accenturestrategy

Framework for IATI business case

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Strategy | Consulting | Digital | Technology | Operations

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This is a framework that helps NGOs to collect data for IATI standard cost and benefit evaluation

Transparent, comparable and compliant data creates an opportunity for NGOs to build new kind of ecosystems and service concepts.

- IATI Standard is a technical publishing framework allowing data to be compared. Now, NGOs are looking for a way to estimate costs and benefits of the standard.
- Currently, there is little measured and quantified data available on the benefits of IATI. A business case would be useful to have in order to better argue why organizations should be interested and invest in IATI compliance*.
- The key questions for NGOs are:
  - What are the main IATI use cases?
  - What are the benefits of IATI standard?
  - What are the costs for IATI standard?

This is a pragmatic framework for collecting data needed for a more detailed IATI business case.

- **The framework purpose** is to set a guideline that NGOs can use for IATI benefits/cost data collection.
- **Potential user** is NGO leadership who needs data for strategy development and investment decision making.
- **Key stakeholders** in the project were: Akvo.org, Bond, Cordaid, Data Openers, Kepa, Oxfam Novib, Partos, Plan Netherland and Finland.
- The project span across 4 weeks in February 2016. It was pro bono done by Accenture Finland and Plan Finland.

* Pre-interview summary. Mika Välitalo. (12/2015).

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The framework covers both additional background information and pragmatic IATI business case guidelines

Background information

Guiding principles – What are the limitations and the scope for the framework?

IATI key features – What makes IATI special?

Key concepts explained – What do we mean with the certain terms in the framework?

Practical guidelines

Maturity levels – How to evaluate organization's ambition for IATI reporting?

Drivers – Where does IATI value come from?

KPIs – What data do you need for a business case?

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IATI business case framework is a result of an efficient collaboration

Thank you all for participating in the work!

- **Caroline Kroon** (DataOpeners)
- **Jan Til** (Plan Netherland)
- **Josje Spierings** (Akvo.org
- **Leo Stolk** (Oxfam Novib)
- **Marten Schoonman** (Akvo.org)
- **Mika Välitalo** (Plan Finland)
- **Roderick Besseling** (Cordaid)
- **Sarah Johns** (Bond)

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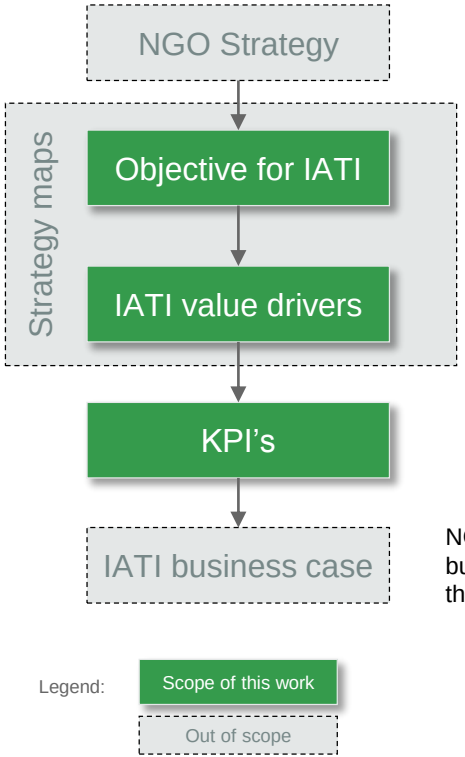
Key concept explained – Business case

Business case provides justification for undertaking a project, in terms of evaluating the benefit, cost and risk of alternative options and rationale for the preferred solution. It provides clear and concise fact-based information that supports decision making.

Business case is used for:

- understanding the qualitative and quantitative value and cost of the estimated IATI investment,
- helping in decision-making between different options to improve reporting,
- gaining alignment between key stakeholders,
- obtaining management commitment and approval for investment in a IATI project,
- tracking the success during and after the IATI investment.



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A business case is always an estimation based on common agreement of the key value drivers and their importance

Intended Audience

- Framework is for NGO leadership who wants to understand the costs and benefits of investing to IATI compatible reporting.
- IATI is primarily established to serve the aid receiving countries to make sense of the different aid streams. **This framework focuses to support on a single NGO high level business case.**

Limitations

- Framework focuses on IATI standard specific value drivers in reporting. The work covers financial benefits (‘€’) and soft benefits (i.e. ‘donor satisfaction’).
- Soft benefits are not quantified in this framework. It is better to use decision matrix to evaluate their impact and importance for a single NGO.
- **This framework gives high level financial estimates for any organization interested in IATI. However, the results should be evaluated & if needed modified to meet NGO’s specific situation.** In ideal case, a business case is always unique and tailored to meet organization’s specific needs.

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Take the three simple step to start creating your business case for IATI Standard

1. **Use ambition levels to set an ambition level for IATI reporting.**

Depending on organization's targets for IATI publishing, management can decide which ambition level it wants to achieve.

See the slides 'Ambition levels' & excel template.

2. **Fill the Excel decision matrix to evaluate non-financial benefits of IATI.**

Some IATI benefits do not require financial valuation - their value is apparent or value is too controversial to quantify (soft benefits).

See the slides 'KPIs' & the excel template.

3. **Fill the Excel template to evaluate high level financial business case for IATI.**

The framework covers financials from 1) reporting time savings 2) IATI's impact on project designing and monitoring. 3) investment cost and 4) on-going support and tool cost.

See the slides 'KPIs' & the excel template.

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Key concept explained – The IATI standard

The IATI Standard is a common, open, international data standard for the aid sector covering aid flows and activities. It has been designed to cover all international aid activities supported by development actors who wish to publish their data using IATI.

The IATI Standard covers several broad areas of data for an aid activity. The IATI standard uses a common IATI electronic data format (XML). All organizations publishing to the IATI standard release their information in the same way. Therefore, the data is comparable and can be aggregated and analyzed across all IATI compliant data globally. This makes it easier for data users tie donors or NGO leadership to access the information, use it for their own purposes and compare it against other organizations' data.

All the IATI compliant data is always in a common IATI Registry (http://www.iatiregistry.org/). The Registry simply provides an internet link to this data, and a basic preview function for each data file published. Organization can also utilize the data in various other channels and formats i.e. on their website or reports.

Read more > http://iatistandard.org/

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There are three unique IATI key features that the business case framework focuses on

Source: Interviews

1. **IATI is made for international aid.** The *information standard* supports NGO's decision-making, learning and monitoring in a more data driven and data informed way. Standard covers both financial and non-financial data.
2. **IATI standard enhances transparency and opens up networks in the development sector.** NGO can easier communicate to the public, stakeholders and political decision-makers about their plans, activities and results. Data is in a machine readable XML-format and can be accessed from centralized IATI repository.
3. **IATI standard drivers overall effectiveness, accountability and empowerment** in international development sector between countries, donors, investors, CSOs and NGOs.

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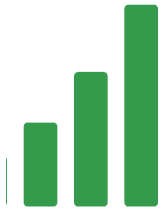
Key concept explained – Ambition level?

- **Depending on the targets for IATI publishing organization needs to reach certain ambition level in governance, talent, data, collaboration, incentives and technology (*enablers*).**
- There are three ambition levels in the framework: low, medium and high.
- **High/low ambition level in one enabler doesn't always correlate with the overall IATI value or cost.** Example: smaller NGOs (running 50 projects or less) can get lot of value from IATI even with manual processes and free tools.
- The most important part is to understand which ambition level in each enabler would help an organization to achieve highest benefit with the minimum investment.



Low – Medium – High

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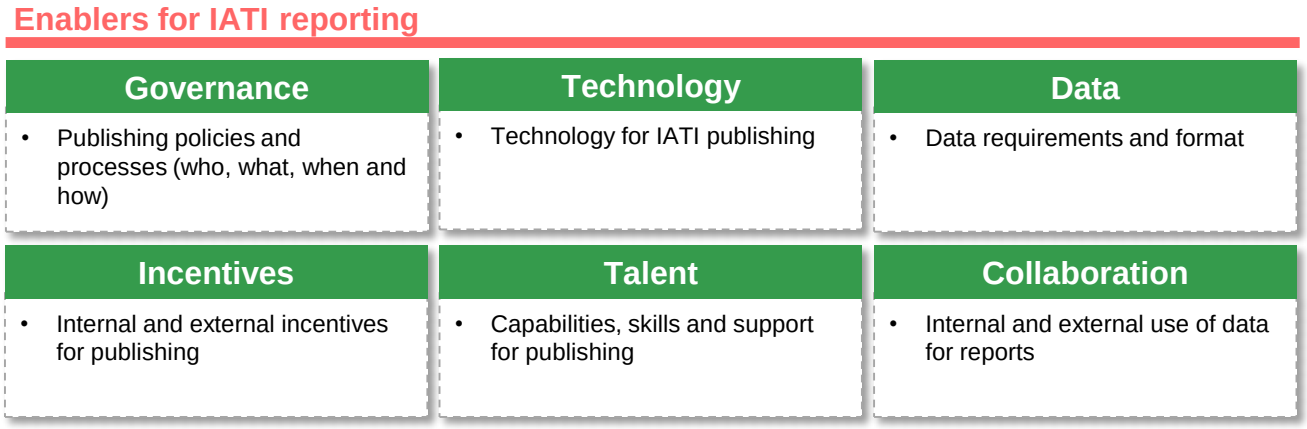
Ambition model is build upon six generic reporting enablers – IATI helps to streamline and optimize current way of reporting



Tip – you might also want to have a view on open data maturity model > https://theodi.org/guides/maturity-model

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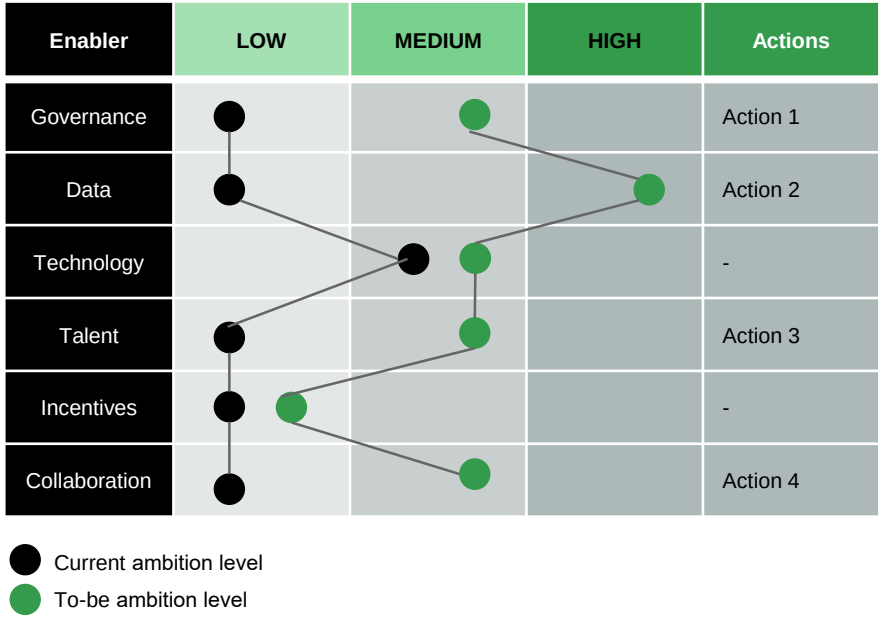
Organization can use the ambition levels to set an ambition for IATI reporting and to create a road map for the IATI development

Ambition model helps an organization to create a road map for IATI reporting development. The key is to focus on identifying “how to get more from IATI with less development”.

1. Estimate at which ambition level your organization is currently.
2. Decide what ambition level you want to be in each enabler.
3. Think what you need to do to achieve the wanted ambition level.



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Governance is one of the core enablers to support use of IATI

Enabler	LOW ambition	MEDIUM ambition	HIGH ambition
GOVERNANCE: Publishing policies and processes (who, what, when and how)			
Policies	NGO doesn't have written policies for who, what, when and how IATI is used for publishing.	NGO has written policies for publishing but not all employees follow that policy.	NGO has written policies for publishing and employees follow that policy.
Process descriptions	NGO hasn't described processes related to IATI.	NGO has some of the processes described related to IATI.	NGO has process descriptions for IATI related activities.
Publication process	NGO has a complete manual process for data entry and publication (i.e. Excel spreadsheet).	NGO has a partly automated process for data entry and publication (i.e. akvo.org).	NGOs data entry, publication and use of data is fully automated.
Scope	NGO reports only few projects in IATI.	NGO reports only most of the projects in IATI.	NGO reports all projects in IATI (excluding confidential ones due to i.e. safety reasons).
Timeliness	NGO reports once a year or irregular in IATI.	NGO reports quarterly in IATI.	NGO reports frequently in IATI, i.e. daily.

Sources: Interviews, Accenture analysis

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IATI standard gives a guideline for data but it is up to a publisher to decide how broadly data is captured

Enabler	LOW ambition	MEDIUM ambition	HIGH ambition
DATA: Data requirements and format			
Depth of information	NGO reports minimum level of information of its projects.	NGO reports medium level of information of its projects.	NGO reports a rich set of information i.e. adding additional docs, pics, frameworks.
Format	NGO produces raw data (xml) in a IATI registry.	NGO produces numbers, information, maps, graphs and dashboards (hard data) in IATI.	NGO produces also narratives and visualizations in IATI.

Sources: Interviews, Accenture analysis

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There are different options for IATI publishing tools – free tools can be a good option if there are 50 projects or less

Enabler	LOW ambition	MEDIUM ambition	HIGH ambition
TECHNOLOGY: Technology for publishing			
Data entry	NGO entries data via web paged tool (i.e. Aidstream).	NGO entries data via integrated tool (i.e. akvo.org).	NGO entries data directly automatically to IATI from its internal systems.
Integration level	Data is not connected to NGO's internal reporting or management systems.	Data is to some extent connected to NGO's internal reporting or management systems.	Data flows automatically from internal reporting and management systems (i.e. CRM and project management).

Sources: Interviews, Accenture analysis

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IATI requires changes in reporting behavior and mindsets as well

Enabler	LOW ambition	MEDIUM ambition	HIGH ambition
TALENT: Capabilities, skills and support for publishing			
Skills	Employees are aware of the topic and have started reporting with direct oversight. There is not a dedicated person for IATI.	Employees work independently on standard reporting and receive input on more complicated tasks. There is a dedicated person for IATI.	Employees work independently on complex tasks and resolve problems and exceptions. IATI dedicated person coaches or supervises others.
INCENTIVES: Incentives for publishing			
Requirements	Investors doesn't require data in IATI.	Investors require some data in IATI.	Investors require detailed data to be shown in IATI.
Internal incentives	There are no internal incentives.	There are some internal incentives to support employees use IATI.	There are correction/reward mechanism to support employees to use IATI (i.e. leadership intervention if data is not reported according to the rules or in time).

Sources: Interviews, Accenture analysis

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At its best IATI standard data can be used for organization's performance management across different functions

Enabler	LOW ambition	MEDIUM ambition	HIGH ambition
COLLABORATION: Internal and external use of data for reports			
Internal integration level	NGO uses IATI for additional reporting.	NGO uses IATI to steer some of its operations (i.e. project planning).	NGO has integrated IATI reporting to its operations (strategy, fundraising, etc.).
Partner collaboration	NGO uses IATI to share information with its partners.	NGO uses IATI to manage partner network.	NGO uses IATI build new partner ecosystems.

Sources: Interviews, Accenture analysis

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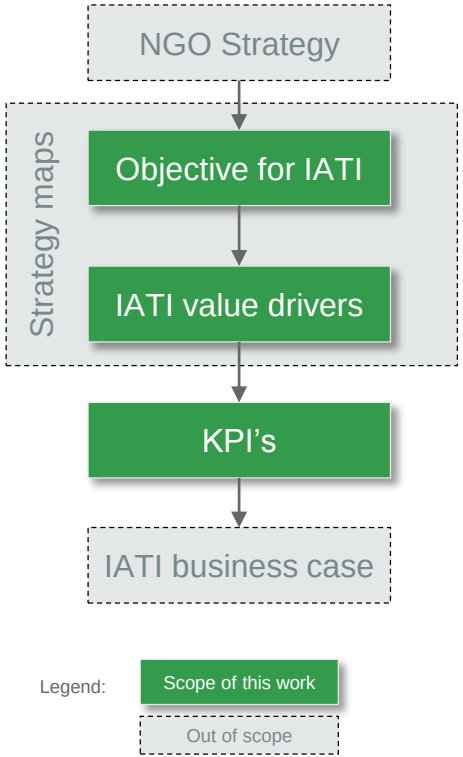
Key concepts explained - What is a value driver?

- **Value drivers** are measurable factors - financial or non-financial - that influence strategy execution and value creation.
- Ultimately, value drivers are the answer to management's question: "In what areas should we excel to achieve high performance?"

- In this framework the management's question is "How can improved reporting help us to achieve positive social impact?"



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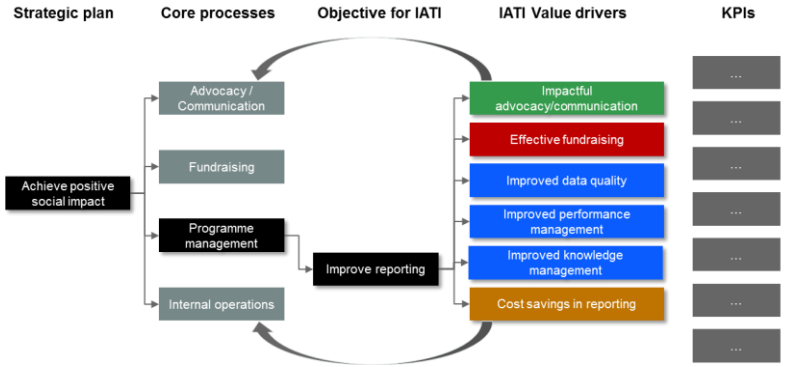
Drivers mapped into a structure ensures that each cost and benefit is calculated only once

- **Drivers are mapped into a tree structure. That ensures each cost and benefit associated with a driver is calculated only once.**
- Programme management is the main core process because IATI is intended mainly for publishing information on development cooperation activities.
- However, organization can use IATI activities data in multiple ways in its advocacy/communication, fundraising and internal operations as well.

A tree structure illustrates the causal relationships between value drivers and strategy



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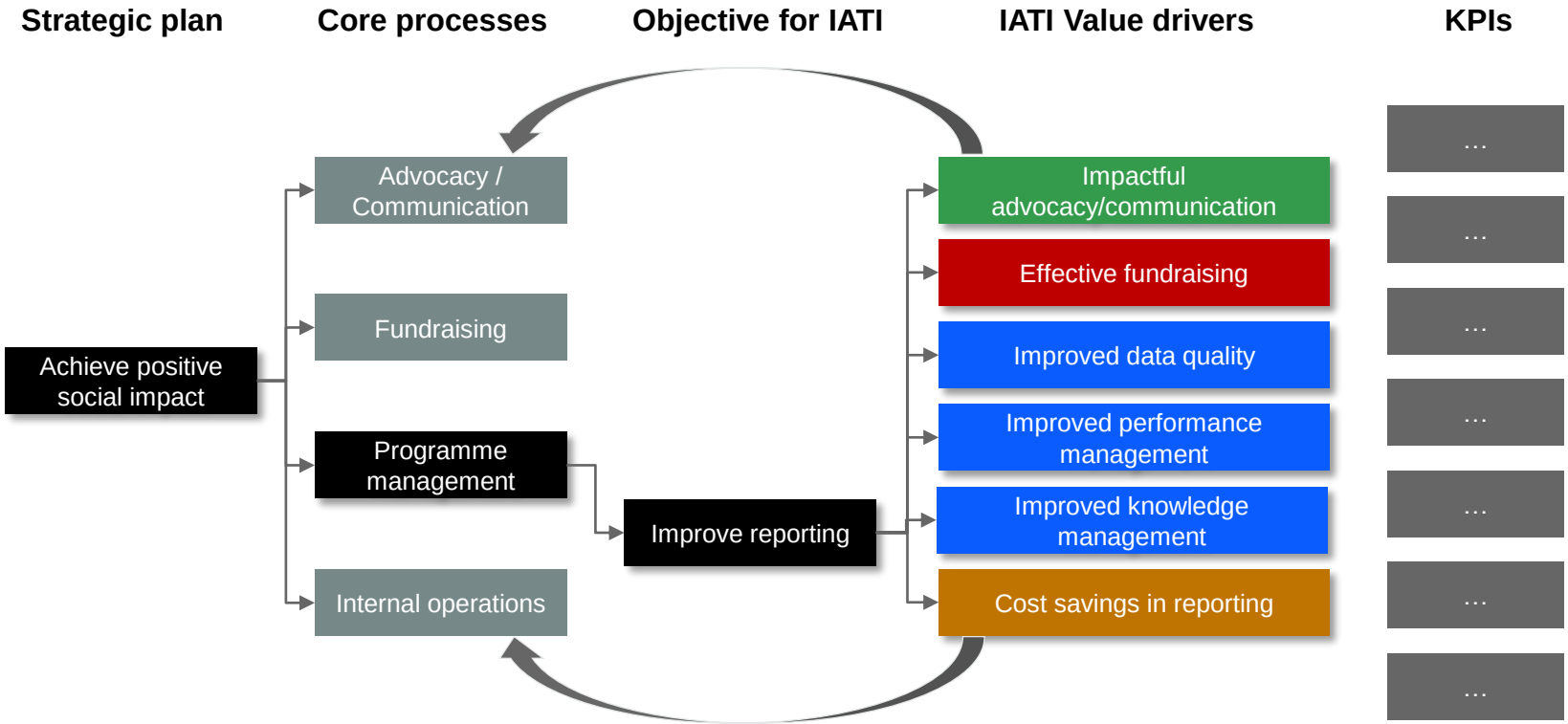
All four identified key drivers can be aligned with an objective for IATI, NGO core processes and finally with the strategic plan



Sources: Interviews, Accenture analysis

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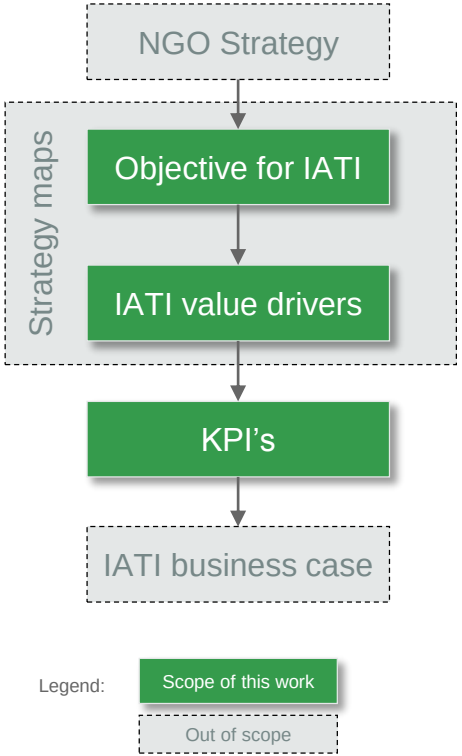
Key concept explained - What is a KPI?

- **Key Performance Indicators (KPI)** are financial and non-financial metrics used to help an organization define and measure progress toward organizational goals.
- KPIs are also frequently used to "value" difficult to measure activities such as the benefits of leadership development, engagement, service, and satisfaction. KPIs are typically tied to an organization's strategy.

- **Following slides explain how to evaluate IATI's non-financial impact and financial impact.**



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IATI non-financial impact

Key concepts explained – Non-financial impact

- **Non-financial impacts (soft benefits) include items that may be too difficult or controversial to quantify, yet are important to a full view of the rationale for/against an IATI project.**
- They may be linked to the organization's strategic objectives or represent the desired outcomes of the IATI project.
- Assessment of the non-financial impact can be highly subjective and should be done inside the organization using i.e. decision matrix.
- A description of the material non-financial impacts are often included in the business case as a way to set context for the financial analysis.

Benefit type	Example
Measureable – Financial	Save 50 000 € time spend in reporting.
Measurable – Non-Financial	Reduce budgeting cycle time by 3 days, increase employee satisfaction, …
Soft Benefits (Not Quantified)	**Data driven decision making.**

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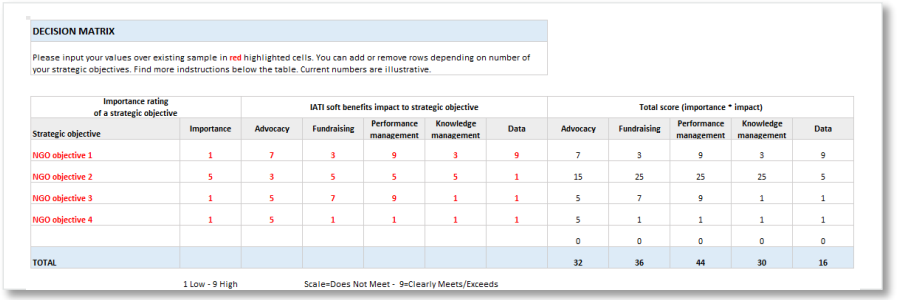
A useful technique for reflecting the non-financial impact of an investment is to develop a decision matrix

- **Decision matrix is a recommended way to evaluate IATI related non-financial impact (soft benefits).**
- The matrix is a tool that demonstrates how the IATI benefit supports an organization's strategic and financial objectives. Gain consensus, over time, on how to position the non-financials within the business case.

- **In the case of IATI, soft benefits most likely have a bigger impact on organization than the financial ones.** An example: Improved project quality due to IATI can help NGO to achieve its social impact objectives. Yet, this relationship between project quality and social impact is difficult to monetize.



DECISION MATRIX

Please input your values over existing sample in red highlighted cells. You can add or remove rows depending on number of your strategic objectives. Find more indstructions below the table. Current numbers are illustrative.

Importance rating of a strategic objective		IATI soft benefits impact to strategic objective					Total score (importance * impact)				
Strategic objective	Importance	Advocacy	Fundraising	Performance management	Knowledge management	Data	Advocacy	Fundraising	Performance management	Knowledge management	Data
NGO objective 1	1	7	3	9	3	9	7	3	9	3	9
NGO objective 2	5	3	5	5	5	1	15	25	25	25	5
NGO objective 3	1	5	7	9	1	1	5	7	9	1	1
NGO objective 4	1	5	1	1	1	1	5	1	1	1	1
							0	0	0	0	0
TOTAL							32	36	44	30	16

1 Low - 9 High Scale=Does Not Meet - 9=Clearly Meets/Exceeds

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Working with the matrix is simple

2.

Each soft benefit is scored according to its ability to impact the strategic objective.

Soft benefits are listed in more details in the following slides.

Importance rating of a strategic objective		IATI soft benefits impact on strategic objective					Total score (importance * impact)				
Strategic objective	Importance	Advocacy	Fundraising	Performance management	Knowledge management	Data	Advocacy	Fundraising	Performance management	Knowledge management	Data
NGO objective 1	1	7	3	9	3	9	7	3	9	3	9
NGO objective 2	5	3	5	5	5	1	15	25	25	25	5
NGO objective 3	1	5	7	9	1	1	5	7	9	1	1
NGO objective 4	1	5	1	1	1	1	5	1	1	1	1
NGO objective 5	1	3	1	3	3	3	3	1	3	3	3
TOTAL							35	37	47	33	19

Scale = 1 Low - 9 High Scale = 1 Does Not Impact rly Impacts

1.

Strategic objectives are listed and rated according to how important they are to the management.

Management first enter ratings individually and then reach consensus through a facilitated discussion.

3.

The importance rating for each strategic objective is then multiplied by the score for each IATI soft benefits to determine the total score.

The benefit with the highest total score across all strategic objectives is typically selected for further discussion & implementation planning.

How to normalize the rating scales for the decision matrix?

- For the decision matrix to work properly, used scales need to have the same meaning and the same unit of measure for everyone. In other words, scales need to be normalized.

- Decision matrix uses following rating scales:

Strategic importance:

1 Low	3	5 Neutral	7	9 High

Benefits impact on strategy:

1 Does Not impact	3	5 Neutral	7	9 Clearly impacts

There are different options for normalizing the scales:

1. Once rated, you can have a general discussion about the individual ratings and allow participants to adjust their scores, if needed.
2. Define by discussing what the highest and lowest scores mean.
3. You can use a scale that you are already familiar with.
4. Find out some concrete examples of which everyone has an opinion. Normalize the ratings by using these test examples, i.e. “When you choose a place to live, how important it is for you to have a good public transport?”

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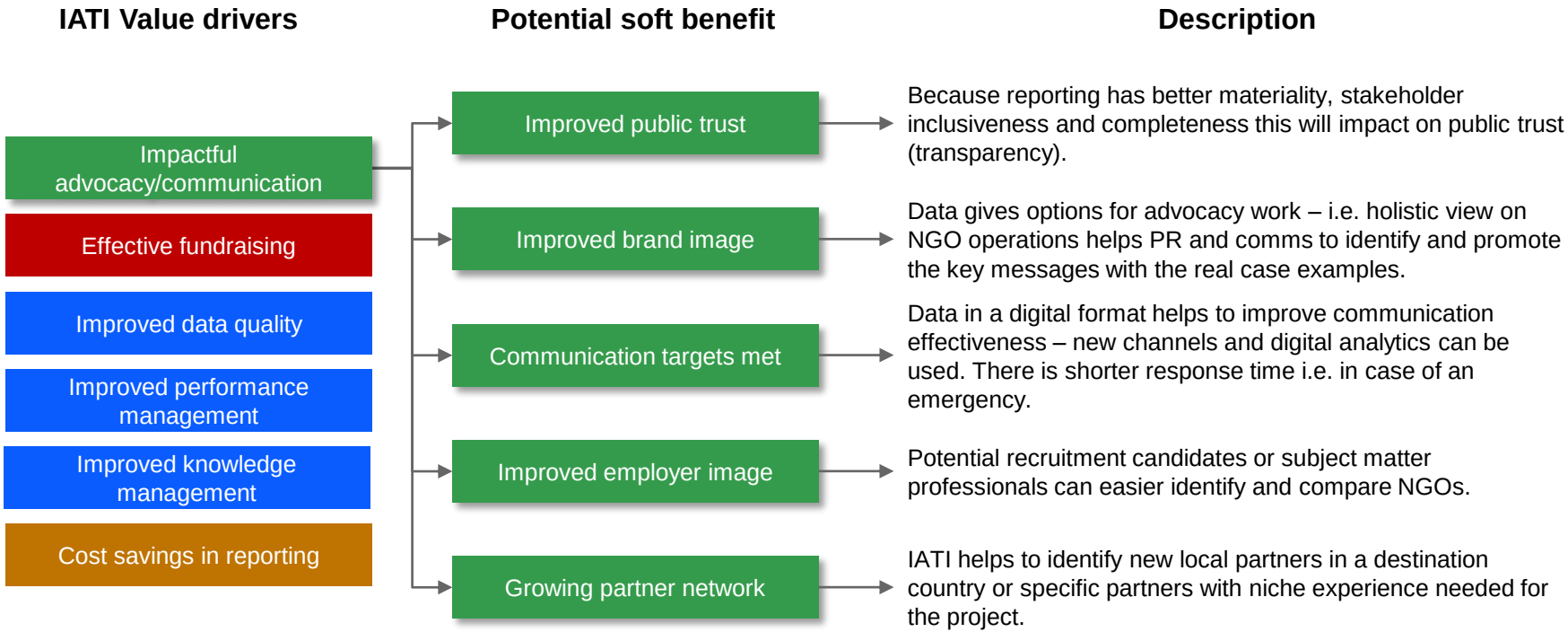
Soft benefits for *advocacy and communication*



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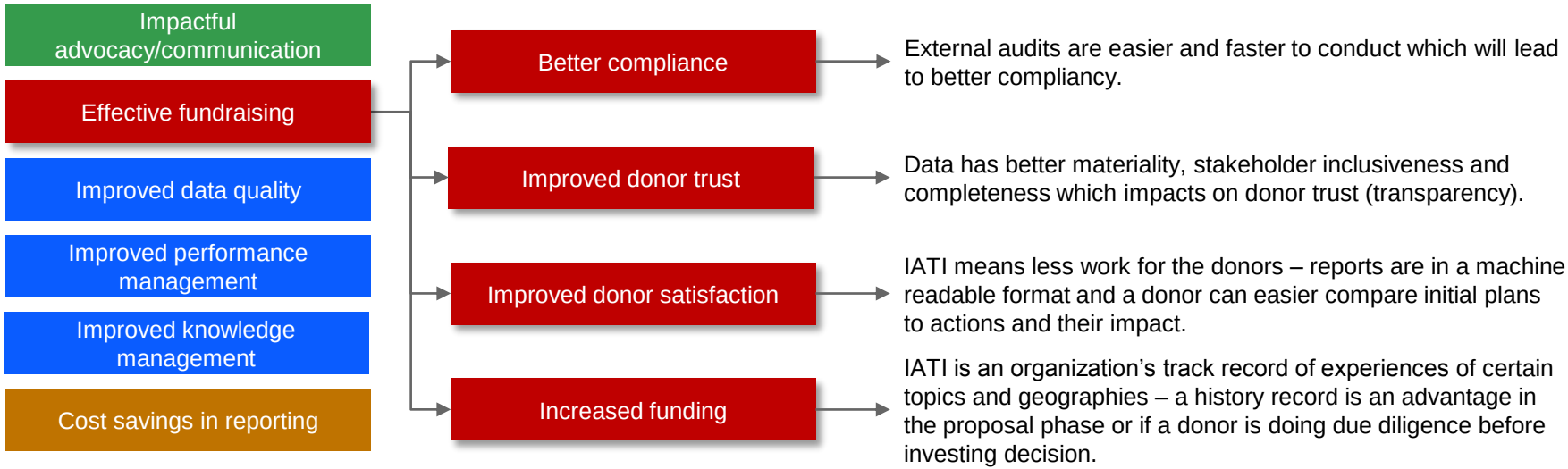
Note: Benefits were mentioned in the interviews. Discuss internally how IATI among other initiatives can support achieving these.

Soft benefits for *funding*
IATI & transparency



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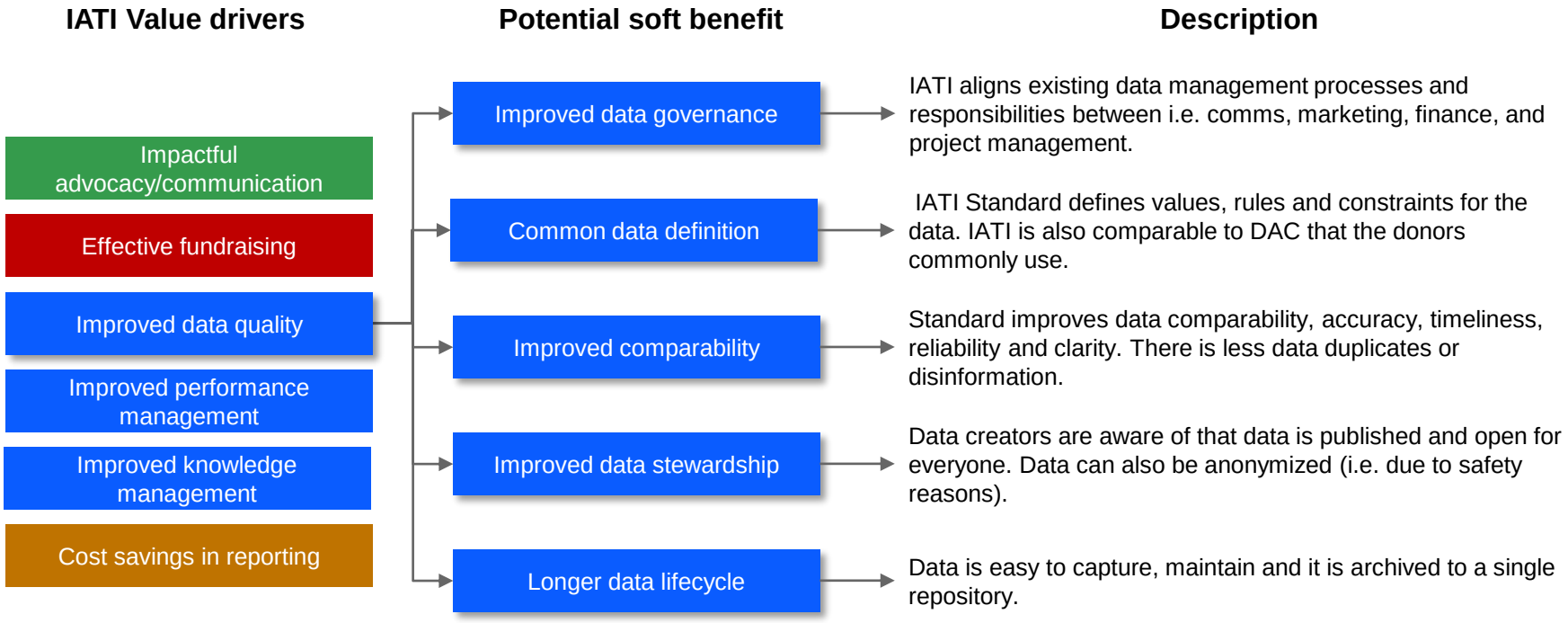
Note: Benefits were mentioned in the interviews. Discuss internally how IATI among other initiatives can support achieving these.

Soft benefits for *data management*



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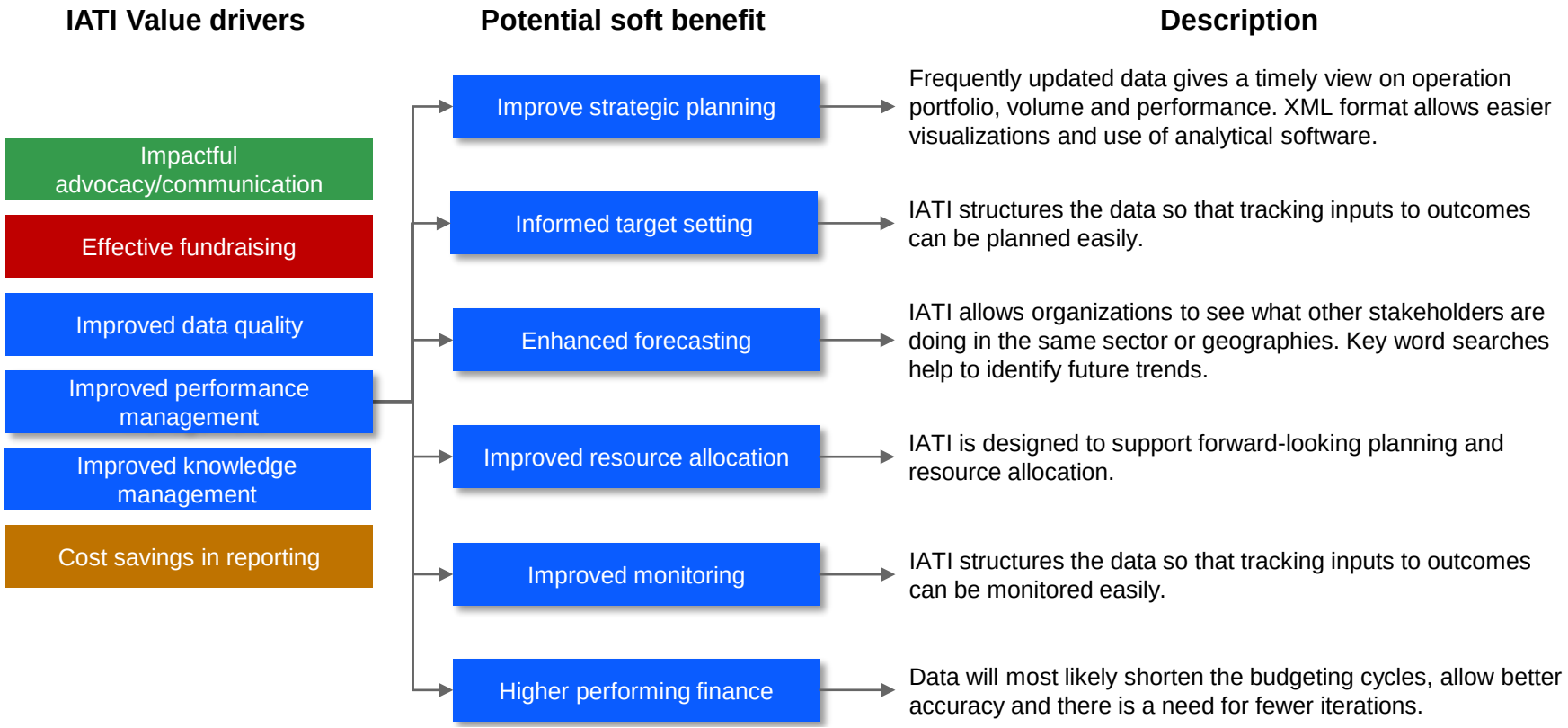
Note: Benefits were mentioned in the interviews. Discuss internally how IATI among other initiatives can support achieving these.

Soft benefits for *performance management*



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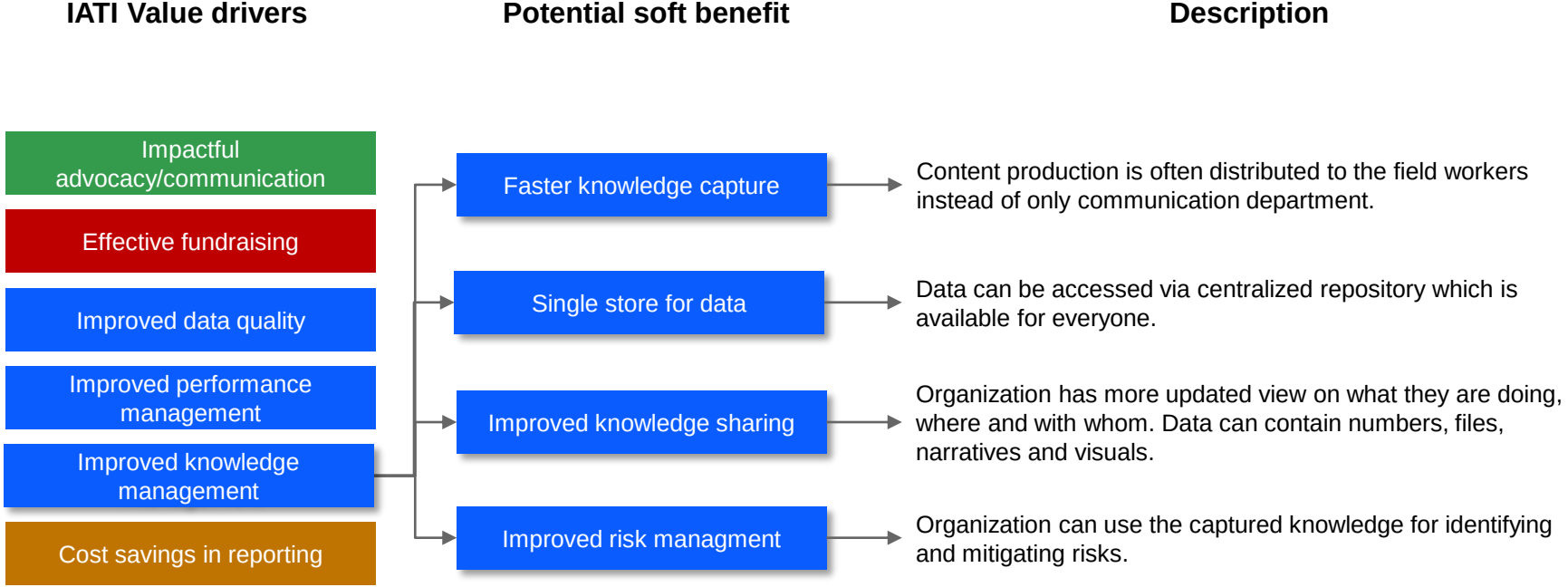
Note: Benefits were mentioned in the interviews. Discuss internally how IATI among other initiatives can support achieving these.

Soft benefits for *knowledge management*



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Note: Benefits were mentioned in the interviews. Discuss internally how IATI among other initiatives can support achieving these.

How can IATI soft benefits create also a compelling numerical story to support an investment decision?

- It is possible to challenge the organization to think creatively about how one might be able to quantify one or more of the “non-financials.”

When quantifying soft benefits, there are some considerations to keep in mind:

- Make IATI soft benefits **measureable** i.e. survey customers, employees, and donors on a periodic basis and track the trend.
- Where possible, **leverage industry/NGO benchmarks** to convert measureable items to financial impacts.
- If you are unable to make it financial, can you **compare to peer organizations** (high, medium, low) to put the value in context?
- Or, **compare IATI to alternative options** for solving the issue (reporting effectiveness) and create comparison.

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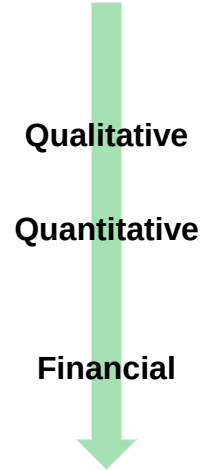
The example below illustrates how it would be possible to transform one soft benefit into a number by leveraging additional information

- In the example trust is a result of multiple actions that organization does in addition to IATI reporting.
- At first there would be need to estimate the portion that IATI has an impact on trust. One could do that i.e. by interviewing experts in the communication department.
- This kind of valuation requires a structured approach and that all assumptions are documented for better credibility and reliability.

Step	Defined outcome
Identified benefit as improving public trust.	Improved public trust.
Make it measureable by conducting a trust survey.	Public trust increase from 3.0 to 3.5.
Research institute A indicates that a .5 point increase in trust to NGO translates to a 5% increase of an individual member's donation.	Individual donation revenue increase 5%. If the revenue was 1 000 000 €, the estimated trust benefit will be 50 000 €.



Numbers only illustrative

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IATI financial impact

Key concepts explained – Financial impact

- **Financial impact illustrates the net economic return of a given project or opportunity in euros.**
- It is derived by modelling two pictures of the business - As-Is and To-Be operations. In this case IATI reporting.
- As-Is operations are simply the organization's current way of doing project reporting. To-Be operations capture how the organization will do things after IATI has been taken into use.

Benefit type	Example
Measureable – Financial	Save 50 000 € time spend in reporting
Measurable – Non-Financial	Reduce budgeting cycle time by 3 days, increase employee satisfaction, …
Soft Benefits (Not Quantified)	**Data driven decision making**

Measurable non-financial benefits are organization specific and require deep understanding of a specific NGO's processes, organization and stakeholders. They are not in the scope of this generic framework.

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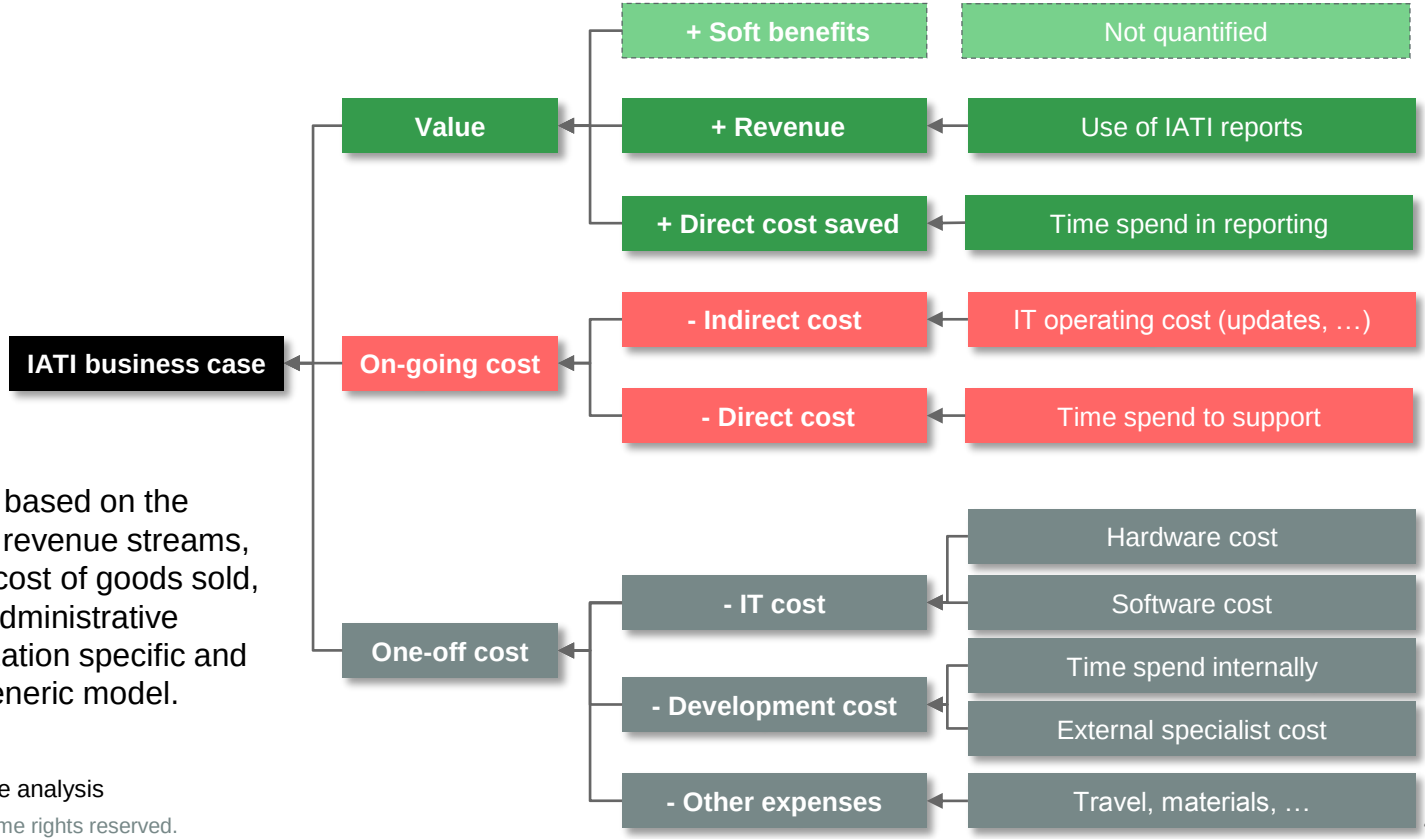
Financial impact can be decomposed to cause and effect which is the basis for the business case template



Value / Cost model is based on the interviews – detailed revenue streams, working capital cost, cost of goods sold, selling, general and administrative expenses are organization specific and not included in this generic model.

Source: Interviews, Accenture analysis

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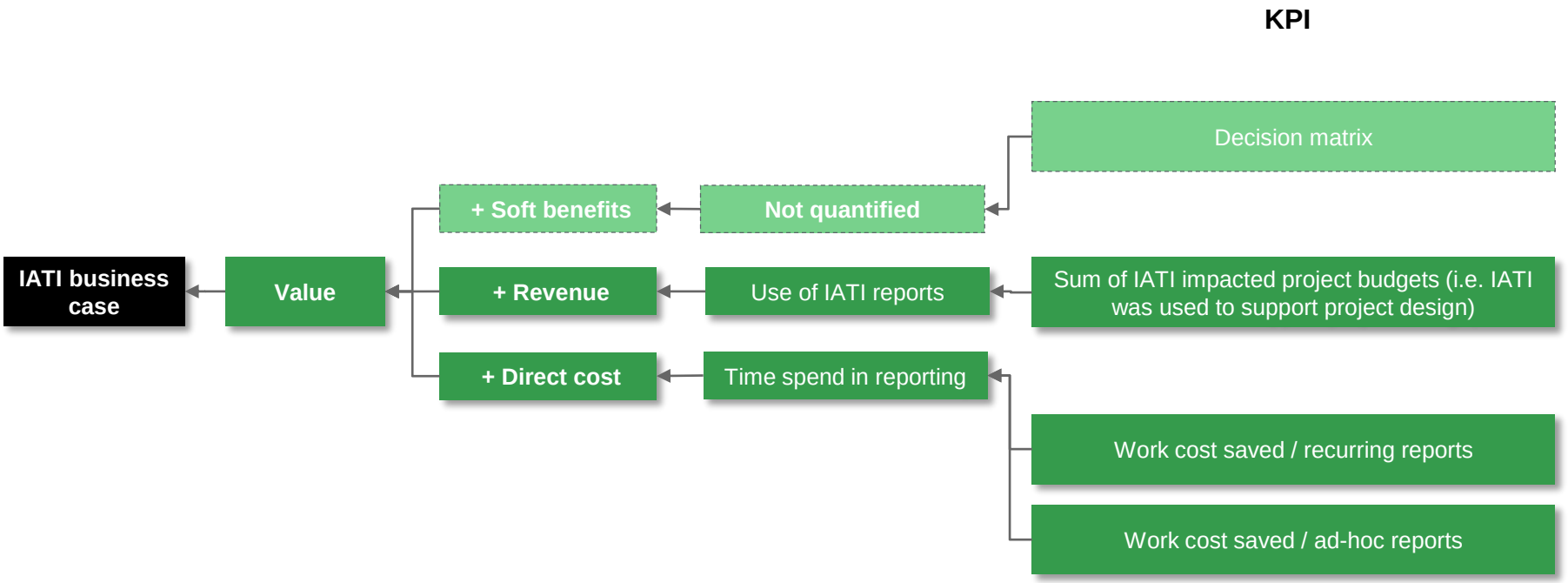
Financial value for IATI is time saved in reporting and use of IATI reports



Source: Interviews, Accenture analysis

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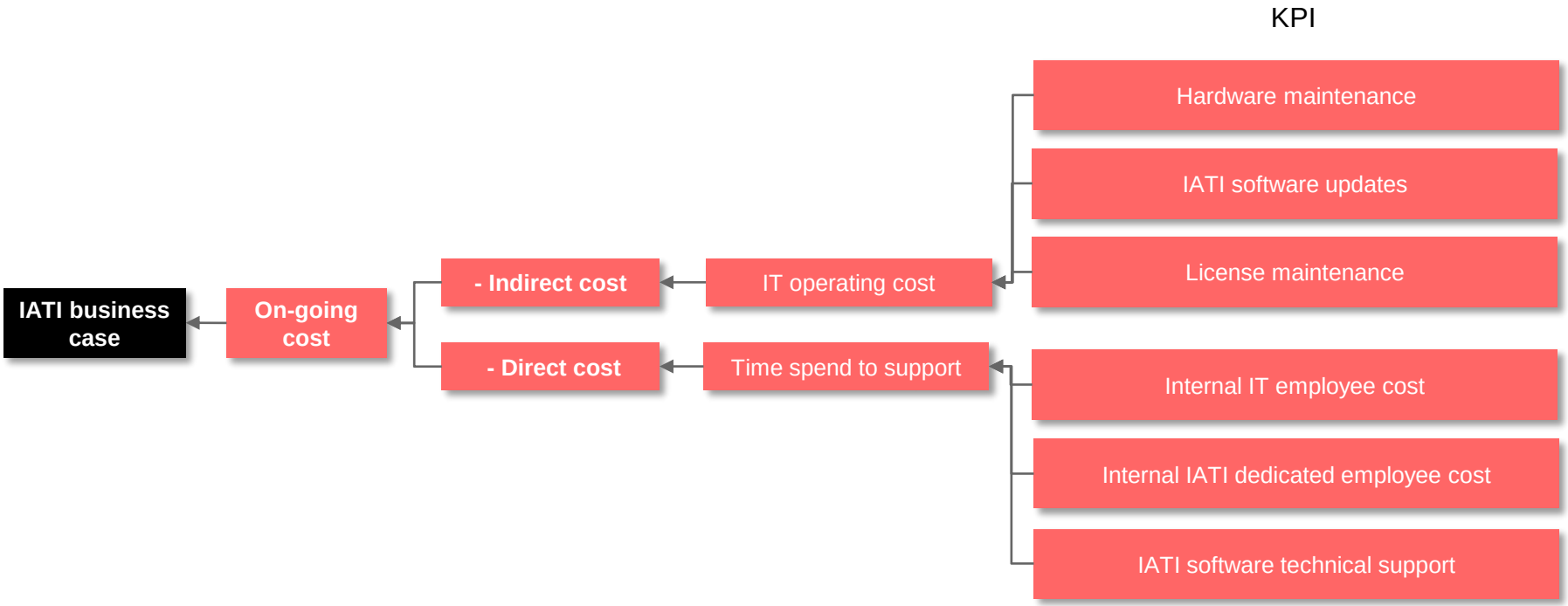
Financial on-going cost for IATI is mainly time spend to support and IT operating cost



Sources: Interviews, Accenture analysis

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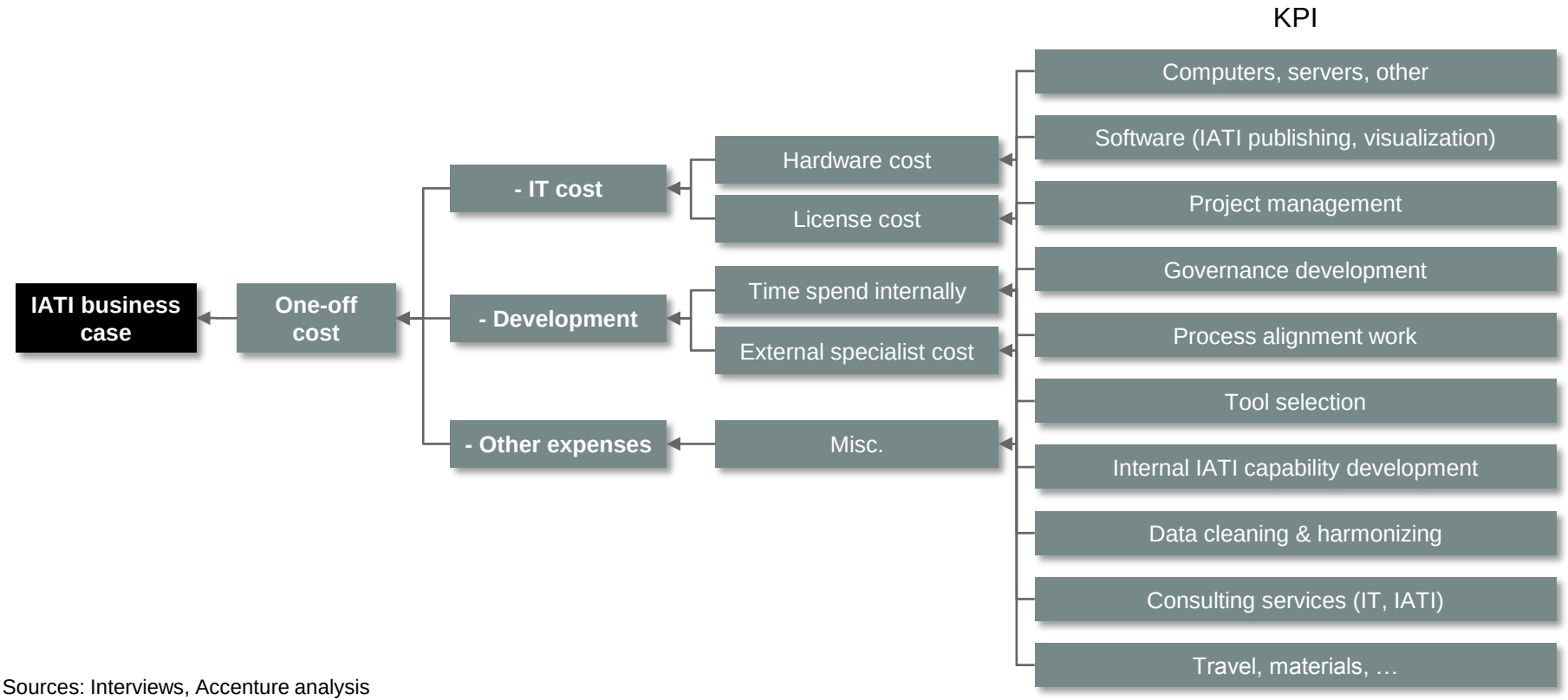
Financial one-off cost for IATI is organizational development, IT and hardware



Sources: Interviews, Accenture analysis

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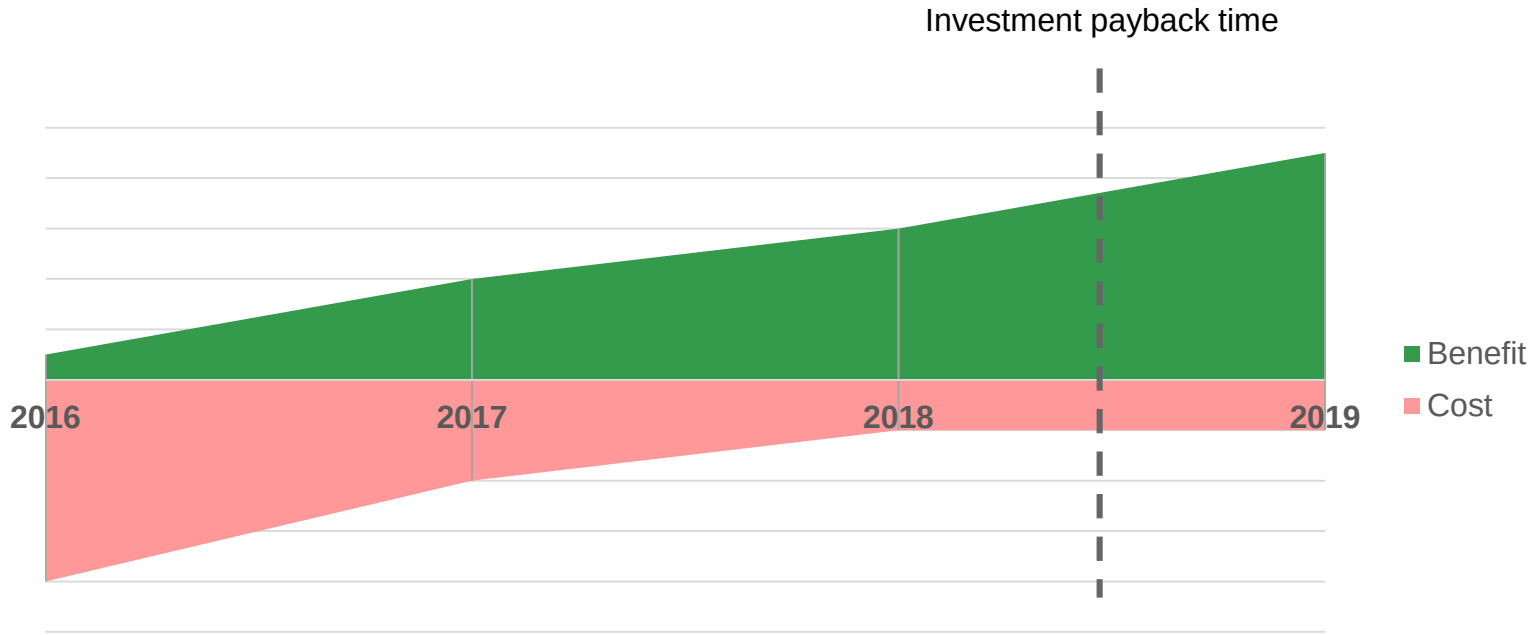
Once organization has made the calculations it can estimate when the on-going IATI benefits exceed the initial investment cost



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The business case template includes also simple scenarios that helps to estimate what happens if a selected variable change

- Sensitivity analysis involves examining how results change as key assumptions change. The goal is to confirm that the framework represents the NGO operations realistically, identify unexpected relationships between variables, and correct errors.
- See the Excel template and Scenario sheet for more information.

*IATI can have an impact on the projects in planning, proposal or monitoring phase. IATI data can help to show NGO's capabilities in the proposal phase or certain donors might require that NGO uses it for reporting. This table helps to estimate the financial impact of IATI to project budgets. Use this for discussion - how much can IATI have a positive impact on project revenue? What does it take to have value from IATI?

IATI value to project budgets	Sum of all project budgets in the organization / this year	Variable* / IATI has an % impact on sum of all project budgets	Value of IATI / month	Value of IATI / year	Comment
Worst scenario	1 000 000,00 €	5,00 %	**4 166,67 €**	**50 000,00 €**	
Current scenario	1 000 000,00 €	30,00 %	**25 000,00 €**	**300 000,00 €**	IATI impact is taken from the Value parameters sheet (C37 or C38)
Best scenario	1 000 000,00 €	50,00 %	**41 666,67 €**	**500 000,00 €**	

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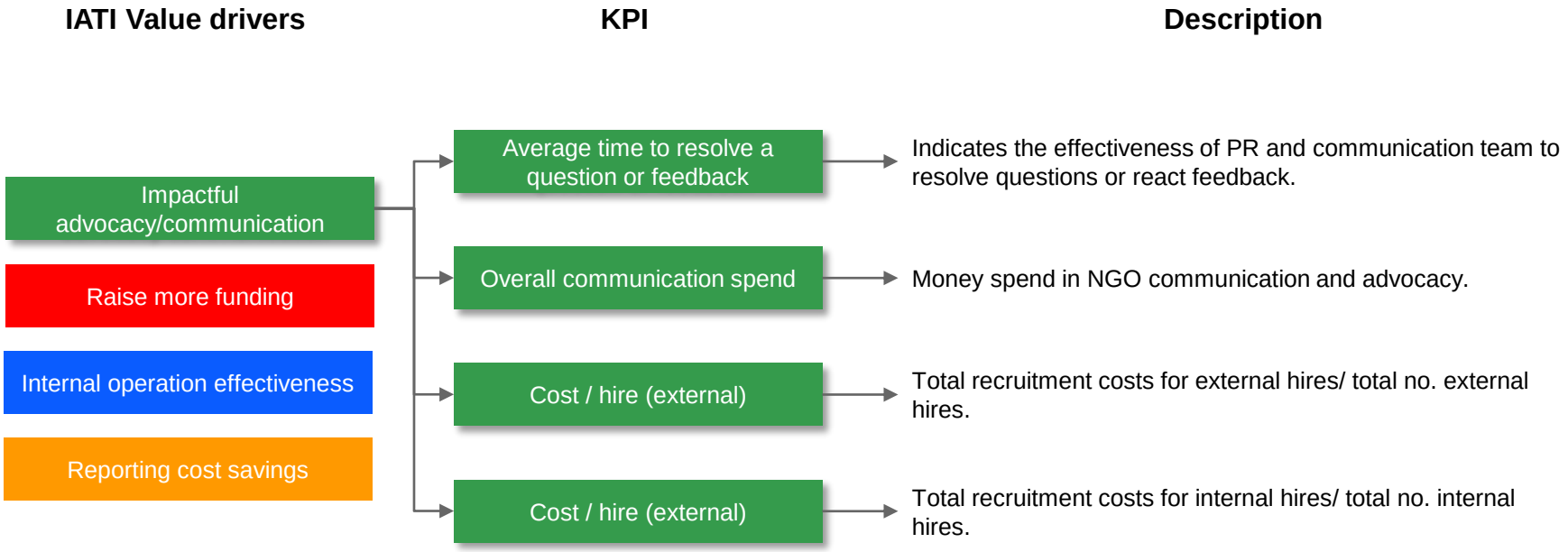
Appendixes

Examples of measurable non-financial KPIs

IATI business case framework project plan

Below are some examples of measurable non-financial KPIs – these can be used i.e. for in dashboards or internal development 1/3



ILLUSTRATIVE ONLY - IATI is just one driver impacting these KPIs

Sources: Interviews, Accenture analysis

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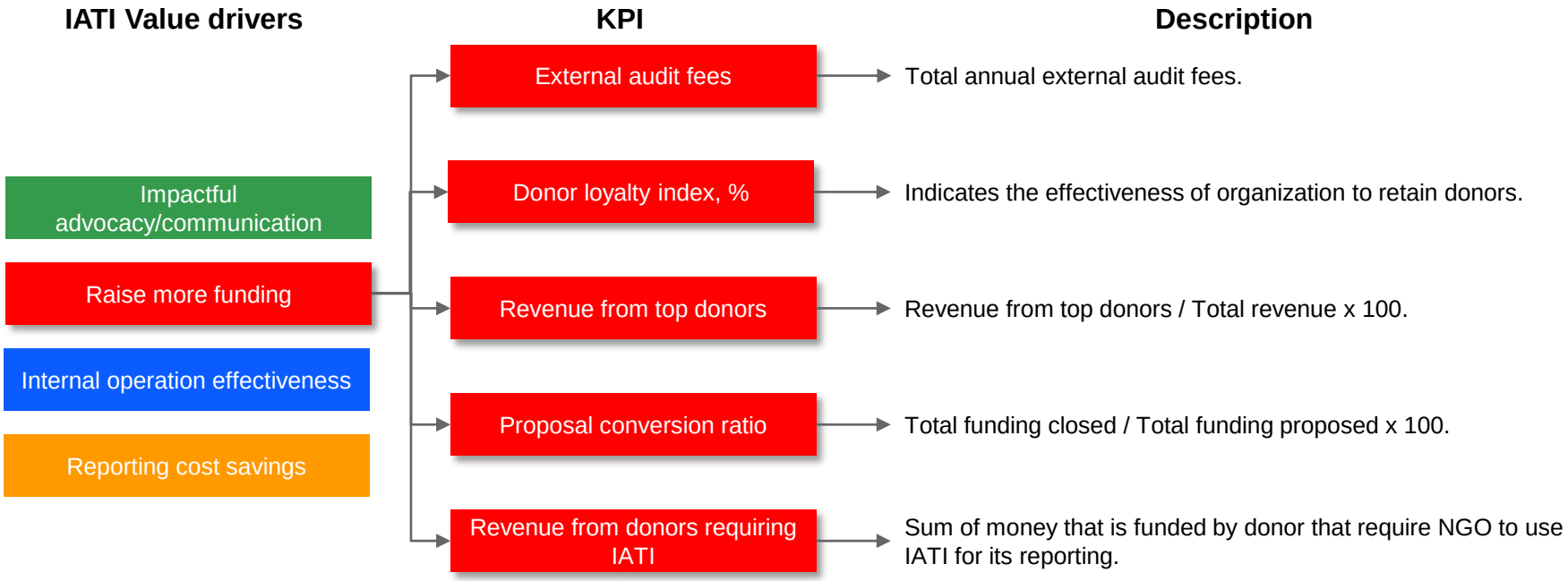
Below are some examples of measurable non-financial KPIs – these can be used i.e. for in dashboards or internal development 2/3



ILLUSTRATIVE ONLY - IATI is just one driver impacting these KPIs

Sources: Interviews, Accenture analysis

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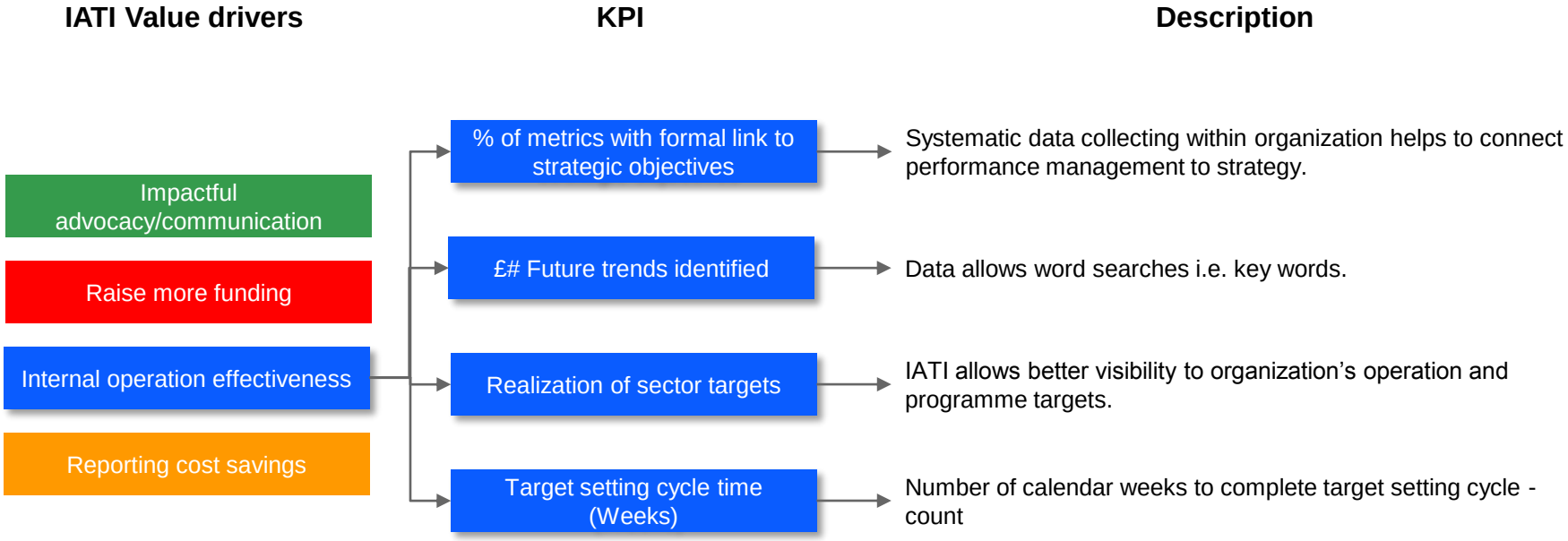
Below are some examples of measurable non-financial KPIs – these can be used i.e. for in dashboards or internal development 3/3



ILLUSTRATIVE ONLY - IATI is just one driver impacting these KPIs

Sources: Interviews, Accenture analysis

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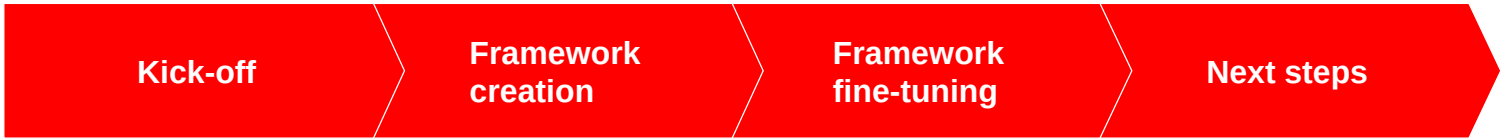
Appendixes

Examples of measurable non-financial KPIs

IATI business case framework project plan

IATI business case framework project was done in February 2016



Time	**February 2016**			
Tasks	• Agree the scope • Create a framework prototype • Identify stakeholders	• Collect additional data • Define value drives, KPIs and use cases for IATI standard	• Refine the framework based on analysis	• Create framework handbook to guide framework usage • Define high level road map for the next steps
Work method	• Desktop study • Kick-off with Plan • Workshop I	• Analysis • 8 Interviews	• Workshop II	• Desktop study
Deliverables	• Framework prototype	• IATI use cases (3)	• Final Framework	• Handbook (PowerPoint & Excel template) • High-level road map

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