A rough guide to IATI collaboration cultures

This is a draft document put together at a workshop in Copenhagen on 27th June 2019. It is a work in progress and suggested changes are welcome.

The International Aid Transparency Initiative has existed for over a decade.

IATI has been, and is, co-created by many different people: from those involved in formal governance structures, to organisations involved in producing data, organisations and individuals making use of aid and humanitarian data to improve their work, private sector tool builders, and active citizens volunteering their time to work on code, guidance and support.

Whether it is your first visit to IATI, or you have been around a long-time, this (unofficial) 'rough guide' is designed to help you find your way around, and understand the different cultures of collaboration at work.

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IATI Discuss

IATI Discuss (https://discuss.iatistandard.org/) is an online forum for people who have questions about IATI. For example, when they are publishing their first dataset; for people publishing or using IATI data to ask for clarification or similar use cases, for technical discussion on particular Standard questions, where public consultations have been held on Standard upgrades, where people are notified of new work or developments.

Discuss has therefore become a repository of historical knowledge and how discussions have informed some decisions about the standard. As of June 2019, there were 465 registered users and 5,500 posts. You will find a great level of detail and depth of discussion on many topics, though sometimes there will be long threads with seemingly no end. Some people use Discuss to 'think out loud'. Others use it to post fully-formed views or announcements.

Using Discuss can be helpful to discover that you are not alone: other people may be finding the same things challenging as you. However, be aware that conversations on Discuss can quickly turn technical, which can be a surprise if you are new. Don't be afraid to ask for clarification!

When you arrive in Discuss land don't be intimidated by the depth of knowledge in the discussions. Don't be afraid to ask your questions - people are really willing to help.

Threads can often go back years, so the Search feature is your friend. When you are writing a new post Discuss shows you other similar posts, which is really useful. Don't go down the rabbit hole!! You can spend hours reading random posts. Focus on the question you want answering.

Discuss has a big membership but not everyone participates/writes posts or answers. It's ok just to read - as your knowledge grows, you

will feel more comfortable about contributing. Or you can just launch in! It's up to you.

It's really hard to convey emotion accurately in writing! Re-read your post before you post it to make sure it's not going to be misinterpreted.

If you like someone's answer to your post, give them a like.

Discuss is predominantly in English.

GitHub

The IATI Github organisation (https://github.com/IATI) it is the place to come if you want to comment on IATI software, to raise a bug or to see what is happening at the code level with our various tools. Github is a widely used platform to support teams to build software, and to work in the open. Reporting issues through Github is done is plain english and not code, so anyone that identifies a bug can ask for it to be fixed.

The IATI Tech Team developers manage their work on Github, so you can see 'issues' assigned to team members to address. If you want to contribute to code, please note if an issue is active -- assigned to a member of the team -- it is best not to contribute your own code at the same time!

The IATI Tech Team have different prioritised products each quarter. Unless your issue or Pull Request (source-code contribution) is critical they won't be likely to be able to look at it unless it connects to their work plan. At the start of each quarter they publish blogs like this one that let you know their work priorities.

In GitHub, each IATI tool has its own repository. Choose the appropriate repository first from the [IATI GitHub page](#), then select the "issues" option in the navigation bar to see the repository's issues list, read or comment on existing issues, or open your own new issue. Often, it will be obvious which repository you need, but sometimes repositories are for 'behind the scenes' libraries or other resources that won't be meaningful to all users. If you have any questions about which repository to use, please get in touch with the tech team or ask the IATI community on Discuss.

Should I use GitHub or Discuss?
- I found a specific problem with an IATI application (button doesn't work, output is wrong): GitHub preferred
- I have a specific new-feature request for an IATI application (want to search by humanitarian marker, need currency conversion): GitHub preferred
- I need help using an IATI application!!!: Discuss preferred
- I'm curious about future plans for an application: Discuss preferred
- I have general or philosophical questions about IATI's tools roadmap and priorities: Discuss preferred
- I think a change to this software broke my app - and I think I know which line of code it was: GitHub preferred

Raising an issue on GitHub (anyone):
- If you see a page with an error in the text, raise an issue and make sure you include the web link to the place you saw the error;.
- If you see a bug or notice that something isn't working describe the problem, say what browser you are using and state what you had been expecting to happen. Screen shots that show the error are really helpful.
- If there is a feature you'd like to see, raise an issue describing the feature.

Pull Requests on GitHub (software developers contributing new code):

- They technical team are always delighted when people want to help, but appreciate it when volunteers get in touch first so that they can help direct effort to place where it can have the most impact.
- For small bug fixes, it is best to raise an issue first, and ask the technical team if a direct code contribution/pull request would be helpful. It can often take longer to get a pull request review than for the technical team to fix the code directly.
- Unsolicited pull requests that don't fit within the agreed technical team work plan are unlikely to be reviewed anytime soon.
- Please write tests! The tech team don't have capacity to review Pull Requests that do not have tests.

Backchannels

The IATI community has a strong culture of transparency: discussing and consulting in the open, hosting discussions online, and posting documents online for anyone to access.

However, just as in any community, there are also lots of other 'behind the scenes' channels where people communicate, including Twitter Direct Messages, Skype Message, WhatsApp Groups, personal emails, phone calls, and informal going for a 'drink' after work/conference etc. These backchannels exist in both digital and physical manifestations.

We find that opinions of individuals can be expressed more freely in back channels than official 'forums'. They are used sometimes sense check opinions and ideas, or to provide a sounding board among individuals or groups. Getting the balance between 'a conversation before the conversation', and having all conversations in the open, is a constant balancing act.

We use back channels because they 'feel' quicker than formal 'email' communication. They are often seen as unofficial channels so we don't have to go 'on the record'. And it seems to be that it provides results quicker. Some backchannels ae short-term (e.g. a conference WhatsApp group): others may exist longer term (ongoing Skype group chats). These channels are made by their members - and so are not (and should not be) regulated or controlled. However, there is a shared responsibility to think about who is included or excluded, and what needs to be communicated more widely.

It can be important to be aware of when is it appropriate to use a back-channel and have conversations in 'private', as opposed to using formal (and transparent) communication.

It can create suspicion if people feel excluded from a back-channel, and being included can build trust. However, adding someone to a backchannel (WhatsApp group; Skype Chat etc.) should be with their consent: don't impose back channels on people.

Google Docs

Within the IATI Community, Google Docs are often used to share document drafts for developing user guidance, formulating ideas and best practices, investigating issues, etc.

Anyone can create a google doc and share it for gathering comments or inviting contributions from any other community members.

Ideally a document starts with an elaborated idea, but needs to show it is still a work in progress. Too 'bulky' documents may be considered 'pre-fabricated' and will lead to comment-storms (*or* general disinterest).

Comments on the document may be requested by either a) posting on the Discuss forum, or b) inviting designated members from the community through Backchannels.

The document owner should respond to the comments, and inform the commenters of any changes made to the document before closing or resolving any comments. Unnotified closure of comments will backfire.

Not all members of the IATI Community can access Google Docs because some lage institutional networks block access.

Members assembly

The [IATI members assembly](#) is formed of the 90+ members who have formally joined the International Aid Transparency Initiative. It is focussed on policy and political discussion.

The initial format of meetings is modelled on the UN, with people around tables with name plates and flags. The format changed in the last meeting, but the decision making process was still unclear. All attendees are able to speak, but formally, only members have decision making power. Conversations are 'filtered' in advance, more diplomatic discussion than brainstorm.

Although there is, in theory, a voting process, decisions are made in practice by rough consensus. This means the decision making process can look opaque, or it can feel like there is 'rubber stamping' of decisions made in advance. The ideal process though is that there has been discussion in advance, to prepare papers and agreements.

Technical advisory group

The Technical Advisory Group was initially formed as a voluntary network of experts providing advice during the early development of the IATI Standard. There is no formal membership process, other than joining the TAG mailing list. At any time, the TAG is made up of those who are actively contributing or attending events.

Recently, the (semi-)annual TAG meetings have had broader participation: with newcomers as well as technical experts. It has taken on the role of providing a community space more informal than the members assembly. At its best, the TAG provides space for non-technical people to get exposed to technical ideas and

challenges, and to learn about using the IATI Standard. And it provides a space for technical community members to learn about the way IATI is being used by publishers and users in different contexts.

Many active TAG participants come from a background of making decisions based on intuition: iterating towards answers, rather than carrying out lots of deep up-front analysis. It has been a where deep-dive technical discussion can take place, and in the past has played a key advisory role when formal upgrades (changes) to the IATI standard have been underway: reviewing proposals and discussing details. It is important when participating in detailed technical discussions to come prepared: there will usually be background reading, and threads to follow on Discuss or GitHub to understand the context for a discussion.

As of June 2019, the TAG is in transition. In the past, many active members had experience of range of other standards, and worked on issues of interoperability between them. It was a small group, able to develop more mature ideas to bring to the formal governance mechanisms of the board and members assembly. With recent growth, this focus has dissipated, but lots of smaller ad-hoc groups within the wide TAG have emerged with different levels of preparation and focus. Proposals to rethink the TAG are being explored as part of the next IATI strategy.

miniTAG

The idea of 'miniTAG' meetings emerged up after the large Tanzania TAG meeting in 2016. The objective of a miniTAG is to have a small group of people from the wider community meet to discuss a common theme on IATI. This might be a 'technical' topic, or more

oriented towards user needs and implementation. The outcomes from a mini-tag have no special status, and can not make any decisions on behalf of the standard or TAG. However, they can provide a way of checking for rough consensus, and feeding proposals to the board, members assembly or future TAG meetings

The venues for a miniTAG may be either virtual or physical. The idea was never properly defined and some *confusion* still exists on the 'technical' character of miniTAGs held the last 2 years, or whether they are simply a form of ad-hoc community meeting. As of June 2019, there are some ideas around simply calling these 'ad-hoc' meetings, rather than using the language of 'miniTAG'.

The first miniTAG was held in London on 28 June 2017, the second in Manchester in May 2018 and the 3rd was held after the IATI Members Assembly in Rome in 2018. These have been opportunistic meetings - based on bringing together people who have travelled to the same place for other reasons. The community are aware of the need to make these meetings more inclusive.

Former TAG Chair, John Adams, has written a definition of MiniTags here:
https://medium.com/@johnthegeo/minitag-top-tips-f9357903ea83

Standard Operating Procedures

[IATI's Standard Operating Procedures](#) draw together and codify all decisions taken by IATI relating to how the initiative is run. It is intended as a living document which is updated after each members' assembly to reflect new priorities or operating realities.

Twitter

There is an active IATI community on Twitter. Look for the #iati hashtag, or see who the @iati_aid account is talking to!

We think of Twitter as a more open, public, and slightly more accessible space than Discuss. It's mode of communication enables the discussion of issues with others in the broad open data and development communities, acting as bridge between IATI communities and others at times. The tone of voice on IATI Twitter can be much more formal than the rest of Twitter, and also much more technical (sometimes too technical for newcomers). At the same time, discussions of IATI community members on Twitter can also be light-hearted and social: so take care when interpreting messages - there may be sub-text!

As a newcomer, stumbling into an IATI twitter conversation might involve a bit of a learning curve, as discussions might assume quite a lot of prior knowledge. You don't always know who is reading, or engaging with a twitter thread.

Things to remember:

- The IATI official twitter feed is more informative than interactive - focussed on highlighting achievements and sharing communication messages
- Many people get information about what's happening from Twitter itself
- When there are key events there's a flurry; when there's not so much happening it can be quite quiet. This also means when things are quieter, things stand out more
- If you're already in the community - Twitter provides a quick way to know what's happening elsewhere. If you're not - you

will find there are probably peaks and troughs of interest and engagement on Twitter around e.g. key IATI events

Zero and first-draft PDF

The IATI Secretariat is hosted by UNDP, UNOPS and Development Initiatives, working on behalf of the board. Often, when documents are drafted, they will go through a formal process designed to make sure all key stakeholders are consulted. This can involve creation of multiple drafts.

Taking strategy development as an example, a zero draft is developed following consultation with a broad group to define the overall objectives. At this stage it's an informal document inviting challenge and further input. Consultation on the zero draft should be moderated to guide the process and timeframe. Inputs required at this stage should come from all constituencies to ensure that gaps are flagged and addressed. One person generally 'holds the pen'. Depending on the subject matter the zero draft can come from a committed source (whether Secretariat, Board or wider community).

The first draft considers all inputs received through the consultation on the zero draft and incorporates missing pieces and addresses inconsistencies. It is circulated to all those concerned (whether members, CSOs, other constituency).

The first draft is taken forward by the Board and Secretariat which addresses inputs and indicates what was or was not included. All comments should be openly provided so it's clear where different ideas have come from and how they are handled.

Subsequent drafts may be required for different topics.

Links to resource documents should be included in drafts for circulation.

The filename, and the communications around a draft, should indicate what status it has, and the kind of input that is appropriate at each point.