
Open Ag Funding

Release

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initiative for
**OPEN AG
FUNDING**

The [Initiative for Open Ag Funding](#) is working to make sure that development actors working in agriculture and food security have the data they need to make smarter investment decisions, and to ultimately end hunger and food insecurity.

Contents:



The [Initiative for Open Ag Funding](#) is working to make sure that development actors working in agriculture and food security have the data they need to make smarter investment decisions, and to ultimately end hunger and food insecurity.

You can read more about the Initiative [here](#).



The Open Ag Funding data framework

On this site you can find out **how to publish and use Open Ag Funding data** that is fit for purpose to support donor co-ordination and more effective use of resources for agricultural development and food security.

You can:

- Read more about *how we are building on the International Aid Transparency Initiative (IATI) data standard*;
- Explore the *priority data elements needed for effective Open Ag Funding data*;
- View the technical documentation on how to prepare your data in XML or spreadsheet formats;
- Read background research from the project

Share your data

Does your organization provides funding for agricultural development or food security? If so - we need your data.

- **If you already publish data using the IATI standard**, you can enhance your existing data to make it Open Ag ready.
- **If you do not currently publish structured data on your funding or investments**, you can *follow these simple steps to plan out new open data publication*.
- **Not sure why you would share your data?** Read more here about the benefits.

Looking for support to publish? We're offering free publisher support during 2017.

Explore Open Ag Funding Data

Over 2017 we will be supporting the development of a range of tools that can help you explore and analyze data published according to the Open Ag Funding framework.

Check back for details of tools here later in 2017, or *get in touch* to let us know about the data analysis you want to be able to carry out, and we'll see if we can signpost you to existing resources.

Interested in other datasets?

The [International Aid Transparency Initiative](#) brings together data from 100s or donors on funding for development.

The [Global Open Data for Agriculture and Nutrition](#) network supports advocacy and action on open data across the agriculture sector.

Extending IATI



The International Aid Transparency Initiative (IATI) standard provides a common data format, used by 100s of organizations, to describe **activities**, their **funding** and their **goals and outcomes**.

Although originally developed for aid transparency, the IATI standard can be used to represent a wide range of funding flows, including grants, loans and investments.

The Open Ag Funding framework extends the IATI standard by:

- Identifying *20 key elements* that **must** or **should** be included to give a clear picture of funding for agricultural development and food security;
- Setting out the vocabularies to use for classifying activities;
- Providing guidance on how to prepare information on partners, locations and results information for each activity.

If you already use IATI then adopting the Open Ag Funding framework will involve checking your data quality, and adding or enhancing information for agriculture-related activities.

If you are new to IATI then you can choose to publish full IATI data, or you can use our simplified spreadsheet template to prepare your Open Ag Funding data. Get in touch with iatisupport@opendataservices.coop to request a copy.

Getting started

There are four simple steps to share your data on agriculture and food security projects in a way that will support:

- Better collaboration between donors;
- Improved targeting of resources;
- Discovery and mapping of local partners;
- Easier evaluation of interventions.

Over 2017 you can get support from the Initiative for Open Ag Funding to work through these steps. [Contact us](#) for more information.

Step 1: Identify your agriculture and food security projects

Open Ag Funding is about publishing enhanced information on investments in agriculture and food security.

Finding your activities

Search your project or investment database or lists for any activities or investments with a focus on agriculture or food security.

If you currently classify your activities using the OECD DAC Sector/Purpose codes, we have prepared a list of relevant codes you may wish to check.

DAC Sector Codes

Table 3.1: CSV

Code	Title
12240	Basic nutrition (under 120 HEALTH/122 Basic health)
14040	River basins development (under 140 WATER AND SANITATION)
311	AGRICULTURE
31110	Agricultural policy and administrative management
31120	Agricultural development
31130	Agricultural land resources
31140	Agricultural water resources
31150	Agricultural inputs
Continued on next page	

Table 3.1 – continued from previous page

Code	Title
31161	Food crop production
31162	Industrial crops/export crops
31163	Livestock
31164	Agrarian reform
31165	Agricultural alternative development
31166	Agricultural extension
31181	Agricultural education/training
31182	Agricultural research
31191	Agricultural services
31192	Plant and post_harvest protection and pest control
31193	Agricultural financial services
31194	Agricultural co_operatives
31195	Livestock/veterinary services
312	FORESTRY
31210	Forestry policy and administrative management
31220	Forestry development
31261	Fuelwood/charcoal
31281	Forestry education/training
31282	Forestry research
31291	Forestry services
313	FISHING
31310	Fishing policy and administrative management
31320	Fishery development
31381	Fishery education/training
31382	Fishery research
31391	Fishery services
32161	Agro_industries (under 321 - INDUSTRY)
32162	Forest industries (under 321 - INDUSTRY)
32165	Fertilizer plants (under 321 - INDUSTRY)
43040	Rural development (under 430 - Other multisector)
520	Developmental food aid/Food security assistance
52010	Food aid/Food security programmes
72040	Emergency food aid

If you have a large number of agriculture and food security activities, you may wish to pilot the Open Ag Funding framework with a sub-set, focussing on a single country or value-chain.

Step 2: Map your current data practices & plan for updates

Our *data quality framework* may require you to:

- Review activity titles and descriptions;
- Add additional classifications;
- Add additional location data;
- Check that partners are clearly listed; and
- Include information on results;

for each of the activities you identified in Step 1. Each item in the quality framework has been designed around the data that is needed to improve support improved coordination and funding impact.

Creating improved data will need input from:

- **Programme or investment officers** - who will have the knowledge to provide additional activity information;
- **Technical staff** - who can adapt databases, or data production workflows, to store and publish enhanced data.

The approach to this step will depend on whether you already publish data using the International Aid Transparency Initiative standard or not.

IATI publishers

Check whether the database or workflow that is used to produce your IATI data includes the fields requested in the Open Ag Funding framework.

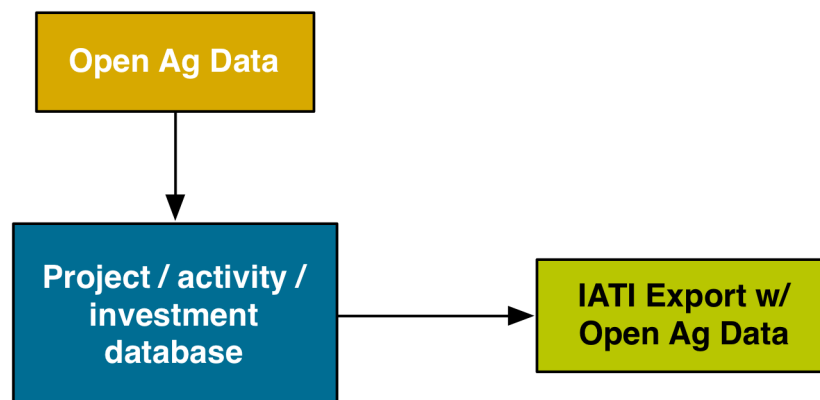
Identify whether new fields can be added to the database information is first stored in, or whether new data will have to be included 'downstream'.

New publishers

You will need to decide on an approach to producing IATI data. This may involve mapping your systems against the wider IATI Standard, as well as against the Open Ag Funding framework.

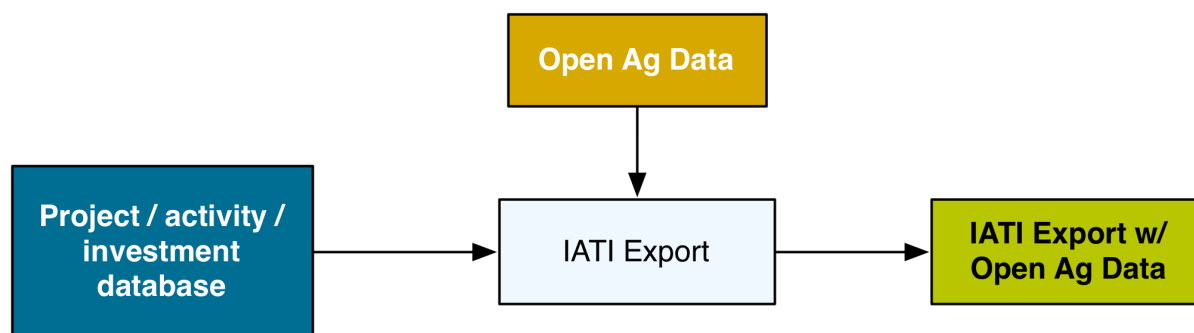
Publishers generally split between (a) building direct integrations with a project database; (b) exporting data periodically into CSV, and converting the data into the IATI XML format.

In an **upstream approach** you would modify the main database or system you use to create your IATI data to directly include Open Ag Funding fields.



We are working with creators of common IATI tools to add support for Open Ag Funding fields to their tools, supporting improved upstream publishing.

In a **downstream approach** you would continue current data production practices, but add in a step that works with the exported data to add extra fields.



We are working to develop simple spreadsheet templates that can be used to create or annotate IATI data with the Open Ag Funding fields. Get in touch if you would like to pilot use of these templates.

Step 3: Enhance your data

There are two choices to make when planning how to enhance your data:

(1) Automated vs manual

It is possible to use auto-coding tools to apply additional classifications to activities using project descriptions and documents, and in some cases, automatic geocoding is also possible.

However, such approaches are not 100% reliable, and how successful they will be depends on your current data quality.

On the other hand, manually updating activity descriptions and classifications may require programme officer time and expertise, and may be more difficult to apply to past activities, rather than future activities.

(2) Periodic vs ongoing enhancement

Providing enhanced data could be part of the everyday business process of the organisation, or it could be carried out as part of a periodic exercise (e.g. once a quarter) that is designed to not only capture data, but also support in-house knowledge-sharing and collaboration.

The guidance here will be updated after our tool development workshop.

Step 4: Validate, publish & use

The guidance here will be updated after our tool development workshop.

Framework

The Open Ag Funding framework identifies 20 elements from the IATI standard and how they should be used to meet the needs of agricultural development and food security funders and practitioners.

The requirements can be divided into three groups

Table 4.1: Data Quality Requirements: Overview

Meta-Data	Core IATI	Enhanced Data
Fields that are important for interoperability, but that can often be set as constant values in the software or spreadsheets used to publish data	Fields that are part of the basic International Aid Transparency Initiative standard. These are commonly available in existing databases of funding or investments.	Fields or quality requirements for existing fields, tailored to the needs of the Agriculture and Food Security community. Providing these will involve some additional steps to collect or re-code information.
Activity ID, Activity Status, Default currency and language, Reporting Organisation, Aid Classifications	Activity Title, Activity Descriptions, Activity Dates, Budget, Location (Country/region), Transactions	Participating organisations, Contact details, Sub-national location, Transaction classification, Transaction parties, Transaction traceability, Results information

Each of the elements are outlined below, along with:

- Why this element matters;
- An example of this element represented in IATI XML;
- An example of this element represented in tabular format;
- Additional information about collecting and managing this information.

For each activity reported, data publishers should aim to provide each of the following components:

Activity ID

Each funding allocation or investment you report on should be assigned an activity identifier. The IATI documentation states that:

An activity is defined by the reporting organisation. Depending on who is reporting, it might be a large programme, a small project or another logical grouping of work and resources.

When publishing your data, you should establish the level at which you will report activities, and then follow IATI guidance to provide a ‘globally unique’ ID for each one.

Why?

It is important that activities are suitably disaggregated. For example, if you have multiple projects in a country, there should be an activity record for each of them.

All the other elements of the framework are about the descriptions you apply to each activity.

By using a globally unique identifier for each activity, it becomes possible to cross-reference between different publishers datasets. This is important for **traceability**.

How?

An IATI identifier is usually constructed by combining the **organisation identifier** of the reporting organisation as a prefix, with a dash (-), and then a local identifier from your existing systems.

For example, if your organisation identifier is 'GB-COH-09506232' and you are reporting on an activity that is in your database as 'A2017_01' then the iati-identifier will be 'GB-COH-09506232-A2017_01'.

You don't usually need to enter or store the prefix in your database for each individual activity: it can be added when data is exported, or using a formula.

<code><iati-identifier>US-1-TZ-50-AID-EXAMPLE-IDENTIFIER</iati-identifier></code>

Table 4.2: CSV

iati-identifier
US-1-TZ-50-AID-EXAMPLE-IDENTIFIER

IATI Docs: [IATI Activity](#) | [IATI Identifier](#)

Activity Title

A clear and comprehensible project title that indicates the focus of the activity.

Why?

Giving each activity a clear titles makes discovering and understanding the focus of activities much easier. This is particularly important when data about activities is being shared across contexts and in different platforms.

Compare the two lists below? Which would you prefer to see in your search results when browsing for relevant projects and investments?

Table 4.3: CSV

Bad titles	Good titles
PROFSERV 15-17 Ghana WDP	Western Ghana Wheat Development Project
PA Zambia RDP	Zambia Rural Development Project (Partnership Agreement)
EARS NP	Early Recovery in Agriculture Sector in Nepal

How?

Usually you will be able to take activity titles from your existing database or management information systems. A good title will:

- Avoid acronyms (unless very widely used - e.g. UN);
- Be 2 - 10 words long;
- Put a project in context (e.g. mentioning the country or locality for the project, the goals, or the crop types)

Consider whether the interface for entering activity names in your database, or training for the people who add new activities, needs to be adapted to promote good quality titles.

The title field in IATI uses the ‘narrative’ element to allow titles to be provided in multiple languages. If you don

```
<title>
  <narrative>Agricultural Capacity Building in Tanzania</narrative>
</title>
```

Table 4.4: CSV

title/narrative
Agricultural Capacity Building in Tanzania

IATI Docs: [IATI Activity | Title](#)

Activity Descriptions

Unstructured text describing the activity, its objectives, or its target groups.

Why?

The general description of an activity is often the first thing people will see when trying to understand the details of an investment or activity. Descriptions are also used by auto-classification tools, that may look for agriculture-specific keywords.

Including a separate description of the objectives of an activity, and the target groups, can further help both individuals reading up on a project, and computers configured to assist with searching across projects.

How?

The description element can be used to provide distinct text for:

- A description of activity in general
- The objectives of activity
- The target groups of activity

The type of description provided is specified using the description’s *@code* attribute as illustrated in the see the xml example.

You may need to consider how project forms, and project databases, collect clear descriptions for each of these fields, or it may be possible to automatically populate objective and target-group fields from structured information in your project database, log-frames or project documents.

A good general description to support Open Ag Funding will be:

- 20 - 500 words long;
- Have a first paragraph written for a general audience;
- Include additional detail in subsequent paragraphs, with specialist information and terminology where appropriate;
- Avoid acronyms, but not avoid specific technical terms - as these can be useful for search and auto-classification;
- Include a line-break between paragraphs;

Objectives and target group descriptions might be written in prose, or using short bullet points.

TODO: IMPROVE THE EXAMPLE DESCRIPTIONS TO MATCH THE ABOVE REQUIREMENTS

```
<description type="1">
  <narrative>General activity description text. Long description of the activity
  ↳with no particular structure.</narrative>
</description>
<description type="2">
  <narrative>Objectives for the activity, for example from a logical framework.</
  ↳narrative>
</description>
<description type="3">
  <narrative>Statement of groups targeted to benefit from the activity.</narrative>
</description>
<!--pre-participating-org-bookmark-->
```

Table 4.5: CSV

description	description/@type
General activity description text. Long description of the activity with no particular structure.	1
Objectives for the activity, for example from a logical framework.	2
Statement of groups targeted to benefit from the activity.	3

IATI Docs: [IATI Activity | Description](#)

Activity Status

Indicates what phase an activity is in its life cycle.

Why?

The activity status makes it clear whether a project is planned, active or completed. This is important to support collaboration on upcoming projects, or shared learning from projects that have already taken place.

How?

Chose from one of the available codes in the [Activity Status codelist](#).

```
<activity-status code="2"/>
```

Table 4.6: CSV

activity-status/@code
2

Note: the code '2' in the examples above means 'Implementing'

IATI Docs: [IATI Activity](#) | [Activity Status](#)

Activity Dates

Start and end dates, either planned or actual.

Why?

These dates allow data users to tell when a project is planned to start and finish, or when a project actually started or finished.

How?

A standardised iso date with the format YYYY-MM-DD, plus a code to declare if a date is start/end planned/actual, according to the [Activity Date Type](#) codelist.

```
<activity-date iso-date="2011-04-08" type="2"/>
<activity-date iso-date="2017-04-07" type="4"/>
```

Table 4.7: CSV

activity-date/@iso-date	activity-date/@type
2011-04-08	2
2017-04-07	4

IATI Docs: [IATI Activity](#) | [Activity Date](#)

Aid classifications

Classifications against core IATI fields for: Collaboration Type, Default Flow Type, Default Finance Type, Default Aid Type and Default Tied Status. Note: These will often be set as constant values for any given reporting organisation if they are not otherwise recorded for ODA reporting.

Why?

These fields are particularly useful when publishing [OECD DAC CRS](#) compatible activities.

How?

Each of these fields have their own corresponding codelist, linked below:

Table 4.8: Aid Classification Codelists

Element	Codelist
Collaboration Type	Collaboration Type
Default Flow Type	Flow Type
Default Finance Type	Finance Type
Default Aid Type	Aid Type
Default Tied Status	Tied Status

```

<collaboration-type code="1"/>
<default-flow-type code="10"/>
<default-finance-type code="110"/>
<default-aid-type code="C01"/>
<default-tied-status code="5"/>
<budget type="1" status="1">
  <period-start iso-date="2017-01-01"/>
  <period-end iso-date="2017-12-31"/>
  <value currency="EUR" value-date="2012-01-01">30000</value>
</budget>

```

Table 4.9: CSV

collaboration-type/@code	default-flow-type/@code	default-finance-type/@code	default-aid-type/@code	default-tied-status/@code
1	10	110	C01	5

IATI Docs: [IATI Activity](#) | (see ‘How’ above)

Sector Classification

Classification against OECD DAC Sector codes, plus additional vocabularies, which can be found on the [Sector vocabulary codelist](#), or a custom sector codelist can be used (see ‘how’).

Why?

Sector classifications allow publishers to specify why they are undertaking a given activity. This is very useful for data users, as it can be cross-referenced with locations / recipient countries / and the receivers of transactions to give an insight in to what aspects of development assistance are well funded, where and to whom.

How?

A recognised code, from a recognised vocabulary, classifying the purpose of the activity. Sector must either be reported at the activity level or at transaction level for all transactions.

The most commonly used sector vocabulary is the [OECD DAC CRS Purpose Codes](#). This is useful to make a broad categorisation of an activity (or transaction), but has limited scope to capture details about agricultural projects.

This is where other vocabularies become useful. There are two ways of using another sector vocabulary:

1. By using one of the alternative vocabularies available on the [Sector Vocabulary codelist](#).

2. By declaring the `vocabulary` of the sector to be 99 , and then specifying the `vocabulary-uri` along with it.

```
<sector vocabulary="1" code="31110">
  <narrative>Agriculture</narrative>
</sector>
```

Table 4.10: CSV

sector/@code	sector/narrative
31110	Agriculture

IATI Docs: [IATI Activity | Sector](#)

Policy Marker

Classification against OECD DAC Policy Marker codes, plus additional vocabularies, which can be found on the [Policy Marker Vocabulary codelist](#), or a custom sector codelist can be used (see ‘how’).

TODO: check available Ag codelists

Why?

Policy Markers allow publishers to specify the focus of a given activity, and indicate the degree of that focus. This is very useful for data users, as it can be cross-referenced with locations / recipient countries / and the receivers of transactions to give an insight in to what aspects of development assistance are well funded, where and to whom. Unlike the Sector element, the Policy Marker element doesn’t extend to transaction level, and doesn’t expect percentages for more than one instance, which means they act more like a *tag*.

How?

A recognised code, from a recognised vocabulary, classifying the policy focus of the activity. Currently, this can only be reported at the activity level.

The most commonly used vocabulary for this element is the [OECD DAC CRS Policy Marker](#). Again, this vocabulary is useful to make a broad categorisation of an activity (or transaction), but has limited scope to capture details about agricultural projects.

As with Sector elements, other vocabularies are useful here. There are two ways of using another Policy Marker vocabulary:

1. By using one of the alternative vocabularies available on the [Sector Vocabulary codelist](#).
2. By declaring the `vocabulary` of the sector to be 99 , and then specifying the `vocabulary-uri` along with it. See the XML and CSV boxes for an example using [AGROVOC](#).

```
<sector vocabulary="1" code="31110">
  <narrative>Agriculture</narrative>
</sector>
```

Table 4.11: CSV

sector/@code	sector/narrative
31110	Agriculture

IATI Docs: [IATI Activity](#) | [Policy Marker](#)

Participating Organisations

Details on all participating organisations, including partners. This information should be kept updated as new partners are engaged with a project.

Why?

Declaring participating organisations is one way of connecting IATI data together, and allowing data users to know which funders, partners, sub-contractors, or grantees are connected to a given activity.

How?

Organisations are identified by their name and IATI Identifier (which is declared in the `ref` attribute). How they relate to the project is declared in the `role` attribute, which corresponds to the [Organisation Role codelist](#), and the type of the organisation is declared in the [Organisation Type codelist](#).

```
<participating-org ref="US-USAGOV" role="1" type="10">
  <narrative>USA</narrative>
</participating-org>
<participating-org ref="US-1" role="2" type="10">
  <narrative>U.S. Agency for International Development</narrative>
</participating-org>
<participating-org ref="US-1" role="3" type="10">
  <narrative>U.S. Agency for International Development</narrative>
</participating-org>
<participating-org role="4" type="10">
  <narrative>ACDI/VOCA</narrative>
</participating-org>
```

Table 4.12: CSV

participating-org/narrative	participating-org/@ref	participating-org/@role	participating-org/@type
USA	US-USAGOV	1	10
U.S. Agency for International Development	US-1	2	10
U.S. Agency for International Development	US-1	3	10
ACDI/VOCA		4	10

IATI Docs: [IATI Activity](#) | [Participating Organisation](#)

Contact details

At least one contact address for more information on the specific project. Documents Any relevant and associated project documents should be published and linked to. Examples of useful documents include: project plans, monitoring data, interim reports and evaluations.

Why?

Contact details offer data users an official communication channel which can be used to make enquiries about data.

How?

IATI is quite flexible with which aspects of the contact information can be included or omitted, but the fields given in the XML and CSV is recommended. For a full breakdown of the available fields, see the official documentation linked below

```
<contact-info type="1">
  <organisation>
    <narrative>U.S. Agency for International Development</narrative>
  </organisation>
  <person-name>
    <narrative>Example Contact</narrative>
  </person-name>
  <telephone>+1 202-712-EXAMPLE</telephone>
  <email>exampe@usaid.gov</email>
  <website>https://www.usaid.gov/tanzania</website>
  <mailing-address>
    <narrative>1300 Pennsylvania Ave NW, Washington DC 20004</narrative>
  </mailing-address>
</contact-info>
```

Table 4.13: CSV

contact-info/organisation/narrative	contact-info/person-name/narrative	contact-info/telephone	contact-info/email	contact-info/website	contact-info/mailling-address	contact-info/@type
U.S. Agency for International Development	Example Contact	+1 202-712-EXAMPLE	ex-ampe@usaid.gov	https://www.usaid.gov/tanzania	1300 Pennsylvania Ave NW, Washington DC 20004	1

IATI Docs: [IATI Activity](#) | [Contact Info](#)

Location (Country/Region)

A broad declaration of the country or region which is the recipient of the activity. This is achieved using codelists reference in the 'how' section below.

Why?

To share where the benefit of a given activity will be. Ideally specifying a country, but if that information isn't available, then specifying a region.

How?

By using an [ISO country code](#), or [OECD DAC CRS Region code](#).

```
<recipient-country code="TZ" percentage="100"/>
<!-- for Tanzania. This could also have been: -->
<recipient-region code="298" percentage="100"/>
<!-- 298 = 'Africa, regional' on the Region codelist (see 'how') -->
```

Table 4.14: CSV

recipient-country/@code	recipient-country/@percentage
TZ	100

For Tanzania. This could also have been:

recipient-region/@code	recipient-region/@percentage
298	100

298 = 'Africa, regional' on the Region codelist (see 'how')

IATI Docs: [IATI Activity | Recipient Country OR Recipient Region](#)

Sub-national location

Detailed information on the on-the-ground location where activities are taking place. Where possible, this should be to the geographic precision of second order administrative division (ADM2) - see the video in 'how' below.

Note that the fields which have been highlighted yellow in the XML example are likely to be generic across activities, and so haven't been explored in much depth below. See the location documentation linked at the bottom of this section for more details.

Why?

To share where the benefit or beneficiaries of a given activity will be *specifically*.

How?

This element has a lot of flexibility, supporting multiple vocabularies and allowing a data publisher to include a lot of information.

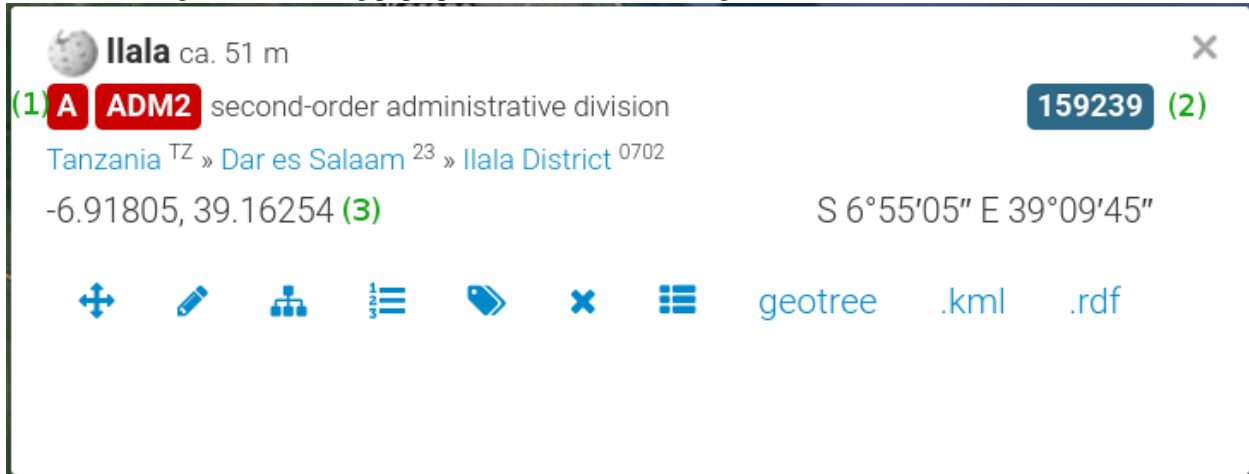
Due to this flexibility, there are many possibilities for how to gather location data. One fairly intuitive method is to use a tool like Geonames both to confirm an activity's location, and to record the relevant values to specify it. Take a look at the video below:

Steps:

- Go to the [Geonames website](#)
- Search for the country, province, administrative district etc., "Ilala District" in this case.

- Click the ‘Search worldwide’ button.
- Click the dropdown menu, which reads “Found X items in this area”.
- Filter by code or class for find the ‘AMD2’ entries if possible (if unsuccessful, try a broader region like “Dar es Salaam” and look for ‘AMD1’).
- Once the small preview has come up, click on the name of the area to be taken to an overview of its boundaries

Below is an image of the resulting pop-up window, annotated with green numbers for reference:



These values can then be used to populate the following location fields:

- (1): “ADM2” in feature-designation
- (2): “159239” in location-id and administrative
- (3): “-6.91805, 39.16254” in point

```
<!-- 298 = 'Africa, regional' on the Region codelist (see 'how') -->
<location>
  <location-reach code="1"/>
  <location-id vocabulary="G1" code="159239"/>
  <name>
    <narrative>Ilala District, Dar es Salaam, Tanzania TZ</narrative>
  </name>
  <description>
    <narrative>Ilala District is one of three districts in Dar es Salaam,
    ↪Tanzania, the others being Temeke to the South and Kinondoni to the North. The 2002
    ↪National Tanzania Census states the population for Ilala as 634,924. The area is
    ↪273 km$^2$. Ilala
    is commonly referred to as 'Downtown Dar', where much of the commerce,
    ↪banking, and national offices are located.</narrative>
  </description>
  <administrative vocabulary="G1" level="2" code="159239"/>
  <point srsName="http://www.opengis.net/def/crs/EPSSG/0/4326">
    <pos>-6.91805, 39.16254</pos>
  </point>
  <exactness code="1"/>
  <location-class code="1"/>
  <feature-designation code="ADM2"/>
</location>
```

Table 4.15: CSV

	location/reach/@code	location/code/@code	location/name/narrative	location/admission/@code	location/station/@code	location/feature/@code	location/point/@code	location/scala/@code	location/class/@code	location/designation/@code	location/feature/@code
1	G1	159239	Ilala District, Dar es Salaam, Tanzania TZ	G1	2	159239	http://www.opengis.net/def/crs/EPSG/0/4326	-6.91805, 39.16254	1	1	ADM2

IATI Docs: IATI Activity | Location

Budget

A given activity's budget, broken into periods of time.

Why?

Budgets are very useful for users of IATI data, as they can indicate how much has been allocated for a given activity, and offer a good point of comparison with expenditure and disbursements (in transactions).

This is particularly true of *forward looking* budgets - those which apply to future time periods. These allow stakeholders to react to funding shortfalls or surpluses i.e. instances of budgets not being met with comparable expenditure.

How?

Budgets only require the amount allocated, the currency, and relevant start, end, and valuation dates, and the following flags:

- **Type:** Whether this is the original budget (prepared when the original commitment was made) or has subsequently been revised
- **Status:** The status explains whether the budget being reported is indicative or has been formally committed. The value should appear within the BudgetStatus codelist. If the @status attribute is not present, the budget is assumed to be indicative.

```

<budget type="1" status="1">
  <period-start iso-date="2017-01-01"/>
  <period-end iso-date="2017-12-31"/>
  <value currency="EUR" value-date="2012-01-01">30000</value>
</budget>

```

Table 4.16: CSV

bud- get/@type	bud- get/@status	budget/period- start/@iso-date	budget/period- end/@iso-date	bud- get/value	bud- get/value/@currency	budget/value/@value- date
1	1	2017-01-01	2017-12-31	30000	EUR	2012-01-01

IATI Docs: [IATI Activity | Budget](#)

Transaction

Information on the major transactions associated with the project, particularly commitments and disbursements to partners. Transaction elements can get large and complex when compared with most other elements of an IATI activity, so the specific use-case for various aspects of the transaction model have been given their own sections below.

Note that highlighted lines in the example XML above are the same fields as their ‘default’ equivalents on the activity level. Specifying them on the transaction level can ‘override’ the defaults, and must be done for all transactions if there are no defaults specified. Because of this they won’t be shown in CSV examples or explained in detail below.

Why?

Providing transactions, particularly when transaction classifications and the associated transaction organisations are described, allows users to understand the relative focus of funding in practice, and to see which organisations are associated with which kinds of work.

Codelists

Table 4.17: CSV

Codelist	Element	description
Transaction Type	transaction-type/@code	What kind of transaction? Incoming/Outgoing, Expenditure/Disbursement etc.
Currency	value/@currency	The currency a given transaction was made using, given in the three-letter ISO code e.g. 'GBP' for Pounds Sterling.
Organisation Type	provider-org/@type	What kind of organisation is fulfilling the role of provider or receiver in a given transaction.
DAC 5 Digit Sector	sector/@code	A transaction-level equivalent of the activity level element. The purpose or category of a given transaction.
Sector Vocabulary	sector/@vocabulary	Again, this is a corollary of the activity-level equivalent. It can be used to specify another (or custom) vocabulary for transaction sectors
Country	recipient-country/@code	Two-letter ISO code denoting the country that will benefit from a given transaction.
Region	recipient-region/@code	An OECD DAC CRS Region code denoting the region that will benefit from a given transaction.

How?

In the IATI Standard, Transaction elements range from small blocks with three values, to much larger pieces of data, which can convey a fair amount of the same metadata as a whole activity. Here is the smallest *valid* transaction which can be published.

Minimal activity elements CSV:

Table 4.18: CSV

transaction/transaction-type/@code	transaction/transaction-date/@iso-date	transaction/value
3	2016-12-19	20000

... And as XML:

```
<transaction>
  <transaction-type code="3"/>
  <transaction-date iso-date="2015-12-31"/>
  <value>257051.44</value>
</transaction>
```

Clearly, this isn't very useful or even usable, except to say that an amount *has been disbursed at a given time*. For a more comprehensive example, see the 'xml' tab.

```
<transaction ref="1234" humanitarian="1">
  <transaction-type code="3"/>
  <transaction-date iso-date="2012-01-01"/>
  <value currency="USD" value-date="2012-01-01">100000</value>
  <description>
    <narrative>Transaction description text</narrative>
  </description>
  <receiver-org receiver-activity-id="AA-AAA-123456789-1234" type="23" ref="AA-AAA-
↪123456789">
    <narrative>Agency A</narrative>
```

```

</receiver-org>
<sector vocabulary="2" code="111"/>
<!--Note: only a recipient-region OR a recipient-country is expected-->
<recipient-country code="TM"/>
<recipient-region code="616" vocabulary="1"/>
<flow-type code="10"/>
<finance-type code="110"/>
<aid-type code="A01"/>
<tied-status code="3"/>
</transaction>

```

CSV

Unfortunately, a full CSV representation of a transaction element would be too big to comfortably read, but the principles in the examples above can be used to incorporate whichever elements are desired above those that are minimally required.

IATI Docs: [IATI Activity](#) | [Transaction](#)

Transaction classification

Where possible, transactions should be classified against relevant sector codes (see Focus 3)

This can be done simply by adding a sector classification in the same way you might at the activity level, for example:

```
<sector vocabulary="2" code="111"/>
```

Note that as of version 2.02 of the IATI standard, transaction level classifications don't permit percentage declarations, and so act more like a 'tag'.

Transaction parties (participating organisations) and traceability

Transactions should clearly identify the partner receiving funding, and the relevant organisation should be detailed under participating organisations. Where possible, transactions should link onwards to related IATI activities (sometimes published by other organisations).

Consider the following XML from the larger example above:

```

<receiver-org receiver-activity-id="AA-AAA-123456789-1234" type="23" ref="AA-AAA-
↪123456789">
  <narrative>Agency A</narrative>
</receiver-org>

```

Because the example transaction was a *disbursement* (declared by `transaction-type` being '3'), this means that the reporting-org, USAID, is disbursing funds at a value of \$100,000. What the `receiver-org` snippet above does, is specify who the funds have been disbursed to. As you can tell, this is a hypothetical organisation, but it has the following attributes (emphasis added to highlight the attributes needed for *traceability* - see below):

Table 4.19: CSV

Attribute	Description
receiver-activity-id	the activity published by the recipient of the funds, in which those funds are documented.
type	The category of the recipient organisation. Government, NGO, Multilateral, etc.
ref	The organisation identifier of the recipient organisation.
narrative	The name of the recipient organisation.

Transaction Traceability is achieved when the details listed in a given activity's transactions can be associated with other organisations and their activities, so that a chain or network of collaboration and funding can be drawn using IATI data.

This ability to connect IATI activities and transactions is particularly useful when trying to find out where a given investment has ended up being implemented, who originally funded a given activity or intervention, or what the result of a given investment was further down the delivery chain.

Results information

Project should publish information on any indicators and benchmarks the project is oriented towards meeting, as well as any structured results data that is available.

Even when results data is not available, the indicators by which a project impact will be measured should be published in a structured form, and associated results documents linked to via the document section.

Why?

Results offer a way to express how effective or impactful a given investment or activity has been. This has a huge range of uses, from evaluating the general outcomes of development assistance in a given country, region or sector, down to evaluating the specific outcomes of a small, regional project to guide future investment decisions in that region.

How?

Much like a Transaction, the Result element is quite sprawling, and can be used to express structured results data in a variety of ways. For the purposes of this guide, the 'xml' tab to the right is an *opinionated* take on the minimally useful, as opposed to the minimal valid, or the maximal utilisation of the element.

Codelists

Table 4.20: CSV

Codelist	Element	description
Result Type	Result	Whether this result describes and output, outcome, impact or something else.
Indicator Measure	Indicator	Whether the indicator is measured in units or percentages.
Indicator Vocabulary	Indicator	A range of external codelists which themselves provide codes and descriptions for indicators, for example to specify results.
Result Aggregation Status Flag (binary '1' or '0', not a codelist)	result/@aggregation-status	Whether or not a given result element is apt for aggregation
Result Indicator Ascending Flag (binary '1' or '0', not a codelist)	result/indicator/@ascending	Whether a given indicator is ascending or descending i.e. higher is better or lower is better.

```

<result type="1" aggregation-status="1">
  <title>
    <narrative>Result title</narrative>
  </title>
  <indicator measure="1">
    <title>
      <narrative>Indicator title</narrative>
    </title>
    <reference vocabulary="1" code="3429"/>
    <baseline year="2012" value="10">
      <comment>
        <narrative>Baseline comment text</narrative>
      </comment>
    </baseline>
    <period>
      <period-start iso-date="2013-01-01"/>
      <period-end iso-date="2013-03-31"/>
      <target value="10">
        <location ref="TZ-PQR"/>
        <location ref="TZ-ABC"/>
        <dimension name="sex" value="female"/>
        <dimension name="age" value="adult"/>
        <comment>
          <narrative>Target comment text</narrative>
        </comment>
      </target>
      <actual value="11">
        <location ref="TZ-PQR"/>
        <location ref="TZ-ABC"/>
        <dimension name="sex" value="female"/>
        <dimension name="age" value="adult"/>
        <comment>
          <narrative>Actual comment text</narrative>
        </comment>
      </actual>
    </period>
  </indicator>
</result>
ti-activity>
activities>

```

CSV

As with transactions, the CSV example would be too large to be helpful here, but again the principles in the examples above can be used to incorporate whichever elements are desired above the minimally useful ones in the xml example given.

IATI Docs: [IATI Activity](#) | [Location](#)

Reporting Organization

Why?

Data users need to know where information has come from.

You can use the IATI standard to publish information about your own activities, or to provide information you have collected on the investments and funding activities of others.

The reporting organization block is used to identify the publisher of all of the following information.

How?

The reporting organisation details can usually be set as a constant value for all the activities you publish.

As well as the organisation name, you will need an **identifier** and a code to describe the organisation type from the OrganisationType codelist.

Check the **identifiers** page for information on locating your own organisation identifier.

If you are reporting on behalf of another organisation, the secondary-reporter attribute should be set to '1'. Otherwise it should be '0'.

```
<reporting-org ref="US-1" type="10" secondary-reporter="0">
  <narrative xml:lang="en">U.S. Agency for International Development</narrative>
</reporting-org>
```

Table 4.21: CSV

reporting-org/@ref	reporting-org/@type	reporting-org/narrative	reporting-org/@secondary-reporter
US-1	10	U.S. Agency for International Development	0

IATI Docs: [reporting-org](#) | [OrganisationType codelist](#)

Metadata: default currency and language

Why?

You can report your activities in different languages and currencies.

When you specify the default, then tools displaying the data can be sure they show the right language and currency values to their users.

How?

These can usually be set as constant values for all the information you are publishing, unless you have certain sets of activities that use different default currencies and languages.

The default currency (default-currency) is represented with a three-letter currency code.

The default language (xml:lang) is represented with a two-letter country code

These are expressed as attributes of the iati-activity element

```
<iati-activity default-currency="USD" xml:lang="en">
```

Table 4.22: CSV

xml:lang	default-currency
en	USD

IATI Docs: [iati-activity](#) | [Currency codelist](#) | [Language codelist](#)

Identifiers

When publishing Open Ag Funding data, two identifiers are particularly important.

Activity identifier

Each activity should be given a stable identifier, following the IATI guidance on activity IDs. You can [read more about this on the framework pages](#).

Organisation identifiers

Additional guidance will be included here from the Identify Org project

Codelists

The most widely used codelist for classifying aid activities and investments (the OECD DAC CRS Purpose codes) does not provide enough specificity when it comes to agriculture and food security.

As a result, the *Open Ag Funding framework* asks funders to provide additional activity classification using a detailed agricultural vocabulary.

We are working to develop an extract of the GACS, the [Global Agricultural Concept Scheme](#) that supports tagging on the following dimensions

- Crops - Does this activity focus on a particular kind of crop?
- Animal products - Does this activity focus on particular livestock or animals?
- Processing - Does this activity focus on a particular form of processing?
- Products - Does this activity focus on a particular form of product?
- Technology - Does this activity has a particular technology focus?
- Nutrition - Does this activity have a specific nutrition focus?

GACS is a structured thesaurus, with a cross-walk for many terms to AGROVOC.

Terms are arranged in a hierarchy, allowing tagging and search interfaces to support classification and retrieval of IATI activities at various levels of granularity.

Example codelist extract

You can use the search box below to find tags currently included in our draft list.

When you select a tag, the term hierarchy will be displayed.

(Note: Javascript required; loading may be slow)

Full codelist

The full draft codelist is displayed below. Work is ongoing to reduce this down to a more manageable size by editorially removing certain terms.

Extensions

The `tag` extension allows you to provide multiple classification of an aid activity to support **discovery** of relevant activities through search and browse interfaces.

It is based on the IATI `sector` element, but differs in that it *cannot* be used to express statistical information about the share of a project budget or spend allocated to the topic of the tag.

What is it?

This new element looks a lot like the existing `sector` element, but without a percentage:

```
<openag:tag vocabulary="99" vocabulary-uri="http://aims.fao.org/aos/agrovoc/" code="c_
↪4397">
  <narrative xml:lang="en">Livestock</narrative>
</openag:tag>
```

NB: the ‘openag:’ at the start of the element is because this element is currently available via an extension. If tag is adopted as a core part of IATI 2.03 the element name will simply be `<tag>`, and the namespace declaration detailed below can be dropped.

Values:

- the `@code` attribute will change use by use, but must always be included.
- the `@vocabulary` attribute is ‘99’ to specify that it’s a custom vocabulary (as opposed to one of IATI’s embedded ones).
- the `@vocabulary-uri` should always be “http://aims.fao.org/aos/agrovoc/” for OpenAg early adopters, as they will be using the AGROVOC vocabulary, but in principle this can be used with any codelist.
- the `<narrative>` should be included to show users what the code means, but will changed depending on the `@code` attribute.

How to include it?

At the top of the `<iati-activities>` if using throughout a file, or at the top of any `<iati-activity>` element which uses the extension, a user should add a `@xmlns:openag` attribute which equals the URL of this extension page.

Furthermore, the `tag` element above should appear at the **end** of an IATI activity file with `openag:tag` as the element name.

Here is a worked example

```
<iati-activities xmlns:openag = "http://openagfunding.readthedocs.io/en/latest/
↳extensions/" version="2.02">
<iati-activity>
  <!-- ..... -->
  <!-- the rest of the -->
  <!-- activity: sectors, -->
  <!-- transactions, etc -->
  <!-- ..... -->
  <openag:tag vocabulary="99" vocabulary-uri="http://aims.fao.org/aos/agrovoc/" code=
↳"c_4397">
    <narrative xml:lang="en">Livestock</narrative>
  </openag:tag>
</iati-activity>
</iati-activities>
```

NB: there can be more than one `<openag:tag>` element per activity.

If you have any questions about implementing this extension, don't hesitate to [get in touch](#).

Using tagged data

If you are building an tool that uses IATI data, consider adding support for the `tag` element. Below are some tips for handling tag data:

When querying for tag data consider establishing a query that will search for both namespaced, and namespace free, data. This will ensure that your tool is 'future proof' for IATI 2.03, but also can accommodate data that was published before `tag` was adopted in the core standard.

For example, the xpath below should fetch both extension and core `tag` data:

```
/iati-activities/iati-activity/openag:tag | /iati-activities/iati-activity/tag
```

Be vocabulary aware. Some tag vocabularies, like AgroVoc, may have a hierarchy to their classifications. You can use this to (a) provide an improved interface for users to select the tags they want to search on; (b) search on all values from a 'child' category when the parent category is selected.

Be careful not to mix information from different vocabularies together when displaying tags to users, unless this is appropriate in your interface.

History and future: towards inclusion in 2.03

In order to allow for the most useful agricultural investment data, the Open Ag Funding Partnership consulted with the IATI community about ways to include additional classifications against established vocabularies. This led to proposals for an addition of `tag` to the next version of the IATI standard (version 2.03).

The primary need met by the `tag` element is to declare classifications which *aren't* statistical. For instance, if a donor is sure that their project concerns both irrigation and livestock, but doesn't want to split the budget based on those groups (as they would have to in the `sector` element).

This addition has been accepted and taken forward by the IATI secretariat for inclusion in the next version. Discussion and subsequent consensus can be found [here](#).

However, the next new version of IATI might not be released for a while, but users want to get going! This is where extensions come in. IATI XML based standard allows publishers to declare their own extensions using a [namespace extension](#).

Contact

If you want to know more about the Open Ag Funding project overall, please contact lead partner, Interaction, using the [contact details on the project website here](#).

For questions about the data quality framework, get in touch with [Steven Flower](#)

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Indices and tables

- `genindex`
- `modindex`
- `search`