



**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?

<b>Timetable and frequency of publication</b>		
<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>	
	In 2015, our IATI data will cover all new and ongoing DFID contracts delivered by the legal entity, WYG International, including our recent acquisition, Delta Partnerships. For every new contract, we will all issue new terms to sub-contractors who will be obliged to submit their data by the end of December where this timeframe is reasonable.	
<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>
May-15	Dec-15	We will commit to full implementation by the end of this year, including all new and current DFID funded projects. Initial implementation will begin in May.
<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	2 weeks in arrears	We are able to publish the data quarterly, one to two weeks after our month end period.
<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	We aim to be transparent on the projects we are undertaking and cannot 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 wil verify all data internally ahead of publication on a quarterly 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 have put together a working group comprising team members from finance, business development compliance and the digital team.
<b>Other notes</b>	

## 2. What are the exclusions from publication?

**Exceptions and constraints:** general rules that exclude activities from being published. *Any specific data item exclusions should be listed in the data tables (Organisation data tab and Activity data tab).*

**Thresholds** (are there any thresholds on the value of activities or transactions to be published. Please specify what the general threshold limits are for

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)</i> Our Exclusions are very much in line with DFID's Exclusions Policy and are provided in more detail in a separate document
<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>
Public domain	
<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
<p><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?)</p>	
<i>Segmentation</i>	<i>Narrative</i>
By country / region	We are satisfied that, given the large capacity available within each file, we can put all multiple country projects together in one file.
<p><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])</p>	
<i>User interface?</i>	<i>Narrative</i>
Yes	We intend to present our data on the wyg.com website so that it is clear to the public.

## 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				Commercially sensitive	<i>This information should be forward looking and cover the whole organisation. This would only be updated annually. More information is available here:  <a href="http://iatistandard.org/organisation-standard/budget-organisation">http://iatistandard.org/organisation-standard/budget-organisation</a></i>
Annual forward planning budget for funded institutions	Unable to publish			a) Not applicable to organisation		<i>If your organisation funds other organisations, include a forward looking annual budget per organisation that you fund. This would only be updated annually. More information is available here:  <a href="http://iatistandard.org/organisation-standard/budget-institution">http://iatistandard.org/organisation-standard/budget-institution</a></i>
Annual forward planning budget data for countries	Unable to publish				Commercially sensitive	<i>Forward-looking annual budgets for each country that your organisation works in. This would only be updated annually. More information is available here:  <a href="http://iatistandard.org/organisation-standard/budget-country">http://iatistandard.org/organisation-standard/budget-country</a></i>
Organisation documents	Future publication			b) A non-disclosure policy		<b>DFID Preferred Level of Disclosure Item</b> <i>Publishing links to organisational documents, perhaps including organisation strategies, country strategies or reports. More information is available here:  <a href="http://iatistandard.org/organisation-standard/documents">http://iatistandard.org/organisation-standard/documents</a> . If funding is strategic, e.g. for a PPA, it may make more sense to include PPA MOUs and reports here, rather</i>

## 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	May-15		n/a (No exclusions)	Organisation Information	Name and organisation identifier of the organisation publishing the activity
IATI activity identifier	Fully compliant	May-15		n/a (No exclusions)	Project number	WYG's unique IATI organisation identifier, combined with our own project number
Other activity identifiers	Partially compliant	May-15		n/a (No exclusions)		This can be used if another organisation will be reporting the same activity, and can hold the activity identifier of the other times this activity has been reported - eg: SJD???
<b>Basic Activity Information</b>						
Activity Title (Agency language)	Fully compliant	May-15		n/a (No exclusions)	Project name	Name of the project or programme you are reporting on
Activity Title (Recipient language)	Unable to publish			a) Not applicable to organisation		
Activity Description (Agency language)	Fully compliant	May-15		n/a (No exclusions)	Project long description	Description of the project or programme you are reporting on
Activity Description (Recipient language)	Unable to publish			a) Not applicable to organisation		
Activity Status	Fully compliant	May-15		n/a (No exclusions)	Whether the project is being implemented or closed.	This indicates whether the project is in the planning stage, if it is being implemented, or whether it is closed.



<b>Activity Dates (Start Date)</b>	Fully compliant	May-15		n/a (No exclusions)	Date of first transaction on the project	The date of when the project starts (either planned or actual). This will depend on when your organisation considers a project to have started e.g. Post-approval or at the date of the first transaction
<b>Activity Dates (End Date)</b>	Fully compliant	May-15		n/a (No exclusions)	Date of final transaction (payment) on the project	The date of when the project starts (either planned or actual). This will depend on when your organisation considers a project to have started e.g. Post-approval or at the date of the first transaction
<b>Activity Contacts</b>	Partially compliant	May-15	No individual staff names or contact details will be included	b) A non-disclosure policy	Website address and general contact email	<b>DFID Preferred Level of Disclosure</b> <i>Contact details for the project, including contact email addresses, a website etc. Some organisations may choose not to name individual staff members or provide their contact details</i>
<b>Participating Organisation (Funding)</b>	Fully compliant	May-15		n/a (No exclusions)	Organisation providing the funds for this activity	<b>DFID Minimum Requirement</b> <i>The organisation or organisations who are providing the funds for this activity. For the case of NGOs this will be DFID or other funding organisations</i>
<b>Participating Organisation (Extending)</b>	Fully compliant	May-15		n/a (No exclusions)	Will provide details if applicable to the activity	<i>Unlikely to be relevant to NGOs. This tends to refer to the government entity using funds from its own budget (for example, DFID would be the extending organisation for the UK Government's funding organisation.</i>
<b>Participating Organisation (Implementing)</b>	Fully compliant	May-15		n/a (No exclusions)	Will be the reporting organisation	<b>DFID Minimum Requirement</b> <i>This refers to the organisation who is carrying out the project. In some cases, this may be the reporting organisation, or alternatively a country partner</i>
<b>Participating Organisation (Accountable)</b>	Fully compliant	May-15		n/a (No exclusions)	Will be the reporting organisation	<b>DFID Minimum Requirement</b> <i>This refers to the organisation who is ultimately accountable for the implementation of the activity.</i>
<b>Geopolitical Information</b>						
<b>Recipient Country</b>	Fully compliant	May-15		n/a (No exclusions)	Country where the project is being run	<b>DFID Minimum Requirement</b> <i>This captures the country where the activity is taking place. You can only report EITHER country OR region per activity, not both</i>
<b>Recipient Region</b>	Fully compliant	May-15		n/a (No exclusions)	Region where the project is being run	<b>DFID Minimum Requirement</b> <i>This captures the region where the activity is taking place. You can only report EITHER country OR region per activity, not both</i>

<b>Sub-national Geographic Location</b>	Future publication	May-15		c) Not currently captured and prohibitive cost	A certain level of information may be available for some activities, but at this time not for all activities	<b>DFID Preferred Level of Disclosure</b> <i>This enables reporting of geographic location of projects below the regional or country level. It is possible to report provinces, districts and also</i>
<b>Classifications</b>						
<b>Sector (DAC CRS)</b>	Future publication			c) Not currently captured and prohibitive cost	Internal sectors are not currently mapped as per the DAC CRS classification	<b>DFID Minimum Requirement</b> <i>The sector or sectors that the activity is covered under, in accordance with the DAC CRS Sector codes, a full list is available here: <a href="http://iatistandard.org/codelists/sector">http://iatistandard.org/codelists/sector</a> . It is only necessary to report one type of sector - either CRS or organisation specific. Organisations are encouraged to map their internal sectors to the DAC CRS classifications to improve comparability of data.</i>
<b>Sector (Agency specific)</b>	Fully compliant	May-15		n/a (No exclusions)	Sector/s covered by the activity	<b>DFID Minimum Requirement</b> <i>The sector or sectors that the activity is covered under, according to an internal or other pre-existing set of sectors. It is only necessary to report one type of sector - either CRS or organisation specific</i>
<b>Policy Markers</b>	Unable to publish			a) Not applicable to organisation		<i>This enables organisations to track key policy issues such as gender through their activities, but is unlikely to apply to NGOs.</i>
<b>Collaboration Type</b>	Unable to publish			a) Not applicable to organisation		<i>This is unlikely to be relevant for NGOs as it is more for donor reporting. For example, DFID would report a collaboration type for providing core contributions to NGOs.</i>
<b>Default Flow Type</b>	Fully compliant	May-15		n/a (No exclusions)	The funding source can be classified as per this flow type	<i>This refers to the type of resource flow that is being made. For NGOs, this is likely to be a "private grant", further information on other flow types is available here <a href="http://iatistandard.org/codelists/flow_type">http://iatistandard.org/codelists/flow_type</a></i>
<b>Default Finance Type</b>	Unable to publish			a) Not applicable to organisation		<i>This is likely to only be relevant to bilateral and multilateral donors, and refers to the financing mechanism that is used for this activity. If you would like further information, see <a href="http://iatistandard.org/codelists/finance_type">http://iatistandard.org/codelists/finance_type</a></i>
<b>Default Aid Type</b>	Fully compliant	May-15		n/a (No exclusions)	C01	<i>For NGOs this is likely to be C01 (project type interventions), Further information on aid type codes can be found here <a href="http://iatistandard.org/codelists/aid_type">http://iatistandard.org/codelists/aid_type</a></i>

<b>Default Tied Aid Status</b>	Unable to publish			a) Not applicable to organisation		<i>This field is only applicable to bilateral and multilateral donors.</i>
<b>Financial</b>						
<b>Activity Budget</b>	Fully compliant	May-15		n/a (No exclusions)	The annual budget for project by financial year	<b>DFID Minimum Requirement</b> <i>The forward-looking annual budget for this project.</i>
<b>Planned Disbursements</b>						<i>Planned payments to implementing organisations or other parties. This information may not be relevant to NGOs.</i>
<b>(UNDER DEVELOPMENT) Recipient Country Budget Identifier</b>	Unable to publish			a) Not applicable to organisation		<i>This field is only applicable to bilateral and multilateral donors and is currently under development with the IATI Technical Advisory Group.</i>
<b>Financial Transaction</b>						
<b>Financial transaction (Commitment)</b>	Fully compliant	May-15		n/a (No exclusions)	The total budget for this project	<b>DFID Minimum Requirement</b> <i>For NGOs, it is best to conceptualise this as the total budget for this project, which may capture some information in common with the "Activity Budget" field</i>
<b>Financial transaction (Disbursement &amp; Expenditure)</b>	Fully compliant	May-15		n/a (No exclusions)	All disbursement of funds being passed to another organisation for them to use in implementing a activity, and all expenditure on goods or services	<b>DFID Minimum Requirement</b> <i>A Disbursement is funds being passed to another organisation for them to use in implementing a activity, and Expenditure is the direct purchasing of goods or services.</i>
<b>Financial transaction (Reimbursement)</b>	Unable to publish			a) Not applicable to organisation		<i>This is only likely to be applicable to bilateral and multilateral donors.</i>
<b>Financial transaction (Incoming Funds)</b>	Fully compliant	May-15		n/a (No exclusions)	The total budget for this project and the donor	<b>DFID Minimum Requirement</b> <i>The incoming funds that fund this project, including the name of the organisation providing this funding. For PPA agencies in particular, it may only be possible to report PPA funding in one overarching activity, with related activities reported without specific incoming funds.</i>
<b>Financial transaction (Loan repayment / interest repayment)</b>	Unable to publish			a) Not applicable to organisation		<i>This is only likely to be applicable to bilateral and multilateral donors.</i>
<b>Related Documents</b>						

<b>Activity Documents</b>	Partially compliant	May-15		b) A non-disclosure policy	Will publish documents relevant to the specific activity, such as objectives, logframes etc, as long s these are not commercially sensitive	<b>DFID Minimum Requirement</b> <i>This enables links to be published to documents relevant to the specific activity, such as appraisals, objectives, contracts, logframes etc. For more information on the kind of information that IATI recommends documents should cover see: <a href="http://iatistandard.org/codelists/document_cat">http://iatistandard.org/codelists/document_cat</a></i>
<b>Activity Website</b>	Fully compliant	May-15		n/a (No exclusions)	<a href="http://www.wyg.com">www.wyg.com</a>	<b>DFID Preferred Level of Disclosure</b> <i>A website that provides further information on the project.</i>
<b>Related Activity</b>						<i>This enables organisations to link programmes and their components together, by recording whether there is a related project to the one being reported.</i>
<b>Performance</b>						
<b>Conditions attached Y/N</b>	Unable to publish			a) Not applicable to organisation		<i>This is only likely to be applicable to bilateral and multilateral donors.</i>
<b>Text of Conditions</b>	Unable to publish			a) Not applicable to organisation		<i>This is only likely to be applicable to bilateral and multilateral donors.</i>
<b>Results data</b>						<i>If an organisation is capturing information on results as data, rather than in documents, it is possible to report baselines, measures and indicators etc. In the IATI XML format.</i>