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## Abbreviations

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<th>Abbreviation</th>
<th>Full Form</th>
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<tbody>
<tr>
<td>AGM</td>
<td>Annual General Meeting</td>
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<tr>
<td>ALAT</td>
<td>Association of Local Authority of Tanzania</td>
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<td>APNAC</td>
<td>African Parliamentarians Network against Corruption</td>
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<td>BWG</td>
<td>Budget Working Group (of Policy Forum)</td>
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<tr>
<td>CAG</td>
<td>Controller and Auditor General</td>
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<tr>
<td>CB</td>
<td>Citizens Budget</td>
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<tr>
<td>CSA</td>
<td>Centre for Social Accountability / PSAM</td>
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<td>CSO</td>
<td>Civil Society Organisation</td>
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<td>CWG</td>
<td>Cluster Working Group</td>
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<td>DPs</td>
<td>Development Partners</td>
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<td>EITI</td>
<td>Extractive Industries Transparency Initiative</td>
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<td>IBP</td>
<td>International Budget Project</td>
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<td>LGA</td>
<td>Local Government Authority</td>
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<td>LGWG</td>
<td>Local Governance Working Group (of Policy Forum)</td>
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<tr>
<td>MKUKUTA</td>
<td>Mkakati wa Kukuza Uchumi na Kupunguza Umaskini Tanzania or (National Strategy for Growth and Reduction of Poverty in Tanzania)</td>
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<tr>
<td>MoF</td>
<td>Ministry of Finance</td>
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<tr>
<td>MoU</td>
<td>Memorandum of Understanding</td>
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<td>MP</td>
<td>Member of Parliament</td>
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<td>NGO</td>
<td>Non-Governmental Organisation</td>
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<td>PF</td>
<td>Policy Forum</td>
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<td>PFMRP</td>
<td>Public Finance Management Reform Programme</td>
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<td>PMO-RALG</td>
<td>Prime Minister’s Office – Regional Authorities and Local Governance</td>
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<td>PO-PSM</td>
<td>President’s Office – Public Service Management</td>
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<td>SAM</td>
<td>Social Accountability Monitoring</td>
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<td>TNRF</td>
<td>Tanzania Natural Resources Forum</td>
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Introduction

Policy Forum is a network of over 100 Tanzanian civil society organisations drawn together by their specific interest in influencing policy processes to enhance poverty reduction, equity and democratization with a specific focus on public money accountability. The organization has implemented 2 years of its 3rd Strategic Plan (2011-2013) whose overall objective reads as follows:

**Overall Objective:** Policy Forum seeks improved quality of life of the Tanzanian people through accountable governance, including the effective protection for human rights, by means of strengthening the capacity of NGOs to influence key policy decisions relating to poverty reduction, equity and democratization.

To support this overall objective, Policy Forum has the following specific objectives:

**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 effectiveness and quality of their advocacy.

**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.

**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.

**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.

This annual report highlights the progress made in 2012, the immediate results, the outcomes achieved, the impacts and challenges recorded. The organisation works to improve its advocacy and strengthen the capacity of NGOs to influence key policy decisions including those that impact positively on governance and accountability particularly in the transparent use of public money as a means of achieving poverty reduction, equity and democratization. More specifically, it focuses on the achievements and challenges marked in assisting the Ministry of Finance to improve budget transparency, progress made in advocating for the establishment of the Parliamentary Budget Office (PBO) and working with Government to facilitate community participation in planning and monitoring service delivery at the local level.
Executive Summary

Civil society networks in Tanzania are nowadays increasingly challenged to strengthen their role in impacting on governance and accountability processes. Particularly, they are expected to encourage the civic actors they work with and citizens to participate in policy processes; induce local government authorities to operate in an open manner; and create better linkages between the advocacy of their members at the local level and their strategic engagement at the national level. In many ways, civil society networks are now considered by both the member organisations and the government to be important in dealing with an array policy issues meant to improve the lives of Tanzanians.

Policy Forum over the years has worked as a network to not only increase informed civil society participation in policy processes, but also to influence these spaces through strategic and selective engagement. This report highlights some of the tasks undertaken in 2012 as part of both continuously building on previous progress and setting the foundations to deal with future challenges.

As an organisation that works to analyze and monitor accountability systems particularly in relation to public money, access to budget-related information is crucial for both the network as a whole, its member organisations and the public at large. To this end, Policy Forum has sought to work with the Ministry of Finance (MoF) for more transparency in the formation of the budget. Advocacy by Policy Forum in this area has included working with MoF to create interest among the public to participate in the budget process by producing and disseminating a simplified version of the national budget. In this report, we touch on how we have sustained this collaboration since 2009 resulting in the government taking charge of this activity in 2012.

The report also illustrates how Policy Forum uses communication tools to ensure that information is packaged in a manner that is relevant, interesting, useful and relevant and provided to its members to use in their Advocacy and their community mobilisation. Encouraging feedback from members reveals that our popular publications are an important source of information for holding village government and leaders accountable as highlighted in chapter two of the report.

LGAs are important in facilitating development and improving service delivery in many communities across Tanzania. But to be able to improve the lives of the poor, they must work with community members and that requires participatory approaches and openness. That is why Policy Forum has been working with Government at central level to facilitate community participation in planning and monitoring service delivery at the local level. In 2012, after much persistence by the network, the Prime Minister’s Office – Regional Authorities and Local Governments agreed to instruct LGAs to make available 19 budget-related documents to CSOs doing monitoring work. This was a key achievement in 2012 and offers the network and its member organisations great opportunity to monitor and see how the government directive will be implemented.

The report also looks at Policy Forum strategic engagement particularly in advocating for the establishment of the Parliamentary Budget Office (PBO) in Tanzania and the struggle for tax justice in Tanzania and in East Africa.
1: Working with the Ministry of Finance to Improve Budget Transparency

Realizing the importance of access to budget-related information in analyzing and monitoring the impact of policy processes and public participation in decision-making, Policy Forum has sought to work with the Ministry of Finance (MoF) for more transparency in the formation of the budget. Advocacy in this area has included working with MoF to create interest among the public to participate in the budget process by producing and disseminating a simplified version of the national budget.

The process began in 2009 after the PF Budget Working Group (BWG) had shared a brief on the 2008 Open Budget Index (OBI) at a General Budget Support Cluster Working Group on Governance and Accountability (CWG III) meeting involving donors, government officials and civil society representatives. The brief highlighted key budget documents that were not being produced by the Ministry of Finance, amongst which was the Citizens Budget. Policy Forum urged the importance of this document but it was apparent at the time that it would be beneficial for both the MoF and civil society if we produced a sample to showcase it.

In May 2010, with the support of the International Budget Partnership (IBP), the PF Budget Working Group was trained on how to produce a Citizens’ Budget. With the expertise acquired, the BWG prepared and produced the citizens’ budget for 2010/11, which they launched and shared with the Ministry of Finance in September, 2010. This act prompted discussions in CWG III meetings of the possibility of the MoF producing a CB. Thereafter, at the breakfast debate of June 2011, PF presented results of the 2010 OBI survey which again reiterated the fact that government still had not produced a CB. Present at the debate was the Deputy PS of the MoF Dr. Likwelile who made a verbal commitment that the MoF will produce the Citizens’ Budget for 2011-2012. The PF BWG followed-up on this commitment by being in constant communication with the MoF following which a team from the Budget Department of the MoF was formed to specifically work with the PF BWG on the preparation of the 2011/12 CB. The PF BWG prepared a draft CB
which they shared with the MoF team and worked to produce the 2011/12 CB.\footnote{Annual Report 2012} The 2011/12 CB was thereafter printed with Irish Aid support and thereafter disseminated. The MoF then uploaded the 2011/12 CB on its website.

To support this initiative, the government under the Public Finance Management Reform Programme (PFMRP) later allocated Tshs 100 million for the production of the 2012/13 CB. In April 2012, at the Open Government Partnership (OGP) Conference in Brazil, in her opening remarks, the US Secretary of State – also co-Chair of the OGP – Hillary Clinton, praised Tanzania, amongst other countries, for producing a CB “... that explains in plain, accessible language how public resources are spent.”\footnote{Remarks by Hillary Rodham Clinton at the Open Government Partnership Opening Session: http://www.state.gov/secretary/rm/2012/04/188008.htm}

In September 2012, the MoF invited the PF BWG to working sessions for the finalization of the 2012/13 CB that was prepared by the government. The sessions ended successfully and the second Citizens Budget by government was uploaded on the MoF website early November\footnote{Citizens Budget: http://www.mof.go.tz/index.php?option=com_content&view=category&layout=blog&id=216&Itemid=206 HANSARD http://polis.parliament.go.tz/PAMS/docs/HS-8-6-2012.pdf} and hard copies have been printed and circulated to the public.

Factors and lessons learned:

- Our preparation of a template of the CB: It was necessary to demonstrate to the Ministry of Finance that preparation of a citizens’ budget is something that could be done.
- Formation of a Joint team with MoF to work on the CB: This approach was meant to nurture working and cross-learning relations between the Ministry of Finance and Policy Forum as far as budget issues are concerned.
- The government’s allocation of Tanzania shillings 100M for the CB for 2012/13: This was a good demonstration of government’s commitment of producing the citizens’ budget for 2012/13 by allocating resources.
- Constant follow-ups: This was necessary as it kept the CB agenda firmly on the Ministry of Finance’s radar.


Remarks by Hillary Rodham Clinton at the Open Government Partnership Opening Session: http://www.state.gov/secretary/rm/2012/04/188008.htm

Other Factors:
• Development Partners’ supporting the idea during CWG III meetings offering financial support to print the government’s first CB.

Other interventions aimed at improving budget transparency, accountability and participation:

• **Budget Working Group Pre-Budget statement.**
  The BWG published a pre-budget statement calling for an equitable and just budget. The statement was published a day prior to the tabling of the 2012/2013 national budget by the Minister for Finance. The key messages that the statement conveyed were: fair distribution of resources, improving the quality of education through better school inspection, effective use of resources in the agricultural sector, budget allocations to key sectors following commitments made under the General Budget Support framework, and honoring its commitment to reduce tax exemptions. This press statement was also translated into Swahili and published in the press on the day the budget was tabled.

• **Monitoring Budget Transparency at Local Level.**
  The BWG also engaged in a pilot field activity that aims to measure the transparency of the budget process at local level - looking specifically at the issue of access to budget documentation. It is a monitoring activity that runs throughout a financial year as it measures real time access to budget documentation each time they are produced at Local level. This activity was introduced to our member, MIICO (Mbozi Ileje and Isangati Consortium) based in Mbeya region, in September 2012. 10 of MIICO staff attended the introduction sessions. Discussions were successful and MIICO agreed to undertake the task of collecting data from the field. It was agreed with MIICO that the activity be introduced to the Local Authorities of the sample areas in which it was to be undertaken, which are Mbeya – Rural, Ileje and Mbozi. This introduction was done in early November 2012 to each of the Planning Officers of the respective Local Authorities. They were receptive of it and were keen to see the results that would come out of the study. The Secretariat continues to monitor the progress of this activity every quarter of the financial year.
2: Providing Relevant Information to Members to use in their Advocacy

Policy Forum produces a variety of publications in a manner that is accessible, interesting, relevant and useful to civil society and other stakeholders for their policy advocacy. These include policy analyses and simplified versions of policy documents which are widely disseminated to PF members, policymakers and citizens.

PF Secretariat continues to receive valuable feedback from its members regarding the usefulness of these publications including how they have been used in training sessions in different local communities. Below are cases that capture some of the encouraging feedback.

Oxfam is a member of Policy Forum whose Governance programme works primarily with a network of community animators (farmer groups, teachers, students and faith leaders) in 6 districts of the former Shinyanga as well as Ngorongoro district. The programme is focused on building, on the one hand, a groundswell of active citizens who can monitor and hold their leaders accountable and, on the other hand, the capacity within local leaders to be able to respond to active citizens’ questions and demands. This process involves using a variety of materials and sources to increase the animators and leaders access to information. One of the most popular publications that Oxfam has used to date is the Policy Forum ‘Utawala wa Kidemokrasia Katika Jamii’ booklet.

Oxfam has indicated to us that:

- The booklet is a source of information for holding village government and leaders accountable
- Community animators have been known to refer to the publication when demanding for village meetings, for income and expenditure reports, and generally to monitor the actions and functions of village government.
- There have been some instances of communities referring to the book when calling for the ousting of a village chairperson or VEO if they misuse their position or do not fulfill their roles and responsibilities.
- The publication and information garnered from it have given animators...
and their groups the courage and confidence to push these issues because they feel that they are supported by facts. It has led to the point where village leaders themselves are asking for the booklet so that they may also know their roles and responsibilities better and can hold other leaders and officials accountable. Each animator is usually given one or two copies of the publication, but demand for it has become so high in the communities that either people take turns borrowing the book or they photocopy it in order to circulate it further.

Youth Partnership Countrywide (YPC), another PF member organization involved in leadership trainings and promoting young people’s participation in civic and political life in order to enable them to demand for their rights and hold their leaders accountable, have also shared with PF some interesting anecdotes.

Their civil programme in Kibaha and Singida districts involve trainings that use various materials such as publications including those from PF. For instance, in 2012 YPC was in Manyoni – Singida to train village chairpersons on leadership and Governance skills, they used the two booklets produced by Policy Forum titled: Utawala wa Kidemokrasia katika Jamii and katiba Mpya na Ufanisi wa Serikali za Mitaa Tanzania (2012). YPC reported that both publications have attracted a lot of interest among youth and LGAs to participate in the constitution making process.

PF has also been using the Utawala wa Kidemokrasia booklet in its Social Accountability Monitoring (SAM) trainings to its members, specifically when illustrating what the roles and responsibilities of village leaders are.

An evolving publication

In 2006, Policy Forum’s LGWG produced two simple volumes on local governance which outline the roles and responsibilities of village leaders. The aim of the publication was to encourage good governance at the local level. In 2007, the two were merged to become what is now known as the ‘Utawala wa Kidemokrasia Katika Jamii booklet. The booklet has continuously been edited by members of the LGWG in light of the feedback received by member organisations working in local communities and with local leaders. Every year, PF reprints this publication due to huge demand from members and the communities and the secretariat can report it is the most popular of the simplified versions ever produced by PF.

PF continues to look for better mechanisms to collect more concrete information and feedback from members who work with animators and their partners using this publication so that we constantly work to improve it.

Also, although the demand for the publication may be reflective of its usefulness to citizens, more research needs to be done to determine the exact impact of the booklet to citizens and their lives.
Other interventions aimed at improving the dissemination of information to civil society and the public and seeing that they actively engage in the policy process are:

- **Policy Forum Website and branding:** Data continues to show that, at least 2000 people visit PF website on a monthly basis and a greater part of users are from within Tanzania. PF also continue to update and upload various documents including reports, studies and news items regularly as a way of broadening its dissemination.

At the beginning of this year PF commissioned a website company to upgrade its website so as to make it more user-friendly and integrate social media features. This task has been completed and we look forward to analyzing user statistics in 2013.

As part of our branding, PF also reprinted and updated its members’ directory for 2012. The purpose of the directory is to provide a contact details list of the organizations who are members of PF for the convenience of horizontal communication within the network.

**Popularization of Policy Documents:** In the year 2012 PF had planned to produce popular versions of 4 publications. The documents produced for popularization were:

1. A Simplified Version Highlighting the Major Weaknesses of the Current Constitution at the Local Level. *(Katiba mpya na ufanisi wa serikali za Mitaa)*. This activity has already been done by a team of members from our Local Government Working Group (LGWG). 25,000 copies of this simplified version were printed and disseminated widely.

2. A Popular Guide for Citizens on the Constitutional Review *(Mwongozo wa Katiba kwa Raia)*. PF commissioned Jukwaa la Katiba (CSO Constitutional Forum) to prepare this document prior to the country-wide public hearings planned for the review of the Constitutional Review Bill. The objective of this publication is to enlighten citizens on the propriety of the process of reviewing the constitution and giving background on previous constitutional amendments in Tanzania. It also
provides expert opinion as to how the process could be carried forward based on experiences from neighboring jurisdictions that have undertaken successful constitutional reviews. Due to a great demand of the booklet from PF members and the public at large PF reprinted 32,000 copies of the booklets this year and disseminated to its members and other stakeholders.

3. A Simplified Version of *Utawala wa Kidemokrasia katika Jamii*. due to an unending demand from PF members and other stakeholders and the public for this document, PF reprinted 33,000 copies for the year 2012 for dissemination particularly to areas where members and different stakeholders have reported urgent need.

4. Simplified Campaign Brief on Extractive Industries Transparency Initiative (EITI). As part of continued advocacy for transparency in extractive, PF reprinted 1000 copies of the EITI briefs and disseminated them to its members and the general public.

**Breakfast Debates:** Breakfast debates have continued to take place on the last Friday of each month. During the year 2012, the topics discussed have been:

1. **January:** The Implementation of Decentralization by revolution in Tanzania: have we achieved?
2. **February:** Revenues in the pipeline: How can Tanzania benefit from oil and gas?
3. **March:** The Village Land Act: Is it worth protecting?
4. **April:** Inspiring young people into action: What can policy makers do?
5. **May:** Access to Information at the District level: The Experience from Southern Region of Tanzania?
6. **June:** Health sector allocation: Is the state of the health sector improving?
7. **July:** Investing in Forests – is it sustainable and who benefits?
8. **August:** Road Safety in Tanzania: How do we tackle the causes of traffic accidents?

9. **September:** Uranium Discovery: Is Tanzania prepared to benefit from exploitation?

10. **October:** Mental Health Crisis in Tanzania: Is it a policy priority?

11. **November:** 10 Percent National Budget Allocation to Agriculture: Could it transform Rural Tanzania?

Attendance to the PF Breakfast Debates has generally been good and media coverage has been encouraging too. Most of participants have been from the public sector, high learning institutions, academia, civil society, development partners and the private sector. Also, requests from PF’s members and other stakeholders to have topics of their areas of interest feature in the debates have increased considerably in the year 2012 where out of the 11 breakfast debate topics, nine were initiated from outside the secretariat and six of these involved our members. This signifies enhanced understanding of the value these discussions have in influencing and impacting policy processes.

**Communication with Members:** The communication strategy developed in 2008 continues to guide us in our day to day activities. For twelve months, we have continued sending weekly updates after thorough selection to suit our objectives and relevance to our members. On a monthly basis, we continue to send out information packs with key documents that are of interest to our members and may assist those whose access to internet connectivity and mobile phones is limited.

**Strategic Use of the Media:** Policy Forum and its members have continued working with the media in the following ways:

1. **Social Accountability Monitoring (SAM) – Documentary.** Policy Forum produced a documentary with a SAM partner, MIICO. The documentary captures the success and challenges of the intervention in Ileje district. A 15-minute documentary was produced and aired on two TV channels and uploaded on the PF website and its YouTube account.

2. **TV Spot on Constitution:** In 2012 members agreed that the TV spot to be produced should focus on the constitutional review process focusing on encouraging citizens to participate. The TV spot was produced and aired in 3 TV stations namely ITV, Star TV and TBC.

3. **Press Statements:** 3 press statements on extractive industries, position of CSOs on doctors’ strike (Swahili and English) and Pre-Budget press statement issued by PF’s Budget Working Group were released in the year 2012.
3: Working with Government to Facilitate Community Participation in Planning and Monitoring Service Delivery at the Local Level.

Prime Minister’s Office – Regional Authorities and Local Governments

Policy Forum has long been working with its member organisations to open up spaces for civic actors and communities to participate in policy and planning processes at the local level. As a network of civil society organisations, we also believe communities should have the opportunity to obtain justifications and explanations for the use of public resources from those entrusted with the responsibility for their management and the performance of officials if service provision at the local level is to be progressively improved.

To this end, Policy Forum has continued to collaborate with the PMO-RALG to improve the participation of communities in planning processes and to request the ministry’s help in urging LGAs to become more transparent particularly with regards to making budget-related information more accessible to civic actors and communities engaged in monitoring public funds at the local level. More concretely, Policy Forum advocated for PMO-RALG to issue a circular to all LGAs that require them to release the documents whenever requested by PF members and other CSOs when conducting activities related to monitoring public resource management using different tools such as SAM, SA, or PETS.

After several meetings and protracted correspondences held between PF and PMO-RALG management that began in 2010, on the 4th of October 2012, a letter with Ref. Na. BA 254/307/01 was issued to Regional Administrative Secretaries for transmission to LGAs instructing them to make available 19 different LGA reports to CSOs.

This advocacy intervention provided a number of noteworthy pointers for PF. One, the protracted bureaucratic processes involved in getting government to take on board and implement CSO recommendations means that civil society has to be patient. Two, DPs have a very major influence on the government decisions and involving them strategically in your advocacy plan can help yield results.

PF in 2012 also had another engagement with PMO-RALG through ALAT whereby we contributed to the document to be used at the local level by councilors titled ‘Masuala ya Msingi na Ujuzi Juu ya Uendeshaji wa Serikali za Mitaa’ (Basic Issues and Details on Local Government Operations) which has a chapter (chapter 6, pg.110-126) concerning issues of social accountability monitoring.
and was printed in 2012. Councilors in almost all the LGAs have now been trained using this guide.

President’s Office – Public Service Management
Policy Forum has continued to collaborate with other ministries. In 2012 we worked closely with PO-PSM under its Ethics Promotion Unit to help it incorporate the concept of SAM in its new guidebook to help CSOs impart ethics lessons to communities (MWONGOZO WA KUFUNDISHIA MAADILI KWA AZAKI). We also worked with PO-PSM’s Ethical Conduct Monitoring Unit to help them incorporate the SAM concept of Public Integrity Management in a guidebook for government officials monitoring ethical conduct in MDAs and LGAs titled: 'Mwongozo wa Ufuatiliaji wa Uzingatiaji wa Maadili katika Utumishi wa Umma'.

SAM at local level
Although opening up spaces for participation and facilitating an enabling environment for communities to monitor service-delivery is important to enhance government responsiveness, improving the capability of CSOs to understand and systematically monitor the accountability system is crucially pivotal in progressing governance processes at the local level.

Social Accountability Monitoring interventions have continued in 2012 building on work we have done in previous years. In the areas we have intervened, we are gradually witnessing LGA officials collaborating more with communities than before. A case in point is in Ileje, Mbeya where the community is in discussions with the LGA regarding decisions on health service provision issues. More specifically, Chabu and Shinji dispensaries which were not previously operating have begun functioning after community follow-up using the SAM approach initiated. Another illustration can be found in Lindi Rural, specifically the case of Mihogoni Primary School where
Toilets have been rehabilitated and the council has terminated teachers’ salary reduction which was paid as house rent as a result of SAM findings.

Challenges and Lessons Learned
Advocacy at national Ministerial and Departmental levels is an attempt to link officials and policymakers with what is happening at the local level and to demonstrate the impact of their policies. However, more forward and backward linkages between the two spaces are needed. Policy Forum national engagement is still challenged with limited input from members and partners working in non-urban areas in terms of evidence-based analysis.

The Secretariat is not well resourced, but there has to be more concerted efforts to better support the work of non-urban CSOs. One way we can improve on this is to share the burden with other urban, well resourced NGOs who also seek to help upcountry NGOs influence social accountability in the use of public resources. Already there is interest from PF members and partners such as Forum Syd, ActionAid Tanzania and MSTCDC to collaborate on this.

Hopefully, such partners will be encouraged by the fact that our advocacy claims are received with greater legitimacy on the part of government when they can be sourced from the community level. This, coupled with a growing and deeper CSO appreciation of the structures of governance across the levels of government, has helped us have more targeted and advocacy strategies at the local level.

Other interventions aimed at helping local Government Authorities create space for communities to participate in planning.

Development of a Capacity Enhancement strategy, a Local SAM Training Course and a ToT SAM Fundamentals Course:
To further deal with the demand for SAM, Policy Forum has adopted a local SAM course with help from the CSA which will be used to develop the capacity of its members and partners. Facilitator’s Guide has been developed and reviewed so as to confirm with laws and regulations of the government of United Republic of Tanzania that relate to accountability and monitoring activities. PF hopes that the SAM Facilitator’s Guide will help maintain the quality of training on SAM. This year’s Local SAM training was conducted in November. Regarding SAM Fundamentals CSA course, five members have attended the course in South Africa (LHRC, ANSAF, TACOSODE, HakiElimu, Mzeituni Foundation/Forum Syd). Also Training of Trainers (ToT) was conducted in August 2012.

For the year 2012, PF members have used SAM tools in monitoring public resource management. For example, in 2012 PF partnered with TNRF and FORUM SYD to implement SAM in Kisarawe and Ukerewe respectively. In the same year, two PF members who were trained the previous year, continued to be mentored by PF when employing SAM tools, for instance MACSNET which implements its activities in Babati district also SIKIKA who implement SAM in Kiteto, Simanjiro and Mpwapwa districts.
In this view of capacitating the members to effectively engage with and influence national and local policy processes, in 2012 PF organized localized training on SAM so as to orient the individual members on the SAM tools. After the training members have been using SAM tools in implementing their activities in their organizations, for example, MACSNET-Babati, Forum Syd - Mwanza, YPC-Kibaha, GULUKA KWALALA, UNGO-Morogoro, KCS-Forum, REPOA
4: Engaging Strategically in Policy Processes for Greater Impact

Parliamentary Budget Office (PBO) Advocacy

In October 2009, members of the PF BWG met in Dar es Salaam with a team of Members of Parliament from Uganda to share issues of interest to both teams. The Members of parliament from Uganda were interested in how Tanzanian CSOs engage with Parliament while members of the BWG were interested in the how the Ugandan PBO functions.

The discussions on the PBO culminated in the building of a collaborative interest following the Uganda MPs’ invitation to members of the BWG to consult them further on issues regarding the PBO as well as how one could be established in Tanzania.

Research around the functioning of PBOs in other jurisdictions as well as discussions around advocacy for the establishment of the Tanzanian PBO continued throughout 2010. Advocacy plans were concretized in 2011 following its inclusion into the 2011 annual plan of the BWG. From the research on the establishment and operation of PBOs in other jurisdictions, a brief entitled “Strengthening Parliament’s Budget Oversight Function: The case for a budget office” was prepared by the BWG in May 2011. The BWG planned to use the brief as a first step of their advocacy process to educate parliamentarians on the importance of the office as well as the benefits and importance of its establishment.

In June 2011, the PF BWG made a presentation of the brief to members of the African Parliamentarians Network against Corruption (APNAC) who seconded the establishment of the office and went as far as committing themselves to moving a motion in parliament for the establishment of the office. Following this commitment, the Parliamentarians consulted the BWG on a bill they had prepared to push for the establishment of the Office. The BWG met and incorporated their input in the draft bill which was then submitted to the Speaker’s office. Through September and October 2011, the BWG continued discussions around the most effective advocacy strategy for the establishment of the PBO and also continued to do informal networking and follow-ups regarding this.
Subsequently, meetings were held with the Clerk of the National Assembly, Private Assistant to the Speaker, Director of Planning and ICT, Chief Parliamentary Legal Counsel and Director of Parliamentary Committees. The advocacy strategy applied was to approach the Office of Parliament and secure their buy-in from the bottom up starting with the officials of the office of Parliament heading up to the Speaker. This approach registered good feedback which necessitated re-printing of the brief (“Strengthening Parliament’s Budget Oversight Function: The case for a budget office”) for distribution to officials of the office of Parliament through the office of the Director of Planning and ICT.

The BWG continued following-up the issue informally and kept in contact with the Director of Planning for the Office of Parliament. In June 2012, the Speaker endorsed the establishment of the PBO. This was stated in the sixth meeting of the eighth session of Parliament held on 20th June, 2012 after the budget had been presented in Parliament. In line with that, the Speaker also endorsed the creation of a Committee for the Budget which will help complement the work of the PBO and advance budget transparency. The BWG continues to follow up on developments and has learned that the Speaker had ordered the preparation of a roadmap for the establishment of the PBO. PF has been contacted by the Director of Planning of the Bunge Office to assist in this initiative which is currently on-going.


The Secretariat also launched a publication entitled ‘Tax Competition in East Africa: A Race to the Bottom? Tax Incentives and Revenue Losses in Tanzania’. This report was co-published together with Actionaid and Tax Justice Network – Africa. The launch was done on the 17th of June, 2012 in Dodoma it was attended by 94 Members of Parliament and received great media attention. On the overall, Members of Parliament were of the feeling that it was an important report but one that should have been launched much earlier since deliberations on the national budget were beginning the following day. The report has since been referred to a couple of time during debates on the national budget that followed the launch.

Lessons Learned

The PBO poses a number of challenges moving forward. Firstly, although the Speaker and Parliament officials are in the process of putting together a team that
will include PF and take the PBO establishment forward, the process of drafting the new constitution has led some government officials to urge for the reform to take place under the latter as it will deal with any “systemic irregularities” that piecemeal efforts might bring. We will follow-up closely on the implications of this and report on other related pending issues regarding our correspondence with the Office of Parliament.
Financial Partnerships:
Policy Forum has continued to partner with various actors both within and outside Tanzania. These partners have helped to push forward the areas which Policy Forum is championing.

In 2012 Policy Forum joined hands with Christian Aid International in The Area of Tax Justice. For the first time Christian Aid supported Policy Forum work with grant of US Dollars 47,867 (Equivalent to TZS 75,931,791). Furthermore more members have contributed to Policy Forum work, with Forum Syd contributing TZS 5,000,000/= and SIKIKA TZS 7,275,000/= and as part of two years agreement Policy Forum received the final installment from KEPA of TZS 20,117,000 on top of TZS 21,315,400 received in 2011.

It is worth mentioning those financially supported current Policy Forum Strategic Plan for the year 2012:

- Aga khan Foundation
- American Jewish
- Agricultural Non-State Actors forum (ANSAF)
- Canadian International Development Agency
- European Union
- HIVOS
- International budget Partnership
- Irish Embassy
- Revenue Watch
- Swiss Development Corporation
- Tax Justice Network

In 2012 a total of TZS 797,607,803 equivalent to US Dollars 498,505 was disbursed by donors and partners with further TZS 32,392,000 valued at US Dollars 20,245 contributed by Policy Forum members. The total of TZS 830,494,181 valued at US Dollars 519,059 including other income was received. This is equivalent to 63.8% of the total budget TZS 1,303,780,445 for the year. The gap was financed by differed income from 2011 which amounted to TZS 443,735,000

Policy Forum began the year with a bank and cash balance brought forward from previous year of Tsh. 944,352,483 and as at 31st December 2012, Policy Forum had an equivalent bank and cash balance of Tsh. 481,149,546.
### Disbursements Only

<table>
<thead>
<tr>
<th>Year</th>
<th>Amount Budgeted</th>
<th>Amount disbursed</th>
<th>Amount spent</th>
</tr>
</thead>
<tbody>
<tr>
<td>2012</td>
<td>1,303,780,445</td>
<td>830,494,181</td>
<td>1,260,006,775</td>
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### Budgeted Disbursements and Pledges

<table>
<thead>
<tr>
<th>Year</th>
<th>Amount Budgeted</th>
<th>Amount obtained for year 2012</th>
<th>Budgeted Surplus/(Deficit)</th>
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</thead>
<tbody>
<tr>
<td>2012</td>
<td>1,303,780,445</td>
<td>830,494,181</td>
<td>473,286,264</td>
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### Summary of Disbursement Status for Year 2012

<table>
<thead>
<tr>
<th>Funding Agency</th>
<th>Amount Agreed in 2012 (in currency of agreement)</th>
<th>Status of Pledges for year 2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>Canadian International Development Agency</td>
<td>US$ 263,448</td>
<td>US$ 263,448 disbursed (Tsh 413,877,452)</td>
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<td>Swiss Development Cooperation</td>
<td>Tsh. 563,600,000</td>
<td>Tsh. 563,600,000 to be disbursed in Jan 2013</td>
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<tr>
<td>American Jewish World Service</td>
<td>US$ 150,000</td>
<td>US$ 150,000 disbursed (Tsh 244,950,000)</td>
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<td>IBP</td>
<td>US$ 39,980</td>
<td>US$ 62,848,560</td>
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<tr>
<td>Christian Aid</td>
<td>US$ 47,867</td>
<td>US$ 47,867 Disbursed (Tsh. 75,931,791)</td>
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<tr>
<td>Kepa (PF Member)</td>
<td>€10,000</td>
<td>Tsh. 20,117,000 disbursed</td>
</tr>
<tr>
<td>Forum Syd</td>
<td></td>
<td>TZS 5,000,000 Disbursed</td>
</tr>
<tr>
<td>SIKIKA</td>
<td></td>
<td>TZS 7,275,000 Disbursed</td>
</tr>
<tr>
<td>Other</td>
<td></td>
<td>Tsh 494,377</td>
</tr>
<tr>
<td>Total disbursed in 2012</td>
<td></td>
<td>Tsh. 830,494,181</td>
</tr>
</tbody>
</table>
Creating Better environment
In 2012 Policy Forum moved to the new rented office, in order to provide good office environment, investing on office resources was on top of the agenda for the year. Purchase of equipment such as new computers and generator among other things were done in 2012 to facilitate staff work.

In 2012 there has been stable working environment for both organization and its employees, there has been no (zero) turnover. Policy Forum has continued to support its staff on self-development through various training and courses. Two staff has acquired professional qualifications in their field of interests. Also eight staff from the secretariat participated in the in-house course on Outcome Mapping. Policy Forum took in two students and one graduate student for internship in different fields.

Governance Issues
Policy Forum elected its new Board of Directors during its 2012 Annual General Meeting held in Dar es Salaam on the 4th of May. The outgoing board members are Julie Adkins of SNV Tanzania, Esther Mongi of World Vision Tanzania, Emmanuel Kallonga of HAKIKAZI-Catalyst and Kellen Mngoya of HAFOTA who retired during this AGM leaving behind Sr. Rita Toutant - The Tanzania Network of Community Health Funds (TNCHF), Ben Taylor – Daraja and Audax Rukonge-Agricultural Non State Actors’ Forum (ANSAF) to stay on for another year so that there is a balance between replacement and continuity on the Board.

Hence, the new line up is as follows:

New Board Members
1. Aida Kiangi – ActionAid Tanzania
2. Godfrey Wawa- Forum Syd
3. Hellen Kijo-Bisimba – Legal and Human Rights Centre
4. Nemence Iriya/ Asia Lembariti - MACSNET

Board Members Staying on for Another Year
5. Sr. Rita Toutant - The Tanzania Network of Community Health Funds (TNCHF)
6. Ben Taylor - Daraja
7. Audax Rukonge - Agricultural Non State Actors’ Forum (ANSAF)
6. Conclusion

Policy Forum is continuing to grow as a network and over the years has worked to increase civil society’s participation in policy processes through strategic and selective engagement.

Challenges still exist, however. For example, for the past two years CSOs participation in the Annual General Budget Support Review has not been substantial as it used to be, widening the gap between CSOs, DPs and the government. We will continue, however to ask and demand spaces for CSOs to engage in these meetings.

Nevertheless, Policy Forum’s strengths as an institution has grown and this is evidenced from the quality of work we produce. Policy Forum has a very strong and committed team in place, this is demonstrated by the consistency of output, member participation though still inconsistent is progressively improving. Different stakeholders such as academicians and parliamentarians have been consistently seeking and acknowledging Policy Forum analysis, advice, input and general information on different policy issues.