TRANSPARENCY &
ACCOUNTABILITY
INITIATIVE

2020

Semi-Annual

Report

Report designed by TAI.

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Contents

About TAI

OUR MISSION

To strengthen the impact of transparency, participation, and accountability (TPA) funding in support of inclusive and equitable development. We do that by developing learning infrastructure and facilitating collaboration to optimize funder practice and resources.

OUR VISION

A more just, equitable, and inclusive world where people are informed and empowered, governments are open and responsive, and collective action advances the public good.

OUR MEMBERS

FORD FOUNDATION

WILLIAM + FLORA Hewlett Foundation

Luminate
Building stronger societies

MacArthur Foundation

OPEN SOCIETY FOUNDATIONS

ASSOCIATE MEMBERS

CHANDLER FOUNDATION

Department for International Development

Overview

2020 is already set to be a turning point in global affairs – the world roiled by a pandemic, the effects of entrenched racial injustice and inequity more evident than ever, and heightened world power tensions that reflect competing visions of the importance of the rule of law and accountability.

TAI and its members are adjusting as fast as we can. We are aided by a new strategy that is well-suited to adaptation. We are buoyed by heightened member participation and the energy and ideas of a new member. The Secretariat is shifting its ways of working in support of the new strategy and with an emphasis on flexibility and responsiveness - including popular tailored support to individual members.

Transparency, Participation , and Accountability (TPA) are more necessary than ever to help societies navigate overlaying crises (including the climate emergency). In the face of so many needs, we have a responsibility to maximize available resources, to prioritize, to double down on our commitment to inclusion. TAI members are looking for ways to bet support partners in their fight to reshape the social contract, and to assure that public resources serve the public good. The TAI platform can help bring coherence and mutual accountability to that effort. We will redouble our efforts in the second half of the year.

SHIFTS IN CONTEXT

The coronavirus pandemic has overshadowed all in the first half of the year – causing enormous disruption worldwide that inevitably extended to TAI members, grantees, and Secretariat. Good governance has emerged as critically important to assuring effective health responses and managing the subsequent economic fallout to "build back better." Many civil society groups - including TAI member grantees - are actively engaged in pandemic responses, be it fighting disinformation, helping disadvantaged groups access social protection services, or influencing debates over contact tracing apps. Yet most are trying to do more with less. Surveys of civil society organizations (CSOs) point to shrinking reserves and growing risks of closure, although those with foundation funding are proving better positioned than most.

The lockdowns in response to the pandemic sparked a flurry of donor activity to reach out to grantees and see how members could better support them to adapt to the crisis. The flexibility offered by TAI members was reflected across the philanthropic sector. For example with over 750 funders signing the Council on Foundations pledge to adapt practices to best help grantees. At the same time, stock market falls hurt foundation endowments, constraining the ability of some private funders to commit new funds. Yet there are signs of innovation against conventional practice - some foundations are spending more than the 5% minimum required by US law, some finding other ways to mobilize additional resources, such as issuing social bonds. For government donors, the crisis created unheard of fiscal pressures resulting in shrinking aid budgets and a prioritization on COVID funding above all.

From the get-go, TAI members have been proactive in acknowledging and responding to the COVID-19 pandemic.

First priority was to reach out to existing grantee organizations to see how they can help them adapt be it through increased flexibility, connecting to expert advice or top up support e.g. to finance infrastructure for staff remote working.

Members made stand-alone investments to support grantees during the COVID-crisis and there were cases where two or more members joined other philanthropy organizations to provide support for grantee organizations. For instance, MacArthur Foundation and Ford Foundation pledged over $1.7billion alongside three other foundations to support organizations surviving the COVID-19 and our members joined over 700 leading philanthropy organizations in committing to responsible grantmaking actions amid the emergency.

Points of emphasis include flexible funding and safeguarding media freedom, migrant rights, and social justice during the coronavirus crisis. Innovations range from scaled wellness support to helping give voice to members as they navigate the repercussions, such as the Hewlett TPA team's "Coronavignettes" blog series which highlight how COVID-19 affects grantee organization's work.

TAI has been a space to compare notes and make sense of developments through dedicated calls, Slack channels and more. To support that the Secretariat has created a qualitative research team to track TPA-relevant shifts most relevant to funder members. We have collated all member responses in one public hub that is regularly updated and designed to help those in the TPA field readily see member thinking, approaches and potential support.

The pandemic has only made starker the pernicious effects of inequality around the globe. Polling data suggests this is sparking growing public receptivity to more radical policies including wealth taxes and limiting corporate profits amid the pandemic. This is compounded by overdue attention to racial injustice sparked by police killings in the United States but with ripple effects globally. However, the ability to foster debate is more challenging in some contexts as some governments take advantage of the health crisis to adopt emergency powers, clamp down further on civic space, and even postpone elections. Civic activism has become more dangerous in multiple ways.

For TAI's own operations, this has meant an adjustment to working remotely for both Secretariat and member staff alike. While this has not proven as disruptive for TAI as for some organizations (we've always engaged with members across disparate geographies), it has no doubt impacted productivity.

TAI publicly launched its new five year strategy against this fast changing backdrop. Fortuitously, the strategy was already built around a more flexible approach so has not required immediate revision.

However, all our members are having to reassess their own strategies given the changing context. For some this meant immediately reopening newly shaped strategies, for others it is being factored into mid-term reviews, and for one it will shape a strategy process only just getting underway..

TAI onboarded a new member - Chandler Foundation - during this period. Lengthy relationship building prior to their joining eased the transition at a time when face to face interactions are now out of the question. At the end of June, the United Kingdom government announced the merger of the Department for International Development (a founding TAI member) and the Foreign and Commonwealth Office. It is not yet clear what implications that will have for their continued participation in TAI.

Progress

TAI has been tracking overall progress against three main results areas since 2017: member collaboration, grantmaking practice, and thought leadership. These three results have also served as the foundation of our Monitoring, Evaluation, and Learning (MEL) practices, and as common results for member grant reporting. As TAI begins implementation of the 2020-2024 strategy, we are revising our MEL Plan and systems for future reflection, learning, and reporting. Below, we reflect on progress to date and how these results will feature in our new MEL Plan and practice.

COLLABORATION

Instances of Member Engagement	
Quarter 1, 2020	Quarter 2, 2020
46	92

Result: Members apply and adapt different modalities of collaboration in their TAI shared work

Collaboration has been more evident than ever in the first half of the year - evident in consistent engagement in TAI spaces, formal collaborations among subsets of members, co-investments in new grantee organizations, and agreement on a new TAI strategy. We are in the process of realigning engagements according to the new strategic outcome areas: What We Fund, How We Fund and Funder Landscape. Instances of member engagement increased significantly in Q2, perhaps reflective of both need for more collective conversation as members navigated COVID impacts, but also of availability of staff with bans on travel.
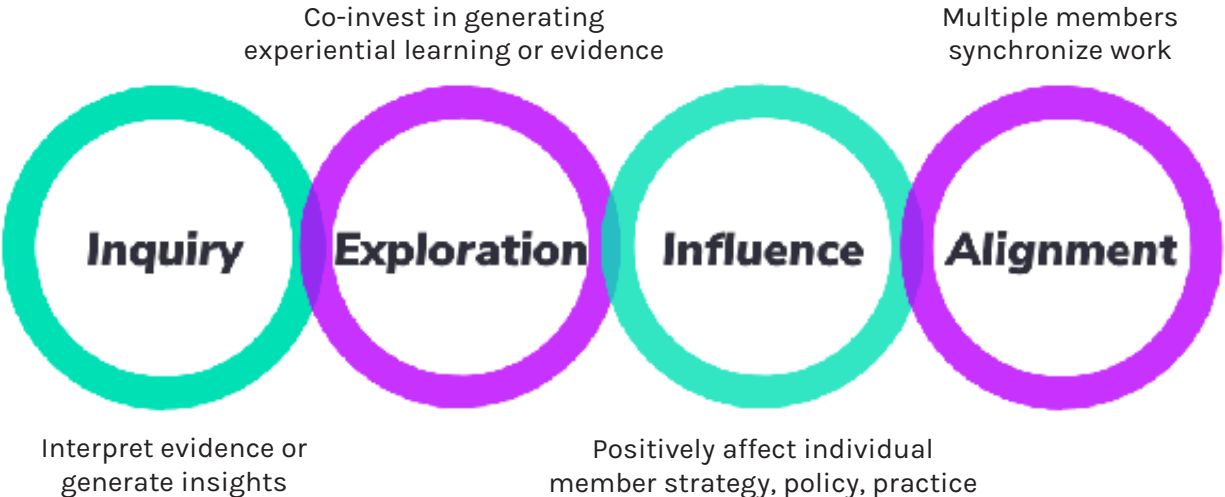
TAI documented and published several evaluative products featuring TAI's collaborative model and specific collaboration initiatives. We were underlined motivated to evaluate TAI practice as a collaborative and to bring that evidence into our strategy transition. Our external evaluation found that members value TAI's contributions to member collaboration and collective learning. TAI has taken steps to strengthen collaboration by putting evaluation insights into practice, including affirming our collective purpose around connecting funders, and facilitating peer learning towards action.

While valuable in theory and in hindsight, Michael Jarvis notes in his blog that collaboration can be challenging in practice. TAI's latest collaboration case note series details both barriers to and enablers of collaboration. Common enabling factors include clear expectation setting, existing trust among individuals involved, and having all institutions involved in a specific initiative commit some sweat equity, money and/or time.

In 2020, TAI got right to applying these insights through our work with several funder member working and advisory groups. TAI's five core member institutions and one associate member are involved in one or more of these groups. We are seeing varying forms and purposes of collaboration with, and among members.

Three member institutions are represented on the outcomes working group that is shaping the contents of TAI's forthcoming MEL Plan for Steering Committee endorsement, which will define parameters for TAI's aligned member reporting (an example of alignment). An advisory group of staff from four different TAI members is shaping questions for an evaluation that will assess TAI funder contribution to advancing the global beneficial ownership policy agenda (an example of joint exploration). And, in line with our new strategy, 5 member institutions are working together to identify and test ways to use our collective voice more effectively (an example of influence). Finally, TAI is responding to member demand to hold informal space to share information around COVID-19 responses. We expect this collective inquiry to continue and possibly evolve into another type of collaboration as members begin to explore longer-term pandemic response strategies.

Collaboration will remain core to TAI's work under the new strategy. We plan to continue the collaboration case note series and to assess member collaboration, whether TAI-facilitated initiatives or those driven by members. Subsequently, TAI will bring greater intentionality to engaging funders beyond our membership for collaborative learning and partnership.

Co-invest in generating
experiential learning or evidence

Multiple members
synchronize work

Inquiry **Exploration** **Influence** **Alignment**

Interpret evidence or
generate insights

Positively affect individual
member strategy, policy, practice

GRANTMAKING PRACTICE

Result: Members influence other members' strategic approaches and/or grantmaking practices

Funder strategies are often in a state of flux as they take stock of progress and respond to changes in context. The pandemic has brought great uncertainty to those processes and has drawn attention to the importance of funder practice in the response and eventual recovery from the pandemic. TAI has supported members to seek feedback with and learn from each others' practices in this context.

On strategy development efforts, the Economic Justice Program at Open Society Foundations worked through TAI to engage other members in shaping and packaging their new strategy. Luminate also drew inspiration from peer practice within and beyond TAI's membership as it continues to develop its organizational infrastructure and non-financial support offered to investees.

Going forward, TAI is putting evaluative evidence into action to update our strategic framework that will balance our level of intention and focus between what members fund thematically and how members use financial and non-financial tools and approaches. On the latter, we have seen increased member demand to use TAI as a platform to compare notes and learn from each other (exemplified by strong participation in the first grantmaking marketplace call and follow ups).

THOUGHT LEADERSHIP

Result: TAI connects ideas and relationships regarding strategic work streams

Fast moving events with immediate relevance for TPA programming has made the thought leadership function more critical than ever. The global pandemic has contributed to member appetite to share information with each other, with the Secretariat, and in spaces we facilitate. The Secretariat is curating a huge amount of information relating to pandemic responses and potential impacts, such as through the TAI Weekly, to aid member sensemaking. Members have asked for more rigorous tracking of trends and data, and the chance to discuss different scenarios to inform planning.

The Secretariat has always offered bilateral feedback, reflections, and other support to individual members. We offer this service as a benefit to members, and also draw on this information to make informed connections between members and with other actors. Starting in 2020 and going forward, we will track this support more explicitly to be transparent around how Secretariat staff uses this time and to inspire future member requests and collaboration. Demand is already growing. Since instituting in the second quarter, we have responded to 18 requests from 4 member institutions.

We demonstrated our commitment to distilling and disseminating learnings from our past strategy period. TAI published several knowledge pieces that concluded work started under the previous

strategy. In collaboration with MIT's Governance Lab, TAI disseminated the final pieces in our Learning from Evidence series that explored the existing evidence base to support members' transparency and accountability goals. The Information and Accountability evidence syntheses looks at evidence for both government officials and citizens actors demanding accountability from other government officials. The Information and Accountability Preface shares the framework used for this series as a contribution to funders and practitioners who design programs and funding strategies to advance accountability outcomes. The series concludes with this brief blog that summarizes the evidence and the authors' proposed approach to using evidence best suited to the accountability context. The Secretariat

It has also been interesting to see interest in TAI work from external groups. For example, the World Bank asked for inputs on their World Development Report and the World Economic Forum asked TAI to share insights on storytelling as part of their Future of Civil Society process and in the context of COVID-19. This prompted TAI to map the journey of our storymaking and telling work.

These thought leadership functions will remain mainstays of the Secretariat's core functions. From curating relevant content, connecting people, and generating new concepts and knowledge, we will apply this work to advancing our new strategy. And our MEL efforts will move beyond quantity of outputs to emphasize the dissemination, use, and results to which these outputs contribute.

Key Activities and Learnings

WHAT WE FUND

Key Activities

TAI commissioned an evaluation aimed at understanding if and how funders contributed to achievement of beneficial ownership transparency commitments. The inception plan is developed and approved by the Secretariat and an advisory committee of relevant member staff.

Data for Accountability programming continues in Nigeria and Colombia with learning partner Global Integrity providing support to grantees in both countries and tracking emergent findings across a shared learning agenda. In Nigeria, grantees are continuing data collection efforts. In Colombia, our partners at the International Finance Corporation updated the joint royalties data assessment in light of government reform. TAI and partners supported Ford Foundation in convening four sessions with government and civil society on implementing the reform, including how to strengthen the role of and benefits for indigenous and afro communities. Drawing on the data for accountability findings and broader insights from member-funded programming, TAI submitted comments on the World Bank World Development Report Data for Better Lives draft and worked with Colombia Center for Sustainable Investment to examine and detail how political factors affect data generation, publication, and use in the natural resource sector.

The Secretariat continued to curate and share new research and evidence relevant to member programming. This includes support to design of member commissions e.g. the Ford Foundation research on state capture and the OSF-supported Fiscal Governance Indicators project. The Secretariat also designed and hosted dedicated member learning sessions around most relevant field products, such as a decade's analysis of multi-stakeholder initiatives.

Lessons Learned

There is no ready template for evaluating funder contribution to global norms development. Hence the widespread member interest in the methodology for the beneficial ownership contribution evaluation, but also the need for active member engagement in shaping and contributing to the process.

There are challenges in navigating and assimilating data efforts in two very different contexts, but some emergent commonalities, not least highlighting the variety of factors that need to be addressed to spark more effective use of data. That complexity still seems absent from some field/donor assumptions, so worth proactively disseminating.

There is real value (affirmed in member participation/response and consistent with our evaluation) in sharing research/evaluations among members and having a space for joint sense-making, reflection. This is especially true when touching on issues that have received significant investment as is the case with multi-stakeholder approaches. There is also value in tracking spread and uptake of knowledge products to inform future product prioritization and dissemination. Currently funders do not systemically do that analysis.

HOW WE FUND

Key Activities

TAI continues to serve as the independent convener for the multi-funder steering committee supporting the evaluation of Open Government Partnership (OGP). Early findings are emerging, and TAI will support OGP and steering committee interest to disseminate this evidence more widely in the coming months.

The uncertainty and devastation of the pandemic has affected member and partner work globally. The Secretariat maintains a public list of curated content on member COVID-19 responses. TAI hosted in April an open space for member dialogue to share information around current and potential future responses to the pandemic. In June, TAI hosted the inaugural Grantmaker Marketplace call for members and invited guests around funder (non)financial tools and practices to support grantee organizational resilience.

Lessons Learned

The OGP developmental evaluation approach has offered a rich, real-time example of collaborative and adaptive work across funder contexts, particularly as OGP and evaluation activities are affected by the pandemic. TAI has observed this evaluative approach to provide a practical framework for the practitioner, evaluator, and funders to engage with shifts in context and learning needs for this multi-year evaluation.

TAI members value the platform to discuss grantmaking practice as a complement to philanthropy-wide spaces. There is a utility to talking with peers funding similar (if not the same) groups and struggling with adapting practices for similar ends. This is reflected in TAI's new strategy that has explicit focus on grantmaker practices, processes, and approaches to improve field and organizational health and effectiveness. This shift was inspired by our past experience and ongoing member demand. There is potential to test mechanisms of mutual peer accountability to raise practice standards, collectively.

FUNDER LANDSCAPE

Key activities

This is a new focus for TAI collective action and programming. However, it builds on some existing explorations. For example, the TAI Secretariat and members continued to participate in donor conversations on tax funding and to provide inputs to donor supported efforts, including the recently launched High Level Panel on International Financial Accountability, Transparency and Integrity for Achieving the 2030 Agenda. The Secretariat has also joined other funder convenings to look for opportunities to align efforts in support of TPA goals. These include joining calls of United Kingdom based funders on anti-corruption and tax issues and helping shape an emergent network of progressive philanthropic networks whose members all fund civil society and social movements in the global South.

The members agreed a prioritized set of funding issues and organizations for increased engagement and the Secretariat has begun outreach and research to map overlaps of interest across the funder community. In this, the Secretariat is supported by the advice of a new Collective Voice Working Group. This group is actively exploring appropriate ways to member TAI funders collective voice as a complementary asset to resources directed to partners. Conversations are already yielding agreement on TPA messages to reinforce at this time of such flux, and more proactive communication efforts. This includes not just cross promoting individual member messaging but TAI authored blogs on higher profile platforms, such as Devex, the World Economic Forum and the Council on Foreign Relations.

Box 2: Civil Society Engagement on Tax Reform

As part of our continued work in raising awareness of the importance for funding for civic actors working on tax reform, we were asked to present at a Tax Justice Network virtual conference on the current state of funding for CSOs.

Our research revealed the difficulty of gaining accurate numbers. ATI sources vary from those reported to the OECD. We identified some quality issues in reporting. For example, one donor categorized $10m in funding to the Kenya Revenue Authority as funding for civil society.

Revising for such anomalies, we affirmed previously commissioned findings that funding for CSOs on tax reform remains low. From 2014 to 2018, revised statistics indicate bilateral aid agencies contributed roughly $37m to CSOs for Domestic Resource Mobilization (DRM), compared with $847m provided to public sector institutions. This amounts to just 3% of funding. Yet the potential for civic society engagement to boost both revenues and the equity of tax systems suggests more resources are merited.

Lessons Learned

TPA is essential to the COVID-19 response and to tackling an overlaying climate emergency and injustice crisis. More coordinated funder advocacy can flag that relevance, but will not happen automatically. There are shifts that TAI member funders wish to see, both in terms of what gets funded and how, that are shared with other funder networks, creating opportunities to reinforce shared messaging with the broader donor community.

Given the ever broader waterfront of issues where TPA has relevance and TAI members have pressure to provide support, it is all the more important to align with other funders, especially given budgetary constraints funders face due to changes in endowment or reprioritization to COVID-19 response above all else. The good news is that investment in relationship building with other funders can yield new insights and influencing opportunities.

TAI needs to build up the "muscle" of using its collective voice with practice. The Secretariat can build some infrastructure to support it, for example, in terms of strategic approaches and tactics for more visible and effective use of the TAI brand.

Operations and Communications

MEMBERSHIP AND GOVERNANCE

TAI made progress in refining member governance and decision making in time for launch of our new strategy. The Steering Committee endorsed a new member Terms of Reference that updates and clarifies policies, processes, and procedures for member eligibility, roles, responsibilities, entry and exit procedures. With this in place, TAI was delighted to welcome Chandler Foundation as the newest member of the collaborative. The Steering Committee also decided that Hewlett Foundation will retain the TAI Chair role until the end of 2020.

Going forward members will propose initiatives for the collective's work plan and will vote to prioritize those that merit Secretariat support (some can be carried forward by a subset of members without use of pooled resources). Ranked choice voting was used successfully for the first time in spring 2020 to finalize initiatives for the TAI current work plan.

FINANCES

TAI's cash balance dipped in the first half of the year, pending decisions and processing of grant renewals. However, Chandler made its contribution as an Associate Member and OSF and Luminate both moved forward with renewals. The MacArthur Foundation also approached TAI to submit a proposal for a new two-year grant. Thus, TAI is in a healthy financial position heading into the second half of the year.

From January 1 - June 30, TAI spend was **$397,611,** roughly **36.5%** of our 2020 budget. This is lower than expected spend due to reduced travel. The Secretariat is redeploying certain budget lines given the effects of the pandemic, most notably redeploying travel budget for extension of the Atlas Corps Fellowship for our communications lead 'Busayomi (who is not able to return to Nigeria as first planned). Given larger consultant payments expected in Q3 and Q4, we anticipate a small and at this point deliberate underspend for the year. We want to be conservative given several grants will end and be subject to renewal in 2021.

REMOTE WORKING

The Secretariat team has been working from home since March and will most likely do so for the foreseeable future. The same applies to our members. It is a definite barrier to productivity, but the team has adapted well given the circumstances. The team has transitioned from twice weekly in person meetings to daily video "huddles" that aid not just programming but also help combat isolation. That said the situation is particularly impactful on our Atlas Corps Fellows, who have not been able to take full advantage of their time bound US placements and faced isolation while far from their home countries.

COMMUNICATIONS

We continue to see reward in strengthening our internal and external communications, with field partners applauding us for "walking the talk of transparency", as we published a brief on our external evaluation, 2019 annual report, and our 2020-2024 strategy.

New outreach efforts include promoting our learning resources in 3 languages (German, Russian, and Spanish), more collaboration with the communications team of member organizations, ensuring our digital resources are reader/SEO-friendly, and connecting content to current events. We also updated our website in line with our new strategy and we keep working to make it more user-friendly and navigable. From January to June time our web page views increased by 32% from 37.5k to 49.4k Additionally, we saw increases in our social media indicators. Our LinkedIn followers increased by 95%, Facebook followers by 76%, and Twitter followers by 7% to reach 5,306 followers.

The TAI Weekly continues to see an increased uptick in subscriptions (16% growth from January through June) and to generate the most unsolicited positive feedback. Overall, we published 25 Weeklys, 20 blogs, 8 reports and 6 collaboration case notes in the first half of the year.

To improve communications with members, we launched a brief poll in May to understand how we can make the member-only Monthly update a more useful resource and we are adapting their feedback into future issues.

We announced the winner of our maiden photo competition. The competition was widely publicized in different languages with support from 15 photography and contest websites. The winner is currently working on his photo series as winner due in the second half of the year - his ability to shoot was delayed due to coronavirus restrictions.
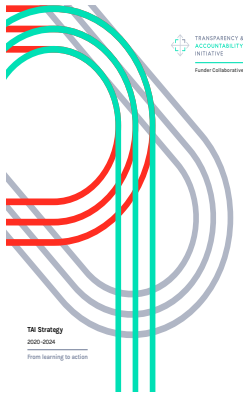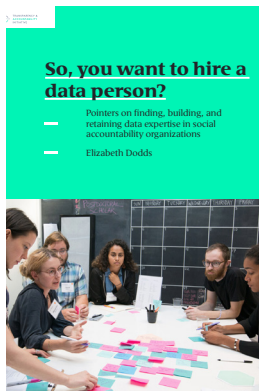
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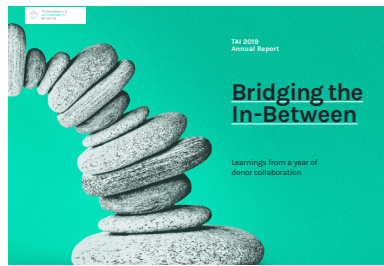
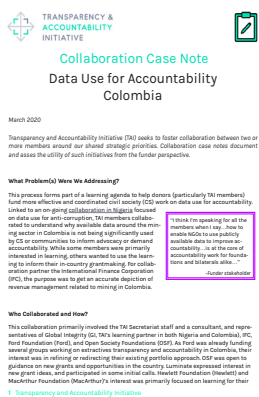
2019 Annual Report

Evaluation Brief

So you want to hire a data person?
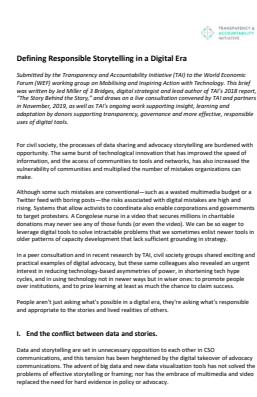

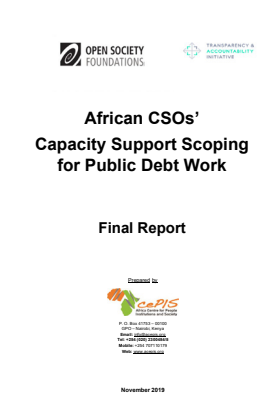Information and Account-ability: Evidence Review

Information and Account-ability: Evidence Review Preface

2019 Collaboration Case Notes

Responsible Storytelling in a Digital Era

Debt Implications for Fiscal Grantees

Diversity, Equity, and Inclusion (DEI)

TAI has been one space for funders to discuss how to strengthen DEI within their own institutions, but also among the portfolios of partner organizations that they support. TAI's Learning Day 2020 focused on implementing DEI practices in global grantmaking and tackling issues raised by TAI members (See Box 3). Since then, the conversations have only gained more momentum given the increased attention to racial injustice in the United States and beyond. TAI is working with members to consider what might be targets to track collectively in terms of the pool of grantees whom TAI members fund.

The Secretariat is partnering with the Dutch grant facility, Voice, in a funding call to enable groups representing typically marginalized communities to leverage transparency and accountability approaches in support of their goals. TAI is supporting the design and selection process, which holds promising lessons for TAI members seeking to diversify the types of organizations they support around TPA outcomes. There was a strong response to the call – over 300 applications from a wide variety of local organizations and consortia. An initial cohort of finalists has been selected for the detailed co-design phase, which has been somewhat delayed due to the pandemic. Among this cohort are networks representing those living with disabilities, indigenous groups, and women mobilizing against violence.

Box 3: Learning Day - Diversity, Equity, and Inclusion

In view of our 2020 annual retreat, TAI members, Secretariat, and other funder organizations gathered for a learning day to discuss how to put Diversity, Equity, and Inclusion (DEI) principles into practice in global development work. This reflects member progress in thinking around DEI issues since 2019 when the conversation had focused more on making a case for DEI.

Funders provided actionable feedback to each other, raised awareness of peer efforts and challenges to deepen DEI practices in different contexts, and surfaced DEI actions and learning questions for TAI's collective work in 2020.

Participants worked with peer-generated questions that they felt would benefit from multi-funder consultation. They discussed defining the ultimate populations being served, mitigating risks in tackling DEI concerns at a global context, prioritizing DEI support in intersectional contexts, and supporting inclusive investee / grantee workplaces. TAI will continue pursuing the DEI agenda and serving as a platform for members to explore further DEI action.

What Are We Excited About in the Next Half of the Year?

Alison: Expanding our learning practices to include more funder member staff and non-member stakeholders.

Busayomi: Enhancing more collaboration with field partners and providing support for TAI members to test ways to advocate around shared priorities.

Michael: Deepening strategic engagement with funders beyond the collaborative on prioritized issues, such as TPA intersections with climate mitigation.

Richard: Continuing work on our civil society funding for tax reform campaign, as we work with partners to create new grants and opportunities for this work.

Zoya: Collective conversations stemming from analysis of funders' responses to COVID-19 and relevant research and findings.

Annex 1: Semi-Annual Outputs

What We Fund	Deliverable	Event	Grand Total
	12	12	24
Input to AidData Eastern Europe shrinking civic space research		1	1
TPA in imagery - photo competition	1		1
Voice Joint Call Grantee Selection		4	4
Accountability Console Webinar		1	1
Do I need to hire a data person? Pointers on finding, building and retaining data expertise in social accountability organizations	1		1
TAI Submission to World Development Report Data for Better Lives	1		1
Natural Resource Governance PO Call	1	1	2
State Capture of Natural Resources - Draft Report Feedback	1		1
Fiscal Governance Indicator Project Final steering committee meeting	1	1	2
Beneficial Ownership Evaluation	1	2	3
Civil Society Tax Funding Presentation	1		1
Debt Report Feedback	1		1
Future of Addis Tax Initiative - Feedback on Draft Indicators	1		1
Tax Working Group Call		1	1
Learning from Evidence series: Information and accountability	2		2
Multistakeholder initiatives "Not fit for purpose" Learning Call		1	1

How We Fund	Deliverable	Event	Grand Total
	12	6	18
Learning Day DEI	2	1	3
Defining Responsible Storytelling in a Digital Era - World Economic Forum Brief	1		1
Let's Follow Where the Story Goes - Infographic tracking report utilization	1		1
Grantmaker Marketplace	1	1	2

	Deliverable	Event	Grand Total
COVID-19 Collaboration Learning and Exchange	3	2	5
OGP Evaluation	3	2	5
Organizational Effectiveness Funder Notes	1		1

Funder Landscape	Deliverable	Event	Grand Total
	1	2	3
Collective Voice Working Group	1	2	3

TAI Collaborative / Operations	Deliverable	Event	Grand Total
	7	5	12
TAI 2020 Retreat	2	1	3
2020 Workplan Inquiries Memo	1		1
TAI MEL Plan Refresh	1	3	4
Member Feedback on TAI 2020-24 Strategy	1		1
Membership Terms of Reference	1		1
Steering Committee Quarterly calls	1	1	2

Member bilateral support	Deliverable	Event	Grand Total
	15	3	18
Foundation Priorities Call (Chandler)		1	1
SDG16 Recommendations to UN High Level Political Forum Submission (Chandler)	1		1
Grantee Funding Research (Hewlett)	1		1
Diversity, Equity, and Inclusion organizational change consultants (Hewlett)	1		1
TPA field evidence scans for strategy refresh (Hewlett)	1		1
Professional Networks for Foundation Strategy & Finance Roles (Luminate)	1		1
Luminate shrinking civic space ToR	1	1	2
Onboarding materials feedback (Luminate)	1		1
List of foundation counterparts (Luminate)	1		1
Effective Philanthropy Research (Luminate)	1		1

Charitable Status for Independent Media UK Submission Feedback (Luminate)	1		1
Choices for tax portfolio (Luminate)		1	1
Economic Justice Program strategy North Stars (OSF)	1		1
TAI collaboration spectrum to Economic Justice Program team (OSF)	1		1
Evaluation steering committee ToR examples (OSF)	1		1
Economic Justice Program Strategy feedback (OSF)	1		1
Economic Justice Program program close out evaluations (OSF)	1		1

Annex 2: Workplan

WHAT WE FUND

Project	Deliverable Date	Description
Beneficial Ownership Evaluation	December 2020	This evaluation aims to understand how member commitments and their grantees contributed to progress on beneficial ownership transparency.
Data Use for Accountability Initiatives	Q2 2021	Documenting ways to boost data for accountability via shared learning agenda based around member grantee projects in Nigeria and Colombia on anti-corruption and extractives data respectively (Global Integrity is our learning partner).
VOICE - From Open to Inclusive Governance	Q2 2021	A collaborative effort with the grantmaking facility Voice to test how typically disadvantaged groups can use TPA practices and principles in support of securing their goals.
Member Learning Series	Ongoing	Periodic calls on notable new research or field products e.g. call on Ford state capture research and funder workshop on shaping the new Global Data Barometer
Civil Society Engagement in Tax Reform	Q4 2020	Shaping proposals and funder conversations to increase funding for civil society engagement on tax.

HOW WE FUND

Project	Deliverable Date	Description
Covid-19 Monitor	Monthly through October 2020	Curated input for members based on qualitative data coding and assessment of COVID-19 impacts on the TPA funding and field.

Project	Deliverable Date	Description
Member Quarterly Marketplace Calls	Ongoing	A forum for member learning, debate, and information sharing on grantmaker practice. Each call focuses on a topic prioritized by members, bringing in non-member funder experiences where relevant.
OGP Evaluation Independent Convener	2022	TAI serves as the independent convener for OGP's evaluation.

FUNDER LANDSCAPE

Project	Deliverable Date	Description
Funder Engagement Plans	Ongoing	The Secretariat will build out plans to strengthen engagement of non-member funders and encourage uptake of TPA insights in other funding contexts.
TPA and Climate Change	November 2020	This project is in the design phase and will attempt to map TPA relevance to climate responses and overlaps of interest with climate funders.
Collective Voice Working Group	TBD	The Working Group will identify ways to strengthen TAI member collective advocacy, building around shared messages, and testing around specific opportunities.

OPERATIONS AND MEL

Project	Deliverable Date	Description
New MEL Plan, Indicators, and Monitoring System	Q3 2020	In accordance with the new strategy, the Secretariat will work with member staff to finalize a new MEL Plan and build a new internal monitoring system to track progress.
2020 Collaboration Case Notes	Q1 2021	The Secretariat will work with an independent consultant to develop our set of 2020 collaboration case notes to be delivered in Q1 2021.