



## **TERMS OF REFERENCE (ToR): Hosting relationship with the International Aid Transparency Initiative (IATI)**

### **Introduction**

The International Aid Transparency Initiative (IATI) aims to negotiate a relationship with a hosting entity to host and manage the Initiative.

IATI is a voluntary, multi-stakeholder network and community initiative that includes governments of donor and partner countries, multilateral institutions and civil society and private sector organisations. IATI maintains an open data standard that aims to make information about qualitative and quantitative development and humanitarian activities easier to access, use, share and understand.

The principal recipients of the services below will be the IATI Governing Board, which serves in a governing capacity to the host on behalf of the Members of IATI and the IATI community.

The hosting entity will carry out technical and support functions as specified in this document. The arrangements will be set out in a Memorandum of Understanding to be agreed between the Governing Board (GB) of IATI and the hosting entity.

### **Timeframe**

A hosting entity is required for the period January 2023 to December 2027.

### **Scope of work**

IATI priorities are established through the 2020-2025 Strategic Plan approved by the MA. The priorities of IATI may shift based on the outcome of mid-term review of the current 2020-2025 IATI Strategic Plan and the formulation and implementation of the next strategic plan after 2025. The GB approves the annual, results based plan & budget allocation within the framework set by the MA and will undertake the responsibility for governing the Secretariat in its task to implement and deliver against these priorities.

The host should demonstrate its capacity to carry out the following activities listed under six topics which are not in priority order.

#### **1. Accountability Structure**

The hosting entity will provide for an Executive Director function which will be accountable to the Governing Board for:

- ensuring that all parts of the hosting function act-as-one (particularly if the host is a consortium)
- providing a clear line of reporting to the Governing Board and Members' Assembly as appropriate, and
- assuring delivery against the strategic plan and annual plans, including the results matrix (outcome and outputs) and administration of IATI activities.

The GB will be consulted on the ToR / job description of the Executive Director and be represented in the interview panel that will decide on the recruitment. The GB will be provided with the opportunity to submit feedback as part of the annual performance review of the Executive Director, to be taken into consideration by the host.

To this end, the hosting entity is required to

- *Draft for GB approval to a schedule determined by the GB* an annual work plan demonstrating how they plan to deliver the results outlined in the scope of work within the available budget, giving details of costs, milestones and planned results in a format agreed with the GB with a view to monitorable and SMART deliverables
- Keep open lines of communication with the various board members on a frequent basis
- Ensure all deliverables meet the requirements outlined in the annual workplan and are delivered in a timely manner
- Monitor and report on the implementation of the yearly work plan and the strategic plan and track progress against the results framework
- Facilitate strategic planning and development of the five year strategic plan
- Set out how it plans to support working-as-one with adequate involvement of the Executive Director function in the hiring and appraisal of key staff across the hosting entity, while respecting the legal and policy requirements of each unit within the hosting entity.

Beyond IATI members, a range of people and organizations benefit from the services of the IATI host through tools, support and guidance in order enable them to publish or use IATI data, as outlined in the Strategic Plan and Annual Work Plans and Budget.

## **2. Stewardship of the Standard**

The IATI standard is a core asset of the initiative, detailing how data should be formatted, structured and published. It is essential that the IATI standard is maintained, supported and, where necessary, developed or altered.

This area of work focuses directly on the standard. The key responsibilities in this domain are:

- i) Maintain the integrity and availability of key assets of the standard to all stakeholders: schema; codelists; rulesets
- ii) Provide a public and open platform that documents the IATI standard, including core guidance materials;
- iii) Ensure that feedback mechanisms on the standard are in place;
- iv) Facilitate channels for stakeholders to discuss, evaluate and collaborate on matters relating to the standard;
- v) Schedule and host the relevant consultative mechanisms to consider, deliberate and propose changes to the standard;
- vi) Make use of established governance and working mechanisms to further develop such input, including Working Groups and Communities of Practice;
- vii) Where requested, organise advance schedules for any planned programme to undertake changes to the standard (aka as “upgrades”);
- viii) Communicate notices of changes to core assets of the standard (schema; codelists; rulesets) promptly and transparently to all stakeholders;
- ix) Provide analytical support in terms of the adoption and take up of the standard;
- x) Undertake research to assess the impact of any proposed changes to the standard;
- xi) Where and when requested, undertake research into how the standard could be further developed to satisfy user needs, for example around south-south cooperation or debt management;
- xii) Gather insights and information from and with peer open data initiatives, to both disseminate and utilise models of best practice;

### **3. Technical infrastructure**

The provision and maintenance of a range of tools, services and resources support the technical operations of IATI is essential to provide a robust, reliable and secure infrastructure, designed according to user needs.

This area of work focuses on this technical infrastructure, with as key responsibilities for the hosting entity:

- xiii) Maintain all core components of IATI: the IATI Registry; the IATI Datastore; the IATI Validator; the IATI technical foundation including all IATI API services;
- xiv) Provide and maintain code repositories for the core components, and any future developments. Wherever possible, ensure that all code is openly licensed for reuse;
- xv) Ensure technical infrastructure is maintained according to transparent and publicly available metrics including uptime and timeliness of dealing with bugs or issues;

- xvi) Provide and publish timelines, roadmaps and commitments in terms of how long core components, and any associated services, will be maintained;
- xvii) Where relevant, undertake research and reviews to explore and propose any significant update or addition to the existing technical infrastructure;
- xviii) Liaise and consult with the IATI community on such proposals in the appropriate channel/fora;
- xix) Ensure all tools are developed and maintained according to user needs, and solicit and process feedback from users;
- xx) When updating or building new technical infrastructure, ensure that all development is conducted in an open manner, with input and consultation from the IATI community;
- xxi) Ensure all documentation on core components and services is maintained, available and openly licensed.
- xxii) Ensuring that, in addition to the open licensing of software codes, all governance, promotion and support/guidance documents and materials are published under an open-source license

#### **4. Publisher and User Support**

The IATI Standard and its technical infrastructure requires a range of support mechanisms to ensure organisations and individuals can effectively publish open data in the IATI format, and/or use the data for their needs.

This area of work focuses on the provision of support channels, materials and other expectations from the hosting organisation. It includes:

- xxiii) Maintain authoritative onboarding guidance materials to organisations seeking to publish to or use the IATI data standard;
- xxiv) Handle registration requests in a timely and efficient manner;
- xxv) Maintain a Helpdesk to provide a support channel for queries from users where feasible;
- xxvi) Provide targeted, proactive support to potential users of IATI data (e.g. partner country governments and CSOs), according to strategic priorities;
- xxvii) Provide targeted, proactive support to publishers in improving IATI data, according to strategic priorities;
- xxviii) Where relevant, generate new public guidance materials, especially when evidenced from repeated user or publisher requests;
- xxix) Where requested or relevant, support users to seek, or be signposted to, external support or vendors;
- xxx) Support existing Communities of Practice and Working Groups and, where appropriate, formulate and resource the establishment of new ones.

## **5. Outreach and Communications**

- xxxi) Maintain the core communication assets of the initiative: website; social media channels; IATI connect; branding materials;
- xxxii) Provide information to potential new members that want to disclose information by using the IATI standard as publisher (official and non-official, multilateral or bilateral, civil society organisations, networks, private sector actors, foundations); to data users such as support-receiving governments, journalists, parliamentarians; and the public at large;
- xxxiii) Devise a plan to recruit further members of IATI, covering both strategic alliances and the need for breadth and scope of organisations represented
- xxxiv) Undertake partner country outreach (involving governmental and non-governmental stakeholders in partner countries in country pilots, support participation in meetings, develop guidance);
- xxxv) advocating for IATI to be included as a standard or a commitment in intergovernmental fora or agreements
- xxxvi) Provide induction training for new members
- xxxvii) Where feasible, promote and support Regional meetings for Peer review among Publishers and Data users
- xxxviii) Where feasible, promote and support Regional meetings with partner countries to push for membership
- xxxix) Maintain social media and communication engagement
- xl) Actively support IATI Governing Board- or member-led fundraising activities

## **6. Administrative Services**

Guided by the Governing Board (GB) and the Standard Operating Procedures (SOPs), the key Administrative responsibilities of the hosting entity are:

- Provide full-service Secretariat programme management for all areas of IATI work
- Organise and Administer all IATI related meetings (e.g. Board, Community, Members' Assembly).
- Draft papers and proposals in a timely manner for decision by the GB or MA
- Report on IATI financial matters in a format and on a schedule determined by the GB
- Implement decisions taken by the GB and MA as they may occur
- Approve in-house make or buy decisions which are identified as part of the strategic and annual plans and financial budgets, and carry out all necessary procurement of goods and services
- Maintain the standard operating procedures in compliance with decisions taken by the GB and MA.
- The collection of membership fees of all members

### **Skills and experience required from candidate organizations**

Based on the above guiding principles and functions, candidates will be required to show evidence of the following:

- Commitment to the values of accountability and transparency;
- Commitment to improving the accessibility, use and understanding of information about qualitative and quantitative aspects of development and humanitarian support;
- Ability, expertise and skills to improve the validation, accessibility, use and understanding of such information;
- Technical expertise and skills to further develop and implement the IATI data standard, based on member, stakeholder, and community needs, to timely publish comprehensive, high-quality data;
- Technical experience and skills to manage, maintain and improve data standards and understand and avoid incompatibility with other technical publishing standards, engaging with the technical leads on other standards as appropriate. Elevate to the Governing Board incompatibility that requires a policy decision to resolve.;
- Expertise and skills to maintain and further develop the core technical infrastructure of IATI;
- Expertise and skills to provide technical support services to publishers making use of the data standards and develop the tools necessary to encourage publishers to improve the quality of IATI data from the perspective of the users of IATI data, especially in partner countries or similar;
- Experience in collaborating with a wide variety of stakeholders and their networks (e.g. donor countries, partner countries, CSOs, foundations, multilateral organisations, IT tool providers);
- Experience, skills and network to advocate for IATI on a global level and to consolidate and further strengthen its perceived value for relevant international initiatives;
- Project management capability including capacity to collect and manage funds; to manage and deliver work plans; and to deliver and buy in and manage services based on value for money;
- Financial management and accounting capacity and experience consistent with accepted international accounting and financial reporting standards;
- Institutional framework for, and expertise and experience with, procurement and contract management, allowing for timely procurement and due diligence

commensurate with risk. Demonstrated experience in procurement with local partners and in languages other than English is essential.

- Experience in and facilities for outreach and providing information to a variety of stakeholders;
- Experience of providing Secretariat functions to diverse groups of international stakeholders;
- With a view to a successful performance on the above requirements, the capacity to work in multiple languages;
- Absence of any **conflict of interest** that would prejudice the achievement of the aims of IATI.