

Does Context Matter?: A Study of PSAM's Approach to Social Accountability in Mozambique, Tanzania and Zambia



Abongile A. Sipondo

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Public Service Accountability Monitor (PSAM)

School of Journalism and Media Studies,

Rhodes University, PO Box 94, Grahamstown, South Africa

Tel: +27-46-6038358,

www.psam.org.za psam-admin@ru.ac.za

About the author: Abongile Sipondo is the Head of the Advocacy Impact Programme at the Public Service Accountability Monitor

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Executive Summary

There are numerous approaches to social accountability that have been developed over the last two decades. The Public Service Accountability Monitor has one such approach, called the Social Accountability Monitoring (SAM) approach, which it implements through its Regional Learning Programme. The study reviews the application of this approach in selected countries. The purpose is to compare and contrast the applicability of the approach in different contexts and to test the effectiveness of universal approaches to social accountability, using the SAM approach as an example in three contexts where the approach is currently applied.

1. PSAM's approach to social accountability

The PSAM approach to social accountability is premised on a rights-based approach to service delivery. The approach begins from the premise that all human beings have a basic set of needs that stem from the condition of being human. By ratifying a human rights treaty, states assume obligations and duties under international law to respect, to protect and to fulfil human rights. The ultimate goal of the PSAM social accountability approach is to monitor and enforce the realisation of social and economic rights by subscribing to a conceptual approach that redefines these rights as entitlements to capabilities.

2. SAM approach in different contexts

The PSAM approach to social accountability has been applied in Tanzania initially through training in fundamentals of social accountability to participants from that country. The Policy Forum has adopted the Social Accountability Monitor (SAM) concept since 2008, as the core strategy for its lobbying and advocacy work in particular at local level. Guided by the RLP strategy, the PSAM's mission in Zambia is to improve the ability of demand-side actors to make evidence-based strategic interventions in public resource management processes. The PSAM has been working in Mozambique since 2008. The PSAM Mozambique country strategy has been focusing on capacitating numerous actors in Mozambique.

3. Lessons for social accountability practice

3.1. Access to information

Access to information allows people to scrutinize the actions of their government and is the basis for informed debate of those actions. However, all the countries which are subject of this study have no access to information laws. Political will is critical in the quest for information, especially in regimes where there is no access to information laws. Civil society organisations need to build relationships with government officials.

3.2. Advocacy

A common issue in all contexts studied that is seen as hindering good relationships between the government and civil society was how civil society crafted their advocacy messages. In crafting the advocacy messages, social accountability practitioners have to ensure:

- Good packaging of the message and the way they communicate the message is crucial.
- That all stakeholders are involved in social accountability exercise, including the government.

3.3. Lack of trust between the demand and supply sides

In all three contexts it was revealed that sometimes officials view the SAM practitioners as doing the monitoring on the basis of personal agendas. Civil society needs to explain that SAM approach is not about personal witch hunt but about cooperation between the supply and demand sides and that the information requested is for them to do analysis in order to improve service delivery. It is crucial to begin engaging with government from the beginning of the monitoring process to the end; constantly informing the officials in a systemic manner how to better serve the citizens.

3.4. Cultivating Political will and building relations with supply side

Social accountability is political in nature and social accountability practitioners have to navigate a political terrain. It is difficult to work on social accountability without a link or relationship with the supply-side. It is important for the demand side to make the government to be more aware of what social accountability is. Moreover, it is crucial to find a space where the supply and demand sides assist each other with the civil society making people aware of government issues and citizens' rights and bringing to the government the concerns raised by the citizens.

3.5. Capacitating the supply side

It is important to involve in the supply side, including politicians and beaurocrats in training for effective SAM implementation processes.

3.6. Getting buy in from all stakeholders

There is no true culture of social accountability in Africa, and both the supply and demand sides need to make effort to create that culture. It is important to get a buy in from different stakeholders for the SAM approach implementation to be successful

3.7. Raising society's awareness of SAM and their rights

The most crucial aspect of social accountability is the demand for

justification and explanations from the officials by the citizens. It is therefore crucial to raise citizen's awareness of their rights. Effective social accountability depends on the citizens themselves.

3.8. Context matters: Adapting training to suit local needs

Current social-accountability programmes largely fail to acknowledge

the dynamic nature of incentive-driven power plays, pursuing instead a technical process which is removed from the contextual reality in which the citizens and state actors operate. Social accountability should be about learning to build trust-based relationships, allowing local realities and relationships, rather than imported social-accountability tools, to be the primary drivers of change.

Abbreviations and acronyms

AIDS	Acquired Immune Deficiency Syndrome
AG	Auditor General
APD	Advocacy, Policy and Dialogue
BDC	Babati District Council
CBOs	Community Based organisations
CIT	Council Intervention Team
CSA	Centre for Social Accountability
CSO	Civil Society Organisation
CSPR	Civil Society for Poverty Reduction
CPE	Civil Partnership and Engagement
CU	Concern Universal
EU	European Union
HIV	Human Immunodeficiency Virus
INGO	International Non Governmental Organisation
JCTR	Jesuit Centre for Theological Reflection
LGAs	Local Government Authorities
MASC	Mechanism to Support the Civil Societ
Macsnet	Manyara Regional Civil Society Network
MPs	Members of Parliament

MoU	Memorandum of Understanding
MuniSam	Municipality Social Accountability Monitoring
NGOs	Non-Governmental Organisations
PF	Policy Forum
PFM	Public Finance Management
PRM	Public Resource Management
PPMT	Provincial Programme Management Team
PSAM	Public Service Accountability Monitor
RLP	Regional Learning Programme
RPA	Research and Policy Analysis
SAM	Social Accountability Monitoring
SAMCOM	Social Accountability Monitoring Committee
VAT	Value Added Tax

1. Introduction

In any democracy, it is important to hold power into account. Unless public officials can be held to account, critical benefits associated with good governance—such as social justice, poverty reduction, and development—remain elusive. It is a fundamental principle of democracy that citizens have both the right and the responsibility to demand accountability and to ensure that government acts in the best interests of the people¹. Moreover, citizens have the right to know what actions have been taken in their name, and should have the means to enforce corrective actions when the government acts in an illegal, immoral and unjust manner. The World Bank definition of social accountability sums up actions that citizens can use to hold power into account. It defines social accountability as “refer(ring) to the broad range of actions and mechanisms beyond voting that citizens can use to hold the state to account, as well as actions on the part of government, civil society, media and other societal actors that promote or facilitate these efforts”².

Traditionally, the accountability of state actors has been a consequence of the implicit social compact between citizens and their delegated representatives and agents in a democracy. The social compact, in turn, derives from notions of human and citizen rights, as enshrined in the General Assembly of the United Nations’ Universal Declaration of Human Rights and in many national constitutions³. The concept of social accountability goes a bit further and underlines both the right and the corresponding responsibility of citizens to expect and ensure that government acts in the best interests of the people. The obligation of government officials to be accountable to citizens also derives from notions of citizens’ rights, often enshrined in constitutions, and the broader set of human rights. Social accountability initiatives help citizens understand their civic rights and play a proactive and responsible role in exercising those rights⁴.

Social accountability goes beyond the traditional accountability efforts by citizen or civil society to hold government accountable. The traditional practice of public accountability in most democracies have always emphasised the citizens or the public as final agent to whom all public servants (both elected and appointed) were to be held accountable⁵. Consequently, accountability was limited to actions such as public

¹ McNeil, M. and Malena, C., 2010 *Demanding Good Governance: Lessons from Social Accountability Initiatives in Africa*. Washington, DC: World Bank.; Tembo, F., 2012, *Citizen voice and state accountability : towards theories of change that embrace contextual dynamics*, Overseas development institute (ODI), London <http://www.odi.org.uk/resources/docs/7557.pdf>; Peng, D. 2005 ‘The Freedom of Information Act: Holding Government Accountable’, available at <http://groups.csail.mit.edu/mac/classes/6.805/student-papers/fall05-papers/foia.pdf>

² World Bank, 2006, ‘Social Accountability Sourcebook’, available at http://www.worldbank.org/socialaccountability_sourcebook/PrintVersions/Conceptual%2006.22.07.pdf

³ Malena and Mcneil, 2010, *supra*, note 1

⁴ World Bank, *supra* note 2

⁵ Haque, M. 2007, ‘Limits of Public Accountability Under the Reinvented State in Developing Nations’, *Public Administration Quarterly*, Vol.31; No.4: 429 – 452; 25; Malena, C. with Forster, R. and Singh, J. (2004) ‘Social

demonstrations, protests, advocacy campaigns, investigative journalism, and public interest lawsuits, judicial mechanisms; political means by way of voters and elections, legislative committees, parliamentary questions, financial audits, ministerial controls, advisory committees, ombudsmen, anti-corruption agencies, public hearings, opinion polls, and media scrutiny⁶. Social accountability extended these mechanisms to include efforts to enhance citizen knowledge and use of conventional mechanisms of accountability and efforts to improve the effectiveness of internal accountability mechanisms through greater transparency and civic engagement. Social accountability efforts have also concentrated on strengthening legislative oversight and links between parliamentarians, citizens and civil society organizations are also important ways to enhance social accountability⁷. It has also expanded mechanisms to hold government accountable to include the use of participatory data collection and analysis tools combined with enhanced space and opportunity for citizen/civil society engagement with the state. These innovations in accountability have led to a new generation of social accountability practices to include participatory public policy-making, participatory budgeting, public expenditure tracking, and citizen monitoring and evaluation of public services⁸.

There are numerous approaches to social accountability that have been developed over the last two decades. The Public Service Accountability Monitor has one such approach, called the Social Accountability Monitoring (SAM) approach. The study reviews the application of this approach in selected countries. The purpose is to compare and contrast the applicability of the approach in different contexts and to test the effectiveness of universal approaches to social accountability, using the SAM approach as an example in three contexts where the approach is currently applied. Ultimately, the aim is to improve the social accountability monitoring practice of the PSAM and other social accountability initiatives from lessons extracted from the implementation of this approach in different contexts. The countries studied are Tanzania, Mozambique and Zambia.

2. The PSAM

The Public Service Accountability Monitor (PSAM) is a research unit in the School of Journalism at Rhodes University in Grahamstown, South Africa. Through its work, PSAM is committed to the institutionalization of the right to social accountability and the realisation of social and economic rights through the effective management of

Accountability: An Introduction to the Concept and Emerging Practice.' Social Development Paper No. 76. Washington, DC: World Bank.

⁶ Callamard, A., 2010 'Accountability, transparency, and freedom of expression in Africa'. Social Research, 77(4): 1211-1240.; Haque, 2007, supra, note 5

⁷ World Bank, supra note 2

⁸ Ibid.

public resources. The PSAM aims to work jointly with civic actors in various countries to engage in systematic and evidence based public resource management monitoring that leads to improved service delivery. To this end, the PSAM, through its Regional Learning Programme (RLP), enters into partnerships with organisations in identified Sub-Saharan African countries. The aim of the partnerships is to jointly engage in systematic and evidence based public resource management (PRM) monitoring in different contexts. Moreover, the partnerships create an avenue through which the adaptability and applicability of the SAM approach and tools to monitoring for sustainable improvement in service delivery outcomes can be tested.

The vision of the PSAM is that the right to social accountability is universally fulfilled thereby creating a world in which:

- Duty bearers justify and explain their decisions and actions in the management of public resources and in pursuit of the progressive realisation of human rights, with an emphasis of socio-economic rights.
- Duty bearers do this as a matter of course in their core documentation and where weaknesses are identified, timely corrective action is taken.
- rights holders are demanding these justifications, explanations and corrective action when they are not provided adequately.

3. The Regional Learning Programme (RLP)

The RLP is one of the three programmes of the PSAM and offers the Fundamentals of Social Accountability Monitoring course three times a year, and has offered the course to participants from a variety of countries, including Tanzania, Zambia and Mozambique. The course provides an introduction to a rights-based approach to social accountability (SAM approach) and an integrated systemic approach to evidence-based social accountability monitoring of public resource management frameworks. The primary target audience of the course is civil society decision-makers, trainers on social accountability monitoring and advocacy, government oversight bodies, media practitioners, and academics.

In addition to offering the Fundamentals course, the RLP engages in partnerships with organisations falling within its target group to test the applicability of its approach to social accountability monitoring in a number of contexts within Sub-Saharan Africa. The nature of these partnerships is context-specific and the terms are negotiated and agreed between the RLP and its partners.

In testing the applicability of its approach, the RLP aims to answer the following research questions:

- Whether and how understanding of the PRM as a system helps demand side actors engage better with PRM processes.

- Whether and how the engagement leads to a better mutual understanding of service delivery problems.
- Whether and how the improved understanding of the PRM as a system by demand side actors leads to a more productive interaction between demand and supply side in addressing service delivery problems.
- Whether and how evidence-based engagement with the PRM system by demand side actors in Sub-Saharan Africa improves service delivery.

One of the main activities carried out in a partnership is training of civic actors in PSAM tools/ approach that empower members of partner organisations to carry out systematic advocacy activities that target systemic weaknesses in their contextual PRM framework. The training courses are an adaption of the Fundamentals of Social Accountability Monitoring course offered by PSAM and accredited by Rhodes University, South Africa.

4. PSAM's approach to social accountability

The PSAM approach to social accountability is premised on a rights-based approach to service delivery. It assumes that all human beings are active holders of fundamental rights as guaranteed within the Universal Declaration for Human Rights of 1948, and not passive users of public services. The approach begins from the premise that all human beings have a basic set of needs that stem from the condition of being human.

An in-depth analysis of needs is particularly important to social accountability in the context of the state as a vehicle for public service delivery because needs ought to be the basis from which development decisions are made. From an agreed set of basic human needs, a set of universal, inalienable, indivisible, and interdependent human rights has evolved over the years which culminated into the Universal Declaration of Human Rights in 1948. This global human rights framework continues to emerge from a recognition that all human beings deserve to have a common set of basic needs met, at least to a minimally acceptable standard, and that they deserve this solely by virtue of being human. The United Nations Human Rights Framework recognises that if all human beings are rights-holders, there must be a level of institution that performs the role of duty-bearer to ensure that rights are realised in accordance with the treaties and covenants therein. It therefore acknowledged that the state, through its government, would be the primary vehicle through which these rights could be realised. This presents the obvious limitation that the ability of states to guarantee the immediate realisation of at least some of these rights is hindered by the considerable disparity among states in terms of access to resources.



Maganjwa Primary school, Babati, Tanzania

By ratifying a human rights treaty, states assume obligations and duties under international law to respect, to protect and to fulfil human rights. The obligation to respect means that States must refrain from interfering with or curtailing the enjoyment of human rights. The obligation to protect requires States to protect individuals and groups against human rights abuses. The obligation to fulfil means that States must take positive action to facilitate the enjoyment of basic human rights and where individuals or groups are unable to access human rights for themselves, states are obliged to provide them directly.⁹

The PSAM 's definition of social accountability has three components. Firstly, the PSAM sees all human beings as equal and therefore have an equal right to participate in the human development discourse. Secondly, that all decisions and actions of the state must be primarily aimed at progressively realising the human rights of citizens within available resources. And thirdly, in order to ensure that the state realises these rights in

⁹ United Nations Committee on Economic, Social and Cultural Rights, (1999, May 12) General Comment no. 12: *The Right to Adequate Food* (11 of the Covenant). E/C.12/1999/5 Retrieved 12 September 2011 from <http://daccess-dds.ny.un.org/doc/UNDOD/GEN/G99/420/12/PDF/G9942012.pdf?OpenElement>.

the most efficient and effective way possible, governments, citizens and the global community need to acknowledge that:

- all states have the obligation to proactively justify and explain all their decisions and actions to citizens in the most accessible way possible in their routinely produced documentation;
- whenever these justifications and explanations are not provided or not provided adequately, all citizens have the right to demand them; and
- when any real or potential weaknesses are identified in the way public resources are managed, all states have the obligation to ensure that corrective action is taken in a timely manner and that preventive action is taken to ensure that any systemic weaknesses are addressed and that potential weaknesses do not materialise in the longer term.

The ultimate goal of the PSAM social accountability approach is to monitor and enforce the realisation of social and economic rights by subscribing to a conceptual approach that redefines these rights as entitlements to capabilities. A main premise of the PSAM conceptual approach is that there are five basic processes through which states manage public resources to deliver services that realise the socio-economic rights of citizens, namely:

- Strategic Planning and Resource Allocation.
- Expenditure Management.
- Performance Management.
- Public Integrity Management.
- Oversight.

These five processes also make up the social accountability system through which the state is accountable to its citizens on an on-going basis between elections.

Finally, the PSAM approach is based on the assumption that strong and evidence-based demand for social accountability is necessary for its effective supply. Accountability of government officials and other actors responsible for the management of public resources with respect to citizens will only ever be as strong as the demand articulated by demand-side actors. Consequently, the transformation of the state into a social accountability system requires the active participation by demand side actors in monitoring the five processes of the public resource management framework to give effect to with the right to social accountability'.¹⁰

¹⁰ CSA Framework of Change (August 2008).

5. Introducing the PSAM approach: Fundamentals of social accountability course

The fundamentals of social accountability course aims to promote the right to social accountability and to share with participants from Southern and East Africa the tools developed by the Public Service Accountability Monitor (PSAM) to give effect to this right. The training objectives of the course are to enable participants to:

- value the effectiveness of resource allocations to key service delivery departments/agencies;
- evaluate the responsiveness and coherence of strategic plans;
- track expenditure against budget allocations of service delivery projects, programmes and/or departments;
- monitor the performance of departments/agencies responsible for service delivery against strategic plans and service delivery commitments;
- evaluate the effectiveness of integrity/disciplinary systems within service delivery departments/agencies;
- evaluate service delivery departments/agencies' accountability to oversight bodies; and,
- apply a set of social accountability and service delivery monitoring tools to their current work practices and organisation-specific advocacy strategy.

In addition, participants are exposed to several advocacy strategies, including examples of where such advocacy has been effective in the region and elsewhere in the world. They are also introduced to case studies of effective social accountability monitoring currently being undertaken in the region.

It is only by obtaining answers to these practical questions from government departments and/or private service providers that civic actors are enabled to meaningfully participate in public decision-making processes. However, the ability to answer these questions is dependent on the existence and effective functioning of social accountability processes within the state. These social accountability processes include:

- planning and resource allocation;
- expenditure management;
- performance management;
- integrity; and,
- oversight.

Although each of these processes is distinct, when effectively implemented and successfully combined, they form an integrated social accountability system. Each process forms part of a chronological sequence and, therefore, the ineffective implementation or weakness of one process has a knock-on effect on other processes, resulting in the weakness of the overall system.

6. PSAM approach applied in different contexts

Tanzania

The PSAM approach to social accountability has been applied in Tanzania initially through training in fundamentals of social accountability to participants from that country¹¹. An agreement with PSAM was to reserve places per year for Tanzania on the Fundamentals course subject to proposed participants meeting the set criteria. These places were shared among the various potential SAM implementers from civil society, Parliament, and the media¹². The PSAM partners in Tanzania had to identify participants for training with a view to obtaining maximum impact of social accountability practice in the country. It was decided to include at least one parliamentarian (or parliament-related person) and one media person among the Tanzanian participants. Commitments were made to reserve places for the partners of the Policy Forum, which became the principal partner of the PSAM in Tanzania¹³.

The Policy Forum is a network of NGOs incorporated as a non-profit company under the Companies Act of 2002 with membership currently includes over 70 non-governmental organizations registered in Tanzania¹⁴. They are drawn together by specific interest in influencing policy processes to enhance poverty reduction, equity and democratization. The network strives to increase informed civil society participation in decisions and actions that determine how policies affect ordinary Tanzanians, particularly the most disadvantaged. To enhance their effectiveness they have narrowed the focus of their work to main activity clusters. These are Local Governance, Public Money and Active Citizens' Voice¹⁵.

The Policy Forum has adopted the Social Accountability Monitor (SAM) concept since 2008, as the core strategy for its lobbying and advocacy work in particular at local level. The PSAM has trained members of the Policy Forum first as implementers and later as trainers of trainers. In Tanzania, the Policy Forum (PF) and its partners implement SAM through a number of activities that lead to the determination of the Accountability status of a public service department or office, follows a step-wise implementation¹⁶:

- Choosing the Implementation Partner and the Stake-holders through a open, participatory and competitive process by the Annual General Meeting of Policy Forum members.
- Orientation training which involves a three-day overview training workshop for the partner networks leadership is organized.

¹¹ Public Service Accountability Monitor strategic Plan 2008

¹² Ibid

¹³ Ibid

¹⁴ Introduction to Policy Forum at <http://www.policyforum-tz.org/about>

¹⁵ Policy Forum Case Study on HIV/Aids available at <http://emjee.biz/resources/case-study-PF-HIV-AIDS.pdf>

¹⁶ <http://www.policyforum-tz.org/about>

- Implementation Training involving a six-day intensive training to the selected team on step-by-step undertaking of Social Accountability Monitoring exercise.
- Undertaking Accountability Assessments which is the actual step-by-step implementation of the Accountability Monitoring exercise including the analysis of the collected information
- Sharing of the findings, presented to the service provider for justifications and explanations and for decision making on improvements.
- The final step is undertaking follow up actions on the findings.



Teachers' ablution facilities at Dabili Primary School

Manyara Regional Civil Society Network

One of the organisations that implement the SAM approach in Tanzania is the Manyara Regional Civil Society Network (MACSNET), a coalition of civil society organisations (CSO'S) that operates in the Manyara Region. The network has dedicated itself to undertake various activities in lobbying and advocacy towards poverty eradication and

sustainable human development. It was established in November 2006 and registered in April 2007, with its main objective as policy advocacy and enhancing good governance at district, regional and national levels¹⁷.

The network intends to achieve its objectives by building capacity of its members so that they can effectively and systematically engage with the community initiatives, facilitate policy advocacy initiatives as well as enhancement of good governance and accountability¹⁸. Currently, the coalitions have about 48 members. Macsnet has been working with the Policy Forum for over 4 years. Prior to their encounter with Policy Forum, they had not done any work that applied the SAM approach.

In 2009, Macsnet formed a partnership with Policy Forum aimed at conducting capacity building for their members. The training was on the SAM approach, with Policy Forum training their members in conducting social accountability. The trainees were mainly program officers as the network failed to get the executive directors to attend the training. They continue to receive technical support from the Policy Forum, who regularly comes in to provide that support¹⁹.

After this training, this network began to conduct social accountability monitoring in Babati, focusing on health and infrastructure as these were areas that needed the most intervention. They decided on health and infrastructure because members realized that services provided by the government in these sectors were poor²⁰. For example, there was no regional hospital in the area as well as poor and inadequate provision of services. Moreover, there were constant complaints from the citizens about poor state of health services in Babati. The citizens also complained about poor infrastructure and that there was no logical link between the allocated budget and the infrastructure in the area²¹.

The second SAM exercise was performed in Babati District Council (BDC) between April and December 2009. Several cases were identified by the Council Investigation Team (CIT) and the HIV/ AIDS fighting project was selected based on various criteria: Availability of information, the quality of the proposal (lack of priority and vision to contribute to improved services), the quality of the budget to name just a few.²²

¹⁷ See Policy Forum Case Study on HIV/Aids, supra note 15

¹⁸ Ibid

¹⁹ Interview with Mr Nemency Iria, Director of Macsnet

²⁰ Ibid

²¹ Ibid

²² See Policy Forum Case study on HIV/Aids, supra note 15

Zambia

In May 2012, PSAM's RLP signed a partnership MOU with three Zambian organisations jointly, Caritas Zambia, Civil Society for Poverty Reduction (CSPR), and the Jesuit Centre for Theological Reflection (JCTR), identified for their strength and experience in monitoring accountability in the Zambian PRM. One of the aims of the MOU was to contribute to the strengthening of Zambian civic actors' ability to interact with supply side actors on systemic issues in public resource management through training²³.

Guided by the RLP strategy, the PSAM's mission in Zambia is to improve the ability of demand-side actors to make evidence-based strategic interventions in public resource management processes.

Even though Zambia has maintained political stability and peace throughout its democratic history Worldwide Governance Indicators²⁴ show that government effectiveness and control of corruption have received low scores. Concerning corruption, the efficiency and effectiveness of the institutions responsible for addressing this are weak, arguably due to legislation that does not empower those that can act to act²⁵.

In Zambia civil society has historically been at the forefront of advocating and achieving political and social change in the country. However necessarily civil society depends on the institutions of democracy to institute concrete change that usually depends on legislative reforms and political will²⁶. To that effect the PSAM in Zambia trains civic actors in a systematic understanding PRM but with a lens of oversight. In a baseline study conducted in the country, the PSAM found that the civil society organisations monitoring the management of resources and governance have consistently engaged government but in an arguably less systematic manner than they could. Moreover, the legislative limitations on civic engagement have often times left civic actors hamstrung in their quest to monitor proper management of resources and ensure they are utilised for the right purpose.

The PSAM also found that the legal framework underpinning the public resource management framework also has fundamental weaknesses as regards accountability. This is primarily because in the utilisation of public resources, an inordinate level of discretion and latitude is vested in the Executive wing of government. Thus accountability weaknesses largely remain in Zambian law. Primary among these is that

²³ Miti L., Regional Learning Programme (RLP) Zambia in-country Work Strategy Paper 2012-2014

²⁴ The WGI are research dataset summarising the opinions of numerous respondents and data from various sources on the quality of governance. The indicators measure six dimensions of governance: political stability and absence of violence/terrorism, government effectiveness, regulatory quality, rule of law and control of corruption and voice and accountability.

²⁵ Miti, L. , (2013) Baseline Study of the Zambia Social Accountability Monitoring Partnership

²⁶ Ibid

much in the planning and budgetary cycle is overseen by practice making it difficult for both Parliament and civic actors to systematically engage with accountability issues.

Furthermore, the PSAM analysis found that in addition, the absence of access to information legislation further makes seeking accountability from a rights-based perspective by civic actors challenging. This is because the current legislative environment allows for government to classify as secret any information it decides to. The secrecy around government use of public resources in this instance is thereby legislatively compounded. An Access to Information Bill has been drafted but remains to pass as law. Without it, much social accountability work may be limited.

After surveying the Zambian context and what can possibly be achieved through working with partners, the PSAM wishes to see Zambian partner organisations who²⁷:

- are demonstrating an integration of PSAM social accountability tools with their own tools to engage with the evidence produced through PRM processes to monitor and evaluate the delivery of services
- are demonstrating an understanding of systemic linkages between PRM processes in their monitoring and advocacy work
- are documenting their contextual circumstances and experience in engaging with PRM and service delivery issues to make progressive and sustainable improvements to their social change interventions
- are accessing lessons learnt from social accountability interventions in different contexts to add to their work
- are influencing their boundary partners to increasingly view PRM as a social accountability system and link service delivery issues to systemic weaknesses therein

In Zambia, the PSAM's strategies are to be targeted at two levels. Firstly, they are targeted at the level of the organization's partners, and secondly, at the level of PSAM's partners' environment²⁸. The strategies aimed at influencing PSAM partners will include²⁹:

- an MOU with activities incorporated in their organisational planning;
- offering Fundamentals of Social Accountability Monitoring courses;
- offering technical assistance to provincial groups on rights based approach to social accountability monitoring;
- organising lesson learning exchanges with partner organisations;
- linking partners to existing networks of trained social accountability monitoring practitioners; and assisting partners identify donors and develop fundraising strategies as and when needed.

²⁷ Miti, L., supra note 23

²⁸ ibid

²⁹ Ibid

The strategies aimed at influencing the environment of PSAM partners will include³⁰:

- publications on the public resource management framework;
- and involvement in ongoing engagement with legislative/policy changes influencing public resource management through submissions.

Jesuit Centre for Theological Reflection

The Jesuit Centre for Theological Reflection (JCTR), a research, education and advocacy team that promotes study and action on issues linking Christian Faith and social justice in Zambia and Malawi. The JCTR began in 1988 as a project of the Zambia-Malawi Province of the Society of Jesus and is similar in orientation to other Jesuit social centres around the world³¹. It has a secretariat in Lusaka that operates three programmes, the social conditions programme, the Faith and Justice programme and the Economic Development Programme

The JCTR engages in research on key social issues like cost of living, social implications of debt servicing, accessibility of healthcare and education, and integrity of local democracy with a strong publication advocacy aspect to its work. It is routinely invited to represent civil society on government structures of accountability such as Sector Advisory Groups in the ministries. As an organisation, the JCTR commands great respect for its advocacy experience and especially its Basic Need Basket that has become an institution in the fight for economic justice³².

While the national JCTR office has the strongest PRM reputation, its work has the weakest relation to a systems approach to social accountability monitoring. The budget tracking work carried out by its subnational outreach teams is focused largely on resource allocation and expenditure³³.

Interviews for this study with the JCTR staff revealed that the organisation works on PRM and have applied the skills acquired from skills the PSAM's SAM framework to make submission on budget processes. One example mentioned is on tax issues, where the organisation called for the taxes on certain commodities to be reduced so that many people can access them including tax on bread and other basic needs basket. Their call to the government had an impact as Zambia now has zero VAT on bread³⁴.

The JCTR also works on sectors such as education and health. On education they have called for more resources to be channeled to education sector and the 2014 Zambian budget allocation on education has increased, and JCTR is of the view that their call might have contributed to such increase. Moreover, as the result of PSAM training, the

³⁰ ibid

³¹ JCTR website June 2013 at <http://www.jctr.org.zm/about-us>

³² For several years, JCTR has carried out in Lusaka a monthly survey of prices of basic family necessities (e.g. food housing, etc.) comparing the finding with take-home wages.

³³ Miti, L., supra note 25

³⁴ interview with Musonda Kabinda, Programme officer at JCTR.

organization has begun not to just advocate for prudent spending but also try to understand the legal framework around the PRM and now check what is stipulated in the law. They also interrogate the Auditor General (AG)'s report, and go further and review other stakeholders such as the public accounts committee³⁵.

Furthermore, the JCTR's advocacy is informed by evidence. They gather information on the ground and see advocacy issues from what has been raised by the communities. As a result their localised version of the SAM training is meant to train people on the ground³⁶. In Livingstone, where they have trained activists, there has been change, with the people trained engaging with service providers and mobilising the community to demand for answers.

The JCTR claims to have seen a change in government behavior as the government is moving towards the direction that the organisation would like to see, one example being tax issue mentioned above. The tax threshold was 2500 Kwacha, they proposed it to be upped to 3500 and the government increased it to 3000 Kwacha³⁷.

Caritas Zambia

The Caritas Zambia was established in 2001 to animate the work of the Catholic Commission for Justice and Peace and the Catholic Commission for Development with the mandate to foster and uphold human dignity through promotion of integral human development³⁸. The organisation aims to improve outcomes for all of Zambian society, specifically targeting the poor and marginalised, through its core programme areas: organisational development, gender equality, HIV/AIDS prevention, sustainable agricultural, emergency response and preparedness, and governance and human rights. Caritas Zambia's organisational work covers a large spectrum that includes among others, agriculture, disaster preparedness, spiritual formation and governance. Accountability monitoring work falls under Caritas' governance work. PRM monitoring is largely carried out by the Economic Justice group³⁹.

In choosing to partner with Caritas, The PSAM realized that in relation to the PSAM approach Caritas pre-existing budget tracking training and subsequent budget tracking interventions in the identified dioceses can be strengthened in the following ways⁴⁰:

³⁵ ibid

³⁶ ibid

³⁷ ibid

³⁸ <http://www.caritaszambia.org/index.php/about-us/87-caritas-zambia-profile>

³⁹ ibid

⁴⁰ Miti, L., supra note 23

Situating the budget tracking in a systemic approach that relates the resource allocation to other process is the social accountability system:⁴¹

- Expanding the training to introduce Justice and Peace members to the systematic approach to social accountability monitoring.
- Systematically linking the social accountability monitoring to service delivery failures.
- Strengthening the identification and exploitation of entry points for the Justice and peace monitors engaging with each process of the social accountability system.

Civil Society for Poverty Reduction

The Civil Society for Poverty Reduction (CSPR) , a civil society anti-poverty advocacy network of over 140 organisation working for pro-poor development in different parts of Zambia⁴². The CSPR, in its work, focuses on five sectors as follows Agriculture, Health, Education, Water and Sanitation. With the overall focus in poverty reduction, it engages with these sectors to monitor whether communities are accessing services that are being delivered by service providers. With a secretariat in Lusaka, CSPR implements all its activities in the provinces where it operates under a provincial coordinator who has administrative control of CSPR activities⁴³.

The organization has a provincial structure is made up of a Provincial Programme Management Team (PPMT) which is the CSPR provincial decision making body. It is constituted from member organisations. The PPMT breaks down into four Task Forces that are aligned with the four programmes at the secretariat as follows⁴⁴:

- Research and Policy Analysis (RPA)
- Civic Participation and Engagement (CPE)
- Advocacy Policy and Dialogue (APD)
- Information Management and Communication (IMC)

The CSPR social accountability work is carried out jointly by all its programmes with each being responsible for sections of it though a financial year. The Civic Participation and Engagement Task Force organises an Interface Meeting between the community and government officials in relation to the research findings⁴⁵. The report is simplified

⁴¹the social accountability system understood by PSAM is set out above

⁴² CSPR website at <http://www.csprzambia.org/index.php/aboutcspr>

⁴³ ibid

⁴⁴ Ibid

⁴⁵ Interview with Makani Mzyece of CSPR

for the community who then have an opportunity to interact with the gathered officials. The community also has an opportunity to validate the research findings and expand on them if required. The community also asks questions on service delivery issues identified. The government officials for their part have the opportunity to interact with the community on service delivery issues, to respond to the research finding as well as answer community questions⁴⁶.

The CSPR's Civic Participation and Engagement Task force then notes the communities' concerns as well as government responses. These are condensed to be used for a subsequent interface meeting held at provincial level. At this point, the Civic Participation and Engagement Programme hands over the intervention to the **Advocacy and Policy Dialogue (APD)** Task Team. The APD Task Team which is aligned to the APD Programme at the National Office⁴⁷. The advocacy work is escalated to the province is because the provincial level has influence on policy that the district does not have. The Provincial Dialogue brings together Provincial Sector Heads as well as other provincial officials. The CSPR also invites other CSO's involved in PRM and service delivery monitoring to the meeting. Selected community members who attended the District Interface meeting also attend the Provincial meeting⁴⁸. The aim of Provincial Interface meeting is to allow stakeholders to make interventions on the basis of the research findings coming up from the District as well as engage with the report of the proceedings of the District Meetings. Provincial officials then provide responses on service delivery issues. Any issues that can be resolved at Provincial level are dealt with. The issues over which the province has no capacity are escalated to the national⁴⁹. At this level the work is taken over by the **Information and Management and Communication Programme**. The programme brings together all the information from the various provincial interventions for advocacy at the national level.

Of the three PSAM partners, the PSAM's baseline study found that CSPR had the most systematic and holistic approach to social accountability monitoring. While not all the process of the social accountability monitoring system were engaged with in interventions, opportunities to do so existed in the advocacy framework utilised by the organisation⁵⁰. CSPR pre-existing work showed the strongest appreciation of inter-linkages between accountability monitoring and improved service delivery. Further, it had the most structured and systematic approach to engagement with duty bearers. CSPR was also the only partner that directly articulated a rights-based approach to accountability in its training. CSPR also showed strong organisational documentation culture documentation.⁵¹

⁴⁶ ibid

⁴⁷ CSPR website, supra note 42

⁴⁸ Mitj., L. supra note 25

⁴⁹ ibid

⁵⁰ Mitj., L. supra note 25

⁵¹ ibid

In relation to the PSAM approach and partnership strategy, the PSAM found that the CSPR's training and subsequent budget and service delivery monitoring can be strengthened in the following ways:

- Strengthening the content of the rights based approach in the training
- Introducing and strengthening monitoring for inter linkages between identified service delivery failures and all the processes of social accountability system
- Introducing and strengthening monitoring for systemic service delivery failures
- Strengthening monitors ability to engage identify and engage with primary documents produced in the five processes of social accountability set out by PSAM
- Strengthening systematic approach to service delivery monitoring that views improved service delivery as a result of government working as social accountability system
- Strengthening the lesson learning aspect of CSPR interventions with government

The CSPR staff has been trained on the SAM approach and they reported that the tools they learnt from the approach are such that they are able to apply them in work place. Some of the tools from the SAM approach had already been applied by the CSPR before they received the SAM training, but not in a systemic way as proposed by the SAM approach⁵². The CSPR reviews strategic plans, either of a ministry or other government institution and use that as a starting point in reviewing whether that strategy meets the desired goals. The other steps in the five steps offered in the SAM training were new to the CSPR, such as the performance management but they realized after the training that these steps are very relevant to their work⁵³. The CSPR is contemplating moving away from just expenditure tracking to look more at the performance aspect. Moreover, the CSPR have been working with different stakeholders to promote oversight and have been working with parliament when it comes to budget debates. The laws in Zambia give parliament very limited room to make changes to the budget itself but CSPR have been strong advocates for parliamentary oversight role to be increased⁵⁴.

Mozambique

The PSAM has been working in Mozambique since 2008. During a visit to the country by PSAM staff (then called CSA), great interest was expressed (mostly by INGOs and

⁵² Interview with Makani Mzyece

⁵³ ibid

⁵⁴ ibid

donors) in building capacity to conduct social accountability monitoring amongst civil society in Niassa⁵⁵. In discussions with the Swedish and Irish (who support work in Niassa), it was agreed that four potential Social Accountability trainers would attend the Fundamentals course⁵⁶. Concern Universal helped organize the CSA first workshop in Niassa and the relationship between the two organisations started from that time. Latter Concern Universal and AMODE trained local trainers in social accountability with financial support from FORD Foundation and technical support from CSA in 2010-2012 period⁵⁷.

The aim of the workshops was to have participants implement the tools in their local context. The content was to be Mozambique-specific and focus on monitoring local government. It was also decided that stronger candidates would be identified as potential SAM facilitators, and would therefore be invited to attend the Fundamentals of Social Accountability Monitoring in Grahamstown⁵⁸.

The PSAM Mozambique country strategy has been focusing on capacitating numerous actors in Mozambique. It provided for ten places per year reserved for Mozambican participants on the Fundamentals course in 2009 and 2010. These places were to be shared by⁵⁹:

- Maputo-based civil society;
- Niassa-based civil society; and
- strong participants from the Amode in-country workshops.

While Parliamentarians and journalists were also seen as part of the groups to be invited to the Fundamentals workshop as part of a broader country approach, initially it was seen as not appropriate for the Mozambican reality and could only be appropriate in a few years time as civil society capacity was developed. The strategy also provided for country support which included providing capacity building.

The interventions in Mozambique sought change on the capacity of demand side actors in order to participate effectively in public resources management processes while changing their capacities and actions in order to recognize the right to get justifications and explanations in the allocation and use of public goods and resources available⁶⁰.

However the PSAM realized limitations were present in that context, such as the necessity of technical assistance, the lack of trusts between demand side and supply side actors, the importance of creating trust between actors in a highly politicized environment where social accountability can be confused with party driven politics⁶¹.

⁵⁵ CSA Mozambique in-country Strategic plan (2008)

⁵⁶ *ibid*

⁵⁷ Interview with Helena Skember, Director of Concern Universal Mozambique

⁵⁸ CSA Mozambique in-country Strategic plan, *supra* note 55

⁵⁹ *ibid*

⁶⁰ *ibid*

⁶¹ *ibid*

To that effect, the PSAM's vision for their work in Mozambique was:

“A Mozambique in which: -duty bearers justify and explain their decisions and actions in the management of public resources and in the pursuit of the human rights of Mozambicans in accordance to the Mozambican constitution and international treaties – Supply side actors justify and give explanations for their actions in a timely manner, having consistency in their policies between the planning, the execution and the implementation – Demand side actors have the tools and the capabilities to demand justifications and assess the decisions of government actors, being able to engage in the debates in relationship with the priorities and the rationale of the government actions”

The PSAM Mozambique country work Mission has been:

“Through the training of members of civil society organizations, government officers, think tanks that support government work and media from Mozambique in the Fundamentals of Social Accountability Monitoring [PSAM] expect to increase the capacity to assess and design policies within the partner organizations in Mozambique in a period of 5 years. In addition the training will be adapted to the contextual conditions and the particularities of Mozambique in order to ground the tools and increase the applicability of the Social Accountability”.

The SAM approach has been applied by a number of organizations in the country, and training in the approach has increased the capacity of particular organizations to undertake PRM and has informed initiatives from them.

Concern Universal

In Mozambique, amongst other organisations, the PSAM works with Concern Universal, an organization that has applied the SAM approach at municipal level. Concern Universal began working with the people of Mozambique when they fled to Malawi as refugees during civil war. Concern Universal improves social accountability, provides safe water and sanitation, and helps families grow enough nutritious food. They also educate on and facilitate local government interaction, to help rural people develop the infrastructure and access the Public Services they are entitled to. CU Mozambique has a bottom-up, demand driven and collaborative approach with full involvement of the beneficiaries, decentralised structures and the local government⁶².

⁶² See more information about Concern Universal Mozambique at <http://concern-universal.org/where-we-work/mozambique/#summary-scroll>

Through partnership with local Community Support Organisations, local communities and local government, Concern Universal Mozambique works to⁶³:

- Assist citizens and CSOs to monitor and demand transparency and accountability from the Government regarding provision of services and public resources allocation;
- Improve incomes, health and well-being indicators of vulnerable communities;
- Improve the effectiveness and efficiency of local CSOs by ensuring that they have skills, confidence and apply necessary approaches to achieve their objectives.

Concern Universal Mozambique was first exposed to the SAM approach in 2009 when they helped organize first social accountability training in Niassa Province. Later they participated in a course in Social accountability which was offered to them by the PSAM in South Africa. As a result of the training, the Concern Universal began to adhere to the five components of the SAM approach but have adapted to the Mozambique reality, meaning that they use the Mozambique legal framework to apply the SAM approach⁶⁴. They have translated and adopted to the Mozambican reality the PSAM training material. However, Concern Universal initially only implemented parts of the SAM approach, focusing more on some components of the cycle (planning, needs assessment, expenditure management, performance management), and did not fully follow the systemic approach that the SAM approach calls for. Concern Universal has been Implementing SAM at local level (municipality, districts, and province) with some action at national level (with the Parliament))⁶⁵.

MUNISAM⁶⁶

A key element in the MuniSAM Program is the mobilization of SAMcoms - Social Accountability Monitoring Committees (with representatives from municipal neighborhoods –bairros), which are trained and continuously supported (through “learning by doing” approach) to analyze the annual municipal plans and budgets as compared to the annual municipal reports/expenditures, identify critical issues backed by evidence collected in the field and elaborate a report with findings⁶⁷. Within MuniSAM citizens have an active role in demanding high quality delivery of public services and a transparent and accountable use of public resources. Moreover, MuniSAM conducts corresponding training of members of Municipal Assembly and

⁶³ ibid

⁶⁴ Interview with Fransisco Tabua and Imbwanga Mapoco of Concern Universal, Mozambique

⁶⁵ ibid

⁶⁶ Diaz, F. A, Study on the Impact of the MuniSAM program by Concern Universal Mozambique, 2014
http://www.academia.edu/9630946/A_Study_on_the_Impact_of_the_MuniSAM1_program_by_Concern_Univers
[al_Mozambique](http://www.academia.edu/9630946/A_Study_on_the_Impact_of_the_MuniSAM1_program_by_Concern_Univers)

⁶⁷ ibid

Municipal Council⁶⁸. This process ends with a public hearing, an event summoned by the citizens and with participation of the Municipal Council and Assembly that feeds into the municipal planning and budgeting process for the following year. At the core of the MuniSAM's approach is the progressive satisfaction of human needs through available resources. MuniSAM fosters continuous, constructive and systematic interaction between all key stakeholders in target municipalities. The program is promoting simple and comprehensive tools that municipal actors are able to implement and sustain.

In addition the program aimed for a more systematic monitoring of the execution of public policies, making use of the PSAM Approach. It looks to promote a more systematic monitoring by civil society actors. Furthermore the project looked for the constitution of spaces where demand and supply side actors could meet and learn from each other strengthening democracy. The program was implemented in the municipalities of Metangula, Cuamba, Mocuba, Quelimane, Mocímboa da Praia and Montepuez between 2012 and 2014

Moreover, at the time of the study, Concern Universal was implementing a Governance programme, which started in 2010. Within this programme, there have been 3 specific SAM projects that they have developed - "Civil Society Empowerment in Niassa Province", funded by the EU, Social Accountability Knowledge, Skills and Networking (SAKSAN) funded by the World Bank and "Promotion of the Civil Society Accountability Movement", funded by MASC, in which they have spread awareness of SAM and conducted training to build capacity in civil society in the Niassa and Zambezia province. Their focus has been CBOs that work in the areas of health, agriculture, HIV/ AIDS, Adult literacy and helping persons with disability⁶⁹.

⁶⁸ ibid

⁶⁹ Interview with Helena Skember.



Municipality council building in Metangula

Metangula SAM COMMITTEE

In 2012, an invitation from Concern Universal came through for citizens in Metangula to form a SAM committee (SAMCOM). An idea came up that the municipality has villages and that people from those villages should have their voices heard⁷⁰. The trainers of the SAM approach started to visit the villages to inform the villagers about their vision and what they wanted and then the communities chose members to be their representative in the SAMCOM⁷¹. About 12 villages chose three members each to be their representatives and the SAMCOM was formed comprising of 36 members. Training on the SAM approach systems took place and it emphasized on the five SAM processes. After two weeks training, the trainees were responsible to go back to their

⁷⁰ Interview with Metangula SAMCOM members, Francisco Evans, Patricio Missael 'Filepe Mawinja and Francisco Omar.

⁷¹ ibid

villages to replicate the training for the villagers. After this they began to implement the SAM approach and they wrote a letter to municipality introducing the SAMCOM⁷².

Because the committee understood social accountability as being about both rights and responsibilities they decided to sensitize people to also take some kind of responsibility by, for example, paying their taxes and to ensure that they keep the environment clean. As a result, the SAMCOM have received official letters from the municipality acknowledging their good work as the tax revenue of the municipality has increased as a result of the SAMCOM initiative⁷³.

Upon seeking and receiving the municipality documents, they divided team into sub-committees within the body. In total, there are four working areas according to areas of municipality: Economics, Agriculture, Urbanization, and Social affairs. After monitoring those areas, each subcommittee is required to write reports and these are analysed by the full committee in order to consolidate the findings and produce a single report⁷⁴. After producing the report, the SAMCOM engages the municipal assembly with the findings in the report. After engaging with the municipality, they record answers and then they prepare a final draft report. This is followed by the committee writing a letter to the municipality president, requesting to monitor what the municipality reported to be doing in their responses to the report. After the field visits the committee produces a final report to be presented in a public hearing to which they also invite the president of the municipality⁷⁵. However, in their last attempt to do this, the president refused to honour the invitation, citing other commitments. They changed date of the public hearing to accommodate the president. On the 2nd Nov 2012, they wrote a letter of invitation again to municipality, informing them that they were moving the date to 30 November to accommodate the president. The response was that the SAMCOM can go ahead with the public hearings but the president would not attend as he was going on annual leave.

The SAMCOM members interviewed as part of this study claim to have seen evidence of improvement as the result of implementing the SAM approach and that those trained make a difference compared to those who have not been trained in villages. Moreover as a result of the training, their engagement is backed by evidence gathered from the citizens⁷⁶. If they write a letter to municipality, it is because they went to the ground for evidence of what is wrong in the communities.

Some of the positive aspects that the committee could attribute to implementing SAM include⁷⁷:

⁷² ibid

⁷³ ibid

⁷⁴ ibid

⁷⁵ ibid

⁷⁶ ibid

⁷⁷ ibid

- Job adverts and tender processes publicly advertised.
- There has been change on some of the things that were criticized in the report e.g building of mortuary etc.
- The refusal by the municipality to attend the public hearing, brought mixed feelings (unhappiness) to the people and the president of the municipality was voted out in a subsequent elections.

However, the committee was quick to point out that it was not as a result of their intervention that the president was voted out but his political party was not happy with him refusing to be accountable to the people. Their only business as SAMCOM is the development of the municipality and do not get involved in politics. Their mission is to ensure the development of their municipalities and never discuss politics.

7. Lessons for social accountability practice

This section of the study will highlight common lessons from applying the SAM approach in the contexts studied.

7.1. Access to information

Access to information is a critical component of social accountability. Proponents of good governance emphasise that public participation cannot be exercised effectively without access to government information⁷⁸ as information is central to holding governments accountable. Democracy depends on a knowledgeable citizenry whose access to a broad range of information enables them to participate fully in public life⁷⁹. Moreover, access to information allows people to scrutinize the actions of their government and is the basis for informed debate of those actions. Thus, transparency and dissemination of information at each stage is important to allow the public to participate in the decision-making process. Unless citizens are properly informed about what government is doing, how it is spending public funds they cannot ensure that it is acting for the general public good, or in accordance with its public promises.

However, all the countries which are subject of this study have no access to information laws. Currently in Zambia civil society organisations report that accessing information

⁷⁸ Ababio, E.P. 2004. Enhancing community participation in developmental local government for improved service delivery. *Journal of Public Administration*, 39(2):272-289. Bellver, Ana, and Daniel Kaufmann, 2005, 'Transparency: Initial Empirics and Policy Applications,' World Bank Policy Research Working Paper, (Washington) <http://www.worldbank.org/wbi/governance> ; 45. Roberts, A. 2002, 'Access to Government Information: an overview of issues', in Neuman, L., 'Access to Information: a Key to Democracy', Atlanta: The Carter Centre.

⁷⁹ Neuman, L., 2002, 'The Carter Center Access to Information project: Jamaica Case Study', in Neuman, L., 'Access to Information: a Key to Democracy', Atlanta: The Carter Centre

is extremely difficult. Information is centralised and if an organisation is unable to access from the central system then it cannot do monitoring at subnational level. The absence of access to information legislation further makes seeking accountability from a rights-based perspective by civic actors challenging. This is because the current legislative environment allows for government to classify as secret any information it decides to. The secrecy around government use of public resources in this instance is thereby legislatively compounded. An Access to Information Bill has been drafted but remains to pass as law. Without it, much social accountability work may be limited.

Mozambique also does not have access to information law and civil society organisations such as Concern Universal reported that it was a challenge to access information and if an organization got to access the information, the quality of that information is sometimes poor or it is not easy to understand.

In Tanzania, Section 18 (b) has out right to seek, receive and, or disseminate information regardless of national boundaries; (d) has a right to be informed at all times of various important events of life and activities of the people and also of issues of importance to the society . However, such constitutional rights are not backed by specific legislation which mandates the government to release all state-held information to its people on a regular basis or when requested to. There are, however, clauses within the Tanzanian legal, regulatory and normative frameworks that require certain types of information to be made available to the public, some of which are relevant to SAM work⁸⁰. The Right to Information Act and the Whistleblowers Act are still pending.

The 2001 Public Finance Act requires the government to make budget data publicly available, while the adoption of a modern financial management system was a condition for accessing debt relief. The partial information provided through these fiscal transparency measures has been used only episodically by political and civil society actors⁸¹. When rifts emerge within the CCM, factions use information against one another. More systematically, parliamentary debate about proposed budgets has become more robust. Some CSOs have used budget information to criticize government failures to deliver services and to expose corruption and leakage through follow-the-money campaigns⁸². Among the most well known are Haki Elimu's campaigns to improve the quality of primary education. These campaigns and associated accountability initiatives, however, are limited by the restricted political environment and weak capabilities of CSOs as well as the absence of channels for effective redress⁸³.

In Tanzania, then, the availability of public budget information has not yet resulted in sustained increases in participation or accountability. Policy Forum demanded access to

⁸⁰ For more on this see examples on Social Accountability Monitoring in Tanzania, A case Study: Gertrude Mugizi August 2011.

⁸¹ Social Accountability Monitoring in Tanzania, A case Study: Gertrude Mugizi August 2011.

⁸² *ibid*

⁸³ *Ibid*

information circular despite no FOI regime in Tanzania– now csos can use that circular to demand information⁸⁴. The CSOs wanted an MOU between themselves and the prime minister’s Regional Administration and Local Government office and in the MOU they listed the documents that they want. The MOU was not signed but a circular was issued by the prime minister and all the documents that were listed in the MOU were in the circular, demanding that the local authorities give the csos information⁸⁵.

MACSNET’s quest for information

For organisations such as MACSNET and others, it is difficult to get information from the government. For example, Macsnet reported that getting information was difficult as the executive directors of the municipality did not want to give them access to crucial documents. In order to get the desired information, the MACSNET would go to the council chairperson (political head) who would instruct the executive director to give out the information⁸⁶. Sometimes, despite the order, executive director would still refuse to hand out the documents and in that case they would then approach the Regional Commissioner. Even after getting the information, it would not be the complete set of documents that they require. Sometimes they would get draft budgets, quarterly reports but no minutes of council meetings, meaning that they could not get the full picture without all the required information, making it difficult to monitor the council⁸⁷.

The LGAs have an obligation to publish publicly needed information on notice boards and accessible areas. The access to information in Babati, where MACSNeT works turned out to be very restricted since Council officials maintained that the CIT had no mandate to request for information from the Council; only a Development Budget for 2007/08 was obtained through an anonymous Councillor. Some information, not accessible in Babati, was collected through the internet and government websites⁸⁸.

Lesson:

Political will is critical in the quest for information, especially in regimes where there is no access to information laws. Sometimes civil society has to report non-compliance with request for information to the relevant authority. Entrenched political powers who benefit from the lack of accountability have blocked further outcomes – such as effective oversight institutions and robust independent political and civic organizations that use information in meaningful arenas of political contest – from developing and taking root

⁸⁴ Interview with Semkae Kilonza, coordinator of Policy Forum

⁸⁵ *ibid*

⁸⁶ Interview with Nemency Iria, Macsnet director

⁸⁷ *ibid*

⁸⁸ Policy Forum Case Study on HIV/Aids available at <http://emjee.biz/resources/case-study-PF-HIV-AIDS.pdf>

The Circular issued by the office of the Prime Minister's office of Regional Administration and Local Government, in combination with relationships built with the authorities together with a carefully crafted advocacy technique is necessary to ensure access to information. So to rectify the challenge with the access to information, civil society organisations need to build relationships with government officials. This shows that although policies might allow for organisations to get data but getting information still depends on the will of the official.

7.2. Advocacy

Social accountability involves advocacy as a way of making people to know and demand for their rights, thus asking for justifications and explanations from those in authority. However, it is important to realize and understand that an organisation might have good message but how it presents it is important. Social accountability practitioners might gather evidence and do thorough analysis but their reports might be ignored simply because they are not presented well. For example, Regional Commissioner in Babati said that some of civil society is not good at presenting issues and they carry more personal weight in presenting issues at times⁸⁹. This creates a perception that civil society organisation work with opposition political parties and this approach may seem that you are against the government.

A common issue in all contexts studied that is seen as hindering good relationships between the government and civil society was how civil society crafted their advocacy messages. There was a general feeling that some of civil society are not good at presenting issues and a perception from some officials that they 'carry more personal weight in presenting issues'. This perception that civil society organisations are used by opposition parties created tension between civil society and the government. Thus it is crucial for social accountability advocates to be able to communicate their message properly.

Lesson:

In crafting the advocacy messages, social accountability practitioners have to ensure:

- Good packaging of the message and the way they communicate the message is crucial.
- That all stakeholders are involved in social accountability exercise, including the government.

⁸⁹ Interview with Mr. Elaston Mbwilo, Babati Regional Commissioner

In Tanzania the Policy Forum ensures that before presenting the analysis to the public, they first engage the government and for them to provide justifications before the report goes to the public in order to give them the right to respond⁹⁰.

7.3.Lack of trust between the demand and supply sides

Interactions with PSAM partners and some government officials in all three contexts revealed that sometimes officials view the SAM practitioners as doing the monitoring on the basis of personal agendas i.e. attacking the person and not the office of the person. Some officials feel that when SAM practitioners ask for documents such as budgets, strategic plans and other official documents, they are doing this to look into the weaknesses of the person (the official) and that they would use the information to report to the higher authorities for them to be taken for further punitive steps.

CSOs interviewed for this study agreed that after explaining to the authorities, there became mutual understanding and less resistance and becomes easier to get information and other forms of corporation from the officials. Once the government understood that the civil society is not necessarily adversarial, they became receptive and more cooperative.

Lesson:

Civil society need to explain that SAM approach is not about personal witch hunt but about cooperation between the supply and demand sides and that the information requested is for them to do analysis in order to improve service delivery. It is crucial to begin engaging with government from the beginning of the monitoring process to the end; constantly informing the officials in a systemic manner how to better serve the citizens. Moreover, the civil society should encourage and influence the officials that there is an incentive in working with the demand side to make sure there is better delivery of services, and that monitoring by citizens is to give them an opportunity to be accountable. Once the supply side is involved from the beginning it is easier for them to cooperate with the demand side. Furthermore, CSOs interviewed for this study agreed that once the public officials started to understand more about the SAM approach and the people behind the approach, they began to cooperate and became more transparent. The experience of all these CSOs is that working with the government needs patience and making the officials to understand the SAM processes.

⁹⁰ Interview with Semkae Kilonzo of Policy Forum

7.4.Cultivating Political will and building relations with supply side

Social accountability is political in nature and social accountability practitioners have to navigate a political terrain. It is difficult to work on social accountability without a link or relationship with the supply-side. The problem with this kind of work is that social accountability practitioners could be confused as opposition political party-aligned actors, and that might compromise their credibility and independence. Therefore cultivating political will of the officials is critical.

Lesson:

It is important for the demand side to make the government to be more aware of what social accountability is. Moreover, it is crucial to find a space where the supply and demand sides assist each other with the civil society making people aware of government issues and citizens' rights and bringing to the government the concerns raised by the citizens.

One example of good relations between CSOs and the government is in Tanzania, where the AG has been negotiating with civil society on how to work together for the purpose of improving service delivery in the country. For example, AG has an agreement with Haki Elimu to translate the AG report to Swahili so that it can be understood by a wider audience. However, Haki Elimu has been doing more than just translating the report but in the process would analyze the report and ask question on the report⁹¹.

Furthermore, the AG and civil society have been embarking on negotiations on how to formalize their relationship. They have agreed on a set number of expectations from both sides. They agreed that the CSO's can identify the areas for AG to cover in the report and for them to help AG to simplify and come up with user friendly version of AG report. However, relationship building between the AG and civil society depends on who is leading the AG, emphasizing the importance of political will⁹².

Cultivating political will also means changing behaviors of the official. And one way of achieving this is through constant pushing by civil society organisations to a point where the government is aware that the SAM teams are present and constantly watching.

In Zambia CSOs reported that the relationship between government and advocacy based CSOs is very polarized⁹³. However, relationship building is important in order for the CSOS to achieve the desired impact. For example, the CSPR sits on the steering committee of the Anti-Corruption Commission and they see this as a demonstration of

⁹¹ Interview with Mr. Francis Mwaka, Tanzania's Deputy CAG

⁹² *ibid*

⁹³ Interview with Makani Mzyce. See also PSAM Zambia Base Line study by Miti, *supra* note 23.

the importance or benefit the government find in collaborating with CSOs⁹⁴. However, they are careful in not becoming the instruments of the state by maintaining their independence and continue to carry their budget tracking and dialogue with the government on issues that are not forthcoming. When the government is not forthcoming, they use other mediums such as the press and also mass mobilization campaigns to demand for the wrongs to be corrected⁹⁵.

Moreover, civil society is in its nature political but should not partisan. A good strategy to achieve a form of impact is to engage the government one on one but when that fails, use other methods such as press statements and mass mobilisation of communities to demonstrate their unhappiness. To cultivate a good political climate, in Mozambique the SAM practitioners meet with some officials to present their initial findings and then go to the field to look for evidence, compile the report and then share it with municipality, then wait for the response, then after organize public hearings. As a result the Mozambican government has declared partnership with CSO's⁹⁶. The government understands the importance of social accountability to the extent that they passed law on public participation⁹⁷.

It is also important to identifying the champions from within the authorities, who will advocate for the cause of accountability and transparency. In Metangula, Mozambique Armando Micaïs is one such champion. He is the President of the Municipality Assembly and the municipality assembly has formed partnership with Concern Universal and other social accountability practitioners to ensure that services are delivered to the people.

It is through working with the Concern Universal that he learnt about social accountability. His aim is to know how, as the elected official, to serve the citizens better. The SAM opened way and widen horizons from how they used to work as the municipal assembly⁹⁸. He feels that the SAM approach has brought about good interaction between the municipal assembly and the citizens. The SAM approach has⁹⁹:

- Opened horizons of government
- brought new way of thinking on how to work in governance
- brought realization that a strong interaction with CSO's is a great value add.
- improved the municipal assembly's oversight skills
- increased level of interaction and built a good relationship between the municipality, the assembly and the SAMcom .

⁹⁴ Interview with Makani Mzeyce

⁹⁵ *ibid*

⁹⁶ Interview with Francisco Tabua and Imbwanga Mapoco

⁹⁷ *ibid*

⁹⁸ Interview with Armando Macaïs

⁹⁹ *ibid*

As a result of this good relationship, the assembly takes seriously what is brought up by the SAMCOM. The Meetings of the municipality assembly are open to civil society and the CSO's groups are involved in a budget and planning meetings and others and fully participate in the processes¹⁰⁰.

7.5.Capacitating the supply side

In Mozambique, Concern Universal has provided training on SAM to some government officials in all 3 levels of government, even though their main emphasis is on the municipality level. The rationale is that both supply and demand side should be on the same page as to the SAM approach and understanding of the five processes in order for them to see the desired impact¹⁰¹.

Capacitating the supply side goes together with relationship building by the civil society with the authorities. When Concern Universal started to work in Metangula, they introduced themselves to the Headmen in villages and shared with them what they were in the villages for. After completing the social audit, they trained both demand and supply side actors on the SAM approach¹⁰².

A Tanzanian Councillor from Bonga ward in Babati, Pasian Aloyce is an example of a government official who has been trained in the SAM approach by the Policy Forum. He stated that the training improved his skills as a councilor and helped give him more insight especially on issues concerning the budget. He became aware of issues to argue for in terms of the needs of the people¹⁰³. The SAM training also gave him insight into how to scrutinise the Auditor-General's report and that as a councillor he became aware of what to question based on issues that emanate from the report. He has also began to understand that as a councillor he has to scrutinize the contents of the reports, as if a councillor is well informed, they can go and even educate people on planning and resource allocation¹⁰⁴.

Lesson: It is important to involve in the supply side, including politicians and beaurocrats in training for effective SAM implementation processes.

¹⁰⁰ Interview with Metangula SAMcom members

¹⁰¹ Interview with Helena Skember

¹⁰² *ibid*

¹⁰³ Interview with Pasian Aloyce

¹⁰⁴ *ibid*

7.6. Getting buy in from all stakeholders

There is no true culture of social accountability in Africa, and both the supply and demand side need to make effort to create that culture. Firstly, there are numerous social accountability monitoring methods in existence and there may be resistance from CSOs to the PSAM approach. So civil society accepting the SAM approach may be problematic as they are already exposed to other social accountability approaches and they might think that SAM might overtake their approaches and may take away their sources of income. The question of why the SAM approach is better than other social accountability methods may arise. It is crucial to market the approach as providing for the entire system of social accountability while others seem to focus on one aspect e.g. budget analysis etc. SAM looks at the whole system in its entirety.

Lesson: It is important to get a buy in from different stakeholders for the SAM approach implementation to be successful.

7.7. Raising society's awareness of SAM and their rights

The most crucial aspect of social accountability is the demand for justification and explanations from the officials by the citizens. It is therefore crucial to raise citizen's awareness of their rights. Effective social accountability depends on the citizens themselves. If citizens understand their rights and demand for explanations, then their challenges can be solved even if that takes time as a full respect for human rights may only be gradually realized in other societies, especially those that have had suppressive regimes for a long time.

The SAM training has raised some kind of awareness amongst people about their rights and citizens are starting to question government action. The PSAM partners in Tanzania reported that the SAM approach acquired skills have not just remained with the SAM team but has spread to the citizens to a point where the citizens ask for progress reports from the SAM team on certain issues they were concerned with¹⁰⁵. Citizens have also visited district commissioners and demanded that expenditure reports be placed on notice boards.

A Case of citizens aware of their rights: TANZANIA FOREST CONVERSATION GROUP in Kibaha

The Tanzania Forest Conversation Group is part of Mama Mimitu campaign, which is a campaign to bring together organisations working on forest management. The Policy Forum trained this group on the SAM approach.

¹⁰⁵ Interview with Richard Angelo and staff members of Policy Forum, Tanzania

This group deals with a challenge of deforestation and poor forest management in their region. Before the introduction of the SAM training, people in the region were not aware of their rights, especially right to ask questions from government officials. After they were introduced to the SAM training, the group convened a meeting where they presented the concept of demanding for justification and explanations to the community. The group claims to have seen a number of benefits that they attribute to SAM: first, they have witnessed an enhanced the relationship between the citizens and their leaders and as a result there is increased improvement in community participation and they have seen a more participatory forest management¹⁰⁶.

The Forest Act 2002 stipulates that whenever there is harvesting in the forests, 20 percent of the revenue has to go to the community¹⁰⁷. Therefore good forest management is crucial so that 20% revenue that can be produced but also that the profits get to the intended beneficiaries, the citizens¹⁰⁸. There is also revenue generated by research as the researchers have to pay certain amount of money that goes to the community every time they conduct research in the forest and that also needs to be managed properly.

Citizen's participation is also important on how to spend the revenue generated from the forest. The village assemble is tasked with the approval of the plans as well as the expenditure of the funds. It is the villagers themselves who decide what the revenue is to be used for, mainly for the village community development activities such as buying windows for village office etc¹⁰⁹.

Misappropriation of funds was previously a big challenge but after the introduction of SAM training and with the group introducing the SAM approach to village assembly and introduced the concept of revenue and expenditure, there is now an expectation by the villagers from the leaders to provide expenditure report.

The group emphasized that what is unique about SAM is that it teaches the community to know their rights. In their campaign they insist on the community to know their rights such as right to development, education etc. Since the introduction of SAM, people are more aware of their rights. Moreover the citizens also now are aware of the process of reporting¹¹⁰.

¹⁰⁶ Interview with TANZANIA FOREST CONVERSATION GROUP members - Yahaya Mtonda , Subira Juma, Shomari Juma and Shiwa Maru

¹⁰⁷ United Republic of Tanzania. 2002. The Forest Act No. 14 of 2002. Dar es Salaam, Tanzania, MNRT, Government Printer.

¹⁰⁸ Interview with TFCG members, supra, note 106

¹⁰⁹ ibid

¹¹⁰ ibid



Members of the Tanzania Forest Conservation Group with Richard Angelo of Policy Forum.

A case of friend of education (FoE)

Haki Elimu's special movement called "Friends of education" has about 40000 members. They work either individually or as groups/networks at both district/regional levels and engage in education issue. The group was introduced to the SAM approach and the Policy Forum provided capacity building. After the introduction to the SAM approach, they elected to concentrate on resource allocation and expenditure¹¹¹.

The friends of education place emphasis on 2 programmes to improve education¹¹²:

- Primary educations

¹¹¹ Interview with Pius Makomelelo, Honoradus Swai and Naomi Mwakilembe of Haki Elimu.

¹¹² Ibid

- Secondary education

For primary education, they advocate for the government to release money to schools. The FOE monitors and evaluate whether the schools received the money and review whether there is infrastructure built with that money. Were the funds used for what they were planned for? They also track the plans and help the local authorities to plan according to the needs of the communities. The purpose is to influence their behaviour, to plan well, and to take into account needs of the people. The SAM team follows up on some authorities to pay back what they embezzled¹¹³.

The friends of education group is not targeting only the leaders but try to influence the people to take action and know their responsibilities and take initiative to inform the government of challenges but also pressurise the government into action¹¹⁴.

7.8.Context matters: Adapting training to suit local needs

Current social-accountability programmes largely fail to acknowledge the dynamic nature of incentive-driven power plays, pursuing instead a technical process which is removed from the contextual reality in which the citizens and state actors operate.¹¹⁵ Context matters and situations change all the time and rapidly, since social accountability work happens in a highly volatile political environment.

Moreover, some of the contextual issues lead to social accountability practitioners tweaking the SAM approach to suit their contexts. For example, in Mozambique, the Concern Universal introduced their own innovation, the social audit, which is not part of the PSAM approach, but it is important in Mozambique context. They, however, train only the CSO's and not the supply – side actors on social audit¹¹⁶. A critical mass of work now illustrates the challenge of transferring models across different contexts, and underlines the very complex (and non-linear) way in which development interventions can unfold over time. This urges us towards a more adaptive, 'learning-by-doing' mindset¹¹⁷.

Social accountability should be about learning to build trust-based relationships, allowing local realities and relationships, rather than imported social-accountability tools, to be the primary drivers of change¹¹⁸.

¹¹³ Ibid

¹¹⁴ Ibid

¹¹⁵ Tembo, F., Supra, note

¹¹⁶ Interview with Helena Skember

¹¹⁷ Tembo, F. Supra, note

¹¹⁸ Ibid.

8. Conclusion

This study highlighted that although contexts matters in social accountability work, there are lessons that cut across different contexts. Firstly, access to information is a critical component of social accountability. However, political will is critical in the quest for information, especially in regimes where there is no access to information laws. Civil society organisations need to build relationships with government officials as although policies might allow for organisations to get data but getting information still depends on the will of the official.

Secondly, social accountability involves advocacy as a way of making people to know and demand for their rights, thus asking for justifications and explanations from those in authority. However, it is important to realize and understand that an organisation might have good message but how it presents it is important. A common issue in all contexts studied that is seen as hindering good relationships between the government and civil society was how civil society crafted their advocacy messages. Thus it is crucial for social accountability advocates to be able to communicate their message properly.

Thirdly, the issue of trust between the demand and supply sides is crucial. Civil society need to explain that SAM approach is not about personal witch hunt but about cooperation between the supply and demand sides and that the information requested is for them to do analysis in order to improve service delivery. It is also crucial to begin engaging with government from the beginning of the monitoring process to the end; constantly informing the officials in a systemic manner how to better serve the citizens.

Fourthly, cultivating Political will and building relations with supply side is equally critical. Social accountability is political in nature and social accountability practitioners have to navigate a political terrain. It is crucial to find a space where the supply and demand sides assist each other with the civil society making people aware of government issues and citizens' rights and bringing to the government the concerns raised by the citizens. Moreover, it is also important to identifying the champions from within the authorities, who will advocate for the cause of accountability and transparency. Capacitating the supply side goes together with relationship building by the civil society with the authorities. Therefore it is important to involve in the supply side, including politicians and beaurocrats in training for effective SAM implementation processes.

Fifthly, it is necessary to raise society's awareness of SAM and their rights as the most crucial aspect of social accountability is the demand for justification and explanations from the officials by the citizens. Effective social accountability depends on the citizens themselves. If citizens understand their rights and demand for explanations, then their challenges can be solved even if that takes time as a full respect for human rights may only be gradually realized in other societies, especially those that have had suppressive regimes for a long time.

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Appendix – List of people interviewed

1. Mr Nemency Iria – Director Macsnet
2. Ms Asia Lembariti – Macsnet board chairperson
3. Mr Elaston Mbwilo – Babati Regional Commissioner
4. Mr Pasian Aloyce Councillor Bonga ward
5. Ms Gaudensia Egoshalimo (SAM team – Babati)
6. Ms Hadija Matola (SAM team – Babati)
7. Ms. Christina Burra Deputy Head Teacher Dabili Primary school
8. Mr Isaiah Mansuet – Head teacher – Maganjwa Primary school
9. Mr Alex Ruchyahinduru – Policy Forum
10. Mr. Richard Angelo – Policy Forum
11. Mr. Semkae Kilonzo – Policy Forum
12. Ms Nuru Ngailo
13. Mr. Nicholas Nekule – Policy Forum
14. Ms. Anna Ndesamburo – Policy Forum
15. Mr Emmanuel Barigira – CHRGG
16. Mr Francis Mwaka – Deputy Auditor General – Tanzania
17. Mr Yahaya Mtonda - TFCG
18. Mr Subira Juma – TFCG
19. Mr Shomari Juma – TFCG
20. Mr Shiwa Maru – TFCG
21. Mr Pius Makomelelo – Haki Elimu
22. Mr Honoradus Swai – Haki Elimu
23. Ms Naomi Mwakilembe – Haki Elimu
24. Mr Musonda Kabinga – JCTR
25. Mr Makani Mzyece – CSPR
26. Mr. Edmond Kangamungazi – Caritas Zambia
27. Mr. Francisco Tabua – Concern Universal
28. Mr. Imbwanga Mapoco – Concern Universal
29. Ms. Helena Skember – Concern Universal
30. Mr. Franscisco Evans – Coordinator of the economic audit committee- SAMCOM
31. Mr. Patricio Missael – Secretary of the Agriculture audit committee- SAMCOM
32. Mr. Filepe Mawinja – Member/secretary of the economic audit committee - SAMCOM
33. Mr. Franscisco Omar – Secretary of the SAMCOM
34. Ms. Sarah Mustata – Mentangula municipality president
35. Mr. Armando Micaïs – President – Metangula Municipal Assembly
36. Mr. Thomas Felipe Npezeme – Secretary -Metangula Municipal Assembly
37. Ms. Gertrude Mugizi – Director of RLP - PSAM