Module 5	Video	Not Available
An overview of IATI tools	Hands on how-to video exploring the functions and purposes of e.g.: <ul style="list-style-type: none"> • D-portal • Datastore Classic • Country Development Finance Data Tool 	Video	Partially Available
Other tools developed using IATI data	Resource guide listing other useful tools and resources	Downloadable	Not Available
Which tools are used for which purpose?	Matching game requiring trainees to match the right answer to a question	Online matching game	Not Available
Success stories: How different IATI tools are used for good	Text, e.g: <ul style="list-style-type: none"> • Communications • Blogging and social media • Advocacy 	Text	Not Available
Using IATI tools quickly and easily	Text how-to	Text	Not Available
How to download and work with IATI data	How-to video, e.g. <ul style="list-style-type: none"> • Understanding data quality issues: e.g. double counting • How to work with and analyze IATI data after downloading • How to use d-portal (instructional video) 	Video	Partially Available
How to use IATI to research donors (case study)	Short how-to video on how to quickly and easily search IATI donor data	Video	Not Available

What data do I need?	Explainer text on how to access specific data, for example within a local context	Text	Not Available
Summary	Summary of all Module 5 materials for future reference and for participants with low bandwidth	Downloadable PDF	Not Available
Quiz	Short assessment for participants to demonstrate and reiterate what they have learned	10 question quiz requiring 70% pass rate	Not Available
Cheat Sheet	Summary of the most important points covered in Module 5	Downloadable PDF	Not Available
Thank you!	2 minute closing thank you video.	Video	Not Available
Certificate	Participants will receive a certificate upon completion of the course	Downloadable	Not Available