



## IATI Implementation Schedule for:

### IATI Organisation Identifier:

(Click on hyperlink above for more information on IATI Organisation Identifiers)

Version:

Date:

### This document provides a publication plan which covers:

1. When will data be published? Timetable and frequency of publication
2. Exclusions and constraints: Overview of exceptions, thresholds & constraints
3. How will data be published? How published data will be presented to users
4. What data will be published? Overview coverage. For each area of the standard:
  - a. Timetable for publication
  - b. Terminology used within the data provider's systems
  - c. Exceptions, thresholds & constraints

### Instructions for completion:

The Implementation Schedule is divided into three tabs, with mirrored guidance tabs providing more help in completing the schedule (which should be deleted prior to submitting a completed Implementation Schedule):

1. Publishing Information
2. Organisation Data
3. Activity Data

### Publishing Information

This provides space to provide more detailed information about what data will be published, whether there will be any exclusions, and how the data will be published.

This is made up of a mixture of boxes for extracting specific information and text boxes for providing more detailed information.

Many of the boxes for specific information consist of drop-down menus where you will need to select the most appropriate category that fits with the qualitative information you provide in the adjacent text box.

Some require a typed entry:

e.g. Numeric entry for % of total budget (/ODA) and date entries for publication timetable (this should appear in mmm-yy format - e.g. Jan-12).

The purpose of these boxes is to make it easier for users to extract the most pertinent information, whereas the text boxes expand on this to provide more detailed information.

### Organisation Data and Activity Data

Although each of these has its own worksheet, the format for completing each is the same.

Each is made up of a table consisting of seven columns:

1) Information Area, 2) Status, 3) Publication date, 4) Exclusions & Thresholds, 5) Exclusion category 6) Data provider definition, and 7) Publication notes.

#### 1) Information Area -

this identifies the data item.

#### 2) Status -

this provides a traffic light rating on the readiness of data to be published and is based on the following key:

|                     |   |
|---------------------|---|
| Fully compliant     | Publishing in full compliance with the IATI Standard                    |
| Partially compliant | Publishing some data required by the IATI Standard                      |
| Future publication  | Data will be published at a future date                                 |
| Under consideration | No current plans to publish, but could be considered                    |
| Unable to publish   | Information not available or collected, or not relevant to organisation |

(The colour coding is auto-generated through use of the drop-down menu.)

For anything less than full compliance, further information should be provided in the publication notes. This includes:

- dates for full compliance if partial compliance is expected initially
- information on future publication of data items - e.g. potential dates or what it is dependent upon (e.g. new management systems)
- under what conditions data items under consideration could be published (e.g. implementing geo-coding or collecting of results data)
- reasons for being unable to publish (e.g. not relevant to the organisation, not part of the organisation's business model, etc.)

### 3) Publication date -

identifies when data can start being published (this will be based on the overall timetable for publication identified in the 'Publishing Information' tab, and should indicate when in the publication timetable this date item will be published).

The date should appear in mmm-yy format (e.g. Jan-12). If any additional information needs to be provided about the date, this should be added in the 'Publication notes'.

### 4) Exclusions & Thresholds -

highlights any specific thresholds or exclusions for the data item.

### 5) Exclusion category -

identifies the reason for the exclusion using the following drop-down menu:

|     |  |
|-----|--|
| n/a | No exclusions  |
| a   | Not applicable to organisation                                       |
| b   | A non-disclosure policy  |
| c   | Not currently captured and prohibitive cost                          |
| d   | Other (please specify within the 'Exclusions & Thresholds narrative) |

### 6) Data provider definition -

provides the terminology used within the organisation's internal systems (this demonstrates how internal terminology maps to IATI).

### 7) Publication notes -

provides additional information, such as reasons for amber or red coding, or relevant information which is not covered in the preceding columns or requires further clarification.

## Support available:

### Knowledge Base

The Knowledge Base has a number of forums that provide additional information about getting started and implementing IATI, including discussions on tools, information for NGOs and some technical information.

Information on communication support can also be found here to help in promoting your IATI publication (including examples of existing news releases, templates and contacts).

The Knowledge Base can be found at:

<http://support.iatistandard.org/forums>

### Further support

If you require any further support or there are any areas of information you would like to see added, please contact IATI Support:

[support@iatistandard.org](mailto:support@iatistandard.org)







## 1. When will data be published?

| Timetable and frequency of publication  |   |  |
|---|---|--|
| <b>Which organisations/agencies/programmes will your IATI data cover?</b> (What % of your total development flows does this cover? What is missing?)  |   |  |
| <i>Percentage of total budget / ODA</i>   | <i>Narrative</i>  |  |
|   | Our data will cover on-going DFID work only.  |  |
| <b>Overall timetable for publication</b> (Provide a date for when these organisations will publish (a) an initial (incomplete) set of IATI data and (b) full IATI implementation)   |   |  |
| <i>Date of initial implementation</i>   | <i>Date of full implementation</i>  | <i>Narrative</i>   |
| Feb-16  | May-16  | Initial implementation will begin in February 2016.          |
| <b>Timeliness and frequency of publication</b> (How soon after data is captured and available internally will data be published? How frequently will data be published?)  |   |  |
| <i>Frequency of publication</i>   | <i>Timeliness of publication</i>  | <i>Narrative</i>   |
| Quarterly   | 1 month in arrears  | We will aim to publish data quarterly, one month in arrears. |
| <b>How early in lifecycle will activity details be published?</b> (Will activity details be published during the pipeline/identification stage or not until they are approved and in the implementation stage)  |   |  |
| <i>Lifecycle status at publication</i>  | <i>Narrative</i>  |  |
| Implementation  | Details will be published post contract. These details will be as transparent as possible. It will not be possible to predict future contracts. |  |
| <b>Data quality status</b> (Do you want to identify the status of the quality/audit/statistical verification of data that is published in registry? Please indicate whether you anticipate doing this, and the likely timing of moving from unverified data to verified data) |   |  |
| <i>Data quality</i>   | <i>Narrative</i>  |  |

|   |   |
|---|---|
| Verified  | We will verify all data internally ahead of publication on a yearly basis.                            |
| <b>Approach to publication</b> (Please outline what staff and system resources are being made available to implement IATI, any relevant organisational structures e.g. working groups, and who is leading on IATI implementation) |   |
| <i>System resource</i>  | <i>Narrative</i>  |
| Manual capture through an online tool (web entry platform)  | We will put together a working group comprising members from our Finance, IT and Commercial divisions |
| <b>Other notes</b>  |   |
|   |   |

## 2. What are the exclusions from publication?

|   |
|---|
| <b>Exceptions and constraints:</b> general rules that exclude activities from being published. <i>Any specific data item exclusions should be listed in the data tables (Organisation data tab and Activity data tab).</i>  |
| <b>Thresholds</b> <i>(are there any thresholds on the value of activities or transactions to be published. Please specify what the general threshold limits are for publication)</i><br>We intend to publish all activities/projects, regardless of their value.  |
| <b>Exclusions</b> <i>(Please identify any rules for excluding data or information that will either be applied automatically or used as a basis to manually exclude publication. Note that exceptions for publication should be)</i><br>Our exclusions are very much in line with DFID's Exclusions Policy. No information will be published which we regard as commercially confidential. |
| <b>Any general issues or other constraints</b>  |

|  |
|--|
|  |
|--|

### 3. How will data be published?

| Information for prospective users of information  |  |
|---|--|
| <b>Licensing</b> (Under which license will data be published: public domain or attribution? If the license does not meet the IATI standard please specify why. Please state whether you intend to use the IATI authorised license or another)   |  |
| <i>Licence type</i>   | <i>Narrative</i>   |
| Attribution-only  |  |
| <b>Definition of an activity and multi-level activities</b> (How is an activity defined e.g. projects and programmes, or some other structure? Do you have multi-tiered project structures e.g. projects and sub-projects or components? At which level do you intend to publish details (e.g. transactions)?)  |  |
| <i>Multi-level activities reported?</i>   | <i>Narrative</i>   |
| No  | Activities will be defined as whole projects and programmes. |
| <b>Segmenting data for publication</b> (The recommendation is to publish data segmented by country i.e. one data file for each country. Duplicate project data must not exist within different files, so projects targeting multiple countries or regional/worldwide by nature should be held within a non-country specific file(s). Is this a practical suggestion for your programme? How many projects are not specific to one country and what non-country files best suit your programme?) |  |
| <i>Segmentation</i>   | <i>Narrative</i>   |
| By country / region   | We anticipate identifying files by Country where possible.   |
| <b>Do you intend to provide a user interface in addition to raw (XML) IATI data?</b> (Will IATI data be accessible for end users through an existing or a new user interface on your website? [Note: this is not an IATI requirement])  |  |
| <i>User interface?</i>  | <i>Narrative</i>   |

Under consideration

This will be decided upon as implementation proceeds.

## Organisation

**Note:** definitions and code lists can be found at:  
<http://iatistandard.org/organisation-standard>

**Note:** For further information or support please go to the Knowledge Base:  
<http://support.iatistandard.org/forums>

| Information Area                                       | Status              | Publication date | Exclusions & Thresholds | Exclusion category                | Data provider definition | Publication notes |
|--|---------------------|------------------|-------------------------|-----------------------------------|--------------------------|-------------------|
| Annual forward planning budget data for agency         | Unable to publish   |                  |                         | d) Other                          | Commercially sensitive   |                   |
| Annual forward planning budget for funded institutions | Unable to publish   |                  |                         | a) Not applicable to organisation |                          |                   |
| Annual forward planning budget data for countries      | Unable to publish   |                  |                         | d) Other                          | Commercially sensitive   |                   |
| Organisation documents                                 | Under consideration |                  |                         |                                   |                          |                   |

## Activities

Note: definitions and code lists can be found at:  
<http://iatistandard.org/activities-standard>

Note: For further information or support please go to the Knowledge Base:  
<http://support.iatistandard.org/forums>

| Information Area                          | Status              | Publication date | Exclusions & Thresholds  | Exclusion category                | Data provider definition   | Publication notes |
|---|---------------------|------------------|--|-----------------------------------|--|-------------------|
| <b>Identification</b>                     |                     |                  |  |                                   |  |                   |
| Reporting Organisation                    | Fully compliant     | Feb-16           |  | n/a (No exclusions)               | Organisation information   |                   |
| IATI activity identifier                  | Fully compliant     | Feb-16           |  | n/a (No exclusions)               | Project number   |                   |
| Other activity identifiers                | Unable to publish   |                  |  | a) Not applicable to organisation |  |                   |
| <b>Basic Activity Information</b>         |                     |                  |  |                                   |  |                   |
| Activity Title (Agency language)          | Fully compliant     | Feb-16           |  | n/a (No exclusions)               | Project name   |                   |
| Activity Title (Recipient language)       | Unable to publish   |                  |  | a) Not applicable to organisation |  |                   |
| Activity Description (Agency language)    | Fully compliant     | Feb-16           |  | n/a (No exclusions)               | Project long description   |                   |
| Activity Description (Recipient language) | Unable to publish   |                  |  | a) Not applicable to organisation |  |                   |
| Activity Status                           | Fully compliant     | Feb-16           |  | n/a (No exclusions)               | Whether the project is being implemented or closed.                            |                   |
| Activity Dates (Start Date)               | Fully compliant     | Feb-16           |  | n/a (No exclusions)               | Date of first transaction on the project                                       |                   |
| Activity Dates (End Date)                 | Fully compliant     | Feb-16           |  | n/a (No exclusions)               | Planned date for the project to finish or actual end date for closed projects. |                   |
| Activity Contacts                         | Partially compliant | Feb-16           | No individual staff names or contact details will be included. | b) A non-disclosure policy        | Website address and general contact email.                                     |                   |

|   |                     |        |  |                                   |   |  |
|---|---------------------|--------|--|-----------------------------------|---|--|
| Participating Organisation (Funding)      | Fully compliant     | May-16 |  | n/a (No exclusions)               | DFID  |  |
| Participating Organisation (Extending)    | Under consideration |        |  | d) Other                          | Clarification required.   |  |
| Participating Organisation (Implementing) | Fully compliant     | May-16 |  | n/a (No exclusions)               | <i>The organisation implementing the project. (Either the reporting organisation or our country partners)</i> |  |
| Participating Organisation (Accountable)  | Fully compliant     | May-16 |  | n/a (No exclusions)               |   |  |
| <b>Geopolitical Information</b>           |                     |        |  |                                   |   |  |
| Recipient Country                         | Fully compliant     | May-16 |  | n/a (No exclusions)               | <i>Country where the project is being run</i>   |  |
| Recipient Region                          | Fully compliant     | May-16 |  | n/a (No exclusions)               | <i>Region where the project is being run</i>  |  |
| Sub-national Geographic Location          | Under consideration |        |  | d) Other                          | District, Province and Village of the Project. Subject to information being identifiable.                     |  |
| <b>Classifications</b>                    |                     |        |  |                                   |   |  |
| <a href="#">Sector (DAC CRS)</a>          | Fully compliant     | May-16 |  | n/a (No exclusions)               |   |  |
| Sector (Agency specific)                  | Fully compliant     | May-16 |  | n/a (No exclusions)               | Sector/s covered by the activity  |  |
| Policy Markers                            | Unable to publish   |        |  | a) Not applicable to organisation |   |  |
| Collaboration Type                        | Unable to publish   |        |  | a) Not applicable to organisation |   |  |
| Default Flow Type                         | Fully compliant     | May-16 |  | n/a (No exclusions)               | <i>Default for all activities as a "private grant".</i>   |  |
| Default Finance Type                      | Unable to publish   |        |  | a) Not applicable to organisation |   |  |
| Default Aid Type                          | Fully compliant     | May-16 |  | n/a (No exclusions)               | CO1   |  |

|   |                     |        |  |  |  |  |
|---|---------------------|--------|--|--|--|--|
| Default Tied Aid Status                                     | Unable to publish   |        |  | a) Not applicable to organisation              |  |  |
| <b>Financial</b>  |                     |        |  |  |  |  |
| Activity Budget   | Fully compliant     | May-16 |  | n/a (No exclusions)                            | The budget for project annually by financial year  |  |
| Planned Disbursements                                       | Unable to publish   |        |  | a) Not applicable to organisation              |  |  |
| (UNDER DEVELOPMENT) Recipient Country Budget Identifier     | Unable to publish   |        |  | a) Not applicable to organisation              |  |  |
| <b>Financial Transaction</b>                                |                     |        |  |  |  |  |
| Financial transaction (Commitment)                          | Fully compliant     | May-16 |  | n/a (No exclusions)                            | The budget for project annually by financial year - Only published on the first level of activities  |  |
| Financial transaction (Disbursement & Expenditure)          | Fully compliant     | May-16 |  |  | Only published on the second level of activities   |  |
| Financial transaction (Reimbursement)                       | Unable to publish   |        |  | a) Not applicable to organisation              |  |  |
| Financial transaction (Incoming Funds)                      | Fully compliant     | May-16 |  | n/a (No exclusions)                            | Only published on the first level of activities (programmes). Total budget for this project and the donor.   |  |
| Financial transaction (Loan repayment / interest repayment) | Unable to publish   |        |  | a) Not applicable to organisation              |  |  |
| <b>Related Documents</b>                                    |                     |        |  |  |  |  |
| Activity Documents  | Partially compliant | May-16 |  | b) A non-disclosure policy                     | Publishing evaluations, plans and a log frame. We will publish documents relevant to the specific activity, such as objectives, log frames etc, as long as these are not commercially sensitive. |  |
| Activity Website  | Fully compliant     | May-16 |  | n/a (No exclusions)                            | <a href="http://www.nri.org">www.nri.org</a>   |  |
| Related Activity  | Under consideration |        |  | c) Not currently captured and prohibitive cost |  |  |
| <b>Performance</b>  |                     |        |  |  |  |  |
| Conditions attached Y/N                                     | Unable to publish   |        |  | a) Not applicable to organisation              |  |  |

|                    |                   |  |  |                                   |  |  |
|--------------------|-------------------|--|--|-----------------------------------|--|--|
| Text of Conditions | Unable to publish |  |  | a) Not applicable to organisation |  |  |
| Results data       |                   |  |  |                                   |  |  |