

2022 ANNUAL REPORT

Looking for bright spots amid the year of permacrisis*

*An extended period of instability and insecurity
Collins dictionary's word of the year



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.

The TAI Secretariat supports our member funders to learn together and align efforts. In addition to funding more inclusive governance efforts around the globe, the TAI community also seeks to live the values it promotes by encouraging more transparent, participatory and accountable funding.

- Looking for bright spots amid the year of permacrisis

**TAI PURSUES GOALS
ORGANIZED AROUND
THREE STRATEGIC PILLARS**

What We Fund

optimizing the impact
of our members
thematic portfolios

How We Fund

reinforcing effective
grantmaking practices

For more about how TAI
operates and our strategy,
see our [website](#)

Funder Landscape

seeking to expand
and enhance funder
connections

MEMBERS



skoll

CHANDLER
FOUNDATION



MacArthur
Foundation

OPEN SOCIETY
FOUNDATIONS

Luminate
Building stronger societies

Format of this report

Please note that this report is structured to comply with the various grant reporting requirements of our members. This is in line with our members' shared commitment to aligned reporting for co-grantees. If you are a grantee organization, don't be shy of pushing funders to consider accepting one report, rather than creating customized content. (For further inspiration, remind yourself of TAI's [Smarter Grantmaking for Grantee Partners - Conversations to Have with Funders](#))

Shifts in context

- lots of moving parts in 2022

EXTERNAL SHIFTS

2022 was nothing if not unpredictable – war returned to Europe, markets went into turmoil, orthodoxies continued to be tested.

Amid much uncertainty the importance of transparency, participation and accountability was highlighted in debates ranging from preventing future pandemics, to finding more equitable solutions to the climate crisis, to restructuring the multilateral system, to planning for the rebuilding of Ukraine with integrity and openness to decisions.

New evidence and momentum emerging in interesting quarters – be that [the link](#) between greater trust, less corruption and lower COVID-19 infection rates, subnational legislation pushing pay transparency in the United States, or the need for more community voice in shaping the energy transition, such as in South Africa. The conflict in Ukraine accelerated the rapid scale up of open-source intelligence analysis by civic actors, bringing previously unimagined levels of transparency to antagonist actions.

However, the year also provided reminders that progress is far from linear. For example, the European Court of Justice halted public disclosure of corporate beneficial ownership reporting within the European Union (a long-time priority for TAI members and partners) on the basis of personal privacy concerns. People power in Sri Lanka overthrew the Rajapaska presidency as spiraling debt and mismanagement forced an economic crisis. We can expect more debt-fueled protests around the globe in 2023, but Sri Lanka serves as a warning that the window for reform can quickly close. Civic space continued to be undermined in India and Indonesia, among the largest democracies.



Opacity in financial systems is undermining confidence in markets, including for crypto, carbon offsets, and currency swaps ([where detective work by the Bank for International Settlements](#) suggests there may be \$80 trillion plus in outstanding obligations to pay US dollars.) No doubt, there is a need to push for transparency to help safeguard economic stability heading into 2023.

Scandal was a constant. 2022 began with details of [astonishing levels](#) of COVID fraud, ended with revelations of influence buying by football World Cup hosts. The Zondo Commission [documented](#) in great detail the mechanisms of state capture in South Africa that are proving so hard to counteract. Corruption continued to fuel popular anger around the world, including driving [people on to the streets](#) of Mongolia's capital even amid frigid temperatures. Both the South Africa and Mongolia cases involve “coal mafias” that undermined energy provision.

One bright spot was US Government leadership on governance issues when most governments prioritized other issues. The Summit for Democracy may have underwhelmed, but strong rhetoric is starting to be matched by actions on the home regulatory front and in rallying support where there are reform moments, as in Malawi.

One challenge heading into 2023 is how to combine technical policy fixes with a more political approach to fostering good governance that might extend to building pipelines of local political leaders who promote integrity and represent previously ignored voices.

Funders – both public and private – continued to face demands to fund on a broad range of issues and in response to emerging crises that force hard choices. In this context, transparency, participation and accountability issues can struggle to get foundation leadership prioritization, although there were positive signs of their inclusion as part of funding strategies on broader issues from climate to fiscal sustainability.

Discussion of localization and “decolonizing” philanthropy gained prominence. Provision of core funding showed some uptick. [“Yield giving”](#) was added to the lexicon. TAI offered space to discuss how these adaptations in grantmaking practice could best be applied on governance-related programming.

INTERNAL SHIFTS

Broader funding trends were reflected in TAI internal conversations and member decision making. Several members, such as the William and Flora Hewlett Foundation, are shifting grantmaking at national and subnational level in a prioritized set of countries.

This poses a challenge in terms of retaining a shared agenda across disparate geographies, although the TAI community is the beneficiary of a greater range of perspectives and ideas as members increasingly hire new staff from the countries in which they fund.

TAI members are still in a period of adjustment. Hewlett and Luminate officially launched new strategies in 2022, Open Society Foundations (OSF) postponed its detailed strategy setting within its new structure into 2023, while the John D. and Catherine T. MacArthur Foundation started to think what will follow its On Nigeria program. Ford Foundation approaches a new strategy cycle in 2023.

However, it is clear that the issues that TAI members are prioritizing are diversifying. For example, Skoll Foundation and Luminate have shared interest in health information ecosystems, while Hewlett talks of fostering “inclusive governance” and Ford prioritizes local voice in governance of natural resources. Intersectionality with the climate justice agenda and efforts to resist authoritarianism are hot topics of conversation.

“Transparency, participation and accountability” is no longer an organizing frame that resonates with all our members’ strategies. Hence the TAI Secretariat started to explore what might be alternative narratives that reflect the common threads across the TAI membership and their grantee partner portfolios. There remains a risk of shrinking common ground among TAI members.

In terms of bilateral member contributions to TAI conversations, a continued aid freeze and turnover of staff hampered UK Foreign and Commonwealth Office participation. In contrast, engagement with USAID increased steadily in 2022 and led to the U.S. Agency for International Development (USAID) joining TAI in an observer capacity. Both the United Nations Development Programme (UNDP) and the World Bank reached out

via TAI for more coordination with private funders. One concrete result was the launch of the Governance and Institutions Trust Fund with three TAI members as founding contributors.

In terms of the TAI Secretariat, the Executive Director was the only point of continuity as new staff and fellows started. Consequently, much of the first half of the year was focused on onboarding and establishing a new team dynamic. The need to build relationships and ways of working extended to the Steering Committee where there was also significant turnover in personnel. The first in person retreat since the start of the pandemic was important in creating rapport, but not all members have yet confirmed new permanent representatives to the Steering Committee. It is harder to design collaborative actions when individual member representation and priorities remain somewhat in flux.

Amid these shifts, a Secretariat workplan was only approved later in Q2. Progress on Secretariat programming picked up significantly in the second half of the year and will continue through the first quarter of 2023. We are now halfway through our current strategy period.

What progress are we seeing?

TAI has aligned reporting indicators under our Monitoring, Evaluation, and Learning Plan that are focused on how we operate as a collaborative. We are seeing progress against those indicators as follows:

STRATEGIC PILLAR	INDICATOR	2020	2021	2022
What We Fund	% of member survey respondents that report TAI participation informed their strategies	(no data)	32%	32%
	% of member survey respondents that report TAI participation informed their portfolio funding decisions	57%	21%	53%
How We Fund	% of member survey respondents that report changes to grantmaker approaches or practices as a result of TAI participation	57%	32%	11%
Funder Landscape	# of unique funders (institutional program or other organizational unit) represented at Secretariat-facilitated initiatives	35	41	75
TAI Collaborative Health/Operations	# of core institutional members	7	8	9
	# of documented instances of collaboration among two or more members	5 case notes	4 case notes	6 out of 7 members that responded (85%) confirmed at least one collaboration case with other TAI member.*
	% of member survey respondents that report benefitting from collaborative initiatives	94%	100%	95%

*TAI adjusted the indicator following the decision to move away from investing in development of in depth Collaboration Case Notes.



TAI is a hub for transparent, participatory and accountable funding

PERCEIVED VALUE

95% survey of 2022 member 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

— **“TAI’s help in providing strategic information and insight as we go through strategy processes has been invaluable.”**

Member Funder

— **“They [the Secretariat] have a great network and are very trusted.”**

Member Funder

TAI is a source of actionable information and learning - most importantly from other members. It can inspire new grants and shifts in practice and avoid redundancies. Examples cited by members in 2022 include:

— **“I am just finishing up a new Partner Support strategy for 2023-2027. I know it would be different if it weren’t for TAI. For instance, our security work and org health fund are both inspired by (and learned through) OSF and TAI events.”**

TAI Member Funder

— **“We planned to fund a landscape study on fiscal issues but decided not to as another funder had already done it and shared it with TAI members.”**

TAI Member Funder

Members’ own satisfaction with their institutional engagement (represented in time and resources and TAI) stayed consistent with around two thirds saying they have the balance right. This suggests some would like to see more engagement of colleagues or perhaps reduced investment - a point for further interrogation.



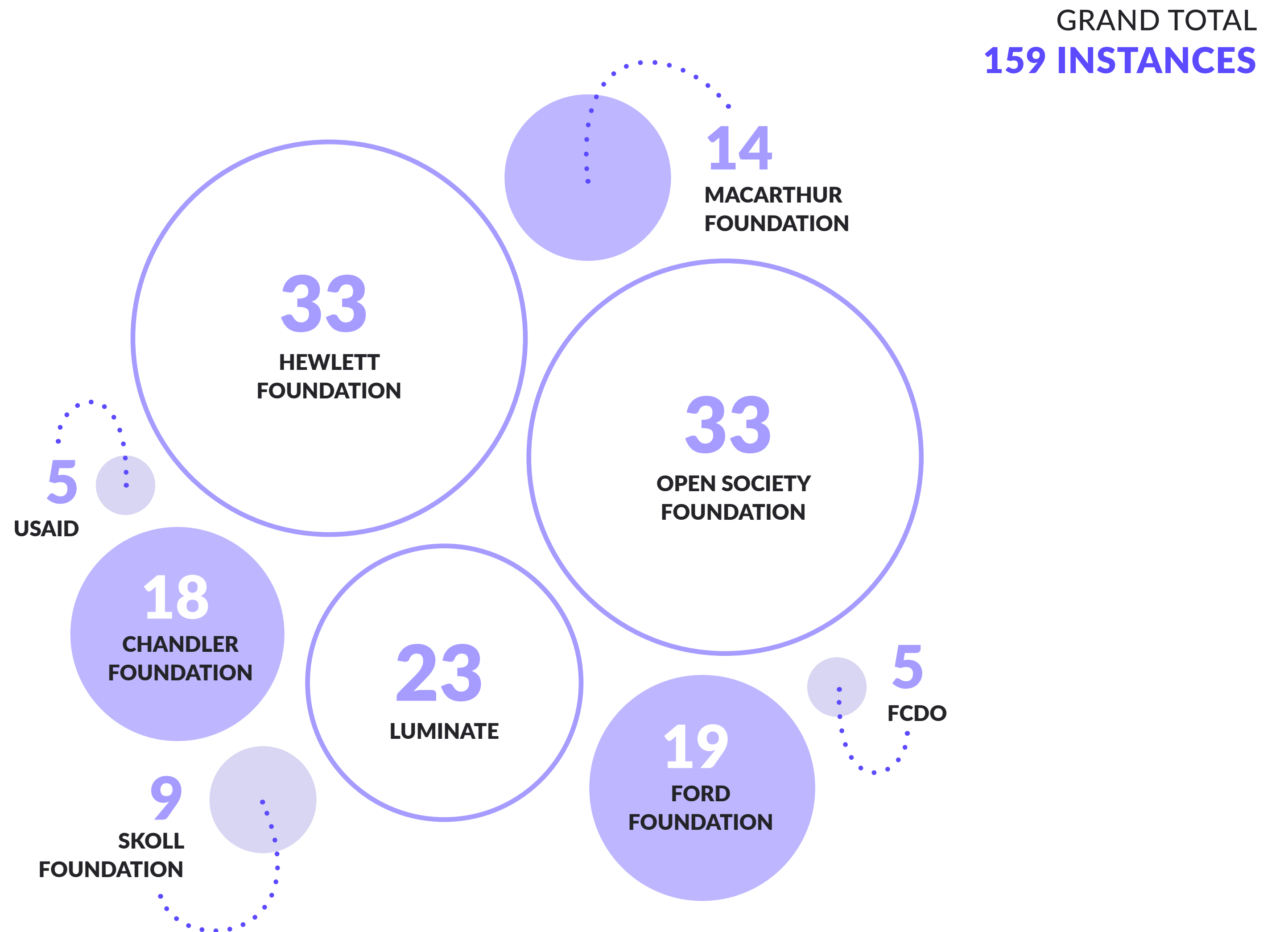
MEMBER ENGAGEMENT

Despite changes in personnel and preoccupation with internal strategy processes during the year, member participation in TAI increased in 2022. All members attended multiple TAI hosted events and input into our products in 2022. Core members participate more actively than associate members.

Participation from within our member funders increased by 170% from the previous year to 159 instances.

The TPA and Climate Learning Series was the most popular offering among our members, although discussions on how to build better leaders, the role of intermediary funders, civil society roles in World Bank project design and the strategy of Open Government Partnership also attracted a lot of member interest.

Member attendance to TAI hosted events in 2022:



MEMBER COLLABORATION

Member collaboration, facilitated through TAI, remains strong. 80% of member survey respondents report new or stronger relationships with other funders through their engagement in TAI in 2022. 63% report strengthening existing funder relationships during the year via TAI.

We are seeing indicators of progress across our three strategic pillars. These 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 organized 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 monitoring, evaluation and learning (MEL) approaches.
- Introducing grantee prospects to other members
- Building a new partnership with USAID, including signing an agreement to partner on their Grand Challenges to Combat Transnational Corruption and the agency joining as an Observer within TAI.
- Members cross-shared grantmaking practices in supporting movements and grassroots CSOs in Africa with MacArthur Foundation.
- Members shared potential grantee prospects in Senegal and Malawi, while exploring potential co-investment in Zambia.

- Looking for bright spots amid the year of permacrisis



ARE WE CREATING RIPPLE EFFECTS? INFLUENCING BEYOND CURRENT MEMBERSHIP

Under our current strategy, the TAI collective is actively seeking to engage with other funders supporting programming where transparency, participation and accountability tools and approaches can strengthen impact.

This has led to regular participation of non-member funders in TAI conversations, including working groups. We almost doubled the number of funding institutions joining TAI convenings in the year to 80 - a sign that outreach is working in line with our funder landscape pillar. We have been able to build relationships with health-focused funders based on our pandemic governance research and with climate-focused funders building from our outreach and new learning series. We also sought to bring in more practitioner voices where relevant. Reflective of this shift, in 2022 **17%** of TAI convenings were attended exclusively by TAI members, and **49%** by both members and non-member funders. The remainder involved practitioners.

In 2022, for the first time, we explicitly asked our members about their perceived influence on other funders. **37%** of member respondents report that TAI supported them to influence at least one other funder's strategic priorities or grantmaking practice. **53%** report TAI has helped increase their own institutional influence among other funders that invest in relevant issues.

Members are doing their part in making links to the broader funder community. 2022 saw an increase in the percentage of member respondents reporting both sharing TAI written products with non-TAI funders (**up 68%**) and inviting non-member funders to TAI events (**up to 48%**)

TAI continues to be recognized as an expert and connector on a range of issues. Examples from 2022 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.



GREATER REACH

The engagement of more non-member funders is in line with an increase in overall reach during 2022. External participation in TAI activities/events increased dramatically - reflective of co-hosting a few larger conversations with partners. We had 681 unique individuals from outside of TAI's membership participate in TAI events in 2022, representing over 65 different organizations.

More proactive communications by TAI Secretariat is working in terms of reaching our target audiences. Our visibility on social media continues to grow steadily. The TAI Weekly is read (not just received) by more than 1,000 people each week and Secretariat analysis suggests readership is aligned well with our target audiences. However, it remains a challenge to find ways to better understand how people use the content we share.

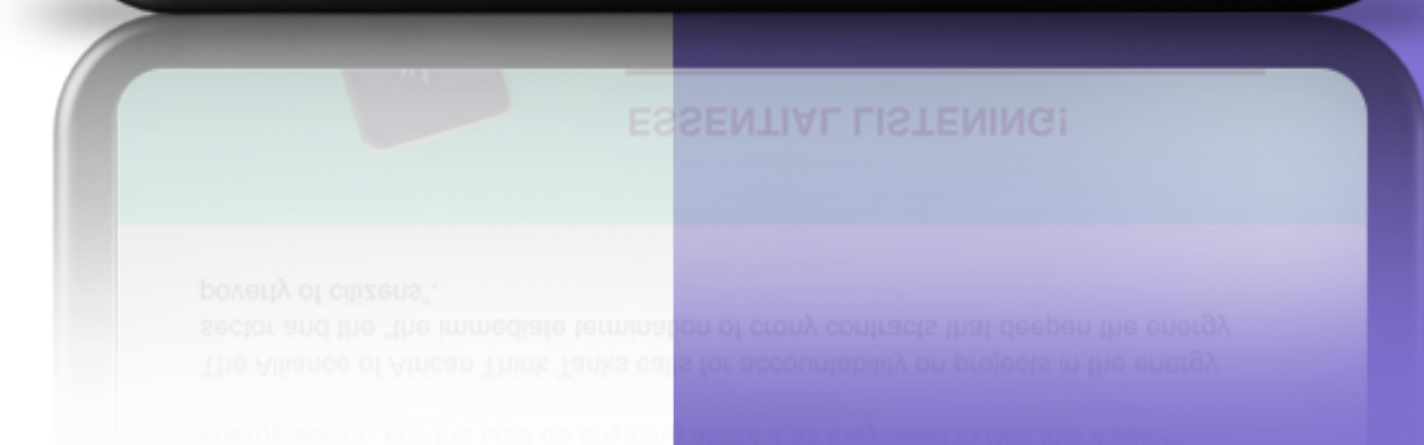
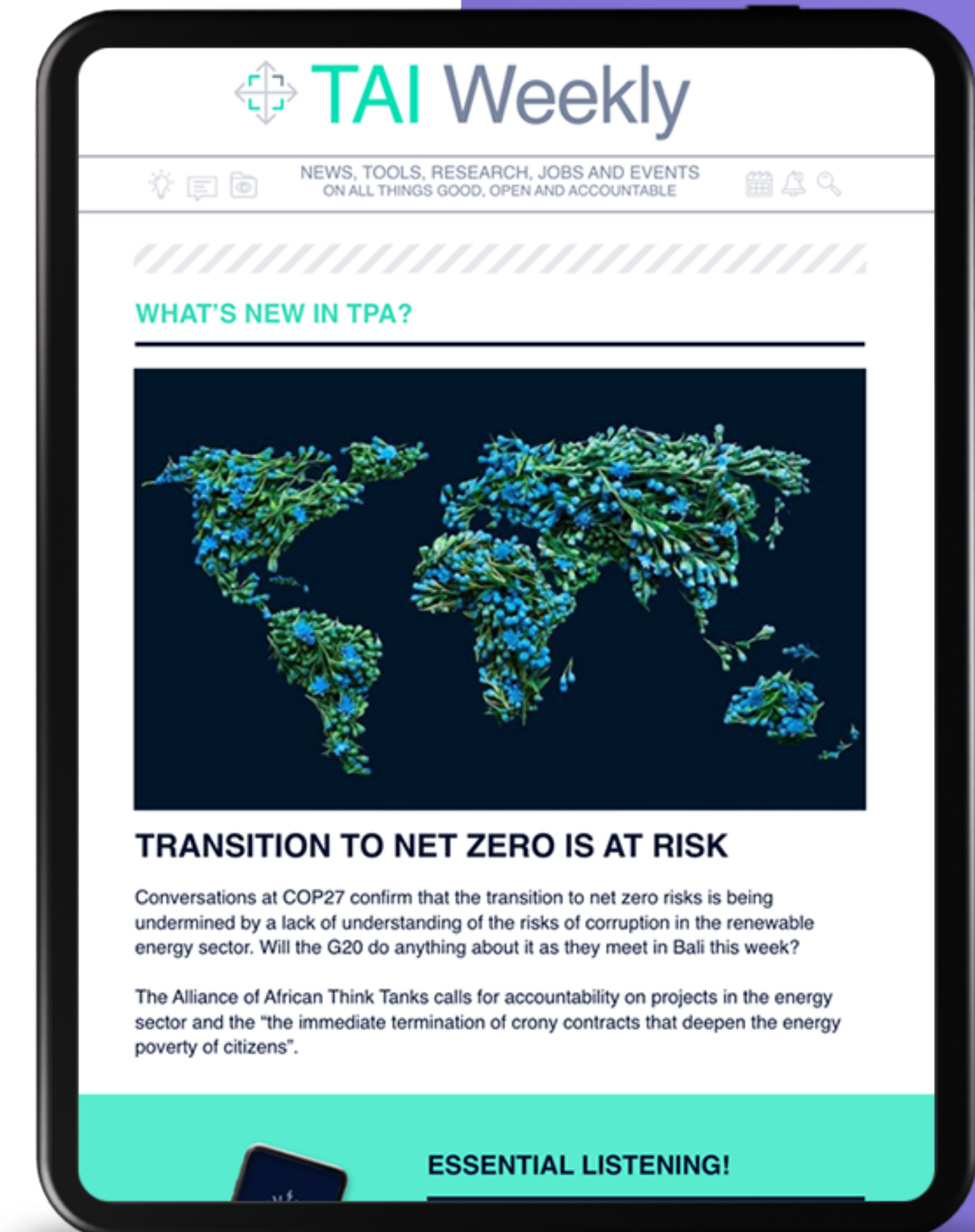
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Readership suggests that we are filling a gap on funder practice. The contents that generated the most engagement in the TAI Weekly are those related to the publication of content from the "Tools for Funders section." In line with our priorities, this section highlights new tools, approaches and concepts for the donor community to better serve the communities they work for.

— **"Each week I learn something from the TAI Weekly"**

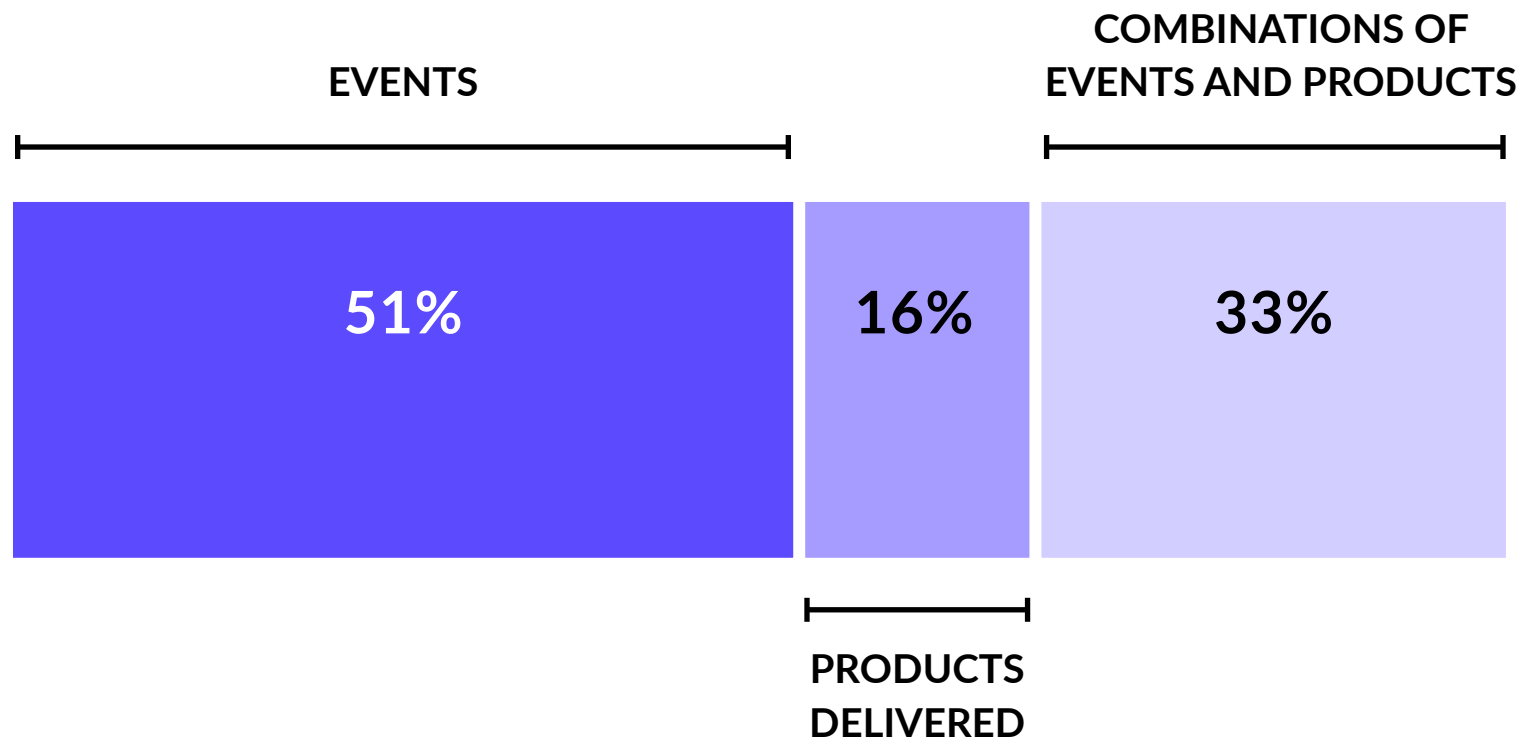
Member Funder

Insights and messaging from TAI programming became more visible to the broader funding community in 2022. Examples include an opinion piece in The Chronicle of Philanthropy and sharing lessons on funder collaboration in Stanford Social Innovation Review.



What did we do in 2022?

In 2022 TAI delivered forty-three strategic outputs across our three strategic pillars - those outlined in on our work plan, plus a few responding to emergent opportunities. Half (51%) were organized as events, 16 percent were products delivered, and 33 percent were combinations of events and products.



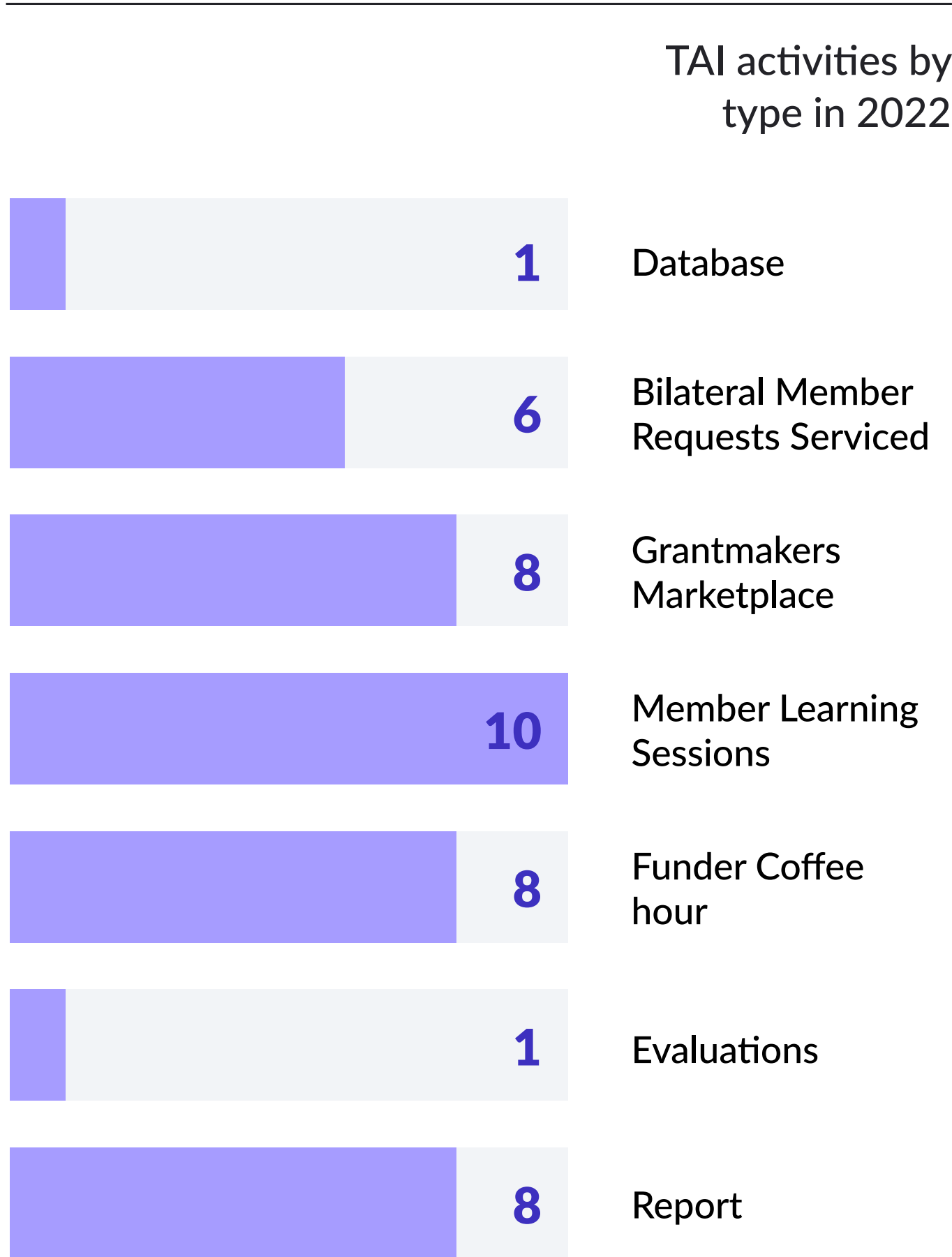
TAI Secretariat continued to offer bilateral support services to its members in the form of Feedback (8), Desk reviews (1), Events Summary (1), and Making Connections (1).

TAI also provided advice to more than twenty TAI member grantees, most often feedback on draft strategies, but also guidance on potential funding and sharing new content/research findings.

We continued to act as a synthesizer of field and funding trends. We produced 48 TAI Weekly newsletters covering research, news, opinion, jobs and events, and 12 blogs.

The following highlights of what we delivered are structured to match our annual workplan. The plan was only approved in April following the member retreat, so it will be carried through to the end of Q1 2023. Accordingly, some activities remain in progress.

This breakdown is roughly consistent with the preference indicated by members in our 2022 spring retreat.



WHAT WE FUND

ACTIVITY	STATUS
Member Learning Series Calls	TAI action on: 1) Debt transparency and accountability – developed opportunities note; held two funder calls to clarify overlaps in funder interest and most actionable grantmaking options. 2) Anti-corruption investigative reporting – hosted funder call discussing evaluative findings from On Nigeria program, 3) Cohosted session on USAID learning agenda and exchanged with members on potential alignment and common interest.
Building healthy information ecosystems	Partnering with USAID on mapping what makes for a healthy info ecosystem and incubate a community of practice. In progress.
TPA Funding Data Snapshots	Launched a dynamic dashboard for the Organisation for Economic Co-operation and Development (OECD) data on governance, civil society and TPA for 2020, 2019 and 2015. Combined OECD data and TAI member funding data to produce governance funding trends analysis (brief and related blogs).
Addressing the Missing “G” in ESG	Consultant hired and developed a menu of potential governance key performance indicators for consideration in sustainability linked finance. The International Finance Corporation has committed to launch and pilot with client companies for concessional corporate loan or bond rates.
Governance and Institutions World Bank Co-Investment	Trust fund officially launched; first Partnership Council meeting held, and annual work plan endorsed (Secretariat coordinated TAI member inputs and review); FCDO to be a new contributor.
Tax Portfolio Program Officer Working Group	Hosted tax program officer working group calls to coordinate, share intelligence and discuss field developments. Non-member funders became regular participants.
Data for Accountability	Launched final products: 1) Effective Data Use: Lessons from Data For Accountability Projects, 2) Mobilizing citizens to investigate corruption and demand government action in Nigeria, 3) Strengthening transparency and citizen engagement in the allocation and use of natural resource revenues in Colombia. Supported local launch events in Nigeria and Colombia.
VOICE - from open to inclusive governance	6 projects with 17 grantee partners in Kenya, Uganda, Ghana, Nigeria and Mali. The projects will be completed by March 2023. Themes vary greatly from LGBTI rights to tax issues. TAI is tracking learnings relevant for members.

**HOW
WE FUND**

ACTIVITY	STATUS
Funder Coffee Hours	Delivered funder coffee hour to discuss challenges in collecting consultants and making such databases public; clarified demand to create a shared consultant database with equity considerations and led to two Secretariat facilitated funder discussions on merits of bespoke or collective efforts.
Grantmaker Marketplace Calls	<p>Delivered a Marketplace Call on <i>Overcoming Hurdles to Going Local: The role of intermediaries and other forms of funding local activism</i>; led to commissioning of review of meanings of localization and new case studies including with socio environmental funds.</p> <p>Commissioned a study by Pur-Ple on “Modifying power relations between the North and the South for a more effective local impact and the transformation of Philanthropy”. To be launched in early 2023.</p>
Grantmaking in authoritarian contexts	Designed TAI Learning Days around this theme to bring together funder and activist perspectives. Event postponed to 24-25 January 2023 (Lisbon) to allow sufficient time for logistical planning.
Hub for transparent, participatory, and accountable funding	<p>1) Developed new case studies and new library of participatory strategy resources for funders; launched in October;</p> <p>2) Partnering with WINGS at their request to update their Transparency Toolkit for funders.</p>

**FUNDER
LANDSCAPE**

ACTIVITY	STATUS
TPA and Climate	<p>Cohosted Climate and Transparency, Accountability and Participation Learning Series:</p> <p>Session 1: Risk and Resilience Governance Session 2: Strengthening transparency, participation and accountability of the Just Energy Transition Partnership – can it be a model for the world? Session 3: Going green while retaining social consent – the challenge of building an inclusive climate policy. Emerging lessons from the EU and beyond</p> <p>Published a video that analyzes the intersections of transparency, accountability and participation with climate justice in the framework of COP 26. (The video was a first attempt to move forward in the creation of audiovisual content that will be launched on our Youtube channel) Mapped most actionable funding opportunities. Led to funder demand for a space to discuss what funding a just transition means in practice.</p>
Targeting New Funders / Field Exit Support Pilot	<p>Consultant working on 1) Building blocks of a case for support to prospective donors, 2) Prospect research to identify higher likelihood new donors that should be prioritized 3) A mapping of organizational relationships to identify potential warm connections and viable outreach strategies for the highest priority potential new funders</p>
Redefining scope and shaping a new narrative	<p>Consultant organization Creatura interviewed members, other funders and CSOs/experts to map out emerging narratives that connect our community. The results were presented in a baseline document for member consideration; anticipate a working group on revising a shared narrative in 2023.</p>
Strategic engagement with USAID	<p>USAID joining Steering Committee as official Observer in TAI. Secretariat signed MOU to support USAID Grand Challenge to Combat Transnational Corruption. Detailed possible advocacy strategies to promote flexible, long-term support to local groups working on transparency, participation and accountability related issues. Primary target bilateral funders, including USAID given its</p>
TPA to aid against future pandemics	<p>Authored the <i>Strengthening Pandemic Governance report</i>, highlighting civil society roles and value of accountability mechanisms backed by grantee examples. Launched formally at the Global Partnership for Social Accountability Forum. Cohosted expert webinar to discuss and showcase TPA relevance in the response to COVID 19. Provided guidance on governance dimensions of new financial intermediary fund for pandemic preparedness to</p>



What did we learn in the process?

Learning is at the core of TAI's purpose. We seek to provide actionable learnings for our members both in regard to the fields they are funding (drawing on member and Secretariat commissioned research, evaluations and grantee reporting), and in terms of how they can best provide support to those fields.

Committed to being a learning organization, we work with a dedicated part-time monitoring, evaluation and learning expert and full time fellow. Among our innovations in 2022 was creation of a dedicated Learning Log to record insights relevant to our agreed Learning Questions under the current strategy. The Secretariat hosts quarterly reflection sessions, including asking how we can improve our offer to members and the field.

FIELD LEARNINGS

- There is a risk that relevant lessons from the transparency, participation and accountability community will not be shared/utilized effectively in other sectors. A failure to adopt adequate governance mechanisms in funding mechanisms to prevent future pandemics risks undermining accountability and effectiveness of large resources deployed and will likely inhibit opportunity for civil society to access resources despite the important role played in fighting pandemics. A similar dynamic is emerging in the flood of new climate finance.
- The US Administration's visible commitment and willingness to convene on the anti-corruption agenda presents an opportunity to help attract much needed new funding for that field. Research and initial outreach suggest the potential for a pooled fund as a channel for engaging new funders (including high net worth individuals, family and corporate foundations.)
- Much data published by governments and corporations is still not being taken advantage of and a lack of use might disincentivize future data releases. Inadequate attention to political economy factors has hindered data uptake (see TAI's 2022 Semi-Annual report for more learnings and recommendations for data-related project investments.)

Here are snapshots of some of our learnings from the collaborative in 2022.



- What the investment community means by the “G” (i.e., governance) in ESG is very constrained, largely defaulting to old school corporate governance measures and missing linkages to many measures that TAI member grantees have been supporting, e.g., beneficial ownership transparency of suppliers.
- Investigative journalism quality factors (as delineated via MacArthur Foundations' On Nigeria programming) can inform design of future investments. More generally, a polarized information environment is further undermining trust between governments and citizens that is a central plank of many initiatives supported by TAI members, but there is no established literature on what makes for a healthy information ecosystem.
- There is growing consensus about the need for debt accountability frameworks at national level, but initial work is needed (and perhaps a new organization) to lead development and promotion of such a framework.

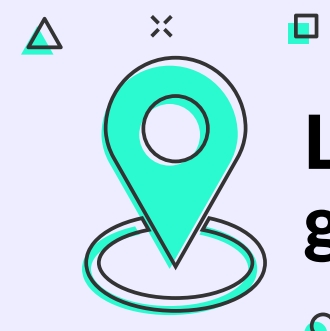
FUNDER PRACTICE AND COLLABORATIVE LEARNINGS

- 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 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.) Members agreed that TAI should continue to provide a forum that fosters emergent collaborations, rather than adopt a single agenda, so we remain responsive to opportunities and embrace the diversity and flexibility in members' approaches.
 - Despite interest in intersectionality, it is hard to get staff within one thematic program of an institutional funder to reach out to those in another. In part this is a reluctance to "tread on toes" and lack of incentives for collaboration. We are interested in testing ways to encourage more engagement, such as from governance to climate or health colleagues.
 - As affirmed by conversations created by the investment of TAI members in a new World Bank trust fund on Governance and Institutions, there is potential for stronger country level coordination between philanthropies and multilateral donors, for example, in leveraging TAI member grantees in coordination with support to governments.
 - It is hard to entice funders to support ideas generated by another funder's initiative (in this case the International Finance Corporation call for proposals under the Data for Accountability initiative elicited more ideas than they could fund alone).
 - With many funders making strategic shifts at the same time, it has led to multiple exits from the same subfields in a short period, leading to funding crunches. In response, TAI is testing the potential to support prospecting and engagement of new funders for specific fields.
 - There is a need/demand for more MEL support among partners. It is difficult to draw out cross-cutting learnings or test field hypotheses if there is not adequate MEL structures/capacity at organizational/project level.
 - TAI's collaboration case notes - documenting specific instances of TAI member collaborations "warts and all" were not receiving sufficient readership to justify the member, Secretariat and consultant time and investment. So, we decided to move away from that model and shift to lighter touch reflection sessions with members at the conclusion of significant work plan activities. However, we did invest in highlighting [common lessons](#) for funder collaboration based on review of three years of case notes - these were published by Stanford Social Innovation Review to reach a broader philanthropic, systems change audience.
 - Bringing our members together in person remains important in building the relationships that then underpin future knowledge sharing, learning and collaboration. Our 2022 annual member retreat - the first in person after the COVID-19 pandemic - 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**
- TAI members are making shifts to "go local" and provide more support to national or subnational partners, but are actively looking to know how to do this well.

Going Local

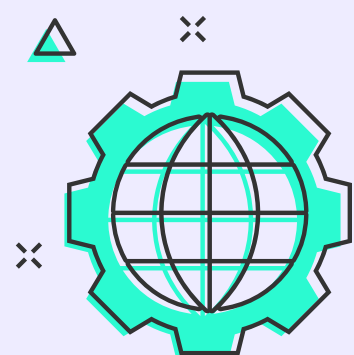
TAI RETREAT 2022

GLOBAL+ LOCAL
“Wee need each one for the other to exist”



LOCAL grants

- Are CLOSEST to the issue
- CONNET with beneficiaries
- Can navigate COMPLEXITIES



GLOBAL work “can”

- Provide a BIRDS'S EYE view & a platform for LEARNING
- AMPLIFY local voices

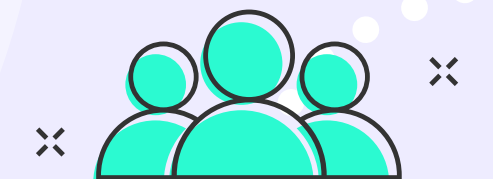
DEIJ in grantmaking

“At the end of the day, we work for them”

ACCESSIBLE proposals & reporting



Funding BLACK & BROWN women



Partner support for DEIS



Humility & LISTENING

WORKING WITH INTERMEDIARIES

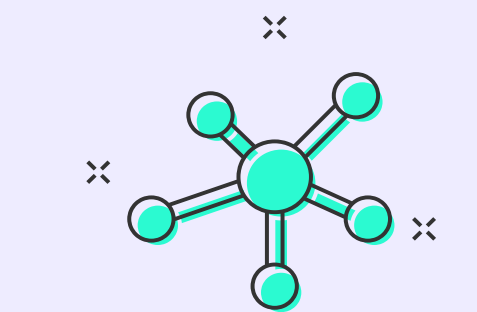
“How can we reach the underreached”

Intermediaries help us...

SCALE



Tick the DUE DILIGENCE box

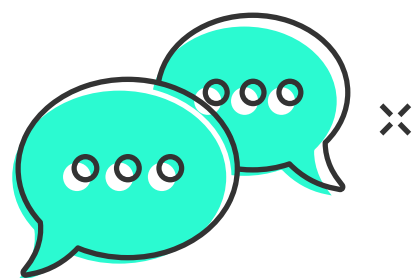


Reach grassroots movements

BUT...

How can we ensure they uphold the same PRINCIPLES & PRACTICES

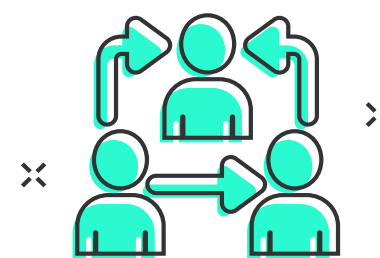
What can TAI do?



Host conversations about localizations



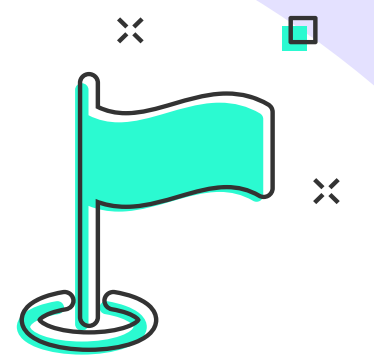
Document members' localizations journeys



Enable peer to peer exchanges for grantees



Pool lists of consultants & intermediaries



Influence regional bodies

How did we do it?

MEMBERSHIP AND GOVERNANCE

Despite significant changes in strategy and personnel among TAI funder members, all members remained committed to the collaborative in 2022 and USAID joined as an official observer with a non-voting seat on the Steering Committee. We also completed the successful onboarding of Skoll Foundation, which joined as an Associated Member at the end of 2021.

Both Hewlett and MacArthur Foundations (those with pending renewals in 2022) made multi-year financial commitments.

The composition of our Steering Committee saw several changes following staff turnover and strategy shifts among our members. The TAI retreat in April 2022 was an important moment to establish a new group dynamic, but further in person gatherings will be valuable as final changes in Committee membership continue into early 2023.

The Secretariat remains a core staff of three, but with effective use of full-time fellows and part-time experts. The creation of a Deputy Director role has proven beneficial for consistent member engagement and outreach to non-member funders.

- Looking for bright spots amid the year of permacrisis



FINANCES

TAI finances are sound entering 2023, although as we accommodate the reduced core member rate of \$100,000 per year, we anticipate drawing down on our reserves in 2023 to retain a budget of close to \$1 million. The Secretariat will need to adjust our spend if grant renewals are not secured in 2023.

In 2022, we had an underspend compared to our final approved budget of \$1,180,918. The bulk of this difference was due to our shifting two high-cost activities - we moved our TAI Learning Days from the planned Q4 to January 2023 (to accommodate travel schedules and visa processing times) and we extended the funder prospecting consultancy through February 2023.

2022 Revenues

Institutional grants	\$1,051,000.00
TOTAL REVENUES	\$1,051,000.00

2022 Expenses	TAI Actual 01/01/2022 to 12/31/2022	Amended Budget 01/01/2022 to 12/31/2022	Budget v Actual Variance	% Actual / Budget
Salaries and Benefits of Direct Staff	\$559,639.16	\$569,555.53	(\$9,916.37)	98.26%
Consultants	\$292,530.19	\$411,000.00	(\$118,469.81)	71.18%
Professional Fees	\$16,639.62	\$9,350.00	\$7,289.62	177.96%
Professional Development	\$5,723.95	\$10,000.00	(\$4,276.05)	57.24%
Occupancy, office and furniture	\$22,931.11	\$32,313.00	(\$9,381.89)	70.97%
Travel, Conference Events	\$64,424.58	\$66,200.00	(\$1,775.42)	97.32%
Management & Operating Fees	\$101,700.00	\$82,500.00	\$19,200.00	123.27%
TOTAL EXPENSES	\$1,063,588.61	\$1,180,918.53	(\$117,329.92)	90.06%

COMMUNICATIONS

The TAI Weekly continues to be our flagship product and continues to see a steady growth in readership. During this year we surpassed 3000 subscribers and our open rate has doubled from 13% to a sustained 26% percent. This means that more than a thousand people open our newsletter with a high frequency and about 1500 open it regularly. The number of people closing their subscription is lower than in the previous year. Less than one person decides to unsubscribe each week. We regularly receive unsolicited feedback praising the Weekly as an important field resource.

“TAI Weekly is the one thing that hits my inbox every week that I read - in depth, never fail! Worth subscribing”

Practitioner

Our presence on social media has grown on LinkedIn, the TAI official profile more than doubled in followers to 2374. This is the highest growth of the page in the last five years. TAI ranks fourth among organizations working on the same agenda, according to the number of followers it reaches on LinkedIn every month, surpassing larger organizations.

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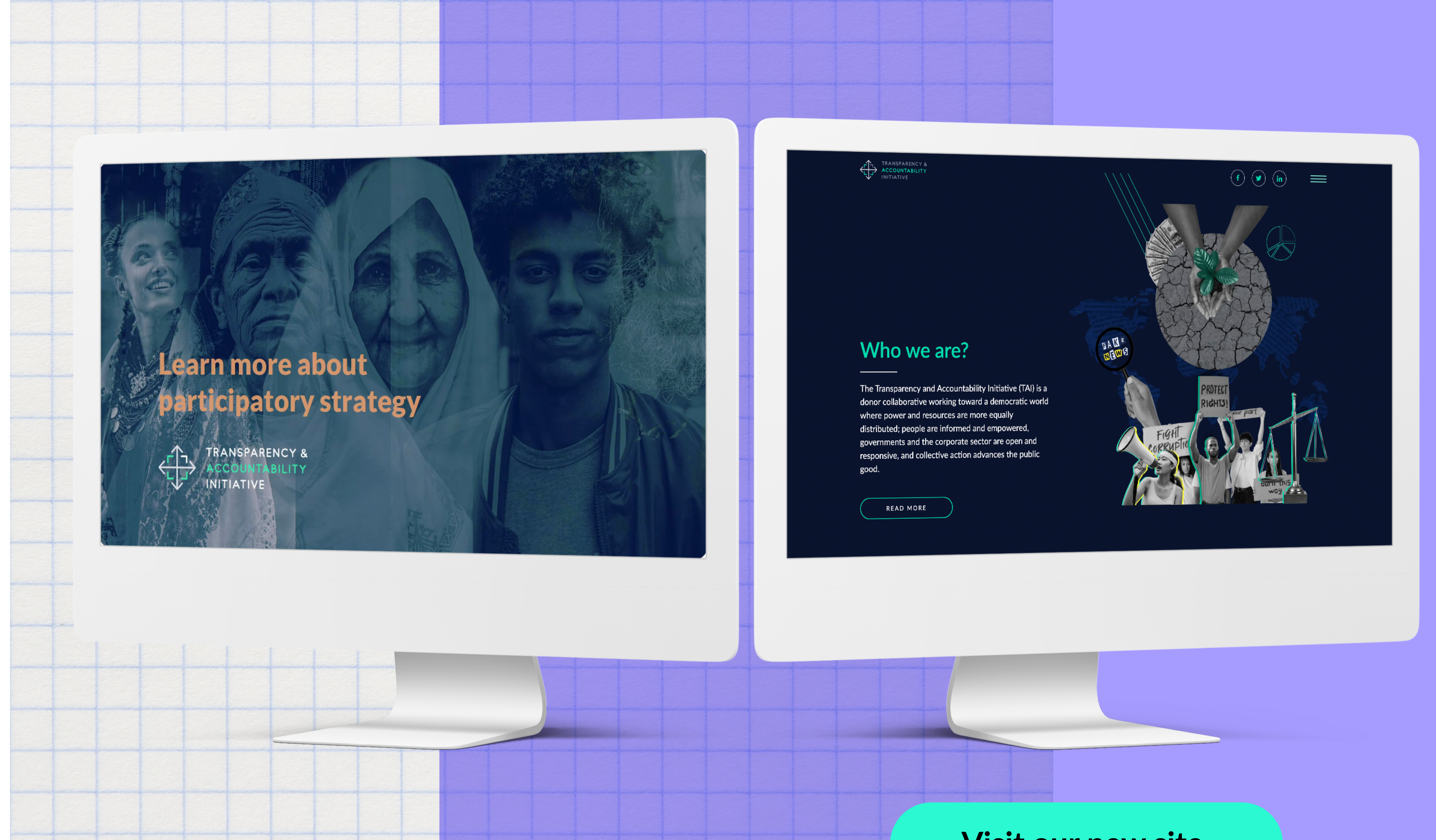
On Twitter we added more than 400 followers during the year to reach over 6,000 followers total. In the midst of the debate about whether or not to abandon the platform after it was acquired by Elon Musk, we opened our Mastodon account under the name [@TAInitiative](#). It is part of our strategy for the coming year to strengthen our presence in this social media, while we collectively decide our future on Twitter.

In both platforms, the largest number of followers gained are related with TAI strategic audiences: funders, civil society organizations, community and social services, academics and development actors.

Both on our social media and in our newsletters, we noticed a growth spike associated with the launch of our Participatory Strategy Library.

This resource helped us to better connect with donors, civil society organizations and other relevant actors concerned with promoting more equitable forms of grantmaking. The Library is open to anyone willing to collaborate with resources and tools.

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[Visit our new site](#)

These shifts build on insights from an audience study that we conducted early in 2022 that helped pinpoint communication targets and messages.

Our new website is now online. TAI's new website meets the latest trends in visuality and navigation. With this new site we intend to take another step towards becoming a resource hub for those seeking a more open, transparent and just world.

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. Our investment in the resource library on participatory funder strategy was one important step in that direction and attracted diverse funder interest.

In 2022, DEIJ issues were also discussed increasingly in the context of thematic programming (so the What We Fund, not just How We Fund conversations). For example, the Secretariat's scoping on governance gaps in managing the climate emergency led logically to discussions of justice and equity, but also shortcoming in terms of inclusion in much current climate finance programming. Inclusion is emerging as a vital part of the conversations of governance programming among TAI members more broadly.

In terms of Secretariat operations, the team devoted time and energy to finding new norms of working as there were significant changes in staff composition. We invested in building respectful and effective ways of working among a team encompassing five different nationalities, four continents and a variety of backgrounds and 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 started to decentralize its operations in 2022 and is seeking some benefits of having staff located closer to different geographies - both for member engagement, but also for interaction with partners and gaining on the ground programming perspectives.

INTELLECTUAL PROPERTY

All TAI publications are published under the Attribution - NonCommercial - Noderivatives 4.0 International (CC BY-NC-ND 4.0) license. All work produced, suitable for public dissemination, is posted on our website and freely accessible to all users. To boost uptake of our work, we maintain an active presence on social media to promote our brand and work, as well as share work widely with partners.



What are we excited about for 2023?



Baba

Engage and collaborate more with member MEL teams to share and align tracking, reporting and learning resources among members.



Cristina

Bringing together practitioners and funders to connect, exchange and co-create best practices for supporting civil society and activism at the local level.

Eszter

Building strategic collaborations across funders to support resilient local activism within increasingly authoritarian contexts and work towards a vision that unites climate and good governance funders.



Yery

Work on adjusting an organizational narrative that reflects the priorities of our members and the contextual changes of recent years around the field of participation, accountability and transparency.

Pushing for more accountability over how climate funding commitments are spent, especially in Just Energy Transition Partnership countries.



Michael

ANNEX

Non Member Grantmakers
Participating in 2022





Ministry of Foreign Affairs of the Netherlands



U.S. DEPARTMENT of STATE
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