

Policy Forum Annual Plan 2017

1. Introduction

The Policy Forum (PF) is a network of 76 Tanzanian civil society organisations drawn together by their specific interest in augmenting the voice of ordinary citizens to influence policy processes that help in poverty reduction, equity and democratization with a specific focus on public money accountability at both central and local levels. The overall goal is to contribute to the evolution of democratic governance in Tanzania through enhanced capacity of various actors involved with holding their government to account. Policy Forum works together to influence policy processes that improve the lives of all Tanzanians through enhanced governance and accountable use of public resources and effective protection for human rights.

The 2017 Annual Plan presents the key priority areas the PF network intends to undertake in its first year of its 4-year strategic plan (2017-2020) and how it will measure successful delivery of this work to contribute to enhanced governance and accountable use of public resources. This desired organizational impact by way of improving civil society capabilities and opportunities to influence and monitor policies is what underpins PF's vision and mission of improved quality of life for the Tanzanian people. This annual plan not only explains the work PF will deliver over the course of 2017 but also provides the network with a baseline to report against its performance each of the remaining years of the new strategic plan.

2017 promises to incentivize civil society working at the national and local level to identify and build relationships with politicians and officials within the administration who are fully behind the new 5th Administration's reform agenda in the areas of governance, accountability and service provision.

1.1 Strategic Focus & expected outcomes

To assist Policy Forum in attaining its planned outcomes, the network will focus on the following three outcome areas:

- **Outcome 1:** Strengthened PF members' capacity to influence and monitor the implementation of policies relating to public resources
- **Outcome 2:** Improved State responsiveness to Policy Forum's advocacy agenda relating to the accountable use of public resources
- **Outcome 3:** Institutional effectiveness and efficiency of Policy Forum network is sustainably enhanced.

1.2 Priority Areas

As in the implementation of previous strategic plans, PF ensures its members continue to decide on an annual basis the primary areas of focus based on the agreed strategic parameters and how they best contribute to attainment of the network's strategic objectives. We have identified the following four priority areas for 2017:

- Improved Policy Forum members' learning for effective monitoring of public budget and policy processes.
- Improved public access to budget, extractives revenue and tax information.
- Policy Forum's domestic resource mobilisation agenda integrated by government.
- Monitoring, Evaluation and Learning system strengthened.

The 2017 Annual Plan further elaborates on these above priorities and in line with the Strategic Plan 2017-2020 Outcome areas:

2. Outcome 1: Strengthened PF members' capacity to influence and monitor the implementation of policies relating to public resources

PF in 2017 will continue efforts to improve Policy Forum members' learning for effective monitoring of public budget and policy processes. In achieving this, PF will create incentives and a supportive learning environment for member organisations to learn from one each other to improve the effectiveness of their monitoring of public resources. This will include organising Quarterly Members Learning Meetings in Dar es Salaam as well as Zonal Reflection meetings upcountry, an annual learning forum and effectively document and disseminate lessons learnt for all stakeholders involved in improving accountability and policy influencing work.

In moving away from the SAM actor/leader and reverting to the convenor role by facilitating and convening SAM learning sessions, PF will assist members to document impact and draw lessons on the application of SAM and other social accountability initiatives so that these can be incorporated into future planning and for reviewing the Theory of Change. These events will take the form of a structured workshop and the new Monitoring, Evaluation & Learning Officer recruited in 2016 will lead on this.

To enhance governance and accountable use of public resources, PF intends to strengthen its members' capacity to influence and monitor policy implementations. Capacity of the PF members will be strengthened through trainings on policy and budget analyses as well as advocacy skills. The knowledge and skills acquired will enable members to analyse policy briefs on Sustainable Development Goals (SDGs), Domestic Resource Mobilization, Five-Year Development Plan (5YDP) and Tax Justice and gender issues. To step up advocacy work, members of PF will produce three position papers on national budget, taxation and local governance.

PF will continue to coordinate monthly breakfast debates which is a platform and tool enabling PF members and other stakeholders to address various systemic issues related to policies in the country.

To reach out the community and policy makers, PF members will be strategically using media as a platform to inform on current developments of policies, statutes related to accountability, transparency, gender, SDGs and extractive industry. TV spots, the PF website and social media platform, documentaries and Community Radio Programmes will be used to achieve the purpose.

Two (2) PF's working groups (LGWG and BWG) will produce four (4) simplified versions of relevant policies and guidelines. The documents will be used as advocacy tools to influence public resources policies but also to inform the public on issues related to public money, accountability and transparency.

3. Outcome 2: Improved State responsiveness to Policy Forum's advocacy agenda relating to the accountable use of public resources

Policy Forum intends to ensure selective and strategic active participation of its members in national policy processes to realise more open and inclusive public resource management processes. It further intends to contribute to efforts geared towards helping government mobilise more domestic resources as well as improve accountability in their use.

Under this outcome, PF would like to see improved public access to budget, extractives revenue and tax information. In achieving this, the network members will use results of the Open Budget Survey (OBS) to advocate for greater transparency of the budget process, conduct campaigns to encourage openness in the extractive industry value chain including contract and revenues transparency as well as encourage government to continue and improve on the production of simplified versions of key audit and budget documents.

PF would also like to see active campaigns for reduction of tax exemptions, reviewing of Double Taxation Agreements (DTAs), as well as Illicit Financial Flows (IFFs) by developing reports on tax policy in Tanzania for advocacy targeting policymakers and MPs. The network will also advocate for the domestication and implementation of the African Mining Vision in Tanzania and follow up on the Stop the Bleeding Campaign (STB) tax justice campaign that was launched with MPs in 2016.

To realise this, several analyses studies on taxation, national budget (including gender budgeting) and public expenditure will be conducted and produced in a form of briefs and position statements that aim at influencing the government on how best it can mobilise domestic resources.

The studies and analyses conducted will be targeted towards policy makers that are better positioned to bring the desired changes. Engagements with strategic Members of Parliament will be conducted to ensure domestication and implementation of the African Mining Vision mapping study recommendations at regional and national levels. This will go hand in hand in following up on the 'Stop the Bleeding Campaign' that aims to end illicit financial flows from Africa in general and in Tanzania in particular.

Under this outcome, PF also recognises the need to improve the capacity of its boundary partners (in this case they include Members of Parliament, government officials including officials from the Parliamentary Budget Office and other Parliamentary Committees) so that they understand our agenda and provide us with the required support.

These efforts are timely as they aim to support the new 5th Phase Administration's efforts to improve revenue collection performance and reduce harmful tax exemptions. They are also pertinent for PF as it pursues tax justice advocacy work with the Tanzania Tax Justice Coalition (TTJC) given the recent discoveries of off-shore gas deposits in Southern Tanzania and relevant as civil society seeks to monitor the implementation of the recent enactment of 3 laws relating to the extractive industries: The Tanzania Extractive Industries (Transparency and Accountability) Act 2015; The Oil and Gas Revenue Management Act 2015; and The Petroleum Act 2015.

3. Outcome 3: Institutional effectiveness and efficiency of Policy Forum network is sustainably enhanced.

Under this outcome for 2017, Policy Forum aims to lay the groundwork towards progressively and sustainably enhancing the institutional effectiveness and efficiency of Policy Forum as an organisation. This includes using the year for predominantly strengthening the Monitoring, Evaluation and Learning (MEL) system and improving the tools and capacities for the Secretariat to effectively and efficiently manage its resources.

MEL will form an integral part of everyone's responsibility but will have a lead in a MEL Officer who will establish a participatory performance monitoring strategy development process, review of data collection, analysis and reporting tools at organizational and membership levels be reviewed, and the training of all staff (and staff from selected member organizations) on how to carry out participatory monitoring and assessments. Parallel to this, an organizational learning strategy will be developed and operationalized. The organization is also committed to undertake the semi-annual and annual reviews of its Annual Operational Plans in a participatory manner. Both mid-term and final evaluations of this Strategic Plan are planned for, a process that will later feed into a participatory stakeholders strategic thinking process for developing next (6th) Strategic Plan document.

Also, PF and the Public Service Accountability Monitor (PSAM) will undertake a joint pilot learning programme to deepen and improve their MEL functions and approaches with their overall strategies and social accountability practices. This includes the development of practitioners' capacities to learn more consciously and proactively through and from practice for improved outcomes and impacts. The piloting process will involve the two organisations "tracing their journeys" and strategically capturing tacit knowledge, reflect on these insights, and build quick analytic narratives. The focus is to understand why and how PF has experimented and adapted PSAM's approach to social accountability to its contextual and organisational characteristics over time and examine the plausible mechanisms by which learning and capacity-building outcomes may lead to service delivery impacts. The pilot will also use the process as a tool to continue to refine their MEL approaches with a view to enabling learning that can inform future social accountability practice beyond 2017.

PF expects to have achieved these capacity enhancement activities by September 2017.

To enable the Secretariat to improve on its ability to effectively and efficiently manage its resources, the acquisition and establishment of an Integrated Management Information System (MIS) was deemed necessary. This, coupled with developing a Human Resource Development Management System (HRDMS), a training & career enhancement plan, gender policy and an occupational health and safety (OSH) policy will help increase the professionalism of the Secretariat and enable it to not only better serve

the interest of the members but to do so efficiently. Lastly, PF will conduct a stakeholder review of the organisational advocacy & communication strategy to ensure the network's work remains relevant to both internal and external stakeholders.

4. Conclusion

Policy Forum sees exciting opportunities in 2017 to growth of PF members' capacities to produce evidence regarding influencing of policy processes and monitoring of the implementation and impact of policies relating to public money accountability.



Annex 1: 2017 Annual Plan Matrix

	POLICY FORUM ACTIVITIES WORKPLAN FOR 2017	2017				TARGET	RESPONSIBLE PERSON	ACTIVITIES DETAILS (venue, no. of pax)
		Q1	Q2	Q3	Q4			
1.1	PF members are equipped with knowledge and skills to analyse policies							
1.1.1	Train PF members on policy, budget analysis and advocacy skills					1 training, 15 PF members	AR,NL,EJ,NN,AN	1 training on SDGs and domestic resource mobilization for 15 PF members
1.1.2	Produce 5 policy briefs on SDGs, Domestic resource Mobilization, 5YDP, Tax justice and Gender					5 briefs	AR,NL,EJ,NN,AN	Produce 5 policy briefs on SDGs, Domestic resource Mobilization, 5YDP, Tax justice and Gender
1.1.3	Produce 3 position papers in Swahili and English on national budget, taxation and local governance					3 position papers	AR,NL,EJ,NN,AN	Produce 3 position papers per in swahili and english)on national budget, taxation and local governance
1.1.4	Prepare and disseminate info pack					12 info packs	EJ,NN	Disseminate infopack to PF members on relevant information
1.1.5	Analytical support to PF working groups					8 meetings	AR,NL,EJ,NN,AN	Hold PF working group meetings. This includes BWG, LGWG and Tax Justice meetings. Each group will have 8 meetings in a year

1.2	Improved Policy Forum members' learning for effective monitoring of public budget and policy processes							
1.2.1	Conduct 4 quarterly meetings with PF members to strategize					4 quarterly meetings	RA,PK	Conduct 4 quarterly meetings with PF Members to strategize
1.2.2	Organize 2 zonal reflection meetings for PF members and other stakeholders to share their experience in their areas of work					2 zonal meetings	RA,AI,PK	Hold 2 zonal reflection meetings for PF members and other stakeholders to share their experience in their areas of work
1.2.3	Organize 1 annual learning forum and back stopping to PF Members on SAM					1 annual forum	RA,AI,PK	Organize 1 annual learning forum that bring together PF members and our boundary partners
1.2.4	Produce 1 governance study					1 governance study	AS,NL	1 governance study will be produced to showcase the work of CSOs in public money, accountability and transparency
1.2.5	Participate in local and international networking meetings						ALL	Participate in local and international meetings to learn from like-minded organizations
1.3	Policy Forum members have access to tools and platforms to engage on policy issues and the public							
1.3.1	Produce 4 simplified versions of relevant policies and guidelines through working groups					4 simplifies versions	EJ,NN,NL,AS	Produce 4 simplified versions of relevant policies and guidelines through 6 LGWG sessions and 4 engagement meetings with policy makers

1.3.2	Airing of Tv spots, radio programs and documentary to inform the public on current policies and legislative issues relating to public resources.					96 radio programs,1 TV Spot, 1 documentary	NN,EJ	Strategic use of media through radio programs spot, Documentaries and social media platform and website to inform public on current policies and legislative issues related to accountability, gender, SDG and extractive industry. This will be achieved by partnering with 4 radio stations that will be responsible in airing a total of 96 radio programs on PF areas of work to discuss on issues around accountability, gender, SDG, extractive industry.
1.3.3	Conduct monthly breakfast debates on public policy issues					11 monthly debates	NN,EJ	The debates will be on public policy issues
2.1	Improved public access to budget, extractives revenue and tax information							
2.1.1.	Disseminate Open Budget Survey findings, website and other electronic channels					1 Meeting with MoF	NL & AS	Conducting a meeting between members of the Budget Working Group and officials from the Ministry of Finance and Planning to share findings of the Open Budget Survey.
2.1.2	Share findings on public expenditure and budget with the govt and MPs					1 session	SK,RA	Participate annual policy dialogue to share findings on the public expenditure and budget
2.1.3.	Conduct campaign on open extractive contracts					2 meetings	EJ	1 Meeting between the Tanzania Tax Justice Coalition and the Ministry of Energy and Minerals to advocate for

								open contracts in the extractive industry 1 Meeting between TTJC and members of the Parliamentary Committee on Energy and Minerals to advocate for open contracts in the extractive industry.
2.1.4	Conduct meetings with the government to provide inputs on the simplified versions of citizens budget and citizens audit report					2 sessions	NL,AS,	Bring together members of the Budget Working Group to work on the draft Citizens Budget produced by the MoF and come up with comments to be shared with the Ministry for improvement. Another session between BWG and NAOT officials to provide inputs on the simplified version of citizen audit report.
2.2	Policy Forum's domestic resource mobilization agenda integrated by state							
2.2.1	Develop a report on tax in Tanzania for advocacy					1 report	NL & AS	Engage and supervise researcher / consultant to work closely with TTJC in conducting a study on the state of tax incentives in the country.
2.2.2	Policy briefs and press releases shared in time to influence government decisions(two weeks before policy engagement)					MPs Government officials, TRA	NL & AS	BWG and TTJC members to work together to engage with responsible parliamentary and committees and ministries on areas like public resources, taxation and Open Budget Survey and share responsible Parliamentary committees and Ministries.
2.2.3	Advocate for the review of DTAs equitable distribution of taxing rights.					1 session	NL & AS	Conducting a session with members of APNAC in Dodoma to follow up on recommendations which TTJC provided to MPs on

								DTAs.
2.2.4	Advocate for the introduction of fiscal transparency through tax expenditure policies.					1 session	NL & AS	Hold a session with members of APNAC to advocate for transparency in the tax exemption process.
2.2.5	Engage MPs on the tax and revenues from the extractives findings					2 sessions	NL & AS,EJ	Conducting 2 meetings and briefings with Members of Parliament
2.2.6	Support regional efforts for tax harmonization to address race to the bottom					1 session	NL & AS	Engagement with key targets including Parliament and other stakeholders at the national level; Campaign for openness and transparency in beneficial ownership registry
2.2.7	Advocate for the domestication and implementation of the African Mining Vision mapping study recommendations at regional and national levels					1 session	NL & AS	Launching of the African Mining Vision (AMV) mapping study reports in Tanzania in 2017
2.2.8	Generate country specific informal tax knowledge in Tanzania					1 session	NL & AS	Generate the country specific informal tax knowledge with MPs to advocate for increased mobilization of domestic resources
2.2.9	Stop the Bleeding Campaign follow up event with Tanzania MPs					1 session	NL & AS	Engagement with members of APNAC to follow up on the recommendations made during the launch of the Stop the Bleeding Campaign.

2.3 Government are more accountable in the use of public resources including gender budgeting and policies								
2.3.1	learning session with Parliamentary committee clerks including PBO staff on responsive and gender budget and policy analysis					1 session	NL & AS, AI	In collaboration with the International Budget Partnership and BWG, PF will conduct 1 learning session with PBO staff on the functioning of the office.
2.3.2	Analyze the national budget with a responsive and gender lens					1 publication	NL & AS	Members of the BWG will analyse the national budget and come up with a report on responsive and gender budgeting
2.3.3	Enhanced skills and knowledge of councilors on responsive and gender sensitive budgets					2 sessions	RA & PK	conduct sensitization sessions with councilors on Social Accountability, gender budgeting and oversight role from citizen's perspective with LGWG. 2 sessions per year
3.1 Monitoring, Evaluation and Learning system strengthened								
3.1.1	conduct baseline survey					1 baseline survey	AI, SK	baseline survey will be conducted to assess before the implementation of the strategic plan
3.1.2	Develop a participatory performance monitoring and Learning Strategy					1 participatory performance strategy	AI, SK	Training will be conducted to PF staff on the participatory performance monitoring to enhance their skills in performance monitoring
3.1.3	Train members on data collection, analysis and reporting at organizational and network levels					74 members	AI, RA	Training will be conducted to PF members on data collection, analysis and reporting at organizational and network levels to enhance their skills in reporting

3.1.4	Train staff (and selected members) on participatory monitoring and assessment					11 staff	AI,RA	To conduct training to staff and selected members on participatory monitoring assessment
3.1.5	Document and disseminate lesson learned					4 documents	AI,SK	PF members key lesson learnt will be documented and disseminated through info pack, website and social media and forums
3.1.6	Conduct semi and annual reviews and develop Operational Plans with Staff, Board members and conveners						AI,SK,GM	To conduct 1 meeting with Board, conveners and staff for addressing issues of operations and programs
3.1.7	community radio program evaluation					one annual evaluation on radio programs	AI,EJ	To conduct annual evaluation on radio programs to assess the impact of the programs
3.1.10	systematic documentation of advocacy experience					2	AI	engage interns
3.2	Policy Forum governance strengthened							
3.2.1	Conduct Annual General Meeting					74 PF members	SK	To conduct AGM with all PF members to discuss and resolve on operational, governance and programmatic issues
3.2.2	Organize Board Meetings					8 board members, 4 board meetings	SK	To conduct 4 Board meetings to discuss operational, governance and programmatic issues
3.2.3	Facilitate conduction of an Internal Financial Review Audit function and Annual External Audit Exercise					4 quarterly internal financial review/audit 1 External Auditing	GM	To conduct 4 quarterly internal review of financial performance and conduct and communicate 1 annual external audit

3.2.4	Board Members Orientations/Training and Board Performance Review for effective policy decision making and board governance					1 board member's orientation 1 Annual Performance review	SK,GM,AS	To conduct 1 orientation/training sessions for new PF board members and conduct one (1) annual performance review of Board of Directors
3.3 Secretariat effectively and efficiently manages resources								
3.3.1	Developing of HRDMS, Training & Career Enhancement plan, gender policy AND Review of Staff Performance, Administration Policy and Financial Manual						GM	To develop and establish HRDMS and Training & Career enhancement plan, gender policy 8 PF Staff Annual Performance Review 4 Annual Review of AP and FM
3.3.2	Establish an Integrated Management Information System (MIS)						GM	To Procure of Integrated MIS and training of PF staff
3.3.3	Develop an occupation health and safety (OSH) policy						GM	To establish OSH policies To orient PF staff on OSH in workplace To procure OSH equipment's
3.3.4	Conduct a stakeholder review of organizational advocacy & communication strategy					1 Advocacy & Communication strategy	EJ,NN,AH,SK,	To review and update organisational advocacy and communication strategy to coincide with PF 2017-2020 SP
3.4 Financial availability and sustainability enhanced								
3.4.1	Organize semi-annual joint donor meetings					1 Meeting	SK	To conduct at least 1 meetings with donors, board members and stakeholders for communicating lessons learnt plans and strategies