





TAI 2019 Annual Report

Bridging the In-Between:

Learnings from a year of donor collaboration

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2019 — Transition, Adaptation and Bridging the In-Between

2019 was a year of transitions, adaptation and exploring in between spaces.

Against a backdrop of an increasingly visible climate crisis, popular outrage at corruption and inequality, continued democratic backsliding and the rise of the surveillance state, rethinks are advisable. No surprise then that half of Transparency and Accountability Initiative (TAI)'s membership initiated or completed significant strategy renewals in 2019. TAI members are considering how to harness transparency and accountability approaches against a bigger waterfront of pressing issues.

Amid such shifts, adaptation becomes a necessity. Within TAI this entailed more flexibility. A willingness to reprioritize learning conversations to accommodate emerging topics, working more closely with individual members to shape their own research and evaluations to be useful to the collective, bringing on a dedicated fellow to support learning work where demand was spiking. Some changes were firmly based on past learnings – for example, undertaking our second country deep dive through a very different model to the first pilot.

A world without TAI would be lonely. Work would advance more slowly. We would lose the nuance, the thoughtfulness, the skepticism, and the smart ways to think about [these issues].

 TAI evaluation, funder member This year saw more requests of the TAI Secretariat from member grantees and from non-member funders in 2019 – be it feedback on draft strategies, fostering dialogue on ways to improve grantmaking practices, seeking the team's take on field opportunities or shaping funding calls. This has given us a greater appreciation of the helpful role that TAI can play in bridging spaces, be that between grantees and members, members and research communities, or members and other funders. 2019 innovations confirmed the potential of broader donor engagement. For example, TAI's support helped secure new funding to test how transparency and accountability can aid inclusion.

Above all, 2019 gave us further confidence in the **value of collaborative approaches**, illustrated across all our current priority areas – data use, tax, civic space and learning. We gained a deeper understanding of the ways our members are collaborating, not least through our new collaboration case notes.

While our members do not pool funds through TAI, the platform should inform and align their investment choices. The value needs to be clear. To that end we commissioned an evaluation in 2019. The findings were largely positive, affirming that TAI is successfully fulfilling its donor-serving orientation and members report benefitting from their participation in a variety of ways. Yet, the process also revealed much that could be clarified and/or improved, so we

are excited by progress on updating our membership governance and evolving our theory of change. These are building blocks for evolutions in our strategy to come in 2020.

2019 Snapshot: TAI Learnings Across Streams

Results Areas — Thematic Priorities —

2019 gave us further confidence in the value of collaborative approaches, illustrated across all our current priority areas—data use, tax, civic space and learning, and our results areas—member collaboration, grantmaking practice and thought leadership.

Data

In Nigeria, we have had to reign in our ambitions regarding what data could be effectively measured while in Colombia we are seeing that there is much to be done to increase data use and relevance for local stakeholders and navigate political constraints.

COLLABORATION &

DONOR ENGAGEMENT

Learning

We proved the value of consulting other members and grantees on research and evaluations commissioned by individual donor members; it facilitates more buy-in, better design, and provides the foundation for uptake.

Thought Leadership

Tax

The threat of increas-

ing taxes and cutting

vital spending to ser-

vice debt payments

merits a coordinated

response among

budget, tax and debt

focused groups.

There are more requests of the TAI Secretariat not just from donor members, but their grantees and from non-member funders for guidance on strategies, to discuss improving grantmaking practices, and to shape funding calls.

Civic Space

Noting a decline in member engagement on strengthening civic space, we integrated our civic space work with other thematic areas, notably Learning for Improved Grantmaking and Taxation and Tax Governance.

Member Collaboration

There is greater appreciation of the helpful role that TAI play in bridging spaces, be that between grantees and members, members and research communities, or members and other funders. This has sparked reflection on how TAI can be a platform for collaboration with a broader set of funders.

Grantmaking Practice

TAI contributed thought leadership and some sweat equity in response to a range of member requests. Wherever possible the Secretariat found ways to translate into public-facing knowledge products.

Who We Are

TAI is a collaborative of donors committed to building a more just, equitable and inclusive society. TAI's members envision a society where citizens are informed and empowered; governments are open and responsive; and citizen engagement with government advances the public good.

TAI Secretariat assists its members to strengthen the impact and effectiveness of their transparency and accountability funding, and the movement as a whole.

WE FOCUS ON FOUR PRIORITY THEMES:



Learning for Improved Grantmaking

Building greater impact of TAP funding through thoughtful, evidence-based, and adaptive donor and grantee practices.



Data Use for Accountability

Assuring more and better use of data by citizens and governments in support of accountability, while addressing concerns about data privacy.



Taxation and Tax Governance

Supporting development of more inclusive and equitable tax governance.



Strengthening of Civic Space

Fostering a plurality of independent and legitimate civil society voices.

Please see our concluding three-year strategy to learn more.

OUR MEMBERS







ASSOCIATE MEMBER







To TAI's credit they have been ahead of the curve on [civic space] for a while. It has been a trend that's really worrying that, now, I think a lot of us have woken up to. And...they are arguably one of the few collectives that are poised to deal with it, or at least to fund against it, which is important.

— TAI evaluation, funder member

Adjusting to Shifts in Context



Adjusting to Shifts in Context

A recurring challenge for TAI as a collective is navigating shifts in strategy and priorities **among our membership.** 2019 brought this home. Luminate embedded its new strategy and operations as an independent entity. Ford Foundation's new strategy and restructuring meant the dissolution of TAI's programmatic counterpart. Open Society Foundations (OSF) similarly merged programs and began a significant strategy rewrite. Fellow members had to navigate these shifts as did the Secretariat, for example, reestablishing the Ford relationship now split between two distinct programs. The implications for shared priorities is still playing out, but the Secretariat is already seeking to be more flexible in responding to a broader range of topics raised by members. As affirmed by our evaluation, TAI should view this constant churn as the norm and our operating model should account for it.

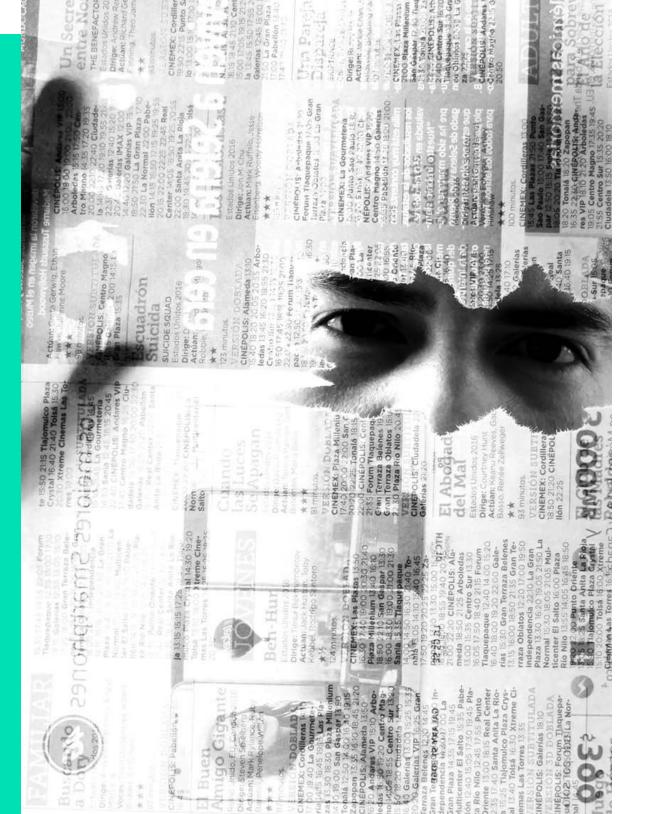
TAI also continued to respond to member desire to serve more of their teams, engaging with a broader range of staff across our members. We worked more with individual members to shape their individually-commissioned research and evaluations that could benefit the collective. In response to increased demand, we brought on a new dedicated Monitoring, Evaluation and Learning (MEL) fellow to support shared learning and reprioritized the learning series to meet time sensitive requests and align with member "heat".

Externally, we saw more asks from grantees and non-member funders for guidance on strategies and approaches. We did not have bandwidth to meet all requests prompting reflection on whether we can offer that as a service offering on an equitable basis. The engagements we did undertake affirmed the potential of influencing a broader set of funders, including new entrants, such as Chandler Foundation, and major global funders, such as the Bill and Melinda Gates Foundation with whom we partnered on ways to fund civil society engagement on tax.

Our evaluation, while broadly positive, is sparking a more substantive strategy refresh than originally anticipated. TAI is already updating its membership criteria and benefits/responsibilities to address points raised. Evaluation findings are the foundation for adaptations in our theory of change and operating model heading into 2020.

TAI creates space to gather and cultivate information, ask questions, and learn in a more complex and nuanced way.

How Did We Do in 2019?



Our Progress

TAI's Secretariat has established organizational structures that
successfully enable members to
work together, and the transparency,
accountability, and participation
(TAP) field sees TAI as a relevant actor
and a donor collaborative that plays
an "agenda-setting" function.

SUMMARY OF PROGRESS ON 2019 TARGETS

Result Area	Target	Completed / Adapted	In Progress / Adapted	Pending / Cancelled
Member collaboration	6	6	2	
Grantmaking practice	3	2		1c
Thought Leadership	20	17	4	1p / 2c

See Annex 3 for a detailed table of 2019 annual targets, milestones, and progress status.

Our Progress: Collaboration

Result

Members apply and adapt different modalities of collaboration in their TAI shared work TAI members pursued collaborative efforts across our four strategic themes, including all of the target initiatives and others beyond this list. Based on our observation of progress and anticipated learning potential, we revised the list of collaboration case notes, and will produce and disseminate content in different formats for other initiatives (see Annex 3 for details).

We pursued a variety of collaboration models, including formal, Secretariat-led work among members (e.g., the external evaluation of TAI).

There are instances of member-initiated work (e.g., the Open Government Partnership evaluation, and the working group on grantmaking practices to support organizational effectiveness). And some of the initiatives included funders beyond our membership as well as grantee organizations (e.g., developing the concept note for funding country groups on tax and the Natural Resource Governance Field Day).

Some of these initiatives built on past TAI collaborative efforts and learnings. For example, the Secretariat-led work on mitigating barriers to data use for accountability and anti-corruption in Nigeria continues and has expanded to Colombia, drawing on the same learning agenda. Learnings from our earlier work in Nigeria informed a new partnership model intended to better manage member and Secretariat time in Colombia. Four TAI members, including a regional office, are co-invested in this work. While the substance of work is similar, the cross-country synthesis and learnings would not surface without TAI's work to connect these initiatives.

This year, TAI increased its interaction with non-member funders around specific products and priorities. These spanned the big (e.g. Norad and Gates Foundation), the small (e.g. Joffe Trust), and new entrants (e.g. Chandler Foundation, BHP Foundation). This sparked reflection on how TAI can be a platform for collaboration with a broader set of funders.



TAI builds relationships and creates connections to enable member collaboration

Findings from the 2019 external evaluation conducted by Arabella Advisors indicate successes and areas for continued improvement as TAI works to advance collaboration and other collective member practices.

- Members regularly exchange ideas, share perspectives, or respond to requests for information from other TAI members (60%) [Inquiry and Exploration]
- Members draw on other members' practices to inform their own grantmaking (71%); and indicate instances of another member influencing their strategies or grantmaking practices (57%) [Influence]
- Members report co-investing in strategic grantee organizations or other opportunities (67%) and to generate new evidence (64%) at least once, but few do this regularly [Alignment]
- Among the barriers to collaboration, evaluation findings suggest
 the need to improve clear and consistent communication practices
 among members, both with and without Secretariat support. Member
 collaboration might also be hindered by a lack of clarity around roles and
 responsibilities and differing expectations about outcomes.

Our Progress: Grantmaking Practice

Result

Members influence other members' strategic approaches or grantmaking practices In 2019, TAI realized mixed achievement across the anticipated milestones for better alignment of member grantmaking practices, and has taken on emergent, unplanned work in pursuit of this result. The Secretariat has seen more traction in supporting members to work together on practices (e.g., multi-funder convenings with grantee organizations) rather

than processes (e.g., aligned reporting requirements).

In 2019, members decided to shift away from explicit aligned reporting targets for existing co-funded grants. This decision reflected learnings informed by the 2018 aligned reporting collaboration case note. Instead, funder members encouraged program officers to explore aligned reporting, and other efforts to reduce the burden for grantee organizations, for new grants or renewals. This included members co-authoring the Smarter Grantmaking for Grantee Organizations guide, to encourage fund seekers to raise their needs during the grantmaking process. To supplement the funder-led organizational effectiveness practice group, the Secretariat hosted two grantmaking practice calls among members that may yield further work in 2020 (on funder support for grantee organizational capacity and holistic safety and security).

Beyond our target milestones, the Secretariat connected members around two convenings this year that bridged multiple member networks. With Secretariat support, the executive director retreat hosted by OSF included groups co-funded with other members, and some funded only by other TAI members. This contributed to a more diverse participant group and experiences shared than otherwise would have been convened by OSF alone. Similarly, the Secretariat helped shape the Natural Resource Governance Field Day, which included multiple TAI members,

It's that time of the week where I spend hours following links and reading all the interesting things in the TAI newsletter.

— Tim Davies, Consultant on open government, data standards and open data. other non-member funders, and practitioners.

Finally, the Secretariat has provided input on funder strategies or other strategic initiatives, but there has been limited evidence this year of members directly influencing each other. On beneficial ownership, TAI members discussed recent research funded by the United Kingdom Department for International Development on making beneficial ownership transparency a global norm. We also worked with OSF and member grantees to draft terms of reference for testing professional uses of beneficial ownership information, and launched a call for expressions of interest to assess donor contributions to shifting norms and practice on beneficial ownership. These initiatives fostered strategic information sharing and sensemaking, but have yet to yield influence or coordination among members.

Beyond our anticipated grantmaking practice milestones, the member peer practice and learning calls on funder strategic shifts and exits, and strategic litigation (see also Thought Leadership) may yield further work towards member coordination and/or influence on these strategy-related themes in 2020. The Secretariat also brokered a strategic funding partnership between TAI member Hewlett Foundation and the Dutch grant facility, Voice. Though other TAI members did not co-invest in this call for grant proposals, the initiative may inform, if not influence, strategic practices of other members in the coming year.



Let's follow where the story goes.

Since its release, Transparency and Accountability Initiative's "Story Behind the Story" report has found audiences and uses we could not have expected - provoking new thinking and collaborations along the way. We measure the power of stories by the change they inspire and the distance they travel. TAI and our members can do the same for our own reports. Listening to how colleagues and peers use our findings can inform how we share results.

Nobody Mentions

March, 2019, Portland, OR

NTEN Conference Session

Storytelling: Solving the Challenges

nten







Many Wrinkles and Short on Time: Exploring the Challenges of "Results Stories"

Blog, Jed Miller May, 2018



Storytelling: Everyone Has a **Story that Matters**

Training for TAI donor members November, 2018, New York, NY



Report - May, 2018





Three Rules for Telling Better Stories About Your Work

Blog, Sarah Jane Staats



Finding Your Story and Your **Strategy**

Workshop

October, 2018, Washington, D.C.



Project Inquiries

Scoping projects and investing in new storytelling approaches



Open Data Surgery

Trainings March, 2018, Manchester, UK

December, 2018, Manchester, UK









Storytelling and the Future of **Advocacy in the 21st Century**

Workshop & Consultation November, 2019, Washington, D.C.





Defining Responsible Storytelling in a Digital Era

Brief for World Economic Forum January, 2020



Mobilizing and Inspiring Action with Technology

World Economic Forum Workshop Februrary, 2020, Kathmandu, Nepal



Government Partnership has broadened its approach to telling stories. As it nears its 10-year anniversary, OGP is seeking to amplify local storytellers. Leaders at OGP also said TAI's recommendations are influencing their advice to foundations beyond the transparency sector.

Open Government Partnership



Open Gov Stories

We were inspired by TAI's StoryCorps training to work with

StoryCorps to record, preserve, and share the stories of

individuals working to ensure women around the world have

full and fair opportunities to earn a living so they—and their

families and their communities — thrive.

Grantee meeting on monitoring, evaluation

Open Society Foundations

MEL Jamboree

and learning practices

April, 2019, New York, NY

Podcast series with global open government advocates and professionals June, 2019

Sarah Jane Staats, Hewlett Foundation



SOCIETY



elt there was so much more to learn — was

Evaluation from NTEN Conference Session

totally blown away. Favorite quote: Going

from "Please join us" to "I see you."

Interactive Storytelling

Workshop October, 2019, Washington, D.C.



Development Gateway Communications Strategy

Interviews

2019 - 2020

Partnership for new communications and storytelling approaches 2019 - 2020

Hewlett Foundation Grantee

Audio interviews with grantees of Global

Development and Population program



Hewlett Foundation StoryCorps Inquiries

Scoping for new storytelling partnerships 2019 - 2020











How to Work with Grantees to Report Transparently on Failures

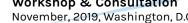
Webinar November, 2018











Our Progress: Thought Leadership

Result

TAI connects ideas and relationships regarding strategic work streams

The TAI Secretariat achieved the majority of our anticipated thought leadership milestones across all strategic themes and pursued some unplanned initiatives to support this result. These initiatives served a variety of audiences, prioritizing TAI's own membership in line with our member-serving approach. Efforts included the external evaluation of TAI's work, thematic convenings of program officers, peer practice and learning calls, serving on advisory groups for member-funded projects and providing bilateral feedback on terms of reference for member commissioned work and targeted thematic queries (e.g., youth and gender inclusion,

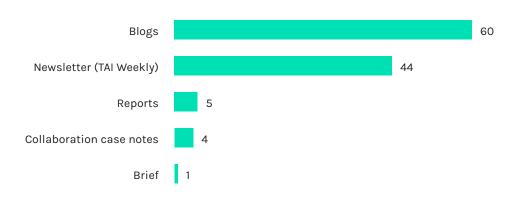
anti-corruption funding, and organizational capacity indicators).

Some of the Secretariat's work directly serves member grantees, such as TAI's accompaniment of the multi-funder-supported **Learning** Collaborative, which concluded this year, and generating a state-of-the-field review for natural resource governance. Starting this year, the Secretariat serves as the independent convenor of the multi-funder steering committee supporting the evaluation of the Open Government Partnership (OGP). In these and other grantee-supporting work, TAI contributes a bird's eye view of the funder landscape and supports connections and more general dissemination of practice and learnings as useful. When bandwidth allowed, TAI Secretariat also responded to asks from non-member funders for guidance on potential grantees, strategy reviews and calls for proposals.

Finally, the Secretariat contributed its thought leadership, and some sweat equity, to producing several knowledge products, most of which are public-facing. These products were either inputs to or content disseminated at multi-stakeholder convenings, such as original content commissioned on debt in Africa and on the roles of civil society in tax reform. Readership for the TAI Weekly - the synthesis of field wide research, news, and event - continued to grow. The Weekly receives more unsolicited positive feedback than any other TAI product.

Publications in Numbers (2019)

2019 TAI PUBLICATIONS



Most TAI activities are exclusively for TAI members, but we rely on blogs and the TAI Weekly to sustain broader outreach and sharing of insights.

Major Publications (2019)



Taxation and Tax Governance: Collaboration Case Note



Civic Space: Collaboration Case Note



Civil Society Engagement in Tax Reform



Data Use for Accountability in Nigeria: Collaboration **Case Note**



Learning From Evidence Through A Funder **Collaborative**



How to Learn from Evidence: A Solutions in Context Approach



Aligned Reporting: Collaboration Case Note

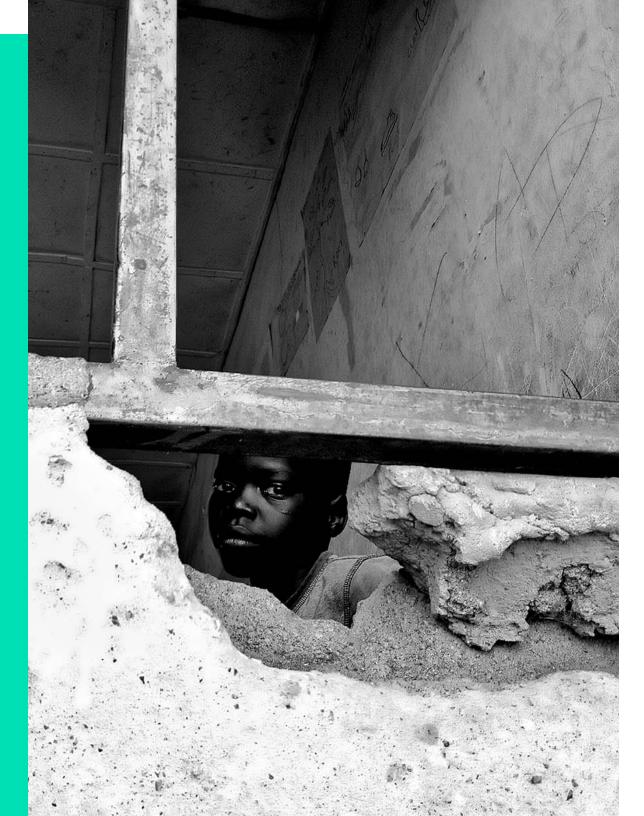


Smarter Grantmaking for Grantee Organizations: Conversations to Have with Funders

I think it's very important to have folks whose main job it is to understand the overall landscape because of the forest/trees problem. It's a field that is so subject to being siloed that it's very useful to have the broad overview. And you can see that in the 'TAI Weekly' and so forth.

— TAI evaluation, grantee staff

Our Work and Learnings



Learning for Improved Grantmaking



Strategic Objectives

- TAI members adapt grantmaking practices for improved grantee learning and impact
- There is adequate infrastructure to support learning among TAP practitioners, researchers, and funders
- There is increased evidence of collaboration among donor members

KEY ACTIVITIES

TAI released guidance for grantees on conversations to have with funders which was showcased at several field convenings. We supported a pilot retreat for executive directors of member grantees.

TAI participated in the wrap up and reflection on the Learning Collaborative and partnered with Open Gov Hub to launch a repository of new stories of open government changemakers.

TAI's member learning series started with an in-person convening of funders and practitioners to share experiences and practices with diversity, equity, and inclusion (DEI) in the global development context. Other calls included previews of The State of Open Government and funder lessons on funding strategic litigation. TAI also acted as independent convener of the OGP evaluation steering committee.

LESSONS LEARNED

As planned, TAI's grantmaking practice initiatives span multiple strategic themes beyond Learning. This includes funder support for civil society groups working on tax and exploring organizational resilience (civic space) in the context of grantmaking practices. This cross-cutting approach attends to program officer needs and increases the potential for downstream benefits for grantee organizations.

We are seeing value from consulting other members and grantees on research and evaluations commissioned by individual members; it facilitates more buy-in, better design, and provides the foundation for uptake.

Our experience supporting the OGP evaluation attests to the value of an independent voice in the governance of a global multi-stakeholder evaluation and learning effort (beyond those directly funding the evaluation).



Why do you care about changing the world? Bringing TAP to Life

From our work with Jed Miller last year on the value and importance of TAP storytelling, we pursued a project to record and share more stories of open government. We recorded a first set of stories with StoryCorps in December of 2018 and have since edited those and recorded more to create an Open Gov Stories Podcast series. In each episode, we aim to understand motivations and influences driving professionals in the open government field. The resulting stories are intended as a source of inspiration and learning.

The podcast series was launched at the Open Government Partnership Summit in Ottawa to maximise interest and potential creation of listener stories. At time of writing, more than 20 stories have been created and shared on the podcast's SoundCloud page with more on the way from Hubs in Liberia and Pakistan.

Data Use for Accountability



Strategic Objectives

- More effective, inclusive, and user-centric interventions that promote the uptake and use of data for greater accountability
- New understanding and evidence informing the development of norms, practices, and standards regarding the use, control, and protection of data, safeguarding personal privacy and public interest.

KEY ACTIVITIES

For our project on barriers to data use, TAI conducted a Nigeria assessment visit and developed a learning agenda with the participating member grantees. Data collection was underway by year end.

In Colombia, we partnered with the International Finance Corporation to conduct the first-ever extractive industries open data readiness assessment. Findings were validated with local stakeholders; Ford and Open Society Foundations awarded new grants to build up data use at subnational level, including with indigenous communities: and other funders committed to a call for ideas for data collaborations.

We supported the heads of open organizations to follow through on ideas for collaboration as captured in the now published Sum of Our Parts report. Data rights and governance concerns receive increasingly prominent coverage in the TAI Weekly.

LESSONS LEARNED

We have had to rein in ambitions regarding what data could be effectively measured while working with grantees in Nigeria. One of the projects would have benefited from engaging relevant government agencies more proactively in design.

In Colombia, we are seeing that there is much to be done to increase data use and relevance for local stakeholders and navigate political constraints, e.g. communities will ignore revenue data if they perceive they have no way to influence how it is spent. By working with partners, the Colombia process was much less burdensome on members. Yet, the challenge remains of selecting countries relevant for a majority of members.

Turning to the broader data community, we recognize that not all "open" organizations are the same but have distinct comparative advantages that can be better leveraged. Their leadership face an emergent set of data-related issues connected to privacy, rights, automation and more, that merit new thinking and approaches (including collectively.)

Fostering Field Collaboration -Leading the way on "open"

The "open" sector, encompassing organizations working on transparency, civic participation and open data, has grown fast in the past decade aided in part by a generous funding environment. Yet, sector leaders saw signs of waning political interest amongst previous champions, and an expected reduction in core funding. At the same time, emergent data-related issues connected to privacy, rights, and automation demanded new thinking and approaches. Against this backdrop, the heads of seven international open organizations undertook a process to review current strategies, the roles of each and identify areas for collaboration. Prompted by similar concerns about sustainability of "open" programming, TAI members supported this process.

Why collaborate? The CEOs identified the following benefits: cost savings, avoidance of duplication, strengthened appeal to funders, peer support, operational support and focus, sharing of public goods and greater impact.

What did it yield?

- Identification of several areas ripe for enhanced collaboration (around policy and advocacy, research, learning and technology) and some immediate steps e.g., merging Open Data Barometer and separate institutional indices into a new Data Barometer
- Mapping of strengths and weaknesses of each organization that helps each build on their comparative advantages and rely on others for complementary roles
- Follow up work on defining an overarching theory of change for openness
- New appreciation of the potential for aligned approaches to create inroads in new sectors and to form joint proposals for philanthropic and commercial funding
- Enhancements in information sharing ranging from shared drives to CEO WhatsApp group
- Clearer asks of existing funders e.g., to help facilitate links to other funders in targeted sectors

A model worth replicating?

Positive feedback on the experience suggests there would be value in replicating this type of process on other issue areas where there is a set of core international grantees. Factors to increase chances of success, based on this experience, include:

- Having a facilitator of the process that is familiar with the sector in question but independent of any one of the groups participating
- Donors signaling they welcome and reward collaborative approaches, but not being in the room themselves
- Dedicated resources for the process, including beyond the initial mapping and reflection workshop as hard to keep up momentum on actions identified without incentive/push
- Some contextual pressure aiding recognition that "business as usual" is not a long term option

Taxation and Tax Governance



Strategic Objectives

- Ending of anonymous shell companies, foundations, and trusts
- More inclusive governance and engagement to ensure corporations pay their fair share of taxes and to strengthen domestic revenue mobilization

KEY ACTIVITIES

TAI's commissioned research on civil society's role in tax reform was launched at the Addis Tax Initiative Conference, prompted invitations from bi- and multilateral funders to discuss the implications, and resulted in a concept note for channeling more resources to civil society developed with the Gates Foundation and International Budget Partnership (IBP).

TAI Secretariat updated our tax funding site, and rolled out a 20+ Fiscal Futures blog series in cooperation with IBP. (See Grantmaking Practice above for beneficial ownership activities).

LESSONS LEARNED

We have identified latent interest among bilateral and multilateral donors on civil society engagement on tax. To shift the imbalance in support for revenue authorities and that to non-government actors who assure accountability, it makes sense for TAI members to work with the large funders of domestic resource mobilization programming. There are applicable lessons from funding accountability ecosystems on public spending.

While there is much interest in the Fiscal Futures work (evident from blog series responses), there remains a challenge to shape a clear mobilizing message e.g. what does it mean to put the "public" back in public finance. Given the interconnections, TAI members should look at tax, spending, even beneficial ownership issues collectively.



Recommendations for Donors for Civil Society Engagement in Tax Reform

The Civil Society Engagement in Tax Reform report showed numerous areas where civil society can play a more constructive role in country level tax reform. The Overseas Development Institute research team spell out key recommendations specifically aimed at donors. As this and other research confirms that much grantee work on tax reform is shaped by funder priorities, more strategic and balanced donor support is vital. Donors are asking for a roadmap to integrate civil society roles into programming, but there is a challenge to find instruments to scale support when multilateral trust funds offer no ability to grant to civil society.

- 1. Funders should conduct a political economy analysis of a country to understand the real power levers and work with grantees to design a country-specific program as no two operating contexts are the same
- 2. As it takes more than technical capacity to successfully advocate for tax reform, funders should focus on additionally building up political savvy among grantees with knowledge gained from a political economy analysis
- 3. In supporting a tax program, funders must support building a tax ecosystem in the country. This can partly be achieved by emphasizing both supply and demand issues in tax, i.e., improving government engagement while also improving civil society ability to hold government to account. Lopsided emphasis will lead to lopsided results
- 4. Perhaps the most important recommendation is providing more flexible and longer lasting core support to grantees. Overly prescriptive project funding is hamstringing grantees

Strengthening of Civic Space



Strategic Objectives

- There are improved TAP donor and grantee practices sensitive to the constraints on civic space
- TAP civil society organizations (CSOs) have more robust organizational capacity to resist government pressures

KEY ACTIVITIES

Building on mid-year reflection and learnings, TAI integrated our civic space work with other thematic areas, notably Learning for Improved Grantmaking and Taxation and Tax Governance.

We hosted peer practice and learning calls on funder support of organizational resilience, which included participants from member regional offices. This topic also featured in the retreat for grantee Executive Directors. TAI represented members in strategizing of the Funders' Initiative for Civil Society.

LESSONS LEARNED

Noting a 2018 decline in member engagement on strengthening civic space, TAI completed a collaboration case note that surfaced barriers to joint action, including divergent framing of "shrinking civic space" and differing member needs and expectations of the collaborative effort.

Individual members are addressing different drivers of shrinking space, but a dedicated discussion at the 2019 member retreat identified several points of consensus, including attempting to integrate civic space into TAI's other strategic priorities where relevant, and to utilize the TAI platform to support member information sharing and learning on strategy and tactics. When relevant, we can use TAI's collective voice to engage and influence other funders.

New Frontiers



Strategic Objectives

Responsive to member needs, the Secretariat supports time sensitive inquiries that go beyond our four priority themes

KEY ACTIVITIES

Members asked to learn more of debt implications for fiscal programming so we adapted our work plan to commission research, support OSF in designing a review of the drivers/features of the emergent debt crisis, and convening Africabased grantees to build a shared understanding of its dynamics.

On extractives, at members' request, TAI developed papers on the state of the field and state of funding - inputs to the OSF-convened Natural Resource Governance Field Day. Despite allocating funds, members were not able to deliver a follow-up training on intersectionality for extractives grantees before year-end. TAI led a session on Extractive Industries Transparency Initiative (EITI) impact described by one Secretariat senior staffer as "the most meaningful" they have had in a decade.

LESSONS LEARNED

These conversations had relevance for multiple member program areas. The emergent debt crisis involves new creditors and forms of debt – past solutions will not be sufficient. The threat of increasing taxes and cutting vital spending to service debt payments merits a coordinated response among budget, tax and debt focused groups.

The extractives governance field has been slow in adjusting focus to climate change, although there are entry points. We can do more to make the most of grantee convenings.

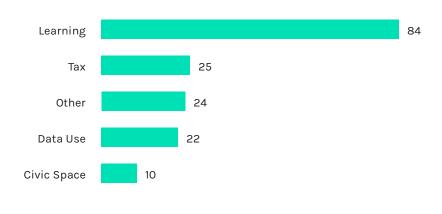
We struggled to get the right regional donor counterparts coordinating on open contracting opportunities in Eastern Europe and Central Asia (more a scheduling challenge than lack of interest).

Our Work and Learnings

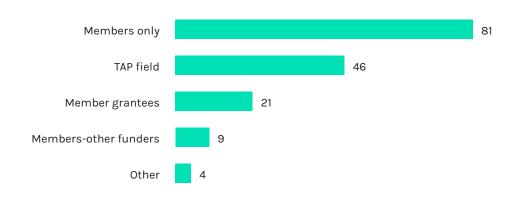
TAI creates space to gather and cultivate information, ask questions, and learn in a more complex and nuanced way.

 TAI evaluation, funder member

2019 TAI OUTPUTS BY WORK STREAM



2019 TAI OUTPUTS BY PRIMARY AUDIENCE



We maintained a strong member-facing focus but also tailored events and learning products to other key field and funder audiences.

In 2019, the Secretariat managed an increased budget to fund our evaluation, addressed the need for more team capacity to support learning activities, and experimented with new communications tools.

Operations and Finances



Operations and Finances

FINANCES

MEMBERSHIP AND GOVERNANCE

Two of our members started implementing new strategies in 2019, a third began a new strategy to account for restructuring, a fourth undertook a major program evaluation, and a fifth maintaining a holding pattern amid political uncertainty. TAI Secretariat needed to be flexible and supportive to these processes and shifts. Beyond strategy, there were adjustments in member staffing and portfolios to navigate. Of particular note, Ruth Levine, Director of the Global Development and Population Program at Hewlett Foundation and TAI Chair, concluded her tenure at the end of May 2019. Dana Hovig, her successor at Hewlett, assumed the Chair role in September.

Amid these transitions, both Hewlett Foundation and Ford Foundation renewed their core membership of TAI. Other members maintained their existing multi-year commitments.

Engagement with new funders and evaluation findings on the need for greater clarity of roles/responsibilities were prompts for creating an updated member terms of reference.

Our financial status is healthy. Our budget for 2019 was around \$300,000 higher than typical in anticipation of the costs of the evaluation and strategy refresh, plus commissioned research on tax. Preliminary figures indicate a small underspend of around \$30,000 due to postponement of a beneficial ownership review into 2020. Those funds will be carried over for that purpose. Compared to the original budget, we under spent by 84% on Professional Fees as fees for copy editing, graphic design, fellow stipends, and IT support were recategorized under Consultants. This switch was to match new categorizations of our fiscal sponsor. Consequently the Consultant spend was even higher than originally budgeted.. Our travel and events budget was also 29% under original estimate, in part due to MacArthur hosting our August member meeting so avoiding Secretariat costs, and due to a conscious decision to minimize travel as we focused on the strategy refresh in the second half of the year. See Annex 4 for complete budget information.

While our spend was higher than revenues in 2019, we retain the necessary six-month balance of operating costs required under our fiscal sponsorship agreement.

STAFFING

The Secretariat benefited from no turnover in full time staff in 2019 and continued to benefit from its partnership with Atlas Corps. Edith Mecha, Communications Fellow, concluded a successful fellowship in July and was succeeded by 'Busayomi Sotunde. The Secretariat also welcomed Mayra Zehra as our first MEL Fellow.

EVALUATION

TAI commissioned an external evaluation conducted by Arabella Advisors. We wanted to assess TAI progress towards our strategic goals from the Secretariat, member, and other stakeholder perspectives. We held a sensemaking workshop in August with members to interpret evaluation results, graciously hosted by the MacArthur Foundation. The results were generally positive, with members extolling TAI's ability to connect, inform, and convene. However, the evaluation did force TAI to ask very hard questions of itself, including around members' shared objectives and continuance of investment in the collaborative. This process helped to reconfirm member support for TAI's continuing operation, and will inform our forthcoming 2020-2024 strategy. We anticipate a number of structural changes, both in how the Steering Committee

guides TAI's work and how TAI will work with and for its members.

COMMUNICATIONS

In 2019 we tested new ways to increase our engagement with members, grantees, and other stakeholders in the TAP field.

Starting internally, we responded to an ask from our members to find a more effective way to keep their staff in the loop on all things TAI. The TAI Monthly — an update and reflection centered around TAI activities — drops the third week of every month into over a hundred member inboxes.

Externally, we used Search Engine Optimization actively in the last quarter of the year to increase the visibility, web traffic, and searchability of our knowledge product on web search platforms. Organic searches became the number one source of TAI web traffic, meaning we were able to influence more readers and stakeholders outside of our usual immediate reach/audience.

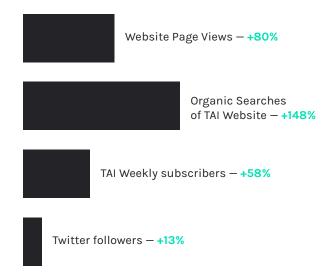
We began using more visuals (pictures and giphy) in the TAI Weekly newsletter including specifically designed imagery and launched a photo grant competition to build up our library of visual content. We also began using Time-warp to ensure the TAI Weekly arrived in inboxes at peak readership hours for each time zone. We made it easy to get translated versions of the Weekly. Such efforts paid off with a 37% increase in readership.

Our social media presence also grew. We established a Facebook and LinkedIn presence. On Twitter we found strength in retweets, referral, and simultaneous engagement to conversations. We were increasingly tagged on relevant subject matters around transparency and accountability issues. For instance, we were tagged in several tweets from the Ministry of Finance of Somalia on guidance informing their fiscal information portal.

In 2019, we published a total of 109 knowledge products. The Smarter Grantmaking report arguably enjoyed most reach, featured by the likes of Candid, Accountable Now, PCDN Global, the Balkan Civil Society Development Network, and Atlas Corps. Also popular is the How to Learn from Evidence: A Solutions in Context Approach brief (republished on the MIT GOV/LAB website) and the Civil Society Engagement in Tax Reform that was <u>republished</u> by our partner Overseas Development Institute (ODI) and Public Finance International. The blogs on data use attracted helpful commentary.

All TAI communication products are produced and disseminated under the CC BY-NC-ND 4.0 Creative Commons license.

TAI SOCIAL MEDIA GROWTH IN 2019



DIVERSITY, EQUITY, AND INCLUSION

Promoting approaches is important in its own right but also for shaping more effective programming on the issues our members care about. For example, the Secretariat is fostering conversations on how networks representing those who have typically been excluded from decision making, can better take advantage of transparency and accountability tools and resources to assert their rights.

Furthermore, the Secretariat benefits from the strong attention to DEI of our fiscal sponsor, Proteus Fund, and also gains further diversity of perspective by participation in the Atlas Corps program. Atlas Corps brings non-profit sector leaders and professionals from the Global South to Washington D.C. for twelve months to sharpen skills, boost their professional development, and enable fellows to take these skills with them back to their home country. In 2019, TAI benefited from the presence of Edith Mecha, our communications fellow through July, her successor 'Busayomi Sotunde from Nigeria, and Mavra Zehra, who joined as a MEL fellow from Pakistan.

What Does Diversity, Equity, and Inclusion Look Like in Practice?

In preparation for our 2019 annual retreat, TAI convened a learning day on what diversity, equity, and inclusion looks like in practice. We aimed to raise awareness of developments and challenges in DEI practices, inspire continuous action and integration of DEI in global work, and inform discussions on funder support for DEI during our retreat conversations. As TAI is uniquely situated between funders and grantees, we felt it was vital to incorporate as many voices in the room as possible. As such, this event brought a number of grantees and funders with great knowledge of DEI in practice, including Red Umbrella Fund, Mama Cash, and Voice.

The combined experience and open format enabled rich debate as we discussed multiple important questions: how do organizations develop cultures of DEI? How can funders help grantees in their DEI efforts? Are groups with more developed community roots more resilient from government harassment or is there no relationship?

There are no right or wrong answers to these questions, but this exchange sparked new insights and TAI hopes to continue learning around DEI principles and applications among members, grantees, and the broader TAP field.



Updating Member Governance

From TAI's original field-facing approach in 2010, to our 2016 strategy pivot that moved us to our current memberserving model – TAI's funder members remain a critical component of advancing our work. While TAI members changed with that pivot, we had not assessed and clarified our membership model. TAI's 2019 evaluation findings demonstrated that this lack of clarity was contributing to confusion and likely inefficiencies for both current and prospective funder members. To address these problems, we received a supplemental grant from OSF's Organizational Health Fund (OHF) to review and update TAI membership processes and governance practices.

Working with an expert in social sector multi-stakeholder structures and governance practices, the Secretariat and a working group of members are working to develop and document membership criteria, the benefits and responsibilities for different member tiers, and processes for member onboarding and exit. Work is scheduled to conclude in early 2020.

What Are We Excited About for Next Year?



Alison

Sharing TAI's evaluation findings with the world and building a new MEL system with funder members to assess our progress towards collective outcomes areas in our forthcoming 2020-2024 strategy.



Busayomi

Increasing usage and relevance of TAI knowledge products in influencing grantees and practitioners working in the TAP field.



Mavra

Utilizing my TAI experience to explore innovative MEL strategies and practices in the social sector space in Pakistan.



Michael

Reinforcing relationships with a broader range of funders to better mobilize complementary resources and insights in support of transparency and accountability programming.



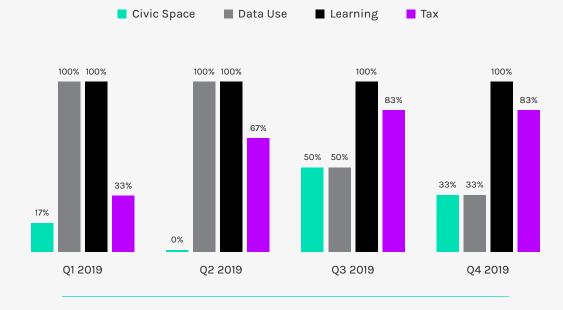
Richard

Helping lay a successful foundation for TAI's new strategy period, especially testing a new format for members to suggest and vote on questions to address during the year.

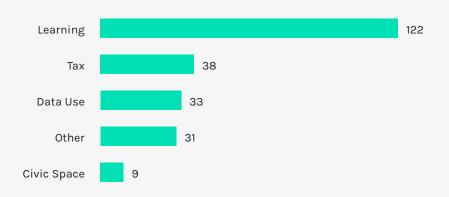
Annexes

Annex 1: Annual Data **Snapshots**

PERCENT OF MEMBERS THAT ENGAGE AT LEAST ONCE BY WORKSTREAM



2019 INSTANCES OF MEMBER ENGAGEMENT BY WORKSTREAM



Deliverable: includes new internal or public document or other written content TAI was involved in producing or for which TAI provided substantive inputs (except TAI blogs, the TAI Weekly, or other social media content).

Event: includes closed or public event or meeting with a formal agenda that TAI contributed funding to or played a role in convening.

Learning for Improved Grantmaking

Total: 166	Deliverable: 89	Event: 77
Member Collaboration		
Learning Day: Diversity Equity Inclusion	3	1
OGP Evaluation Independent Convener	6	8
TAI Evaluation Sense Making Member Meeting		1
TAI Member Retreat	1	1
TAI Steering Committee Quarterly Calls		3
Learning Infrastructure		
Collaboration Case Notes	4	
Evidence Summaries for TAI Members	4	
Fiscal governance indicator project	1	2
Member Learning Series: Funder exits	2	1
Member Learning Series: I Am Aware evaluation	1	1
Member Learning Series: OGP State of Open Government		2
Member Learning Series: Strategic litigation	1	2
Smarter Grantmaking Practices for Grantee Organizations	3	1
TAP Learning Collaborative	1	5

Deliverable: includes new internal or public document or other written content TAI was involved in producing or for which TAI provided substantive inputs (except TAI blogs, the TAI Weekly, or other social media content).

Event: includes closed or public event or meeting with a formal agenda that TAI contributed funding to or played a role in convening.

Learning for Improved Grantmaking

Total: 166	Deliverable: 89	Event: 77
TAI Feedback to Members		
Curated Resources on Youth / Gender Inclusion Strategies & Assessment for MacArthur	1	
Ford State Capture ToR	1	
Grantee Capacity Indicators and Resources	1	
Luminate Argentina Grantee Learning and Collaboration	2	1
Organizational Health Fund Reflection with OSF		1
OSF ToR on Learning During Anti-Corruption Windows	1	
Shared Member Proposal and Reporting Templates with Hewlett	1	
Think Tanks & Social Movement Paper	1	
Other		
Accountable Now Donors and Dynamic Accountability Concept	1	
Evidence vs. Storytelling: Which Works Better to Convince Skeptics?		1
Feedback on GOV/LAB Guide Academic-Practitioner Partnership Convers	sations 1	
Fiscal Grantees Executive Directors Retreat	1	1
Landscape of Global Organizations Focused on Capacity Building for Movement Builders	1	

Deliverable: includes new internal or public document or other written content TAI was involved in producing or for which TAI provided substantive inputs (except TAI blogs, the TAI Weekly, or other social media content).

Event: includes closed or public event or meeting with a formal agenda that TAI contributed funding to or played a role in convening.

Learning for Improved Grantmaking

Total: 166	Deliverable: 89	Event: 77
Open Gov Stories: Podcast series		1
OSF Monitoring, Evaluation, and Learning Jamboree		1
Storytelling & the Future of Advocacy in the 21st Century		1
Transparency for Development	1	2

Deliverable: includes new internal or public document or other written content TAI was involved in producing or for which TAI provided substantive inputs (except TAI blogs, the TAI Weekly, or other social media content).

Event: includes closed or public event or meeting with a formal agenda that TAI contributed funding to or played a role in convening.

Data for Accountability

Total: 21	Deliverable: 10	Event: 11
Data Use for Accountability Learning Initiative		
Colombia extractives industry data assessment	2	6
Nigeria data for accountability learning initiative	6	1
Data Grantees: More Than the Sum of Our Parts report	1	
Disclosure to Development: IFC Advisory Committee		2
Mobilizing Data Against Corruption		2
State of Open Data Book: donors chapter	1	

Deliverable: includes new internal or public document or other written content TAI was involved in producing or for which TAI provided substantive inputs (except TAI blogs, the TAI Weekly, or other social media content).

Event: includes closed or public event or meeting with a formal agenda that TAI contributed funding to or played a role in convening.

Taxation and Tax Governance

Total: 28	Deliverable: 17	Event: 10
Beneficial Ownership		
TAI Evaluation TOR Distributed	1	
DFID Beneficial Ownership Report		1
Revised TOR Beneficial Ownership Use Case Detailed Mapping	1	
Utilizing Beneficial Ownership for Public Accountability: Consultancy To	oR 1	
Civil Society Engagement in Tax Reform	7	5
Funding Mechanisms for Civil Society Work on Tax	3	2
Civil Society Engagement on Tax at Country Levels Workshops (NORAD + USAID)	2	
Fiscal Futures Blog Series	1	
Tax Transparency Webinar		1
Tax and Corruption UK Strategy Retreat	1	1
TAI Tax Working Group		1

Deliverable: includes new internal or public document or other written content TAI was involved in producing or for which TAI provided substantive inputs (except TAI blogs, the TAI Weekly, or other social media content).

Event: includes closed or public event or meeting with a formal agenda that TAI contributed funding to or played a role in convening.

Strengthening Civic Space

Total: 10	Deliverable: 5	Event: 5
Civic Space Memo 2019 Retreat Discussion	1	
Member Learning Series: Holistic grantee security initiative	1	1
Member Learning Series: Organizational capacity and grantee resilience	e 2	1
OSF call on Next Steps for Civic Space		1
Preparing Civil Society for the Fourth Industrial Revolution Advisory Board Meeting		2
Voice/TAI Joint Call for Proposals: From Open to Inclusive Governance	1	

Deliverable: includes new internal or public document or other written content TAI was involved in producing or for which TAI provided substantive inputs (except TAI blogs, the TAI Weekly, or other social media content).

Event: includes closed or public event or meeting with a formal agenda that TAI contributed funding to or played a role in convening.

New Frontiers

Total: 17	Deliverable: 10	Event: 7
Natural Resources and Extractives Industries		
BHP Foundation Consultation and Consent Proposal Reviews	1	
CCSI Executive Session Politics of Extractives Governance		1
EITI Conference Session: Is Extractives Transparency Having an Impact?	1	1
Extractive Industries Member Call		1
Natural Resource Governance Field Day	2	1
Debt		
Debt on the Rise Event		1
African CSOs' Capacity Support: Scoping for public debt	3	2
TAI Comment on OSF Debt TOR	2	
Other: Corruption Funding Scan for OSF	1	

Deliverable: includes new internal or public document or other written content TAI was involved in producing or for which TAI provided substantive inputs (except TAI blogs, the TAI Weekly, or other social media content).

Event: includes closed or public event or meeting with a formal agenda that TAI contributed funding to or played a role in convening.

Operations

Total: 13	Deliverable: 7	Event: 6
Chandler Foundation Introduction to Field		2
Draft TAI Theory of Change		1
TAI Evaluation	3	2
TAI Membership Due Diligence Memo	1	
TAI Membership Terms of Reference	1	1
TAI Semi/Annual Funder Grant Reports	2	

Result: Collaboration

Result Summary: TAI members apply and adapt different modalities

of collaboration in their TAI shared work

2019 Target: At least six case notes that document

instances of TAI member collaboration

Milestones

Progress as of December 31, 2019*

1. Data Use

Multi-member country scoping in Colombia leads to individual and joint donor actions

In Progress

2. Taxation

Tax working group and Secretariat efforts contribute to grantee, member, and other funder engagement on beneficial ownership Completed

Instead of case note, will commission an external evaluation

3. Taxation / Civic Space

Members and other funders commit to ongoing information sharing and coordination around civil society roles on tax

Completed

4. Learning

Aligned reporting 2.0 - revisit 2018 pilot and subsequent member efforts to streamline grantee reporting and learning processes

Adapted / Completed

Instead of case note, will continue to promote Smarter Grantmaking for Grantee Organizations guide

*progress status of initiative, case notes to be published in 2020

Result: Collaboration

Milestones

Progress as of **December 31, 2019**

Learning

Member-led organizational effectiveness working group strengthens members' grantmaking practices to support healthier and more effective grantee organizations

Adapted / Completed

Learning

Multi-member funding of Open Government Partnership evaluation and TAI's role as independent convenor of the evaluation steering committee (See also Thought Leadership)

In Progress

New case note added

7. Secretariat Special Project

Funder collaborative evaluation effort yields actionable insights and learnings

Completed

8. New Frontiers / Learning

Convening brings multiple funders and grantee organizations together for dialogue and action-oriented learning around natural resource governance

In Progress

New case note added

Result: Grantmaking Practices

Result Summary: TAI members influence other members' strategic

approaches or grantmaking practices

2019 Target: At least three instances of member strategic approaches or

grantmaking practices being influenced by other TAI members

Progress as of Milestones **December 31, 2019**

1. Taxation

TAI work on beneficial ownership influences funder grantmaking and/or advocacy approaches, coordination among TAI and other funders (See also Collaboration)

Adapted / Completed

2. Learning

Member-led organizational effectiveness group - TAI members influence each other to strengthen practices, coordinate support (See also Collaboration)

Adapted / Completed

3. Learning

Aligned reporting efforts evolve, and new grants reflect streamlined reporting / learning processes (See also Collaboration)

Cancelled

Result: Thought Leadership

Result Summary: TAI connects ideas and relationships

around our strategic workstreams

At least 20 instances of where TAI demonstrates thought leadership **2019 Target:**

> (e.g., generates new content or knowledge, enhances ideas, brokers partnerships, or incubates new ideas or concepts)

Progress as of December 31, 2019 **Milestones**

1. Data Use

Engage HQ and field member staff in one country-level field scoping trip and generate learnings on data use for anti-corruption

Completed

Data Use

Grantee guidance to access data capacity, commission and disseminate guidance content with funders and grantees

Adapted / In Progress

3. Taxation

Lead dissemination and collective use of joint member portfolio analysis through the tax mini-website (updated annually)

Completed

4. Taxation

Agenda design and convenings around beneficial ownership problems relevant to funders and grantees

Adapted / Completed

Result: Thought Leadership

Mi	lestones	December 31, 2019
5.	Taxation	
	Commission and disseminate knowledge products on	
	effective models of civil society engagement on tax issues	Completed
6.	Taxation	
	Sourcing and curating Future of Fiscal Transparency	
	and Accountability blog series	Completed
7.	Civic Space	
	Contribute inputs, guidance and facilitation to reframe civic	
	space work towards dialogue and learning for action	Completed
8.	Civic Space	
	Broker relationship between at least one TAI	
	member and Voice grantmaking initiative to engage	
	marginalized communities into TAP work	Completed
9.	Learning	
	Commission and disseminate TAP story collection in	
	partnership with StoryCorps and the Open Gov Hub	Completed
10	. Learning	
	Leverage independent convener role for OGP	
	Evaluation to elevate learnings across TAI members	
	and support OGP efforts to share with TAP field	In Progress

Progress as of

Result: Thought Leadership

Milestones	Progress as of December 31, 2019
11. Learning	
Design agenda and convene funders around shared	
thematic priorities (extractives, open contracting, tax)	Completed
12. Learning	
Support strategic thinking and action for successful	
conclusion of Learning Collaborative grant	Completed
Learning	
Design agenda, draft framing inputs, and convene	
funders around shared learning priorities:	
13. Diversity, equity, and inclusion (Learning Day)	Completed
14. Gender and TAP	Cancelled
15. Integrating power analysis in strategic and	
programmatic theories of change	Pending
16. Strategic litigation and legal empowerment	Completed
17. Funder transitions and exits (added)	Completed
18. Supporting grantee organizational capacity and resilience (added)	Completed
19. Learning	
Scope international organization grantee interests and needs	
on DEI and make recommendations to members on potential	
convening or alternative sharing/learning on good practice	Cancelled

Result: Thought Leadership

Milestones		December 31, 2019	
20.	New Frontiers		
	Generate state of the field paper and funding scan		
	for Natural Resource Governance Field Day	Completed	
21.	New Frontiers		
	Design agenda for debt transparency convening and generate		
	and disseminate a synthesis of reflections, ideas, and learnings	Completed	
22.	Secretariat Learning Product		
	Curate and disseminate weekly TAP-relevant		
	content and doubles subscribers for the year	In Progress	
23.	Secretariat Strategic Project		
	Engage members in systematic evaluative		
	initiative that emphasizes learning and informs		
	collaborative's action going forward	Completed	
24.	Secretariat Strategic Project		
	Lead members through strategic refresh process		
	focusing on shared priorities and clear, realistic		
	outcomes with appropriate indicators	In Progress	

Progress as of

Annex 4: Financial Summary

Revenue

Total: 13	Amount
Ford Foundation	\$250,000
Hewlett Foundation	\$300,000[1]
Luminate	\$250,000
Open Society Foundations	\$265,000[<mark>2</mark>]
MacArthur Foundation	\$150,000[3]

- [1] Funds committed in 2019, but to be disbursed in 2020.
- [2] Additional \$15,000 beyond original commitment for member governance review.
- [3] Funds committed in 2019, but to be disbursed in 2020.

Annex 4: Financial Summary

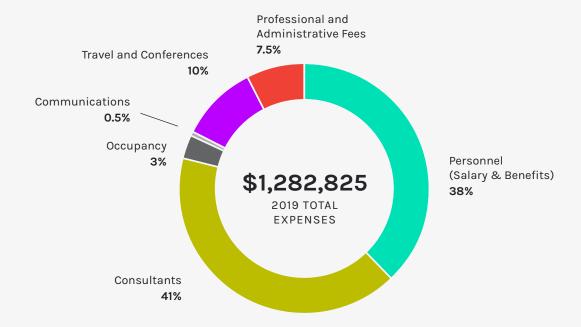
Budget

Category	Budget	Expenses	Variance \$ / %
Salaries and Benefits	\$501,780.15	\$489,159.22	\$12,620.93 / 2.51%
Consultants	\$462,500.00	\$533,055.18	(\$70,555.18) / 15.25%
Professional Fees	\$28,500	\$4,014.57	\$24,485.43 / 85.91%
Occupancy	\$44,450	\$39,986.03	\$4,463.97 / 10.04%
Communications	\$6,800	\$6,978.89	(\$178.89) / 2.6%
Travel and Conferences	\$177,900	\$119,631.29	\$58,268.71 / 32.75%
Administration Fees (for Proteus Fund)	\$90,000	\$90,000	-

Total	\$1,311,930.15	\$1,282,825.18	\$29,104.97 / 2.21%

Annex 4: Financial Summary

Budget



Transparency and Accountability Initiative is a collaborative of leading funders of transparency, accountability and participation worldwide. It envisions a world where citizens are informed and empowered, governments are open and responsive, and collective action advances the public good. Toward this end, TAI aims to increase the collective impact of transparency and accountability interventions by strengthening grantmaking practice, learning and collaboration among its members. TAI focuses on the following thematic areas: data use for accountability, strengthening civic space, taxation and tax governance, and learning for improved grantmaking.



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