Proposed solutions

This paper proposes that the [page on the IATI Standard website](#) be modified as below.

Note: A [PDF version](#) is also available showing how the new version will appear on the website.

Upgrades

The IATI standard is a living entity that will require improvement over time.

The standard is a collection of XML schema, embedded codelists, non-embedded codelists, documentation and rules.

Changes to some or all of those parts of the standard will be driven by the suggestions and experiences of the publishers and users of IATI data, and managed by the IATI Steering Committee through its Secretariat and Technical Advisory Group.

Minor Changes

Some changes can be made at any time without having a major effect on data publishers or data users. These are known as Minor Changes.

Minor changes can be made without changing the version of the standard. They cover:

- bug-fixes, including resolution of spelling and grammar errors (where there are no implications for usage and/or meaning)
- modifications to non-embedded codelists
- improvements to documentation

Minor changes can be tracked through the IATI GitHub account.

More significant changes to the standard are handled via upgrades. There are two types of upgrades - Decimal Upgrades and Integer Upgrades.

Decimal Upgrades

Decimal Upgrades (e.g. from 1.01 to 1.02) can only will cover:

- bug-fixes, including resolution of spelling and grammar errors (<u>where edits have implications</u> for usage and/or meaning)
- modifications to embedded codelists
- minor additions to the standard which improve the functionality without introducing substantial new content
- changes will be optional
  changes will be backwardly compatible.

Integer Upgrades

Integer Upgrades (e.g. from 1.x to 2.x) will cover:

- substantial additions involving new areas of data
- new mandatory fields
- changes that are not backwardly compatible
  proposed minor upgrades that are disputed by one or more members.

Open Consultation on all proposed changes

All proposed changes, for Integer and Decimal Upgrades, will be published on the IATI Knowledge Base (http://support.iatistandard.org/forums) in the IATI Standards forums.

The entire process should be open to public scrutiny at all times.

Anyone can make a proposal (via the Modifications, Additions, Improvements section), and each upgrade process receives it's own forum where proposals can be assigned. The forums allow for a public exchange on the merits of the proposals to take place. The IATI

Technical Team will contribute to these exchanges and will draft proposals for the formal formats required for the standard.

Minor Changes may take place with our without wider consultation. You can suggest a minor change directly to support@iatistandard.org

If you wish to discuss an idea before submitting a proposal you may wish to consult the IATI Technical Mailing List first.

Decimal Upgrade Procedures

Clear cut off dates for proposals to be considered for a Decimal Upgrade will be advertised on the Upgrades section of the IATI Standard website. The IATI Technical Team will select those proposals meeting the above mentioned guidelines and prepare a proposed decimal upgrade on behalf of the IATI Secretariat. The contents of this proposed upgrade will be published on the Knowledge Base and all members and publishers of IATI data will be informed of its contents by email.

A timetable governing a process of consultation and implementation of the changes will be published.

Objections, improvements, observations etc. will be addressed throughout the upgrade process.

Integer Upgrade Procedures

The timing and planning for an Integer Upgrade will be approved by the Steering Committee. All proposed changes will be fully documented and circulated to all members. A timetable for the upgrade process will be available on the Upgrades section of the IATI Standard website

Consultation, and progress on the upgrade will be available in public via IATI websites.

Integer upgrades will require the formal consent of members.