
IATI Standard Maintenance Handbook

IATI Secretariat

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This is the IATI Secretariat's documentation to help with day-to-day tasks around maintaining the IATI Standard. It is shared publicly for transparency but it is not anticipated that anyone outside of the Secretariat will need to use it.

PREPARATION FOR A PROPOSAL

The publication of a proposal and the deployment of changes are well-defined processes that are the same for all proposals. They are preceded by a period of research, consultation and refinement that is not well-defined because it is different for every proposal.

The preparation should be proportionate to the scale and impact of the change. Three examples are given below as a guide.

1.1 Fixing some typos

In 2023, a Secretariat staff member noticed some typos in field descriptions. They proposed alternative wording, and checked with a colleague to confirm that their new wording didn't introduce any new ambiguity, cause any new confusion, or have any other unintended effects. The results of this conversation and details of the changes were the basis of the [first proposal](#)

1.2 Updating well-used codelists

OECD DAC codelists are widely used in published IATI data and had fallen out of sync. An initial review also revealed that the format of the upstream codelists had changed.

Due to the widespread use and potential for validation changes, we felt it was proportionate to check all published IATI data that uses the codelists to ensure that we didn't accidentally cause any data to become invalid. We created a Deepnote notebook to conduct this analysis.

This also helped us quantify the impact of our delay in updating the codelists and therefore decide on an appropriate cadence for future updates.

The product of the work can be seen in [this proposal](#)

1.3 Tightening rulesets

We may choose to tighten some rulesets, making rules that previously generated warning instead generate errors.

As part of our research, we should conduct analysis to identify all organisations whose data will be affected, and quantify the impact. We will want to carry out a communications and advocacy campaign to inform organisations of the forthcoming changes and to encourage them to improve their data. We can track the progress of the campaign by re-running our analysis.

After a suitable period of analysis and outreach, perhaps 3 months, we can proceed with the proposal.

MANAGING A PROPOSAL

A proposal is the penultimate stage of making a change to the IATI Standard. It is preceded by consultation and research and, if unopposed, is followed by deployment.

2.1 Stage the change

A proposal includes the specific, line-by-line change that is being proposed, to ensure that there is no ambiguity.

This requires a GitHub pull request to be prepared which details the change. See instructions for:

- [embedded codelists](#)
- [non-embedded codelists](#)

Updates to the schema and rulesets are made through regular PRs on <https://github.com/IATI/IATI-Schemas> and <https://github.com/IATI/IATI-Rulesets>

2.2 Author the proposal

Make a copy of the [proposal template](#) and fill it out with the relevant details.

Make a copy of the [gazette template](#) and fill it out as well.

Open a PR against <https://github.com/IATI/iati-standard-gazette> to preview the proposal and Gazette entry, and to prepare for publication. This [proposal from June 2026](#) is a good example for reference.

Once the date of publication has been agreed, update the PR on `iati-standard-gazette` that you made earlier:

- Correct all dates and notice periods
- Add a note to the top of the proposal to note the Gazette circulation date
- Ask a colleague to review your work to check for any errors, inconsistencies, typos, etc

2.3 Publish the proposal

On the day of publication:

- Merge the pull request on `iati-standard-gazette`
- Copy the relevant details from the Gazette template into the Mailchimp email template (in Mailchimp itself) and send it to the Gazette mailing list

2.4 30/45 days later

Once the notified period has elapsed, assuming no objections:

- Update the note in the proposal to say that it's been accepted via a PR against iati-standard-gazette (see [example](#))
- Deploy the change

DEPLOYMENT

Once a proposal has passed, the final step is to deploy the changes.

3.1 iatistandard.org

The first place to deploy is [iatistandard.org](https://dev.iatistandard.org); this updates the official reference and provides assets that other tools use.

First, update the SSOT. See <https://github.com/IATI/IATI-Standard-SSOT> and https://github.com/IATI/IATI-Internal-Wiki/blob/main/IATI-Standard-Website/SSOT_Updates.md

Then, update the IATI reference. See <https://github.com/IATI/IATI-Reference-Generator>

Then, deploy to dev.iatistandard.org via <https://dev.iatistandard.org/cms/pages/88/edit/> (see the update buttons at the bottom of the page)

Review the output, then deploy to iatistandard.org via <https://iatistandard.org/cms/pages/88/edit/>

3.2 Other tools

Several other tools use the IATI Standard. Review the tools that might be affected by the change and check with colleagues if they need to be updated.