Policy Forum
January – December 2013 Annual Work plan

OBJECTIVE 1: The effectiveness of the accountability system including planning, expenditure, performance, integrity and oversight of government at both central and local level is systematically analyzed and monitored, and the resulting evidence is used by a broad base of civil society and advocacy groups to improve the quality of their advocacy.

The accountability system is analyzed and monitored, and the resulting evidence is used by civil society and advocacy groups in their advocacy		
Targeted Partners	**BP One: PF Members**	**BP Two: Ministry of Finance, PMORALG**	**BP Three: Members of Parliament**
Outcome Challenge	PF members use PF analytical materials used by to improve the quality of their advocacy	Ministry of Finance/PMORALG makes budget-related documents publicly-accessible in timely and user-friendly manner	Members of Parliament use PF materials in their oversight function (overseeing the executive)
Progress markers	- PF Members use PF materials in their advocacy work, meetings and events - PF Members issue statements	- Ministry of Finance meets PF BWG to discuss documents that CSOs need to be published (including meeting to prepare CB for 2013/14) - BWG members meet GoT officials from the Public Finance Management Reform Programme (PFMRP) to discuss fiscal transparency	Members of Parliament/Parliamentary Committees meet PF members to discuss content of policy briefs.
Verifiable indicators	Record of meetings of between PF members (or BWG) and other stakeholders. Feedback from members on the use of PF materials. CSO statements	Record of meetings of between PF members (or BWG) and MoF; PFMRP. Production of CB CB published on MoF website	Record of meetings of between PF members and MPs. Hansards, newspaper articles.

Activities	Outputs (Reporting by Activity)	Obj	Short-term Results (Immediate Outcomes)	Indicators	Assumptions/Risk Indicators	Lead	Timeframe
Analytical Think pieces		**1.1**	**Active and effective analysis of GoT policies**			**Budget:**	
	At least 2 Analytical Think pieces in a simplified manner and a press release/conference for advocacy purposes.(Possible topics; Constitution, Extractive Industries) or other identified by members.	1.1.1	Quality (satisfaction, usefulness, comprehension, relevance to CSO programming, timeliness) of policy documents	# of policy-analysis related publications	Lack of consensus amongst members on PF focus issues (Low). Qualified peer reviewers and consultants will be available (Low).	Manager – Policy Analysis	Last week of each quarter during quarterly monitoring meetings
	At least 4 Policy briefs (written, produced, peer reviewed, published and distributed to relevant stakeholders according to agreed timetable). Topics to be determined by working group possible press release/conference for advocacy purposes.	1.1.2	Quality (satisfaction, usefulness, comprehension, relevance to CSO programming, timeliness) of policy documents	# of policy-analysis related publications	Peer reviewers will be available to read the briefs and provide comments.	Manager - Policy Analysis	QT 1 – 1 brief QT 2 – 1brief QT 3 – 1 brief QT 4 – 1 brief
Produce preliminary analysis and commentaries on demand to assist members with advocacy		**1.2**	**Consistent and rigorous NGO statements.**				

Activities	Outputs (Reporting by Activity)	Obj	Short-term Results (Immediate Outcomes)	Indicators	Assumptions/Risk Indicators	Lead	Timeframe
	At least 3 position statements prepared (commentaries to be determined by working groups and quarterly meetings, where the secretariat has specialist knowledge and capacity)	1.2.1		CSO statements Relevant government documents	This activity will primarily be member-led and supported by the secretariat. At least 4 position papers requests come forward	Manager – Communications and Advocacy (with input from other managers	As determined by members and working groups.
Proactive Participation in the budget process		**1.3**	**Effective monitoring of public budget and expenditure processes**				
	Review the 2012 BWG plan and develop Budget Working Group Annual Plan for 2013	1.3.1	BWG Annual Plan 2013	Minutes of monthly meeting where Strategic Plan was agreed.		Working Group Convenor and/or Manager-Policy Analysis	By end January 2013
	- BWG monthly meetings held (or held as needed) - BWG trained on Taxation - Training (production of briefs and experience sharing session)	1.3.2	Minutes	Minutes from the BWG meetings and reports of the trainings	The Budget Working Group will have active membership by PF members	Working Group Convenor and/or Manager-Policy Analysis	Throughout 2013
Measuring Subnational Transparency		**1.4**	**Monitoring of budget transparency in SAM LGAs**				
	PILOT – continue field data collection for the three districts (Mbeya rural, Mbozi & Ileje) and compiled data, analyse and prepare report for advocacy interventions.	1.4.1	Report measuring budget transparency in 3 districts	Budget transparency indicators; Report of OBI	Study will be received positively by LGAs	Manager-Policy Analysis	Throughout 2013

Activities	Outputs (Reporting by Activity)	Obj	Short-term Results (Immediate Outcomes)	Indicators	Assumptions/Risk Indicators	Lead	Timeframe
Major governance and accountability study		**1.5**	**Quality analysis of governance in Tanzania in respect of SAM**				
	One major governance & accountability study undertaken and published SAM component integrated into the 2012 governance report - Study disseminated to target audiences	1.5.1	2010-2011 Governance report 2012 governance report.	- Peer review comments - 7.30am BD on study results (for feedback, evaluation.	Peer reviewers will take time to read and provide critical feedback Results will influence the desired changes as far as transparency and accountability is concern.	Manager – Policy Analysis (with input from members, working groups and other managers)	Completed by Jan 2013 and December 2013.
Policy analysis support provided to members undertaking policy activities		**1.6**	**Effective support of civil society and advocacy groups in policy work**				
	- Job descriptions and contracts signed - Required orientation given - Quarterly work plans in place	1.6.1		Level of effectiveness of support	- Suitable and interested candidates available - Board approval to PA position being made permanent	Coordinator	Required positions filled by March 2013

OVERALL OBJECTIVE 2: The body of evidence produced by Policy Forum through analyzing and monitoring the accountability system is widely used in targeted advocacy strategies to policy makers, the media, civil society, the academic community and the general public in a manner that is accessible, interesting, relevant and useful to the intended target audience.

Analysis and monitoring information on the accountability system produced by Policy Forum is used by the wider stakeholder community.			
Targeted Partners	**BP One: PF Members**	**BP Two: Ministry Officials**	
Outcome Challenge	PF Members share their specific documentation needs for advocacy and so that PF's Information, Education and Communication (IEC) materials are packaged according to those needs.	The number of participants from Government ministries, departments and agencies attending Policy Forum Breakfast Debates increases so as to improve the quality and balance of policy debates.	
Progress markers	- Evaluation of effectiveness and usefulness of PF publications is undertaken. - Working group members feedback sessions on publications take place. - Review of communication strategy undertaken. - PF internal M&E report	- PF BD mailing list imporved to include more MDA contacts (target a total of 5,000 BD contacts – from 2,000). - Phone book of PF improved to include strategic government mobile phone numbers	
Verifiable indicators	Evaluation report and recommendations on how to improve, Record of emails/letters from members on how they have used PF materials	BD Registration forms/records, BD mailing list, phonebook entry list, request for BD space, publications, etc.	

Activities	Outputs (Reporting by Activity)	Obj	Short-term Results (Immediate Outcomes)	Indicators	Assumptions/Risk Indicators	Lead	Timeframe
PF website evaluated and adjusted to maximise impact. Branding is used to promote the Policy Forum image		**2.1**	**Increased accessibility of citizens and target groups to policy information and issues**				
	- Evaluation of website (including updating of Frequently Asked Questions) - Weekly update of the website	2.1.1		- Analysis of website hits - Feedback forms		Manager – Communication and Advocacy	Throughout 2013
	Produce Promotional material (use it on stationery, business cards, tyre covers and promotional material e.g T-shirts)	2.1.2		- No. of stationery with PF Brands No of Tshirts		Manager – Communication and Advocacy	Throughout 2013
Systematic documentation of advocacy experience		**2.2**					
	Documentation – lessons learned and case studies drawn up	2.2.1		- Case studies - No. of learning documents uploaded to website		Manager – Communication and Advocacy with help from intern	Throughout 2013
Evaluation of usefulness, accessibility, and relevance of Policy Forum production		**2.3**	**Recommendations for improvement of PF publications**				

Activities	Outputs (Reporting by Activity)	Obj	Short-term Results (Immediate Outcomes)	Indicators	Assumptions/Risk Indicators	Lead	Timeframe
	Analytical assessment of feedback - Outsourcing of the polling and analysis of impact. - General public and members	2.3.1		PF reports Consultant reports.	- Funds delay could hamper the implementation of this activity - Depending on one consultant	Manager – Communication and Advocacy	By November 2013
Four policy documents/processes rendered in simplified form, printed, published and distributed to target audiences		**2.4**	**Increased accessibility of citizens and target groups to policy information and issues**				
	At least 4 simplified versions. Possible documents include: - Constitution (upon members consensus) - Member's publications upon demand - CDCF "survey report" - TEITI law - Oil and Gas law	2.4.1		- No. of simplified versions. - PF Distribution list	-Not sure whether the government will enact TEITI law as committed	Manager – policy Analysis to coordinate (but inputs from or lead taken by member organisations, working groups and/or other managers as appropriate)	2 in Quarter 1 1 in Quarter 3
Monthly Breakfast debates organised on the last Friday of every month from January to November 2011		**2.5**	**Increased public debate on policy issues**				
	11 public debates conducted with key policy audience on topical issues on a monthly basis [breakfast talks 07:30-9:30 last Friday, except December].	2.5.1		-List of debates facilitated - List of participants -Policy debate reports -Record of media coverage/articles		Manager – Communication and Advocacy to coordinate with input on content from members, other development stakeholders and other Secretariat members	Last Friday of each month – January to November 2013

Activities	Outputs (Reporting by Activity)	Obj	Short-term Results (Immediate Outcomes)	Indicators	Assumptions/Risk Indicators	Lead	Timeframe
Information regularly shared among PF members		2.6	**Increased accessibility of PF members to the network's activities**				
	11 Monthly information packs sent out to all PF members.	2.6.1		- Distribution records - Postal records -Feedback from members		Manager – Communication and Advocacy with help from Program assistant, Communication and Advocacy	Information pack to be sent out each month
Media used strategically to improve awareness, understanding and mutual responsibility in governance and accountability within the Tanzanian public.		2.7	**Increased accessibility of citizens and target groups to policy information and issues**				
	Accountability monitoring promoted through the use of *Television Spots* - Television spots developed (Oil and Gas) LGWG/BWG to suggest the focus of spot - Spots on air	2.7.1		- No. of aired television spots -Feedback records		Manager – Communication and Advocacy	By end of 2013
	- TV documentary that discusses policy and governance issues sponsored by PF (Messages on SAM incorporated to sensitise citizens on accountability monitoring) - Documentary produced and aired - Evaluate at the end	2.7.2		- No. of aired documentary programme -Market research reports	People interested to watch documentary and tune into TV stations	Manager – Communication and Advocacy	Throughout 2013

Activities	Outputs (Reporting by Activity)	Obj	Short-term Results (Immediate Outcomes)	Indicators	Assumptions/Risk Indicators	Lead	Timeframe
Monitoring and Evaluation officer		**2.8**	**Effective documentation of the advocacy experience**				
	- Job description of vacant position in place, required recruitment completed and contracts signed - Required orientation given - Quarterly work plans in place	2.8.1	Level of effectiveness documentation		- Suitable and interested candidates available - Board approval to M & E position being made permanent	Coordinator	Required positions filled by March 2013
Support for Dissemination to Members and Public		**2.9**	**Effective support of civil society and advocacy groups in policy work**				
	- Job descriptions and contracts signed - Required orientation given - Quarterly work plans in place	2.9.1		Level of effectiveness of support		Coordinator	March 2013

OVERALL OBJECTIVE 3: The capability of civil society organizations to understand and systematically monitor the accountability system is progressively enhanced, and the ability to engage more effectively in governance processes at both local and national level through evidence-based advocacy, is improved.

The capability of civil society organizations to understand, to monitor and to strategically and proactively and effectively engage with and influence national and local policy processes is progressively enhanced.			
Targeted Partners	**BP One: PF Members**	**BP Two: LGAs**	**BP Three:**
Outcome Challenge	PF members have an improved understanding of social accountability monitoring (SAM) and are systematically monitoring the accountability system using SAM tools.	LGAs create space for communities to participate in planning at the local level	
Progress markers	1. Two new SAM partnerships with PF members established 2. Upcountry members meet with PMO-RALG 3. Civic pressure groups developed at local level 4. SAM learning sessions with partners held 5. Two new members begin to use SAM tools	• Strategic meeting with PMORALG, POPSM & Councillors to share findings eminating from SAM interventions conducted • CIT teams working with councillors to improve their oversight role	
Verifiable indicators	• Number of PF members partners involved in SAM intervention • Reports & case studies • SAM documentary • Upcountry members registration forms • Quarterly meeting reports	• Meeting minutes • Report findings shared • Feedback from the councilors on the use of SAM for their oversight role	

Activities	Outputs (Reporting by Activity)	Obj	Short-term Results (Immediate Outcomes)	Indicators	Assumptions/Risk Indicators	Lead	Timeframe
Non Dar es Salaam members to effectively participate in quarterly meetings in 2013		**3.1**	**Participation of non-Dar members and new members**				
	- 30 Non-Dar based members participate in 4 quarterly meetings - Development of orientation pack for new members.	3.1.1		- No. of non-Dar members participating in PF activities (Both Women and Men) -Number of agenda items originating from non-Dar members for quarterly meetings	Upcountry members make use of opportunities available	Managers	1st QM-Feb 2013 2nd QM-May 2013 3rd QM-Aug 2013 4th QM-Nov 2013
	Orientation session for new members and networks	3.1.2		No. of new members completing orientation	New members will get to know better the PF activities and will contribute to network mission & vision	Managers and Coordinator	1st QM-Feb 2013 2nd QM-May 2013 3rd QM-Aug 2013 4th QM-Nov 2013
Institutionalization of SAM within GoT and its embedment in PF member activities.		**3.2**	**Enhanced capacity of members and others to integrate SAM**				
	Continue working with PMO-RALG, PO-PSM and LGAs on SAM as an all inclusive method for accountability monitoring of public resources.	3.2.1		- Feedback from Governance Task Force - Minutes from task force meetings -No of SAM lessons learnt as shared to PMO-RALG, PO-PSM&LGAs -No of invitations from PMO-RALG and PO-PSM	- There is adequate cooperation from PMO-RALG, PO-PSM & LGAs - Different levels of government will be open on Public Resource Management -lessons learnt shared by PF taken on board by PMO-	Manager – Capacity & Enhancement	Q1, Q2. Q3 & Q4

Activities	Outputs (Reporting by Activity)	Obj	Short-term Results (Immediate Outcomes)	Indicators	Assumptions/Risk Indicators	Lead	Timeframe
					RALG, PO-PSM & LGAs		
Two additional partner networks/member CSOs/ NGOs identified for Social Accountability Monitoring during 2013.		3.3	**SAM geographically expanded**				
	- revised criteria for the selection of implementing partners - Identification of two compatible networks/ CSO/NGO by members and the secretariat - member partners assessment - agreements signed	3.3.1		- No. of Signed agreements - criteria developed - number of implementation reports/case studies documented,	-Partner networks/CSOs/NGOs continue to implements SAM related activities	Manager – Capacity & Enhancement	Q1, Q2. Q3 & Q4
	Expand use of SAM tools to a total of 12 networks (including improvement of SAM orientation and implementation packs)	3.3.2		- No. of CSOs within PF networks employing PF SAM tools - CSO contribution to the tools used		Manager – Capacity & Enhancement	Q1, Q2. Q3 & Q4
Strengthening and monitoring of the 2012 SAM partnership implementation with TNRF & FORUM SYD		3.4	**Improved capacity of TNRF & FORUM SYD networks for SAM**				
	- Capacity building and backstopping for TNRF & FORUM SYD	3.4.1		- Monitoring and recommendation reports	Continue partnership to implement SAM	Manager – Capacity & Enhancement	Q1, Q2. Q3 & Q4
Localised SAM		3.5	**More**				

Activities	Outputs (Reporting by Activity)	Obj	Short-term Results (Immediate Outcomes)	Indicators	Assumptions/Risk Indicators	Lead	Timeframe
training			**members and partners trained on SAM**				
	- Conducting Localized SAM training to PF members/Partners/Councillors	3.5.1		-Number of members/partners trained --Number of councillors trained	- Members will attend and implement SAM --Improved oversight role to the councillors	Manager – Capacity & Enhancement	July 2013
	- SAM member technical assistance upon request	3.5.2		-No. of request from PF members	PF members to continue use SAM tools		
Staff who leads on Capacity Development - **Manager** - **Program Officer**		**3.6**	**Effective SAM implementation in networks and PF membership**				
	-Job descriptions in place and contracts signed - Required orientation given - Quarterly work plans in place	3.7.1		Level of effectiveness of support		Coordinator	2013

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OBJECTIVE 4: Engagement by Policy Forum in national policy processes particularly on issues pertaining to the implementation of effective accountability systems is systematic, selective and strategic in order to enhance the quality of engagement and to engage where impact is most likely to be achieved.

Active participation of Policy Forum as a network in national policy processes is selective and strategic in order to engage where impact is most likely to be achieved.			
Targeted Partners	**BP One: Office of Parliament (PBO)**	**BP Two: PMORALG**	**BP Three: Members of Parliament**
Outcome Challenge	Officials of the Office of Parliament are working together with MPs, government offcials and Civil society to establish a Parliamentary Budget Office.	Prime Minister's Office – Regional Administration and Local Government (PMORALG) is regularly consulting with Civil Society and implementing the suggestions that result from those consultations.	Members of Parliament who are part of the Energy and Minerals Committee invite CSOs to give input during the review of EITI and Gas draft legislations
Progress markers	- A task force of various stakeholders is formed to chart the process of establishing a PBO and PF BWG is invited to participate.	- Meeting between PMORALG and CSOs is held - CSO position papers presented to PMO-RALG	- Meeting between E&M committee and CSOs is held - CSO position papers presented to E&M committee
Verifiable indicators	Minutes of meetings, emails and letters of invitations.	Minutes of meetings, emails and letters of invitations, PF mid-year reports and records of CSO/PMORALG meeting attendees.	

Activities	Outputs (Reporting by Activity)	Obj	Short-term Results (Immediate Outcomes)	Indicators	Assumptions/Risk Indicators	Lead	Timeframe
PF to engage strategically and selectively in the following policy areas:		**4.1**	**Strategic and selective engagement in policy processes**				

Activities	Outputs (Reporting by Activity)	Obj	Short-term Results (Immediate Outcomes)	Indicators	Assumptions/Risk Indicators	Lead	Timeframe
	Policy engagement (possible areas): • *EITI Secretariat (EITI Law)* • *MEM (Gas Law)* • *Constitution;* • *Office of Parliament (PBO)* • *Prime Minister's Office – Regional Administration and Local Government (PMORALG)* • *MoFEA (budget transparency);* **Substantive input into 2 major annual policy consultations led by PF**. Possibilities include: - Annual National Policy Dialogue	4.1.1	Quality and effective engagement in policy processes Task force to form bill to establish PBO	- Evaluation report - Annual report - AGM report - Advocacy experience 4 Seminars with Parliament focusing on the budget - report Feedback on advocacy message	PF Board Members, Secretariat and members are proactive and consistent in engaging with the chosen areas of focus. Government departments will offer PBO Task Force required support.	Management Team Manager for PBA with input from BWG members PF members	Throughout 2013 Throughout 2013
Strategic collaboration of PF with other networks and more meaningful participation in the activities of PF members		**4.2**	**Enhanced quality of engagement in national policy processes**				
	Active participation of PF in major activities of others (to be decided by members and the secretariat)	4.2.1		• Event Programme • Event report • Event invitation		Manager – Policy Analysis	One major written input by August 2013 Active engagement throughout the year.
To develop relations with international partners, contributing to cross-learning and influencing policy		**4.3**					

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Activities	Outputs (Reporting by Activity)	Obj	Short-term Results (Immediate Outcomes)	Indicators	Assumptions/Risk Indicators	Lead	Timeframe
in Tanzania							
	- Strategic Partnerships e.g. with International Budget Partnership, Centre for Social Accountability, RWI and Tax Justice Network. - PF to participate in and/or present at 2 International Fora relating to PF objectives during 2013	4.3.1		- Networking File - Email correspondence - No. of International For a attended		Management team	Throughout 2013

Institutional Governance, Planning, Monitoring and Evaluation: To ensure governance at Policy Forum is functioning effectively and efficiently in support of organizational objectives and that it conforms to the highest levels of ethical integrity and accountability.

Activities	Outputs (Reporting by Activity)	Obj	Short-term Results (Immediate Outcomes)	Indicators	Assumptions /Risk Indicators	Lead	Timeframe
PF Institutional Governance Development		**5**	**Improved Policy Forum governance plan, structure and process**				

Activities	Outputs (Reporting by Activity)	Obj	Short-term Results (Immediate Outcomes)	Indicators	Assumptions /Risk Indicators	Lead	Timeframe
	- Annual strategic meeting and Board retreat; - Annual plan produced & agreed with members and Board - Technical Assistance sought when required - Mid-year Progress report to members & partners produced & circulated, Annual report to members & partners produced & circulated - Annual Evaluation for programme & organisation undertaken	**5.1**		- Annual plan - SC meeting minutes - Mid-year progress report. - Annual report - Quarterly reports - External audit of accounts - External evaluation report - External audit report for year two.		Board with support from Coordinator	Through out the year 2013

Secretariat Functioning: To ensure proper management of financial, administrative and human resources.

Activities	Outputs (Reporting by Activity)	Obj	Short-term Results (Immediate Outcomes)	Indicators	Assumptions/ Risk Indicators	Lead	Timeframe
PF staff contracted and managed in accordance with agreed arrangements		**S1**	**Improved management capacity**				
S1.1	- PF Secretariat functions are consistent with its current composition - PF Staff contracts in place - Performance & development plans in place for all staff containing "SMART" objectives & success criteria -Team Development Plan in place • Feedback mechanisms • Monthly Social Events • Orientation Board & Staff - Quarterly job discussion reports assessed against work plan Document advocacy experiences in brief. - monthly visits to members (all secretariat) - SAM lessons compiled	S1.1		- Assessment of progress against agreed indicators in six-monthly & annual reports - External evaluation report		Coordinator (with input from Management Team)	Through out the year 2013
PF rented and owned assets procured, used and managed in a way that promotes and safeguards efficiency, effectiveness		**S2 and S3**	**Effective and efficient use of resources**				

Activities	Outputs (Reporting by Activity)	Obj	Short-term Results (Immediate Outcomes)	Indicators	Assumptions/ Risk Indicators	Lead	Timeframe
and value for money							
	- Possibility of own premises examined; Required assets procured in accordance with policies, regulations and guidelines, with value for money ensured for all procurement; - Procured items recorded onto assets register within one week of delivery and together with others, maintained according to high quality standards as per policies.	S2.1		- Inventory/ assets register		Finance and Administration Officer (with guidance from Coordinator	Through out the year 2013