



Learning from using UNICEF IATI data in Madagascar and Senegal AMPs

Final Report

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Background

Building on advancements in IATI data and tools, UNICEF sought to support the use of IATI data by partner country governments to reduce the burden of data collection, increase timeliness of data, and drive improvement of UN agency IATI data for further use and country benefit. It sought to move the IATI community into “Phase III” of its history, emphasizing the *use* of IATI data. Partnering with Development Initiatives (DI), Development Gateway (DG), proposed the a program to advance the use of IATI, and reduce costs of UNICEF country offices through:

1. Demonstrating the value of IATI data for more efficient reporting and collecting of data;
2. Identifying areas for improvement of UNICEF IATI data to better serve partner country needs;
3. Creating knowledge products and guidance on IATI data use to facilitate broader use of IATI data.

The program was designed based upon knowledge already obtained through DG’s year-long program on the “Use of IATI in Country Systems,” supported by the French Ministry of Foreign Affairs. Learnings from this work were reported in the report, “Use of IATI in Country Systems: Final Report of 2015-2016 Program¹.” Main findings included that additional training, support, and resources were needed by local government to be able to take the next step in using IATI data in country systems. Based on these findings, DI and DG developed a curriculum to train those interested in using IATI in country systems. The curriculum introduces users to IATI and the available tools for IATI use. It also explains what to look for in terms of data quality and preparing data to be used in country systems, and guides users on how to use the DG developed IATI-AIMS Import Tool.

Based upon prior success in using embedded fellowships to support geospatial data use, DG and DI hired and trained IATI-AIMS Fellows to work in Senegal and Madagascar, two countries that had already been using the IATI-AIMS import tool and shown interest in taking it to the next level. After going through the training, the Fellows worked with government and UNICEF country office staff to review and prepare data to be imported into the Aid Management Platforms used by each government. This report details that process, the lessons learned, and recommendations from this experience. As such it makes an important contribution to evidence base on data needs and the practical steps that governments, publishers and technical experts can advance to address these increased use of IATI data.

The Process

IATI AND AIMS TRAINING GUIDE

Based on the feedback from DG’s work that continuous hands-on training was needed in order to use IATI data in country systems DI and Development Gateway developed on IATI-AIMS Training Guide with hands-on exercises. The guide was prepared for a general audience starting with a presentation of IATI data, an explanation of the standard, a detail description of how to navigate through the registry and get the desired data. It also dives into how to analyze and prepare data for use in country systems. The last

¹ <http://www.developmentgateway.org/sites/default/files/2017-02/IATI-UseinCountrySystems-FINAL.pdf>

section of the guide gives the detailed step in using the embedded AMP IATI importer. Each steps has hands-on activities to get trainees comfortable with using and understanding the data and tools. This Training guide was used for the a basis for the fellows training that took place in Dakar June 19th - June 23rd. The user guide contains the following sections:

- An introduction to IATI
- Who is publishing to IATI and who is benefiting from IATI data
- Understanding the information that is published on IATI website
- Accessing and using the IATI data
- Preparing data for use in country systems
- Commons issues found in using IATI data
- IATI data quality and what to do if the IATI data is not of good quality
- Importing IATI data into AMP

This Training Guide was updated with what was learned from the experience from the project and translated in French. The Training Guide can be found on DG's website² and is available as a tool for others interested in using IATI data in country AIMS. Creation of the Training Guide, hiring of AMFS planning and administering the training of the AIMS took about two months, while the rest of the activities took a remaining three months of work.

AID MANAGEMENT FELLOWS

DG began the Aid Management Fellows (AMF) program³ in 2012 as a way to provide in-country support for an extended period of time to Governments implementing the Aid Management Platform. AMFs have various goals depending on what is needed and have included helping roll-out and train development partners on the AMP near the beginning of implementation, data cleaning, or a focus on geocoding.

Partner country governments reported that the sustained presence of a fellow within their ministry, working side-by-side with government colleagues, was instrumental in strengthening data quality, raising awareness, and building broader support for robust data collection processes and use in decisions.

We decided to extend this program to include support to countries aiming to use IATI data in their AMPs. This was also in response to the feedback that more continuous training and support was needed to use IATI data in country systems.

IATI-AIMS Management Fellows were hired in both Senegal and Madagascar to be the main focal points and liaison between government counterparts, UNICEF Country Office, DG, and UNICEF HQ. Development Initiatives (DI) and DG administered a one-week in-depth training in Dakar using a curriculum developed and administered both entities on the IATI standard, the available tools for

² <http://www.developmentgateway.org/sites/default/files/2017-10/IATIAIMSHandsOnPractice.pdf>;

http://www.developmentgateway.org/sites/default/files/2017-10/IATI-AIMS%20Training%20Guide_16.10.2017.pdf

³ <http://www.developmentgateway.org/blog/how-aid-management-fellowships-benefit-governments>

accessing and using IATI data, how to review IATI data for data quality, and how to use the IATI-AIMS Import tool developed by DG.

For 3 months, fellows worked hand-in-hand with government counterparts in ministry of finance and with UNICEF Country Office staff to institutionalize the IATI standard. AMFs provided training and support in the following areas: IATI data understanding, IATI data collection and validation methods; AMP IATI importer tool.



Figure 1: Petya, from DI, training Zo Randrianasolo, the IATI-AIMS Fellow for Madagascar

The AMFs have worked closely with UNICEF Country Offices and the Government Offices to come to a clear understanding of definitions, identifying the lessons learned noted in this report, and preparing the AMP to be updated with IATI data. It was necessary to work with all three groups, UNICEF HQ, UNICEF Country Offices, and Government staff to understand how IATI data was being reported, how UNICEF was currently reporting to AMP, and to understand the needs and requirements of data that is shared to the AMP. Without all three parties participating, we would not have been able to understand and improve the data files in order to use the data in the AMP.

TRAINING OF STAKEHOLDERS (UNICEF AND GOVERNMENT)

The objective of the training was to familiarize UNICEF Country Office staff and governments of Madagascar and Senegal with the IATI standard, available tools, and the process for analyzing and preparing IATI data to be used in the AMPs. While Madagascar is well versed and aware of the standard, Senegal had limited knowledge especially on how to read the IATI data and how to import it in their AMP. At the same time, UNICEF Country Office staff had very little knowledge of IATI and needed to be familiarized with what was in the data in order to verify, provide insights into how it should be mapped to the AMP, and give sign off on the use of the data.

At the completion of this study, the government personnel and UNICEF Country Office Staff in both countries have the capacity to take on the steps necessary to import IATI data in their respective AMP.

Madagascar

The objective of the training was to familiarize the Government of Madagascar- STP-CA and UNICEF Madagascar planning and monitoring teams with IATI. This training was also the occasion for the fellow to introduce UNICEF Madagascar to AMP and train the responsible focal points on its diversity of modules and functionalities including the IATI import tool.

For the training methodology, we used a participative approach: the 3 days training was tailored to facilitate the ownership of the project by the government and by UNICEF Madagascar. For this purpose, training sessions were followed by practical exercises and guided data exploration both on IATI and AMP. Participants were divided into groups of 2-3 persons, and every group was assigned different tasks. On the last day of the training and based on the knowledge acquired during the previous days, all the participants worked on the elaboration of the roadmap and the identification of key activities that should be carried out in order to improve the import tools to allow a more streamlined process in importing IATI data in AMP.

3 staff of STPCA and 4 staff of UNICEF Madagascar have been trained and participated actively in the discussion during the training, which allowed both teams to be more knowledgeable on AMP and on IATI process in general.

Senegal

In Senegal, after the kick-off meeting with UNICEF and Government, all members of the AMP team (3 staff) participated in a practical training session on IATI. The aim was to review the basics of the standard, access to the data sources via platforms including the IATI registry and d-portal, and dataset structures (XML and CSV). The training contained information on the use of the published data as well as the various existing tools. This practical session was based on the training support provided by *Development Initiatives* in its translated version by the AMF. In addition, practical training has been provided to the AMP team on the IATI import module. This allows to the team to collect and insert data from IATI datasets.

UNDERSTANDING THE DATA

Identify the data sources

Various sources of data related to the monitoring of development aid exist in Senegal, in various aspects, with different technologies and data types. Those specifically exploitable within the framework of the study can be classified into two main groups by their origin:

- Government sources
- UNICEF data sources

Government Sources

The Aid Management Platform (AMP)

Both Senegal and Madagascar use the AMP, an Aid Information Management System that currently used in over 25 countries. It is intended to be a decision-making tool for the Government and development partners. The AMP in both countries can be accessed via any web browser. Development

Partners in each country have been given access by the Government AMP Admin to add and edit information about their development projects. Meanwhile, any user can navigate through the AMP's Public Portal to access information on development activities, explore the map, view interactive dashboards, etc.

The AMP offers advanced functionalities in terms of collection, management, analysis and reporting of aid data; it also lists information about development projects and programs (on own resources or external funding) at the national level. It has a customized data entry module and a report generator. Its analytical dashboards allow interactive visualization of data. In addition, its geolocation module introduces innovations in mapping interventions and allows the visualization of data based on national statistical indicators.

All the activities and the process of operation of the AMP are defined in a reference document, the data management plan, which also organizes the roles and responsibilities of each actor.

The Triennial Public Investment Program (PTIP) - Senegal

The Senegalese Ministry of Economy and Finance has in place a three-year program highlighting the major strategic objectives of the Government's general policy and the coherence of planned investments with the priorities of economic and social development and the Sustainable Development Objectives (SDOs). In addition, it presents the sectoral distribution of investments, specifies the availability of funding (acquired, in negotiation or to search), and presents the sources of financing. The current PTIP covers the period from 2017 to 2019.

It should be noted that this program only contains projects and programs that go through the national budget. All other development activities resulting from direct financing (ex. through NGOs etc.) are not included in the program. As such, funding pertaining to those off-budget activities is not visible through common government channel but present in IATI country files.

The PTIP is available as a document that can be downloaded from the Ministry of Economy website. It is also possible to ask the budget division of the Ministry to generate queries from their electronic system in XML format. This format is used to import the budget data in AMP.

The "SIGFIP" - Senegal and Madagascar

The Integrated Public Finance Management System is a software platform that allows government to manage its budget transparently and efficiently. It operates as a network under Oracle and allows the interconnection of all the national financial departments. The system allows for dedicated user accounts, to perform a real-time follow-up of the budgeted expenses.

Only the MoF ITs have the right to use and update data. All writing rights are restricted. SIGFIP doesn't have a Web interface and is not available to the public.

UNICEF Data Sources

IATI registry and D-portal

UNICEF, which has subscribed to IATI and has published its data since 2013, is also part of the IATI member's assembly. The available datasets concern country offices interventions around the world as well as the regional programs including that of Senegal. UNICEF's IATI data is accessible via the IATI Registry and D-portal.

The IATI Registry provides links to all raw data officially published by organizations using the standard. It is the single access point for users to locate the data.

The D-portal offers more user-friendly access to IATI data and allows it to be explored by providing various search functions, such as filtering by country or publisher on the development activities and budgets published to IATI.

VISION and INSIGHT

« VISION » is a specialized management platform for tracking business processes used by UNICEF offices. It is based on the SAP® platform and covers finance, logistics, fund and grant management, human resources and payroll and project management. "INSIGHT" is an interactive portal that acts as a performance management system based on SAP® VISION data. Access to these systems is limited to authorized personnel.

UNICEF's transparency portal

Available at <http://open.unicef.org>, UNICEF's Transparency Portal aims to be an accountability tool by sharing with the public how and where they use resources. The UNICEF Transparency Portal displays their IATI data (which is also available on D-portal) and provides additional dashboards and information on the different beneficiary countries.

The portal includes interactive geo-localized data and visualizations. It allows users to search, filter, group, and generate information intuitively by attributes such as program areas, funding sources, and geographic locations.

Summary of Relevant Data Sources in Senegal

The table below summarizes the different information sources detailed above highlighting their respective advantages and added value in terms of accessibility and the type of data available in each system. The comparative analysis made it possible to highlight the most relevant sources of information to be compared: the data contained in the AMP and data published by UNICEF in the IATI Registry.

Government		UNICEF	
PGFE	<ul style="list-style-type: none"> • Web application • Public access • Ext Funding • State budget 	IATI register	<ul style="list-style-type: none"> • Web application • Public access
PTIP	<ul style="list-style-type: none"> • Document • Public access • Ext Funding • State budget 	D-Portal	<ul style="list-style-type: none"> • Donor Fund • Ext Funding
SIGFIP	<ul style="list-style-type: none"> • Web application • Restricted access • State budget • Ext Funding 	open.unicef.org	<ul style="list-style-type: none"> • Web application • Restricted access • Ext Funding
		VISION / INSIGHT	<ul style="list-style-type: none"> • Web application • Restricted access • Donor Fund • Ext Funding

**PGFE is the French term for AMP*

It should be noted that, before the import process data structure and quality all those sources were checked to identify discrepancies that might affect the import on AMP.

Results

The practical questions and challenges for the aid data fellows included the following: How can the IATI data be matched with the AMP data? Where can you find information about the funds allocated to projects and programs implemented in UNICEF's internal management systems? What structure then give this data flow so that it can be successfully imported through the IATI import module into the AMP?

These are questions that fellows mandated by Development Gateway tried to answer and provide solutions and recommendations at the technical, organizational, and institutional level.

SENEGAL

With the IATI training courses and then the practical work on the data import module, the government team not only has a solid knowledge of the IATI standard and data but is also now able to import the data using the AMP import module. At UNICEF level, the staff already had a fairly good knowledge of IATI because they were familiar with the transparency portal open.unicef.org. However, the presentations of the AMF have enabled them to better understand the usefulness of the process of importing IATI data and their use within national AIMS.

The Fellow worked with UNICEF on the analysis of financial data available in internal systems (VISION / INSIGHT), published data on IATI and their comparison with those of the MPA. These steps made it possible to identify the significant structural and organizational differences and thus propose a common structure and improvements to the technical tools.

The UNICEF IATI file contains 32 recorded activities related to Senegal that have been fully imported into the PGFE. This was achieved through data analysis performed by the fellow: corrections had to be made in the data structure as well as improvements in the IATI import module.

MADAGASCAR

Unlike for other countries, data on UNICEF Madagascar, both on IATI and AMP were organized by sector, which facilitated the matching between the two datasets. Therefore, all data recorded on AMP could be matched with data on IATI. However, additional item such as cross-sectoral activities, PCR support, adjustments, prior year commitment, Madagascar country programme, which are mostly linked to operational costs were not found on AMP.

One of the main reasons that might explain the differences between the amount published on IATI and on AMP is the difference of key terms used by UNICEF Madagascar and UNICEF HQ. Thus, some work sessions have been conducted to harmonize the transaction definitions on IATI, AMP and the one that are actually used by UNICEF Madagascar.

Based on UNICEF HQ explanation	Based on UNICEF Madagascar explanation
Allocation= Incoming funds=commitment on IATI	Allocation=Actual commitment on AMP

Output planned=planned disbursement on IATI	Output planned= Planned disbursement on AMP
Commitment= Disbursement on IATI	Utilized (Commitment+Actual)= Actual Disbursement on AMP
Expense= Expenditure on IATI	Actual=Expenses on AMP

Table 1: Definitions of transaction key term according to UNICEF Madagascar and UNICEF HQ

The greatest achievement is that all stakeholders agreed on the fact on having better data through the use of the imported IATI data. In addition, the quarterly update of the AMP platform poses less burden to UNICEF and AMP team through the use of the import tool: less time is needed to remove transactions reported by donors and the verification for the double counting is made easier.

Based on DG's feedback above in both countries, UNICEF made some changes to the IATI file: splitting out disbursements for each transaction, adding funding organization to each transaction, as well as the changes to the description and title. UNICEF modified the IATI file accordingly with the following main changes:

- **Transaction-date:** for transactions of type disbursements and expenses, breakdown the transactions by month
- **Activity Description:** publish output short text as Activity Title and output long text under Activity Description
- **Provider-org:** For transactions of type disbursements and expenses, breakdown by provider-org (donor)
- On the other hand, the DG technical also made improvements to the import module on:
- The design of an **automated script** to correct the problem related to an implementation of IATI datasets and AMP that prevented importing
- The **update of the import module** which includes improved features such as: support for funding filters and location information, - Save/Update mappings, General Bug Fixed (List of projects, autocompletes), Policy Marker and all dates available, Increased timeouts for bigger files and processing time, Added Results to source and destination
- Options for **choosing the type of update** of the data to be performed (total replacement, partial or selective import).

A standard training manual on the use of IATI data with AMP was developed and used for stakeholder training. It could be improved by taking into account the lessons learned and adapted to the specific case of the data published by UNICEF.

IMPROVEMENTS TO THE IATI-AIMS IMPORT MODULE

Based on the findings and lessons learned, key improvements were necessary to the IATI import module. Here are the improvements we made to the IATI-AIMS Import tool based on what was learned during this process:

- Allow users to select which provider organizations they want to import transactions for;
- Allow users to select what activities they would like to perform Overwrite, Insert or Replace;

- Include a title sensitivity functionality to help the tool better recognize projects with similar titles;
- Allow to map description to any Multilanguage text field in AMP;
- Allow for mapping of policy marker to gender marker field in AMP;
- Add planned start and planned completion dates;
- Add all organization roles from transaction source and destination (Accountable, Executing, and Implementing);
- General improvements: extending timeout value, improving error messages, etc.

These improvements are now available in the open source IATI-AIMS Importer code on github that you can find in <https://github.com/devgateway/iatiimport/>. Senegal and Madagascar have both received the most recent version of the IATI-AIMS import tool and have successfully imported their data.

Lessons Learned

IATI DATA: USEFUL AND COMPLEMENTARY, BUT QUALITY CAN BE IMPROVED

AMP has significant advantages with its advanced monitoring, management and reporting capabilities of development aid flows: the portal accessible online, the functionality to import data from other platforms (IATI/SIGFIP) is embedded in the platform etc.

However, it still appears difficult for the government to maintain real-time information on external financing in AMP. Some of the financial flows are totally outside the traditional monitoring channels due to specific procedures at the level of donor organizations. This unrecorded data leads to inconsistencies in the reporting of aid information with significant lags between funding amounts from the perspective of the donor community and the government.

In many cases, IATI data can therefore offer complementary, reliable and regularly updated sources of information on development aid. In the case of the UNICEF IATI data on Senegal, data are directly extracted from the internal financial information systems and present not only the complete lists of transactions, but also performance indicators to measure the effectiveness of the interventions.

Although the problem of the language barrier and the use of the UNICEF outcomes/outputs model can be highlighted, IATI data nevertheless remains a valuable and precise source of information on development aid including UNICEF development contributions in Senegal. As an illustration: the current monitoring process of the Government of Senegal does not capture transactions to direct execution projects, (i.e. funds transferred directly from the donor to implementing partners and not transferred through the public treasury), but these are listed in the data published in the IATI Registry.

UNICEF also has a reliable, up-to-date and comprehensive source of information that takes into account all external financing, government counterparts and development interventions. This would, in the long run, improve the coordination of interventions between actors and avoid polemics linked to inconsistencies in the reporting of aid flows in Senegal.

The IATI import module of the AMP allows importing the data of the XML files published by the editors downloaded from the IATI register. However, the current structure and organization of UNICEF datasets

based on a results-based model makes it rather difficult to match with the AMP project/program approach.

COUNTRY CONTEXT MATTERS

While we were expecting differences between Senegal and Madagascar, some of the differences were still surprising. For example, UNICEF Country Offices reported projects differently to the AMPs in each country. UNICEF Madagascar entered projects at the sector level, as “Health” for example, and aggregated several years of agreements into a single project entry in the AMP. Meanwhile, UNICEF Senegal entered them as individual projects, but information was less up-to-date and was missing a lot of projects. Both were only entering basic information to the project.

Government’s reporting requirements to the AMPs were also different. For example, in Madagascar, it was really important to be able to exclude transactions from specific funding organizations, and be able to import it for some of them. This is because of how they managed who was responsible for reporting data to the AMP. The approach was different from Senegal where this ability wasn’t needed.

HAVING AN IATI-AIMS FELLOW CAN BE HELPFUL

Especially in settings where there is less government ownership, or government is less familiar with IATI and the tool. Having a Fellow who is very familiar with IATI and the steps that need to happen can be incredibly helpful to move the process forward. This may be less necessary in countries where government has stronger ownership of the AMP and data and a solid understanding of IATI and how to use the IATI Import tool. Since this project was focused on a single organization’s use case, it will be important to see if the Government partners will be able to follow a similar process without support of the AMF for other organizations, or if remote support will be needed for key activities.

IT TAKES TIME

While replacing data reporting with using IATI data will save time in the long run, there is an up-front time cost that is needed to understand and prepare the data for reporting. This means that we needed UNICEF Senegal and Madagascar to be quite involved as they were the most familiar with the data they reported to the AMP in order to learn how it compared to what was reported to IATI.

DON’T ATTEMPT THIS DURING VACATION SEASON

As mentioned above, this is not something that someone unfamiliar with the context can take the data and hide in a back room and come out with ready-to-import data. We needed UNICEF staff to be available to help answer questions about the data and verify what could be replaced and how. We had difficulty trying to do this during the summer months when staff often take long summer vacations. Identifying your main focal points and making sure they’ll be available during the time you attempt this is important. This delay also meant we weren’t able to bring in other organizations into the process as we might have hoped.

STARTING WITH THE SAME DEFINITION

Definitions needed to be mapped between the AMP, IATI, and UNICEF, especially for transactions. This was critical to make sure the correct data was being compared. In this case, understanding of how data mapped from UNICEF Systems to AMP differed between country offices and HQ. Thus creating a guide that everyone agreed to use was important for comparing data and understanding how it will be imported.

The proposed structure takes into account the required data fields and the relevant fields in the description of activities. Some fields already exist, against those whom it is not the case will be added in the relevant platform to ensure interoperability between the two platforms.

UNDERSTAND AIMS REPORTING GUIDELINES

Guidelines for roles and responsibilities of reporting data to AIMS varies from country to country. Understanding who is reporting what data is critical, especially for projects with multiple donors. We learned that in Madagascar, executing agencies were only responsible for reporting other donor organization's contributions if that donor was not reporting to the AMP on their own. This meant that project transactions from certain donors needed to be included while other needed to be excluded. From this learning all IATI transactions needed to have "funding organization" added to it, and the IATI Import tool was modified to allow users to choose to import or exclude transactions from certain funding organizations.

DIVERSITY IN REPORTING LEVELS

We learned that while UNICEF IATI data was published at the "Outcome" level, in Madagascar and in Senegal by "Theme," which was an aggregation of outcomes, and each theme was reported as a single activity since 2009, and in Senegal, by project. This meant that there was not a direct one-to-one when comparing projects between IATI and AMP.

In Madagascar it was decided that the IATI data held more detail, and thus entries from 2012 onward would be replaced by IATI data. However, since UNICEF IATI data could only go back to 2012 when their SAP went live. This meant that AMP entries needed to be split since data had been aggregated into a single entry for each theme since 2009. This was a tedious process of identifying transactions that would stay, and ones that would be deleted, and later imported and updated through IATI.

In Senegal, it was decided to replace projects contained in PGFE with projects imported from IATI. As this time, the UNICEF portfolio in PGFE only contains 8 activities while the IATI file contains 32 outcomes. It was therefore decided that DG would proceed with the complete import of the UNICEF IATI file giving the users a more accurate picture of UNICEF activities at the national level.

DOES THE DATA INCLUDE ADMINISTRATIVE COSTS?

Most AIMS don't ask for development partners to report on administrative costs. However, some organizations publish this funding data in their IATI publication. This means the organization HQ, country

office, and government need to agree on if administrative costs will be included in the reporting. If it's decided that Administrative costs will not be included in the AIMS, then there needs to be a clear way to exclude this information from the import, for example by publishing it as it's own project.

HOW TRANSACTIONS ARE REPORTED

In a typical AIMS, transactions such as disbursements are reported on a specified timeline, whether it's monthly, quarterly, or other. Donors are expected to either report transactions with the specific date the transaction occurred, or to use a specific date, like the last date of the quarter for all transactions that took place that quarter. This comes to play in how data appears in reports and dashboards where date filters look at transaction dates on if it should include the transaction or not looking at a specific time period, and allows users to look back at historical trends. Thus it's important for IATI files to follow this same concept. Disbursements need to be published as individual transactions, with either the exact transaction date, to be sure that they appear appropriately in dashboards and reports.

This was an important learning as UNICEF IATI data previously was aggregated as a single transaction and the date updated so that you couldn't track historically when disbursements were made, and it would have appeared as all disbursements were made with the latest date.

LOCATIONS AND FUNDING

In many Aid Management Platforms, sub-national location is a required field, as well as having to assign the percentage of funding going to each location. Unfortunately, currently the IATI Standard does not have a place to put funding amounts or percent of funding going to each sub-national location. This means that importing locations means either creating an extension to the IATI standard to allow the organization to add funding percentages to the IATI file, automate the import so that it automatically splits the percentages evenly, or require the donors to manually enter them in the AMP before the project can be submitted.

As UNICEF has not started reporting sub-national locations widespread, this is something local offices will continue to work towards in the future, but was not a priority for this phase.

MINOR DATA IMPROVEMENTS

During the process we noted minor improvements to be made to the data. One example was making sure that actual end dates weren't entered for projects before the project was closed. As well, it was noted that project title and descriptions could pull from different sources in their internal system and the country office could enter better descriptions.

ON VERSUS OFF BUDGET

One feature that is important for governments is to know if a project is on the government budget, allowing government to manage the funds for the project, or if it's off budget, meaning the donor is implementing the project themselves or having another organization implement the project and

managing the funds themselves. This is important for governments to keep track of funding and understanding what development efforts are taking place that they do not directly manage.

Since there is not a field in IATI to track this, it was decided that after the IATI import, UNICEF country office would select in the AMP whether the project is on or off budget in order to submit the project.

REPORTING TIMELINE

Madagascar and Senegal both request quarterly reporting by the end of the month following the end of the quarter. Since UNICEF publishes IATI data monthly by the end of the following month, this timeline matched what the country governments needed and no changes were needed to the reporting timeliness.

Recommendations and Next Steps

Based on this experience, we offer some recommendations to streamline and systematize the use of IATI data in country AIMS.

RECOMMENDATIONS FOR UNICEF SENEGAL AND MADAGASCAR

1. **Improve project descriptions:** Country offices should continue to improve project descriptions to provide better narrative on what the project activities and goals are.
2. **Add Locations:** Add locations to systems to be included in IATI file:
 - a. Determine how you will provide funding percentages to locations.
3. **Continue validation and reporting of IATI Data to AIMS:** Continue to use IATI data to meet Government reporting requirements and validate the data to be sure that the data is correct and imported correctly. Provide feedback to UNICEF HQ if there are issues in the data, or if data needs to be expanded or changed to fit evolving needs.

RECOMMENDATIONS FOR GOVERNMENT OF SENEGAL AND MADAGASCAR

1. **Outreach to other Organizations:** Reach out to other organizations that might be interested in using their IATI data for importing, such as USAID, and AfDB.
 - a. Provide training to interested organizations using the IATI-AIMS Import Training Guide developed by DI and DG.
 - b. Go through a similar review process to prepare IATI data and AMP data for importing additional organization's IATI data.
 - c. Collect suggestions from users of IATI data and module and share with IATI Members' Assembly.
2. **Outreach to other countries:** Share experience using IATI data and import tool with other countries interested in doing the same.

3. **Create an AMP/IATI Steering Committee:** the idea of creating a steering committee comes from the Senegal AMP team, taking into account the lessons learned and the evolution of the organizational context since the beginning of the implementation of the project. It would consist in setting up a multi party committee including: Government officials, Development Partners (e.g. UNICEF, United Nations, WB...), Development Gateway, and DI for technical aspects and, possibly, a representation of the Civil Society. This committee would meet regularly to organize and plan activities, monitor the quality and accuracy of the data, and produce relevant analyzes and reports on aid to guide decision-making.
4. **Make AMP the main tool for aid management:** strong measures must be taken by the Government to support the implementation of AMP at the national level. In Senegal for example, the publication of a formal decision institutionalizing AMP as the official aid monitoring tool will strongly support its implementation and encourage its use by all stakeholders. This will also demonstrate the government's commitment and its willingness to sustaining the tool including its embedded IATI importer module therefore promoting the IATI standard.
5. **Conception and sharing of communication tools:** effective and appropriate communication tools on AMP and IATI should be designed and published. Periodic reports on the development assistance and thematic analysis reports should also be created and regularly shared with all stakeholders. Those reports should include IATI data as it gives information that may not be available to government agencies.

RECOMMENDATIONS FOR UNICEF HEADQUARTERS

1. **Continue publishing IATI data:** Continue publishing regularly to provide users with up to date data;
2. **Rollout to other countries:** Reach out to other country offices in countries with IATI-AIMS import tool to rollout the program to others either through the AMF program, or by using own staff to administer the training and process using the IATI-AIMS Training Guide developed by DI and DG.
3. **Create a guide of UNICEF IATI data structure & terminology:** In order to continue rolling out IATI data for UNICEF country offices to report to country AIMS, UNICEF HQ should create a guide that shows how data from UNICEF's Vision system maps to IATI data, what data is included and guidelines to understanding their data. This would be a useful tool for discussions with country offices and understanding what data is included and how it relates to the terms they are familiar with.
4. **Lead UN Agencies for standardizing IATI publications:** This project highlighted important ways data needs to be published to IATI to be usable within country systems, such as how disbursements need to be published as individual transactions, and including provider organization to transactions. UNICEF should guide other UN agencies to help standardize IATI

reporting based on the lessons learned from this experience to provide all organizations with the opportunity to use their data for reporting to country systems.

5. **Add Implementing Organizations to IATI File:** Right now UNICEF Headquarters are not publishing any Implementing Agencies due to security concerns. While DG recognizes that security concerns for certain implementing agencies is important, in many cases this is not the case. UNICEF should prioritize identifying what implementing partners they are able to share and include this in their IATI data since this is a critical piece of information for understanding who is doing what within the countries and following the flow of funds.

RECOMMENDATIONS FOR ORGANIZATIONS INTERESTED IN USING IATI IN COUNTRY AIMS

1. **Make pre-emptive improvements to your IATI data:** Review the list of Lessons Learned in this report and the IATI-AIMS Training Guide to identify ways your IATI data could be improved to be more usable in country AIMS.
2. **Create a guide for your organization's IATI data:** Create a document that details where the data comes from (what internal systems), how it maps to IATI data, any difference in terminology, and specific details for Country Offices to understand how to understand what is included in the organization's IATI data file.
3. **Determine who will lead outreach efforts:** Determine if you will be hiring AMFs, or appointing someone internal in the organization to lead outreach and training for country office staff.
4. **Outreach to Country Offices:** Determine which countries are best for rolling out IATI data use within country AIMS, look for countries that have an AIMS with an IATI-Import tool, and begin sensitizing them to the data and tools available to them. Conduct trainings and work closely with the Government AIMS administrators to begin the process for using IATI data in country AIMS.

RECOMMENDATIONS FOR GOVERNMENT AIMS ADMINISTRATORS

1. **Include IATI Import tool in your AIMS:** If your AIMS doesn't already have an IATI Import tool, take steps to make this happen.
2. **Have IATI-AIMS Trainers:** Make sure staff are appointed as IATI-AIMS trainers and that they are comfortable with working through the process of training organizations on how to analyze and prepare their IATI data for import.
3. **Have a good Data Management Plan:** Make sure you have a Data Management Plan that outlines all the data that is requested in the AIMS, definitions, and how it should be reported. This should be shared with organizations, and is especially useful when mapping IATI data to the AIMS.

4. **Outreach to Development Partners:** Have sessions with Development Partners about IATI and the IATI Import tool. Provide support and training to Development Partners interested in using their IATI data for reporting to the AIMS. Consider using the IATI-AIMS Training Guide created by DG and DI for these trainings and sessions.

RECOMMENDATIONS TO IATI MEMBERS' ASSEMBLY AND TAG

1. **Make it easier to locate and understand field terminology:** The IATI Standard and Codelist is not easily navigable and should be more integrated between each other and make it clearer on the website what the field definitions are. This is important for country level staff and government who are new to IATI and trying to understand how the data matches terms they're familiar with.
2. **Add On and Off Budget to IATI:** Many AIMS track both on and off government budget projects and differentiate between the two within the AIMS. This is important for monitoring what funding should be managed by government agencies, and to understand what is not going through government systems. There should be a field in IATI to denote if a project is on or off government budget if IATI is to be used to fully replace all manual reporting to AIMS.
3. **Allow for adding funding percentages to Locations and/or add sub-national locations to transactions:** Most of the AMPs track locations at least at the various Admin Levels and assign the percent of funding going to each selected location. This is often a mandatory field. In order for IATI data to fully replace manual data, there needs to be an assigning of percentage of funding at the sub-national location level, or adding individual sub-national locations to transactions.
4. **Reliable API for IATI:** Right now the IATI datastore does not include API calls for all elements, including location data. This means we're not able to do a fully sync with the registry to automate the import process even more.
5. **Provide IATI Documentation in French:** Currently the IATI standard and codelist are only available in English. Translating key information into French and making that easily available would be helpful for Francophone countries trying to undertake these tasks.

RECOMMENDATIONS AND NEXT STEPS FOR THE IATI-AIMS IMPORT TOOL

While we made a lot of improvements to the IATI import tool during this project, there is still room for improvement. Here is our wish list of things we would like to do to the Import tool next:

1. **Add Results Data:** Being able to import results data is one of the next things we hope to expand the IATI Import tool for.

2. **Automatically sync IATI data:** Right now the IATI Import tool is designed so that users need to upload their IATI XML file. We hope to be able to make this link more automated, but the tools out there are not currently reliable enough, or built so that we could use them for our tool.
3. **Add budget and planned disbursements:** Since these projects are not transactions in IATI, they need additional work to be able to map to fields in the AMP that are seen as transactions. This is something we hope to take on in the future.
4. **Preview IATI Data during Import:** Right now the tool does not provide a preview of the IATI data as it is being imported, adding this functionality could make it easier to identify data quality issues and help with mapping and avoid a two-step process of having to review the data in another format such as a large excel file, on D-portal, or looking at the XML itself to identify what the data is, all of which can still be a bit difficult when trying to look at transactions specifically.
5. **Allow multiple destinations for the same source field:** For example, be able to map Sector in IATI to Sectors and National Plan in AMP. This ended up not fitting within the time frame for this project.
6. **Add Tool Tips with Definitions:** Especially during the mapping phase, we would like to be able to add tooltips with the IATI field definitions, and have editable tooltips for the AMP fields so that it can be easier to know how the fields should map with each other during the process.

Annex

Field	Description	AMP	IATI	Mandatory in AMP	Observation
<iati-activity>	Overall definition of activity	Ok	Ok	Yes	Description of an implemented project or program (or activity); this XML tag frames each occurrence of activity. There are normally as many activities as there are.
<iati-identifier>	Unique identifier	Ok	ok	Yes	The unique code of activity: in IATI it is currently the unique IATI organisation identifier for UNICEF and internal reference UNICEF are using for the specific activity Ex: 41122-Senegal-3810 / A0 / 04/800/890. In the AMP, this is an ID generated automatically by the system.
<participating-org >	Definition of the organizations involved	Ok	ok	Yes	Any actor involved in carrying out the activity: It can be the executing agencies, implementation, am, but also the supervisory ministry; this XML tag frames each occurrence of actors
<title>	Title of the project / activity	Ok	ok	Yes	A brief but evocative name of the activity / project as stipulated in the project documents
<activity-status>	Status of the activity	Ok	ok	Yes	Ongoing, terminated, canceled or even in negotiation
<implementation-level>	Implementation Level	Ok	ok	Yes	Defines the coverage of the project: National, regional or even sub-regional

<location>	Definition of the intervention area	Ok	ok	Yes	With the estimated percentage (distribution of funding per area) for each definition in the case of multiple zones; options: zone type, name
<location-type>	Type of area	Ok	Add	No	Defines the type of zone in which the project is implemented Ex: village, hospital, camp, desert
<name>	Nom de la zone	Ok	ok	Yes	Area designation
<activity-date >	Setting dates	Ok	ok	No	Start and end (proposed and effective), date of signing of agreement etc. There are 4 types (1 to 4) corresponding to each of the dates EX <activity-date iso-date = "2012-04-28" type = "1" /> start-planned) end-planned (code 3) end-actual (code 4)
<sector>	Definition of sectoral classifications		Add	Yes	Sectors of intervention (with percentage for each definition in case of multisectorial and as many tags as occurrences)
<default-finance-type>	Type of funding	Ok	ok	Yes	Grants, loans or grants
<default-aid-type>	Financing Instrument	Ok	ok	Yes	The type of assistance provided (intervention by type of project, budget support, debt relief, etc.)
<transaction>	Definition of financial transactions	Ok	ok	No	Inward / outward capital movements (as many tags as occurrences)
<value >	transaction amount	Ok	ok	No	the amount (Options: currency, value date)
<transaction-type >	Transaction Type	Ok	ok	No	Choice between Disbursement / Expense

<transaction-date/>	Date of Transaction	Ok	ok	No	Date of Disbursement / Expense
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