Participants (Virtually):

Abdul Riza (UNDP); Aissatou Diallo (UNICEF); Alex Miller (Development Initiatives- IATI Secretariat); Anna Whitson (UNDP - IATI Secretariat); Annelise Parr (UNDP - IATI Secretariat); Cody Wallace (UNDP - IATI Secretariat); David Eade (Development Initiatives- IATI Secretariat); Jonas Hakansson (ICRC); Justin Leo Senn (UNHCR); Kambal Hind (IOM); Michelle Levesque (IOM); Mark Brough (Emergentally); Otto Reichner (WFP); Paul Allen (ICRC); Sanjana Gaddam (UNICEF); Sarah Lofti (ICRC); Stephane Malti (ICRC); Steven Flower (Open Data Services Cooperative)

Background:

Why is multi-year-funding important to publish? Are there tangible use case scenarios that clearly articulate the utility of publishing multi-year-funding to IATI? Perhaps, as a recipient organisation of multi-year-funding, I may want to record that commitments have a multiyear dimension, to "give credit" to the donor; or, as a data analyst, I want to track the spending of MYF commitments, so I can understand the rate of utilisation and/or understand the longevity of any funding commitments, to undertake time series analysis.

To galvanise a discussion around multi-year-funding, the IATI Secretariat convened a technical focus group consultation on 3 May 2023, among 'recipient' multilateral organisations to review current practices and identify possible solutions for addressing the limitations of publishing multi-year funding to IATI. While the existing IATI Standard does not provide explicit publishing guidance for recipient organisations that receive multi-year funding, the purpose of this initial discussion was to understand how organisations are currently recording multi-year funding, and determine common methodological approaches and best practices that could be utilised, while making it easier for data users to track multi-year funding commitments.

The result of this discussion, along with the next round of consultations with 'provider' organisations of multi-year funding, will inform the basis for developing the IATI Secretariat's guidance note for publishing multi-year funding in the interim period and in turn providing evidence and engagement points for any future changes to the IATI Standard.

Discussion:

The meeting began with an opening presentation by Mark Brough (Emergentally) providing first a historical backdrop of the commitments derived from the Grand Bargain Caucus on Quality Funding [Outcome Document](#). The presentation also introduced different approaches in publishing multi-year income identified from the [Guidance note](#) from the technical leads of the Grand Bargain Transparency Workstream. (*The presentation from Emergentally can be accessed [here](#)*).

The next segment of the discussion progressed to a moderated brainstorm whereby the organisations exchanged their views and different methodological approaches to publishing multi-year funding. Moreover, several challenges and limitations were identified for publishing multi-year funding from the perspective of 'recipient' organisations. The matrix provided below captures the feedback provided the brainstorm discussion:

Proposed Solutions	Challenges / Limitations
● The Activity level: The possibility to identify multi-year activities through an analysis of the start / end dates of the Activities. (For example, using the activity-date elements to determine if an activity start/end date spans more than one year.)	● For UNHCR & WFP, MYF is an attribute of 'Transactions,' not of activities. No correlation exists between activity duration and funding duration, i.e. activity duration cannot be used to determine MYF. ● The assumption (timeframe of activity = timeframe of associated commitments if total budget = total commitment at the outset) breaks down when there are multiple donors contributing to an activity, or a multi-year activity is only partially funded.
● The use of XML extensions as a mechanism to express data on MYF: colleagues expressed interest in how they could flag/tag specific transactions with a MYF value - to make it easier to identify. ● Currently, no element or attribute exists to identify MYF (either at the activity or transaction level); therefore, an XML extension is a possibility to explore.	● The implementation challenge of agreeing definition terminology for XML extension tagging/flagging data as MYF.
● Definition methodology for multi-year-funding	● Timeliness and predictability aspects of the definition on multi-year-funding are not necessary characteristics as according to Grand Bargain definitions, funds do not have to be fully disbursed at the beginning of the multi-year-period (common for multi-year funding to be contractually agreed upon up front and then disbursed in annual/quarterly tranches).
● The planned disbursement field could potentially offer a solution, given it allows for the specification of the period start and end date. Similar to transaction types, the planned disbursement element is allowed	● Requires clarifying methodological guidelines and commitment of publishing organisations' to provide granularity of planned disbursement data. (Note: intended purpose was to capture payment

to have provider orgs and receiver orgs along with the specific reference codes and provider activity IDs. Assessing the scope of the planned-disbursement element in relation to the transaction element could be a solution for users trying to distinguish a period of time (i.e. like multi-year-funding).	schedules) ● Additionally, reconciling separate planned disbursements may pose challenges from a data user perspective for easily identifying multi-year funding. As 'planned-disbursement' is a different element to the transaction-level, users would need detailed understanding/bespoke guidance on how to look at the scope of the planned-disbursement element in relation to the transaction element. ● Only about 10% of publishers are using the planned disbursement element.

● Discussion around using transactions assess multi-year-funding:
● For example, possible use case/solution how transaction is published:
  ○ transaction date: 31 Dec 2022
  ○ transaction value date: 31 Dec 2022
  ○ transaction period: 1 Jan 2023 - 31 Dec 2023
	● At the transaction level: One challenge lies with the lack of an end date to commitments & disbursements in the current IATI standard. In general, transactions lack a period of time for which it applies. For example, any transaction regardless of the type, has two dates: 1.) transaction date; and, 2.) transaction value-date (in many cases these are the same value).
	
	● A second major challenge is that it is not possible to cross-reference different transactions. For example, it is impossible to determine if a commitment relates to a disbursement making it more difficult to track MYF (the burden is on the data user to make this assumption).
	
	● Another challenge is that IATI transactions cannot have a date that is in the future - they should be immutable / in the past.

● Donors may be best positioned to report on multi-year-funding.	● Recipient Organisations may not know the actual aid type.
Other Observations	
● Streamlining OECD-DAC definitions	● OECD-DAC code list and ODA terminology is not easily translated for humanitarian organisations and contexts.

● On earmarking, cf. [IATI data for Earmarking](#).	

Action Points / Next-Steps:
- Schedule next round of consultation with 'provider' organisations of multi-year funding vis-a-vis to understand how donors could report on multi-year-funding.