TAI
Semi-Annual
Report 2022
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.

**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.
Shifting Global Context - War, Drought, Pestilence, Penury

The first half of 2022 has thrown down no shortage of challenges to the global community, many of which have implications for those championing transparency, participation and accountability.

The war in Ukraine led to a sanctions effort of unprecedented scale and a swift realization of the difficulty in tracking who owns what assets and limiting illicit financial flows in today’s globalized financial system. This has prompted renewed attention to enablers of kleptocratic regimes and concerns over the use of funds controlled by authoritarian regimes to undermine democracies. By mid-year, there were signs of legislative responses. For example, the UK government was pressured into moving up its economic crime bill and the US is moving on an ENABLERS Act. At the same time, we have seen inflows of money to regimes outside of sanction regimes, such as the United Arab Emirates.

There is also a concern for the well-being and sustainability of Ukraine’s own open government and anti-corruption community that was such an affront to Putin’s regime. Attention is now shifting to how best to build integrity into future Ukraine reconstruction efforts.

Events in Ukraine have also impacted the climate debate. While extreme weather events continue and show the challenges of adaptation as well as mitigation, the need for energy security is prompting a rush to secure new gas deals in Africa, restart fracking wells in the US, and spark a mini-revival in coal. The need for strong oversight and effective governance of the energy transition is increasingly evident.

Global health security is also in need of some governance innovation. As new architecture is created for future pandemic preparedness, there is no guarantee that those of us demanding more inclusive and accountable processes will be heard. Even as more evidence emerges of the important role civil society played in responding to COVID-19, prospects for more concerted collective action remain tenuous.
On the fiscal front, the picture is bleaker still. Many countries are facing a debt crisis and decisions on servicing debt will likely only further exacerbate inequality. More transparency - both of overall debt burdens and of renegotiation processes - would be a step forward.

On the digital front, the EU is leading the way with its big tech regulation. Other key jurisdictions, such as the US, will likely follow. In the meantime, models that emerged in the absence of (or to forestall) legislation, such as Meta’s Oversight Board, are showing the scale of challenges in content moderation. The Board received over a million appeals from Facebook and Instagram users in 2021 and issued decisions/explanations on 20 cases.

Looming food insecurity and humanitarian disasters will further pressure aid budgets. The push to localize bilateral and multilateral aid will run up against instincts to assure that the donor country sees some benefit (e.g. through awards to national contractors). In philanthropy, the localization trend should see fewer obstacles, but still stands to be a lengthy process. Mackenzie Scott’s significant cash injection to many philanthropic networks and movement builds should help, but how many other funders will follow her trust-based approach remains to be seen.

Internal shifts - strategizing, turnover, reconnections

Strategy renewal is a constant in philanthropy and multiple TAI members have been in overlapping strategy processes. Hewlett published its new Inclusive Governance strategy in the spring that includes a notable shift to prioritize four countries. Luminate also completed its strategy reset (focusing on geographies and themes), while Open Society Foundations has initial strategy outlines for the new global directorates at. It will not be long before Ford’s Natural Resource and Climate Change starts a review of its own, while MacArthur’s On Nigeria program is already starting to consider what will follow once it wraps up in 2024.

Across these processes, you can see a shift in terminology. There is less headline mention of transparency - for example, Hewlett shifted to an Inclusive Governance frame. New threads are emerging across the membership such as
new attention to information ecosystems (including the push to resource/protect independent media and to combat mis/disinformation), a greater prominence to broad-based participation and support to social movements, and more sensitivity to power and the challenges of doing grantmaking in increasingly authoritarian contexts. It is a challenge for the Secretariat to navigate these shifts and assure TAI continues to provide value across sometimes divergent member interests.

Shifts in member personnel also poses a challenge for the Secretariat. Several long-time TAI participants departed their institutions in the first half of the year, continuing a trend that started in 2021, and new staff joined TAI conversations. The TAI retreat - our first in person gathering since the onset of COVID-19 - was therefore a welcome chance to establish new relationships as well as to reconnect with long-time collaborators. We look forward to the chance to do more in that vein in the second half of the year.

Within the Secretariat itself, the first half of 2022 saw a focus on embedding a new team (only the Executive Director is a holdover from the previous team), adjusting to more decentralized ways of working (with team members in Europe as well as the Americas), and experimenting with a hybrid model of in-person and virtual working for those in the U.S. These adjustments slowed our level of output in the first half of the year.

1. WHAT PROGRESS ARE WE SEEING?

ALIGNED INDICATORS

<table>
<thead>
<tr>
<th>Strategic Pillar</th>
<th>Indicator</th>
<th>2020</th>
<th>2021</th>
<th>Q1-2 2022</th>
</tr>
</thead>
<tbody>
<tr>
<td>What We Fund</td>
<td>% of member survey respondents that report TAI participation informed their strategies</td>
<td>(no data)</td>
<td>32%</td>
<td>Measured yearly</td>
</tr>
<tr>
<td></td>
<td>% of member survey respondents that report TAI participation informed their <em>portfolio funding decisions</em></td>
<td>57%</td>
<td>21%</td>
<td>Measured yearly</td>
</tr>
<tr>
<td>Strategic Pillar</td>
<td>Indicator</td>
<td>2020</td>
<td>2021</td>
<td>Q1-2 2022</td>
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<tr>
<td><strong>How We Fund</strong></td>
<td>% of member survey respondents that report changes to <em>grantmaker approaches or practices</em> as a result of TAI participation</td>
<td>57%</td>
<td>32%</td>
<td>Measured yearly</td>
</tr>
<tr>
<td></td>
<td># of financial and non-financial tools introduced or shared through TAI adopted by TAI members</td>
<td>(no data)</td>
<td>5</td>
<td>Measured yearly</td>
</tr>
<tr>
<td><strong>Funder Landscape</strong></td>
<td># of <em>unique funders</em> (institutional program or other organizational unit) represented at Secretariat-facilitated initiatives</td>
<td>35</td>
<td>41</td>
<td>15</td>
</tr>
<tr>
<td><strong>TAI Collaborative Health/Operations</strong></td>
<td># of core institutional members</td>
<td>7</td>
<td>8</td>
<td>8</td>
</tr>
<tr>
<td></td>
<td># of documented instances of collaboration among two or more members</td>
<td>5 case notes</td>
<td>4 case notes</td>
<td>6 out of 7 members that responded (85%) confirmed a collaboration case with other TAI member</td>
</tr>
<tr>
<td></td>
<td>% of member survey respondents that report benefitting from collaborative initiatives</td>
<td>94%</td>
<td>100%</td>
<td>100%</td>
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</tbody>
</table>

As many aligned indicators are measured yearly, we designed our semi-annual members’ survey around collaboration and personal benefit.
Member collaboration, facilitated through TAI, remains strong.

Examples reported by members include:

- Chandler, Hewlett and MacArthur Foundations co-funding the World Bank Governance and Institutions Umbrella Program that was formally instituted in June 2022 (facilitated via TAI).
- MacArthur organizing a learning/sharing session with other TAI members on supporting underserved groups and social movements in Sub Saharan Africa
- Sharing of draft strategies by multiple members to inform each other's thinking, as well as information sharing on grantmaking decisions and MEL approaches.
- Introducing grantee prospects to other members

More broadly, we are seeing indicators of progress across our three strategic pillars. These include:

- building a new partnership with USAID, including agreement for USAID to become an Observer within TAI;
- establishing funder relationships with health-focused funders based off our pandemic governance research and with climate-focused funders building from our outreach and new learning series;
- demand from member and non-member funders to make TAI a hub for transparent, participatory and accountable international grantmaking (hosting a community of practice)
- funder and practitioner interest in the consolidated insights of our research, such as the multi-year Data for Accountability project;
• recognition as an expert and connector on a range of issues (examples include a request for advice from a leading social media platform on a new transparency policy for content moderation, a World Bank ask to review an open government project proposal, ask for advice from a non-member foundation to shape a new tax justice portfolio, and multiple field requests to review products or advise on the under landscape.)

All the survey respondents indicated that they personally benefited from participation in TAI’s activities and collaborative initiatives in the past six months. Members reported that TAI engagement offered a platform for learning and sharing, to build new contacts in other key foundations, and to influence bilateral and multilateral donors.

“More than previous years, the joint learning and peer discussions have not merely sharpened our thinking but helped refine our work.” - Member Funder

“I have benefited from understanding other funders’ priorities.” - Member Funder

DO TAI CONVERSATIONS HAVE ANY RIPPLE EFFECTS?

Our annual member retreat was a chance to boost funder relationships.

“The retreat was really helpful in getting to understand each other more, in sparking thinking, and in getting a better sense of the landscape” - Member Funder
2. WHAT HAVE WE BEEN DOING?

WHAT WE FUND

Among our activities in this period, the Secretariat: (i) had a PO tax call covering OECD Update, G20, debt and taxes, and member updates; (ii) published an updated TAI’s Grants Database with data inputs provided by members and in a new interactive dashboard; (iii) presented lessons of a decade of transparency programming to Twitter internal workshop to shape content moderation transparency; (iv) developed a dynamic dashboard of TPA members grants data presented and shared with members; and (v) provided written feedback to the Global Partnership for Sustainable Development Data white paper on Data Values, which Included references to learnings from TAI’s Data for Accountability programming.

HOW WE FUND

Among our activities in this period, the Secretariat: (i) partnered with USAID to present their Democracy Human Rights and Governance learning agenda and exchanged with members on potential alignment and common interest; (ii) hosted a member dialogue on localization in the TPA field; (iii) reviewed member exits and agreed on investment in scoping new funders; (iv) began a project with WINGS to revise the Transparency and Accountability Philanthropy Toolkit; (v) developed content for a participatory strategy mini-site which will be launched in the 3rd Q of the year.

FUNDER LANDSCAPE

Among our activities in this period, the Secretariat: (i) coordinated a grantee partner call on TPA and climate agenda, sharing TAI products to spark discussion on field ambitions; (ii) produced the Strengthening Pandemic Governance Report and presented at the Global Partnership for Social Accountability Forum; and (iv) carried out the first session of the Climate and TPA Learning Series on Risk and Resilience Governance (online).
ORGANIZATIONAL HEALTH AND OPERATIONS

In terms of organizational health and operations, we (i) carried out a Steering Committee call where we discussed annual survey insights, welcomed Skoll and the new Chair, and talked about our Climate & TPA kine of work; (ii) coordinated a focus group discussion as follow up to the annual members survey; (iii) designed and implemented the 3-day in-person TAI retreat in Washington DC; (iv) developed and agreed on TAI’s workplan; and (v) carried out a second Steering Committee call, where the SC approved the work plan/budget, shared strategic updates and discussed USAID engagement.

3. WHAT HAVE WE LEARNED?

For this report, we are focusing on 3 areas of learning from the first half of the year:

1. GOING LOCAL

Several TAI members have made the commitment to localize their grantmaking, shifting resources away from headquarters to local offices and closer to the communities they serve. But what does localization look like in practice, and how can we do it well?

In a panel at the April retreat, Ousseynou Ngom (Hewlett Foundation), Justin Sylvester (Ford Foundation), and Toyin Akinniyi (Luminate) shared reflections from their experience. Afterward, retreat attendees brainstormed the resources and conversations they need to “go local” better, and what TAI can do to support that transition. Since the Retreat, TAI Secretariat has been reaching out to experts and new initiatives on this topic and is commissioning two case studies to feed into a funders coffee hour discussion and planning concrete actions to improve grantmaking at local level.
2. COLLABORATIVE HEALTH: COLLABORATIONS AT TAI

The 2021 Annual Survey revealed that while TAI members engage in a great deal of peer learning and exchange, this exchange has not always translated into high rates of formal collaboration.

We wanted to dig a bit deeper to understand this pattern. In a focus group, we identified barriers (it’s difficult to take on external collaborations when undergoing an internal strategic shift) as well as enablers (a critical mass of interested members empowers the TAI Secretariat to push it forward), and raised bigger-picture questions about the role of collaboration at TAI.

What types of collaborations do we value most as TAI? At the retreat, members agreed that TAI is currently best positioned to facilitate co-investment in research and evaluation, leveraging its birds’-eye-view to identify trends and gaps. Still, there was ample appetite to engage in country-level collaborations as members strengthen local grantmaking and co-investments in strategic grantees as new strategies are set.
What strategy should TAI adopt to promote collaborations? Broadly, the group agreed that TAI should continue to provide a forum that fosters emergent collaborations, rather than adopt a single agenda to drive more targeted collaborations. This approach is more responsive to opportunities, enables diversity and flexibility in funders’ approaches, and ultimately is more relevant to members’ work.

3. DATA FOR ACCOUNTABILITY (D4A)

From the D4A project we learned that further progress in achieving accountability requires approaches that start with sectoral problems and political economy analysis and, from there, develop innovations in project design, implementation, and MEL. There is still a need for investments in data availability and capacity, but such investments should go beyond achieving technical skills.

Recommendations for funders and practitioners in data projects include:

- Focus on relevant problems for target audiences
- Integrate target audiences into project design
- Strike a balance between demanding improvements and helping to facilitate change
- Acknowledge context, reforms, and political dynamics
- Facilitate better monitoring of data use and impact
4. HOW ARE WE DOING IT?

MEMBERSHIP AND GOVERNANCE

TAI Membership remains unchanged. We completed the successful onboarding of Skoll Foundation, which joined as an Associated Member at the end of 2021. Most members are amid multi-year commitments. Renewal conversations are beginning with those members whose current agreements conclude at the end of 2022. Increased engagement with USAID has led to a provisional agreement for the Agency’s participation in TAI as an observer. The Secretariat will need to confirm the nature of observer status in the second half of the year.

Our Steering Committee saw several changes in representatives and there is the potential of additional changes as staffing structures settle among members who have been through more substantive restructurings and strategy redesigns. The Secretariat remains a core staff of three, but with effective use of full-time fellows and part-time experts.

FINANCES

TAI finances remain healthy. The collaborative started 2022 with a budget of $1,150,076.32 and was later adjusted to $1,180,918.53. Provisional figures show TAI spent $503,522.58 in the first half of 2022, a 43% spending rate.

MONITORING AND EVALUATION

Our annual member survey was the first undertaken since we completed the MEL baseline for our current strategy, and the first to allow us to see trend line data. We corroborated the annual survey findings with a focus-group discussion with TAI members staff as well as discussion with our Steering Committee.

During our annual retreat, held at the end of April 2022, we mainstreamed collective learning and data-informed planning into the member discussions. Our resulting 2022-23 annual work plan was designed with close attention to member feedback.

Our next annual survey will be conducted in early 2023 and will provide progress tracking for yearly outcomes indicators; informing members’ strategies, grantmaker approaches, and portfolio funding decisions.
COMMUNICATIONS

This period has been very productive for TAI’s communication management. We have continued to work on defining our audiences, our messages, our channels and our products.

We continue to work on creating a visual identity that allows for better recognition of TAI’s products. The updated design of our flagship product, the TAI Weekly newsletter has boosted readership and open rate - we have almost 1000 active readers every week (out of close to 3,550 subscribers) We have gained 150 subscribers in the last 3 months alone.

Our publications by the numbers:

- 26 TAI Weekly newsletter
- 7 blogs
- Pandemic Governance report
- TAI Annual report

The blogs that got most traction include: “Corrupt Financial Systems Help Russian Oligarchs and Hurt Ordinary People. Philanthropy Must Do More to Support Change” by Leslie Tsai (Chandler Foundation’s Director of Social Investment) and Michael Jarvis; the analyses by our Mehdi Bousnina and Jeanette Bonifaz on the TAI donor database and the recent texts of the OECD Funding Data 2020 Series, which includes, among other resources, a dynamic data visualization, infographics, and brief.

Regarding TAI’s platforms, this period has seen the most important growth in social media in the last two years. Our Twitter account has increased by 232 new followers to a total of 6,439. From January to July we have received an average of 6,395 visits to our profile, this represents an increase of more than 2000 visits compared to the similar period the year before. We have had an average of 11,872 impressions (the number of users whom Twitter shows our content). These figures exceed the average numbers of followers, visits, and impressions of larger organizations in the sector such as Integrity Action and equal TAI with bigger philanthropic networks such as WINGS.

LinkedIn has also grown to a total of 1,706, a number similar to our member Chandler Foundation. Most of the visitors belong to the Philanthropic and Development sector, but also to other areas such as Business Development and
Public Administration. The highest number of impressions was reached in June 2022 (6667), this was also the month where the highest number of followers were gained (75), which are mostly located in the Washington D.C., London and NYC areas.

We continue to work on updating our website to make it more in line with the needs of our audience, with more easily searchable information and less data consumption for groups of readers located in areas with limited internet access.

We are also working on the creation of a minisite/dossier with resources focused on Participatory Strategy. For the collective creation of this minisite, we have been talking to organizations such as Mama Cash, Frida and PGM Community of Practice. We hope to have it ready for the second half of August, so stay tuned.

Finally, regarding our products, we are working on the creation of an animated video on the relationship between TPA and climate change, which will be available on the new TAI website and on our social media very soon. We are also planning the launch of the Data4 Accountability series with experiences and lessons learned from sustained work in Colombia and Nigeria.

5. DIVERSITY, EQUITY AND INCLUSION

Diversity, Equity, Inclusion and Justice (DEIJ) featured in discussions during our 2022 Member Retreat. It remains a priority for all TAI members as they look to strengthen accountable grantmaking practice in the context of their thematic programming. The Steering Committee endorsed the Secretariat’s push to make TAI more of a hub for transparency, participation and accountability grantmaking.

The TAI Secretariat team devoted time and energy to finding new norms of working across its new team representing 5 different nationalities, 4 continents and a wide variety of experiences. That includes continued participation in the Atlas Corps program with intentionality about bridging experience between young professionals from the Global South and US-based organizations.
The Secretariat also continues to discuss with other progressive funder networks how to further DEIJ within philanthropy. Building on last year’s joint global racial justice training series, we are monitoring a pilot version for foundation staff to assess the potential to adapt for TAI membership.

**INTELLECTUAL PROPERTY**

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**6. WHAT ARE WE EXCITED ABOUT FOR THE REST OF THIS YEAR?**

**Michael** - working with the International Finance Corporation and field actors to identify governance indicators for sustainable finance

**Eszter** - working with our members, other funders, and stakeholders to rethink what we mean by TPA field, what the opportunities and challenges are, and what narratives we align the most with in promoting inclusive and responsive democracies.

**Jeanette** - Looking forward to an in-person learning day with the entire secretariat team and members.

**Mehdi** - I’m excited to support more data-driven collaborations and deliver high-quality learning calls to attract more organizations (funders) and enlarge the TPA community

**Yery** - Finalizing TAI’s communication strategy and visual identity that better represents our commitment to our members and external audiences in a creative and innovative way.