Social accountability
tools guide

**How to integrate advocacy
into the CCT process**

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What is the purpose of this guide?

This is a 'one-stop' resource bringing together useful social accountability tools for integrating advocacy into the CCT process.

Who is it for?

Facilitators, church leaders and advocates involved in church and community transformation can apply these tools to bring about better governance and transparency, and more responsive service delivery, by governing bodies.

For each tool, there is guidance for putting it into practice and adapting the templates provided for your context.

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Contents

Introduction

Tearfund believes that local churches – wherever they are in the world – begin a lifelong journey when they embrace and commit to living out a theology of what we call 'integral mission'. This journey empowers them, changes mindsets and brings about holistic transformation in both the church and the community.

The ultimate goal of this journey is to see broken relationships restored. The church seeks 'whole-life' change, and responds in a comprehensive way to the needs of their local community. Overcoming poverty in the community is approached holistically and from within, as people realise their potential and recognise the resources God has given them. We refer to the destination of that journey as 'church and community transformation' (CCT).[1]

We are convinced that integrating advocacy into CCT strengthens the outcomes and ultimately contributes to the vision of 'whole-life' change. This approach uses advocacy strategies and actions that lead to 'good governance and responsive and transparent service delivery by governments'[2]. Church and community transformation advocacy integrates this advocacy into CCT using social accountability tools.

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[1] An introduction to church and community transformation (CCT) - Tearfund Learn

[2] Lawson and Watson (2016)

This social accountability tools guide is intended to be a 'one-stop' resource explaining useful social accountability tools, to be used primarily by CCT advocacy facilitators (Tearfund staff, church leaders, CCT advocacy champions, trainers/facilitators) to integrate advocacy into their CCT work. It is also available for wider use by all advocacy colleagues seeking to build the capacity of communities to lead their own advocacy work at a local level.

As you put this into action, we'd love you to let us know what you learn. Do reach out if you need any support.

To get the best out of this resource, use it together with:

- the Tearfund **Advocacy toolkit**
- **Advocacy in a digital age resource**
- **CCM advocacy guide**

Each is also available in French, Portuguese and Spanish.

What is social accountability?

> **Social accountability is defined as, 'the extent and capacity of citizens to hold the state and service providers accountable and make them responsive to the needs of citizens and beneficiaries'.[3]**

Citizens, communities, the church, independent media and other organisations can therefore use social accountability tools to influence the quality of service delivery, by holding accountable service providers such as public officials and public servants. Social accountability approaches can be applied at local and national levels and can target a range of governance issues and processes, including:

- public information-sharing, policy-making and planning

- analysis and tracking of public budgets, expenditures and procurement processes

- participatory monitoring and evaluation of public service delivery

- broader oversight roles, anti-corruption measures and complaints handling procedures

The goal of social accountability is not to replace but to reinforce and complement existing accountability processes.

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[3] World Bank (2003). World Development Report 2004: making services work for poor people

Biblical basis for social accountability

📷 **Group Bible study.** Photo: Aaron Koch/Tearfund

We serve a God of justice. As Christians, we are also required to 'act justly' (Micah 6:8). The Crossway ESV Study Bible Notes put it this way:

> 'True worshippers of God will manifest justice and righteousness. Justice is much more than legal equity; it refers to the entire scope of God's government of his world. So to "do justice" involves, on the part of the government, a fair and just use of power and proper functioning of a fair judicial system, especially to protect the weak from the strong. On the part of

individuals, "justice" involves honest and fair business dealings and faithfulness to keep one's word, as well as not taking advantage of the poor or those with less power or protection.'[4]

To do justice therefore also requires accountability; that is, it requires people to be responsible for fulfilling their duties and obligations to others. One biblical narrative on accountability can be seen in Ezra 8:28-34. A Bible study in Tearfund's Footsteps magazine[5] sets out three main areas of accountability as demonstrated by the 12 men in this passage:

- accountability to God

- accountability to self

- accountability to others

It highlights that 'biblical accountability begins with taking responsibility for one's own actions and making a conscious choice of allowing God and others to help in accomplishing what is right.'[6]

Advocacy promotes mutual accountability between the individual and others like the government.

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[4] Crossway article

[5] Accountability: Footsteps 76 (2008) – https://learn.tearfund.org/en/resources/footsteps/footsteps-71-80/footsteps-76

[6] David (2008) p11

Tearfund's *Advocacy toolkit*[7] sets out that for Christians, advocacy is an outworking of obedience to God, a desire for compassion and justice for others (particularly people who are poor, marginalised or vulnerable) and it is a way of pointing people towards Jesus Christ. God has placed Christians in many different areas of work and society, all of which need to be influenced and transformed if poverty is to be alleviated. Christians need to use their strategic influence by following the biblical example:

- Speaking out against injustice and idolatry

- Modelling an alternative society, showing how God intended it to be

- Confronting authority when it goes against what the Bible teaches

- Praying for God to intervene

- Bringing peace and reconciliation

- Seeking social and economic justice

The social accountability tools support local churches to achieve these goals, working together with their communities.

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[7] See *The why of advocacy: The biblical basis,* in Tearfund's Advocacy toolkit, section B3, for more details.

Some scriptural references

- **Proverbs 31:8-9 (NIV)**
  'Speak up for those who cannot speak for themselves, for the rights of all who are destitute. Speak up and judge fairly; defend the rights of the poor and needy.'

- **Jeremiah 22:3 (NIV)**
  'This is what the LORD says: "Do what is just and right. Rescue from the hand of the oppressor, the one who has been robbed. Do no wrong or violence to the foreigner, the fatherless or the widow, and do not shed innocent blood in this place."'

- **Deuteronomy 25:13-16 (ESV)**
  'You shall not have in your bag two kinds of weights, a large and a small. You shall not have in your house two kinds of measures, a large and a small. A full and fair weight you shall have, a full and fair measure you shall have, that your days may be long in the land that the Lord your God is giving you. For all who do such things, all who act dishonestly, are an abomination to the Lord your God.'

- **Psalm 82:3 (NIV)**
  'Defend the weak and the fatherless; uphold the cause of the poor and oppressed.'

Main goals of social accountability tools

Kohli's *Manual on Social Accountability*[8] provides a good summary of the main goals of social accountability tools:

1. To enable citizens to directly engage with state institutions – to influence policies and monitor functions.

2. To be an effective way of collecting, analysing and passing on information.

3. To provide opportunities to mobilise public support for community development projects.

4. To facilitate advocacy and negotiation for changes or improvements to service delivery.

5. To help citizens and communities to understand the accountability processes at different levels of government.

6. To enhance citizen or civil society organisation (CSO) participation in the 'internal' government process of accountability.

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[8] Kohli (2012)

Factors to keep in mind for successful and effective use of social accountability tools:

1. Have a good understanding of the social and political context.

2. Take time to understand the structure of public finance at local, regional and national levels.

3. Follow the CCT approach of identifying and prioritising needs to ensure sensitivity to people in the community.

4. Support the community to identify a group (called 'social accountability champions' in some contexts) to lead the process.

5. Ensure other community members understand the process and provide regular feedback to ensure maximum participation.

6. Secure the commitment of the service provider(s) from the beginning.

7. Put together a plan for coordinated follow up.

How to use these tools

1. You should reinforce the importance of advocacy and the basis for it at every stage of the CCT process. The church and community mobilisation (CCM) advocacy guide provides clear guidance on how this can be done, eg what to focus on when envisioning leaders for CCT advocacy.

2. Different CCT processes are used in different contexts so ensure you have a good understanding of the CCT approach used in the community where you will use the chosen tool.

3. You need to use these tools at the right stage of the process; the majority of the tools in this guide are ideal for use at the stage where resource mapping has been done. Together the church and community will have conducted their needs assessment, identified problems and opportunities in their communities, prioritised the problems they want to focus on, and will have begun to mobilise resources to address those problems. You can then use the right social accountability tool to help them access government resources to address their concerns.

4. This guide has been designed in a simple, easy-to-follow format, however, we encourage you to make use of the links to resources in the 'Further guidance' section of each tool to broaden your understanding of the tool and its use.

5. Each of these tools has a template which can be adapted to suit the needs of each context or situation. This guide will help you think through what to include when you use each tool.

6. There is an example of the relevant template at the end of each tool. There is also a link to access the adaptable version of the template which you can download and change to suit your context.
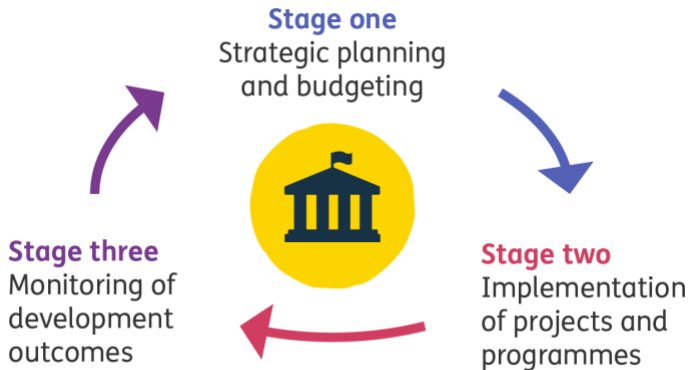
Use of digital social accountability tools

All these tools can be printed out or maintained in their digital format to allow ease of access using different digital platforms.

Using the tools within a government development cycle

There are three main stages in a government's development cycle.

Stage one
Strategic planning and budgeting

Stage two
Implementation of projects and programmes

Stage three
Monitoring of development outcomes

Social accountability tools are extremely effective when:

a) They become established and linked to the various structures of governance involved in service delivery.[9]

b) They are put in place at the correct stage of the government development cycle.

The majority of the social accountability tools focus on the first two stages, as they are foundational in achieving positive outcomes. Planning that does not prioritise the correct things will not lead to the correct outcomes, and neither will poor implementation of a great plan. The CIVICUS Participatory Governance Toolkit is very useful for in-depth reading.

[9] Kohli (2012)

Below are the common stages of a government development cycle together with some of the social accountability tools that can be used at each stage, and feature in this guide.

Stages of a government development cycle	Stage one: Monitor and influence the strategic planning and budgeting	Stage two: Monitor implementation of projects and programmes	Stage three: Monitor the development outcomes
Key question being answered	Are the plans developed and funds allocated adequate to achieve set goals?	Are projects/activities being carried out according to desired quality, plan and budget?	Are the projects and activities implemented helping us reach the desired goals/outcomes?
Social accountability tools to be used, available in this guide	Participatory planning process	Budget tracking	Budget tracking
	Budget tracking	Citizen journalism	Citizen journalism
	Citizen journalism	Community scorecards	Community scorecards
	Community scorecards	Public expenditure tracking surveys	Social audit
		Social audit	

See Appendix for a chart of the key stages of a generic government development cycle

Participatory planning process tool

📷 **Members of the planning committee for Simayiwa 1 village hold a meeting with villagers to explain their plans for future development.** Photo: Alex Baker/Tearfund

In this section

About this tool • **Using and adapting the tool** • **Further guidance** • **Example template** • **Editable template**

Social accountability tools guide

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About this tool

> **Participatory planning is a process by which citizens demonstrate their influence and control over development initiatives which affect them. They do this by playing an active role in the process of setting priorities, allocating resources and monitoring the outworking of development initiatives.**[10]

Participatory planning allows various stakeholders – citizens, local community-based organisations (CBOs), local churches, civil society organisations (CSOs), government officers, etc – to take part in identifying and prioritising development projects which use public funds.[11]

The term 'participation' can be used to mean various processes such as information-sharing, consultation or collaborative planning. We are aiming for collaborative planning as it encourages the direct involvement of communities in local governance planning. It involves the community in the decision making around prioritising problems, coming up with solutions, putting actions in place, and monitoring and evaluating them. It also includes the mobilisation and management of resources.[12]

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[10] World Bank (1996) p.xi

[11] Odour (2014)

[12] Institute of Development Studies (2002)

It is more sustainable as it may lead to the setting up of structures such as:

- stakeholder representation on decision-making bodies
- local planning committees
- participatory budgeting
- finance schemes to fund community-managed development[13]

Purpose of the tool

This tool is aimed at supporting local churches and communities' efforts to do the following:

- Ensure local knowledge and understanding are incorporated in government development plans and initiatives.
- Ensure communities actively participate in the making of development decisions that may affect them
- Ensure that development interventions are appropriate to the needs and preferences of the communities they are intended to benefit.[14]

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[13] CIVICUS: Participatory Development Planning

[14] CIVICUS: Participatory Development Planning

To get the best from this tool, use it together with other complementary tools such as community scorecards (CSC) and social audits. This is to ensure communities have evidenced-based information to share when participating in planning conversations – gathered using a CSC tool – and have a way to objectively follow up on implementation of agreed plans – the social audit tool.

This tool is ideal for use at a local level where community participation in planning is desired. It can, however, be adapted for use at regional and national level.
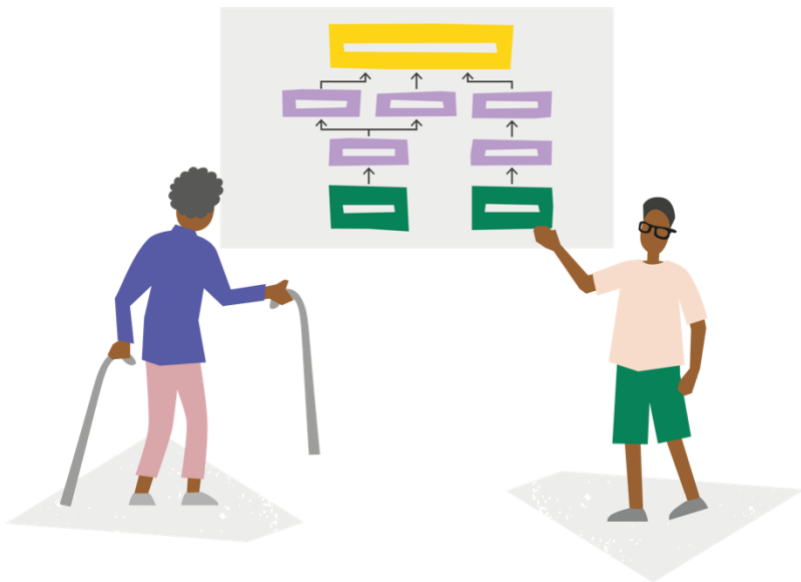
Strengths and limitations of the tool

Strengths:

- It increases citizens' voices. Citizens are well informed about development plans through being involved in the government planning processes. They have opportunities to participate in identifying development needs and in deciding what policies and programmes of their local governments should be prioritised.

- It opens up new civic spaces for citizens to exact performance, transparency and accountability from their local governments. Citizens to be involved not only in the implementation of the plans but also in monitoring and evaluating the performance of their local governments.[15]

- It builds community ownership in local government plans, which in turn, opens access to community resources, for example resources identified during the church and community mobilisation processes.[16]

- It helps shift the power dynamics between different forms of power, stakeholders and resources thereby enabling different participants to interact in an equitable and genuinely collaborative way.

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[15] Institute of Development Studies (2002)

[16] Institute of Development Studies (2002)

Limitations:

- It may not directly lead to community involvement in the actual outworking, monitoring or evaluation of actions. Even in the presence of supportive legal frameworks, there may not be the right environment for this involvement. For example, there may not be a culture that encourages interaction between citizens and the government, or an informed and engaged community, or the political support.[17]

- The process could be captured by community elites or other powerful people and organisations as they seek to promote their own interests by manipulating the process.[18]

- It requires time and resources to include various stakeholders with diverse interests.

- It raises expectations. Asking for input from multiple stakeholders into the policy making and planning process is likely to raise their expectations of having their views taken into account; this is not always possible and these limitations need to be clearly spelled out from the beginning.

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[17] Institute of Development Studies (2002)

[18] CIVICUS: Participatory Governance Toolkit

Using and adapting the tool

At what stage in the CCT process can this tool be used?

Different CCT processes are used in different contexts. However, a common feature of all CCT processes is that they all use the participatory method, so they are well set up to incorporate participatory planning. This tool is ideal for use at the stage where the communities, with the church, have conducted their needs assessment, identified the problems, opportunities and resources in their communities and have begun to mobilise resources to address the problems. The community is already experiencing a mindset shift and recognising their own agency. They are well placed to inform the priorities being set in local government plans, as well as to safeguard community interests, and even participate in resource mobilisation efforts which support local plans.

If one of the resources identified is local government funding, participating in the local government planning process will increase the chances of the community priorities being reflected in those plans and resource allocation.

Below are examples of some CCT approaches and suggestions of where the tool can be used:

CCT approach	CCMP	Umoja/Parivartan/Unidos	Sangsangai
When participatory planning can be introduced	**Stage 4:** Information analysis **Stage 5:** Decision making	**Stage 3:** Dreaming dreams and taking action (planning for action) **Stage 4:** Taking action	**3rd cycle:** The community

The church and community can build their skills in participatory planning using the process described below.

Using the tool

You can see the template at the end of the guide to this tool.

> **To download a zip file of working templates which you can adapt for your context, please visit learn.tearfund.org/sa-tools and click on Social accountability tools: Templates under the 'Download resources' section.**

Please remember that the CCT approach is participatory in nature and much of the work described in the participatory planning tool will have been done by the church and community if they have done stages 3 and 4 of the CCT process.

The exercise below will be done specifically for issues that need to be attended to with government support or intervention. The focus will be on creating a plan of how to input the government planning process to ensure the community priority issues are reflected in their plans. The following are the key steps to take in the participatory planning process. An example of the template can be found at the end of the guide to this tool.

1. **Verbal ranking of problems and opportunities**
   This is equivalent to stage 3 and 4 of many CCT processes where there is an evaluation of problems and resources to gain consensus among community stakeholders on what should be prioritised and what opportunities exist.

2. **Community action plan**
   This is similar to the planning and decision-making stages in CCT approaches. At this stage the community should be clear on the following in some form:

   - What activities will address the identified issues

   - Where they will be done

   - Why they should be done

   - Estimated number of beneficiaries

   - What should be done by the community

   - What should be done by the relevant institutions, eg government

3. **Mapping of existing opportunities**
Look for opportunities where identified issues can be incorporated into government plans and budgets. You will need to:

a. **Do background research**
Find out what laws and policies there are in your country relating to citizen participation in government planning processes.

b. **Build relationships**
It is very important to try to build relationships with people in the relevant government department or local authority, as well as with community leaders.

c. **Agree on the issue(s) that need to be included in the government plan and budget**
This is based on the priorities and resources identified during the CCT problem identification and prioritisation exercise. Not all issues will be incorporated into the government plan as some of them will be addressed by the community using its own resources in line with CCT principles.

d. **Gather the information you need**
Try to get hold of the local authority guidelines for planning and community participation to establish if there is a legal framework supporting citizen participation, and to understand what government planning platforms exist (including key dates in the planning process). Once you have received all the

documents, read them carefully. Don't worry if you have questions about things you don't understand – it is fine to ask the people in the office or authority who provided the information.

e. **Develop a strategy**
Depending on the responses given in the participatory planning tool, agreement will be reached on how to engage with the government planning process to ensure the community priorities find their way into the final government plans and budgets. This will include agreeing on who should do what.

Impact of the tool
Case study

In Nepal, the national government created a law which gave communities a way to participate meaningfully in development work, through the participatory planning process (PPP). The law stipulated that when local governments allocated funding development work, proposals from village development committees (VDC) had to be considered. However, in reality, the decisions were often left to a few influential leaders and politicians. This often failed to include the community's needs and views.

To reverse this trend, United Mission to Nepal (UMN), mobilised people from selected VDCs to help increase their participation in this community development, and trained them in how to access local government funds. At the community level, they also encouraged local facilitators to visit each household and invite them to join the initial meeting. The facilitators had a longstanding relationship with their communities and extensive knowledge of the local context.

This meant they were in a position to particularly encourage poor and low-caste families and other marginalised groups to take part, people who might otherwise not have been included.

At the meetings, communities learnt that the VDC funds for development belonged to them, and they were entitled to have a say in how they were allocated. UMN trained them in the government's process and priority areas, as well as the way proposals were developed. They encouraged the communities to identify and prioritise issues, and discuss possible solutions. They also helped them to consider and find other local resources, and access technical expertise where needed. Ward representatives took the communities' proposals to the VDC.

As a result of this involvement in the local government decision-making process, communities saw funds released to pay for community projects. These included sewing training for single women, materials for early childhood centres, irrigation channel maintenance, toilet construction, a new church building, and fencing for a cemetery.

Further guidance

As you plan to support a specific church and community to use this tool, you need to do some background work to get a basic understanding of the country's local and national planning cycles to build your confidence on the subject. Then you will need to research with the community to acquire a more detailed understanding of the planning processes in their local area.

Key questions to be answered:

- Is there a law that supports participatory planning?

- When is the beginning and end of the fiscal year?

- How is annual planning done in the country at local and national level?

- What platforms are available to input into the local or national plans?

- Who leads the planning process?

- What are the key dates, eg start and end dates of consultation periods?

Links to more documents and tools on participatory planning

a. **Advocacy in Nepal: Community participation in government planning**

b. **2.1.4 Participatory planning methods and tools used**

c. **Participatory Development Planning**

Glossary of terms

Budget: An estimate of income and expenditure for a set period of time.

Community-managed development: A process where community members come together to take collective action and generate solutions to common problems.

Fiscal year: A period of twelve months (not always 1 January to 31 December) for which a government or business plans its management of money.

Government: The offices, departments, and groups of people that control a country, state, city, or other political unit.

Plan: A set of decisions about how to do something in the future.

Public policy: Public policy is understood as a course of action, authorised by a government, to achieve certain goals. This may take many forms. It could, for example, take the form of a law, a strategy or a programme. Even a speech made by a president or a minister could outline a government's planned course of action.

Example template

Participatory planning process template

Country	Date
Administrative name of catchment area	
Community/village name	
Project(s)/public service(s) to be incorporated into government plan:	
1.	
2.	
3.	

Key themes	Responses
1. Has the ranking of problems and opportunities been done? This list of problems and opportunities should be available if the community has done the following in their CCT process: information gathering and analysis; dreaming dreams; planning for or taking action.	☐ **Yes** ☐ **No**
Comments and detail	
2. Has the mapping of existing opportunities for communities to participate in government planning processes been done?	☐ **Yes** ☐ **No**
Comments and detail	

Key themes	Responses
2.1. Is there a legal framework supporting citizen participation in the planning process?	☐ **Yes** ☐ **Yes – Information sharing** ☐ **Yes – Community consultation** ☐ **Yes – Collaborative planning** ☐ **Yes – Other** ☐ **No** (If NO, skip to question 2.2.)
Comments and detail	

Key themes
2.1.1. What government planning platforms exist at your governance level of interest? Which ones are best for you to participate in, to get your prioritised problems incorporated into government plans?

Comments and detail

2.1.2. What are the key dates for the government planning process?
 	
    ● In what months of the year does the planning process begin?
 	
    ● When do consultations start and end?
 	
    ● When will the final government plan and budget be ready?

Comments and detail

Key themes	Responses
2.1.3. In what formats does the government receive submissions from communities? ● Is your information (from the CCT process) available in the required format? ● Who has been selected to make the submissions on behalf of the community?	☐ **Written submissions** ☐ **Community consultation meetings** ☐ **Planning workshops**
Comments and detail	
2.1.4. Are there any other specific opportunities for community participation? Eg a certain percentage of the development funds are specifically earmarked for community-chosen projects?	☐ **Yes** ☐ **No**
Comments and detail	

Key themes	Responses
2.2. If there is no legal framework supporting citizen participation in the planning process: **2.2.1. Are there opportunities to develop/strengthen relationships with relevant duty bearers identified during institutional analysis in CCT approach and share the community priorities with them at the beginning of their planning process?** ● Is your information (from the CCT process) available in the required format? ● Who has been selected to make the submissions on behalf of the community?	☐ **Yes** ☐ **No**
Comments and detail	

Key themes	Responses
2.2.2. Are there opportunities to influence the planning process so that community concerns are still incorporated into the plans?	☐ Yes ☐ No
Comments and detail	
2.2.3. Are there opportunities to advocate for the setting up of a legal framework to require citizen participation in the government planning processes?	☐ Yes ☐ No
Comments and detail	

Guidance on immediate steps to take when the government plan and budget is ready

3.   Review the approved plans and budget to establish if the community priorities are reflected

- With the help of community leaders request the duty bearers to make a presentation to the community on the plans and budgets that have been approved. This will be important information to use to monitor the implementation of the projects using the other social accountability tools, eg public expenditure tracking, community scorecard, or social audits.

- If the community priorities are not reflected, establish why and brainstorm ideas of how to fund the community priorities using other sources, or wait for the next planning cycle.

- Agree on what your contribution will be as a community to ensure success of the plans.

- Ask the duty bearers what challenges they foresee and agree together on how the effects of the challenges will be mitigated against.

- Agree on frequency of update meetings between the communities and duty bearers.

Comments and detail

This is an example of the template for the participatory planning process.

> **To download a zip file of working templates which you can adapt for your context, please visit learn.tearfund.org/sa-tools and click on Social accountability tools: Templates under the 'Download resources' section.** ⌇

Budget tracking tool

📷 **Self-help group (Grupo de Ahorro) in Las Flores supported by Tearfund through our local partner AGAPE.** Linda Esperanza Aragon/Tearfund

In this section

About this tool • **Using and adapting the tool** • **Further guidance**

Example template • **Editable template**

tearfund

About this tool

This tool is used for the monitoring of government spending, by citizens, communities and other interested stakeholders through the review and periodic analysis of the budget.

Budget tracking involves conducting:

1. Reviews: Looking at the allocations of funds and establishing whether or not the funds have been allocated to the correct sectors.

2. Budget analysis: Looking at what was allocated at the beginning of the fiscal year and tracking what has been released and spent. Answering the question: 'Is this leading us towards the intended development outcome?'

Purpose of the tool

To monitor the allocation of money to ensure that the funds are correctly distributed, being released on time and being spent according to the plan (budget).

This tool can be used at all levels of government where budgeting or expenditure takes place.

Strengths and limitations of the tool

Strengths

- It supports the effective implementation of set budgets: the budget reflects the 'choices that the governments make to realise their socio-economic agenda. Thus, how effectively the budget is implemented is indicative of the extent to which policy is translated into outcomes.'[19]

- Improved service delivery can come about as budgets are used where needed instead of delayed or diverted.

- It has the potential to reduce and expose corruption, crime and misapplication of resources as citizens notice when funds do not reach their intended destination.

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[19] Kohli (2012) quoting Aiyar & Behar (2005)

Limitations

- Those most impacted by decisions may not have opportunity to participate in the process: the choices about where resources are used can be biased by personal opinions or needs. There might also be political motives at work. Those who are most likely to be impacted may not have political or economic power, leaving them unable to participate in the budget formulation process.[20]

- There is no guarantee that resources budgeted for will be raised and be available to fund the various programmes.

- The tool is more difficult to use in a centralised system of government.[21]

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[20] Kohli (2012)

[21] It is easier to use in a decentralised system of governance where political, financial and administrative authority has been moved from central to local (district/city) governments, so that the government can facilitate and guarantee better public services for the people. Cifor

Using and adapting the tool

At what stage in the CCT process can this tool be used?

Different CCT processes are used in different contexts. This tool is ideal for use at the stage where resource mapping has been done. Communities, with the church, have conducted their needs assessment, identified the problems and opportunities in their communities, prioritised the problems they want to focus on and have begun to mobilise resources to address the problems. It is at this stage that this tool can be used as the community will be clear on the problems for which tracking the government budget will be useful.

Below are examples of some CCT approaches and suggestions of where the tool can be used:

CCT Approach	CCMP	Umoja/Parivartan/Unidos	Sangsangai
When the budget tracking tool can be introduced	**Stage 4:** Information analysis	**Stage 3:** Dreaming dreams and taking action (planning for action) **Stage 4:** Taking action	**3rd cycle:** The community

The church and community can be trained in tracking budgets of interest using the template shown at the end of the guide to this tool.

Using the tool

Budgeting exercise: This group activity, to be led by the facilitator, helps demonstrate budgeting.

> The main lesson is that the 'families' represent different governments. Some have more resources than others but they all plan, and the budgets they develop represent their priorities.

Every family plans and budgets, some plan by faith as they are never sure how much money they will have. As the facilitator:

- Come up with some family names and assign them with occupations well known in your community/country.

- Ensure you have a high earning family, a middle-class family and a daily income earning family (no formal employment).

- Using your local currency, indicate how much each family earns on a monthly basis and the number of children each family has.

- Give each family a name and assign participants to the groups.

- Ask each family group to create a budget for the month.

- Each family then presents its budget to the group, explaining the rationale for their choices and decisions.

- Lead a conversation to help participants think through the kind of items being budgeted for.

- Discuss the differences in priorities between families, if any.

- Discuss what happens if the money is not spent according to the budget for each family. For example, imagine Mr Koffi spends the 700 on alcohol. What would be the impact on the family during that month? Or if the Mwale family contributes 5,000 to a family wedding?

See an example below:

Family name and occupations	Number of children	Total income	Assets
1. **The Mwales** **Doctor and company executive director**	4	80,000	3 vehicles Own their home
2. **The Smiths** **Teacher and bank teller**	3	20,000	1 vehicle Rented home
3. **The Koffis** **House help and labourer**	4	700 and unknown amounts depending on what is earned on the day.	1 bicycle Rented home
4. **Mr Keita** **(Single man)** **Mechanic**	0	5000	Renting a bedsit

Conducting a budget tracking process[22]

The following are the key steps to take in the process of budget tracking using the budget tracking tool template below.

1. **Form a budget tracking team:** If possible, the team should be elected by the community. Teams vary in size, but usually have between nine and 14 members. It should include women and men, and people of different ages, ethnic groups and status within the community.

2. **Background research:** Try to find out what laws and policies there are in your country relating to budget transparency. For example, there may be laws that say people are free to access information regarding budgets.

3. **Build relationships:** It is very important to try to build relationships with people in the relevant government department or local authority, and with community leaders.

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[22] Monitoring government spending, adapted from Tearfund's REVEAL Toolkit.

4. **Agree on the issue to monitor** based on the priorities set during the CCT problem identification and prioritisation exercise.

   a. **Gather the budget information you need:** Try to get hold of the local authority plans and budget information that you need. Once you have received all the documents, read them carefully. Don't worry if you have questions about things that you don't understand – it is fine to ask questions of the people in the office or authority who provided you with the budget.

   b. **Find out what is actually happening:** Is the budget being spent as it should be?

   c. **Analyse all of the information:** Does it all add up?

   d. **Feedback to your community** and decide on how to follow up. Collect all your information and hold a community meeting to make sure everyone has the opportunity to hear your findings, and to be involved in any follow up.

Impact of the tool
Case study

Through church and community transformation (CCT) training, a local Bolivian church supported its community to engage the local government to improve the community's water supply. With support from the local church, the community participated in the budgeting process and monitored the use of the allocated funds until the water supply infrastructure was built. This ensured improved household water supply and waste management infrastructure.

How budget tracking supported community transformation

In Tipa Tipa, a rural community in Bolivia, access to water was limited and was having serious impacts on people's livelihoods and domestic lives. Despite the community's impressive initiative to dig an irrigation system for their crops, their homes would still suffer for hours or days without water.

After receiving CCT training, Tipa Tipa's local church was determined to support their community to have better access to water. They also understood that these water and sanitation

issues were the government's responsibility. The church saw their opportunity to ensure Tipa Tipa's water access when the Bolivian government passed a new law allowing citizens' participation in budget allocation. Tipa Tipa's local church lobbied the local government to provide appropriate water supply to their community by allocating a budget to build a new water tank and water pipeline network for each home.

After many meetings, the local government and community agreed that the government would provide a budget for this project and the community would give their time and labour to build these new water systems. In addition, Tipa Tipa's church played a role in influencing the municipality's annual operating plan and the construction of a sewerage system in Tipa Tipa. Families were then able to connect their toilets and showers to the system, and the community was able to build bathrooms where previously they had only had latrines.

Further guidance

As you plan to support a specific church and community to use this tool, you need to do some background work to get a basic understanding of the local and national budget development and implementation cycle in the country to build your confidence on the subject. Then you will need to research with the community to acquire a more detailed understanding of the budgeting processes in their local area.[23]

Key questions to be answered:

1. When are budgets approved in the country at local and national level?

2. What form of government is in place? Centralised or decentralised form of government?

3. What resources are sent to the local level?

4. In what ways can budget information be accessed?

5. What are the key dates for budget allocations, disbursements and reporting?

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[23] Although this tool can be used independently, its outcomes can be strengthened when it is used after the Participatory planning tool

Links to more documents and tools on budget tracking

a. **Monitoring government spending (budget tracking)**

b. **Budget tracking for beginners: An introductory guide**

c. **Manual on Social Accountability: Concepts and Tools.** Pages 52 to 80 explain budget tracking in depth.

d. **Just and Democratic Local Governance: Budgets**

e. **Kenya County Budget Training Workshop Materials for Facilitators and Participants**

Glossary of terms

Budget: An estimate of income and expenditure for a set period of time.

Centralised government: A government in which both executive and legislative power is concentrated centrally at the higher level as opposed to it being more distributed at various lower level governments.

Community-managed development: A process where community members come together to take collective action and generate solutions to common problems.

Decentralisation: The transfer of control of an activity or organisation to several local offices or authorities rather than one single one.

Fiscal year: A period of twelve months (not always January 1st to December 31st) for which a government or business plans its management of money.

Government: The offices, departments, and groups of people that control a country, state, city, or other political unit.

Plan: A set of decisions about how to do something in the future.

Public policy: Public policy is understood as a course of action, authorised by a government, to achieve certain goals. This may take many forms. It could, for example, take the form of a law, a strategy or a programme. Even a speech made by a president or a minister could outline a government's planned course of action.

Example template

Budget tracking tool template[24]

Country
Community/village name
Administrative name of catchment area
Project/public service earmarked for budget tracking
Period of budget tracking

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[24] Adapted from the Evangelical Fellowship of Zambia's *Constituency Development Fund (CDF) Budget Tracking Tool* (2015).

Monitoring the process and implementation for a particular project[25]

Name of project			
Monitoring the process			
	Yes (Please provide explanation)	**No** (Please provide explanation)	**Unclear** (Please provide explanation)
1. **Is the community aware of this project?**			

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[25] Use the same methodologies used during CCT to collect, analyse and disseminate the information to relevant stakeholders.

	Yes (Please provide explanation)	No (Please provide explanation)	Unclear (Please provide explanation)
2. Is the community aware of the amount of funds allocated for the project?			
3. Did the community participate in the identification of the project? Eg Did community members make a submission when plans were being made for the project?			
4. Did the community participate in the implementation of the project? Eg Did they contribute materials/time?			

	Yes (Please provide explanation)	**No** (Please provide explanation)	**Unclear** (Please provide explanation)
5. Did the community identify the suppliers of goods and services for the project?			
6. Did the local authority publicly advertise for the supply of goods and services?			

Monitoring implementation of the project			
7. How much in total was allocated for this project? (Access information from local authority)			
	Yes (Please provide explanation)	**No** (Please provide explanation)	**Unclear** (Please provide explanation)
8. Are the materials procured by the local authority the same as those put in the proposal?			
9. How much was the supplier meant to receive (according to the local authority)			

10. How much does the supplier claim to have received?			
	Yes (Please provide explanation)	**No** (Please provide explanation)	**Unclear** (Please provide explanation)
11. Is the project complete? (Visit the project)			
12. Do the community members feel the project was beneficial? (Community question)			
13. Do the community members feel the project was of good quality? (Community question)			

To ask/gather from the local authority
(These are guiding questions, adapt based on context)

	Yes (Please provide explanation)	No (Please provide explanation)	Unclear (Please provide explanation)
14. **Did the community participate in the identification of the project?** Eg Did community members participate in the planning meetings?			
15. **Did the community participate in the implementation of the project?** Eg did they contribute materials/time?			

	Yes (Please provide explanation)	No (Please provide explanation)	Unclear (Please provide explanation)
16. How were the suppliers of goods and services chosen? Did the community identify them? Was it through a public bid?			
17. How much in total was allocated for this project?			
18. Are the materials procured by the local authority the same as those put in the proposal? If not, why not?			

	Yes (Please provide explanation)	No (Please provide explanation)	Unclear (Please provide explanation)
19. How much is the supplier meant to receive?			
20. Is there an audit report for the project?			
21. Have there been any challenges with the project?			

To gather during on-site visit (Physical inspection of the project)			
	Yes (Please provide explanation)	**No** (Please provide explanation)	**Unclear** (Please provide explanation)
22. Are the materials procured by the local authority the same as those put in the project plan/budget/bill of quantities?			
23. Is the quality of materials sufficient?			

	Yes (Please provide explanation)	**No** (Please provide explanation)	**Unclear** (Please provide explanation)
24. How much does the supplier claim to have received?			
25. Is the project complete?			
26. Have there been any challenges with the project?			

This is an example of the template for the budget tracking tool.

To download a zip file of working templates which you can adapt for your context, please visit learn.tearfund.org/sa-tools and click on Social accountability tools: Templates under the 'Download resources' section.

Citizen journalism tool

📷 **Community member records a video of the volunteers' school visit in Bangladesh.**
Aaron Koch/Tearfund

In this section

About this tool • **Using and adapting the tool** • **Further guidance** •

Example template • **Editable template**

tearfund

About this tool

Citizen journalism is the action of ordinary citizens without journalistic experience creating stories intended for their chosen audience using a cell phone with a camera and sound recorder, and sharing it with their community or the world using social and traditional media.

The stories created by citizen journalists often represent communities and issues overlooked by traditional media. Citizen journalism:

- can be done by any citizen

- addresses stories not covered in the main news

- gives citizens an opportunity to be active people with voices

- gives an opportunity for citizens to collect, analyse, report, and distribute information to an audience

Purpose of the tool

To provide an essential representation of marginalised groups in media dark areas[26] and enhance the local community's social and cultural cohesion.

This tool can be used at all levels of governance where there is a demand side (citizens) and supply side (government).

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[26] Communicating to distant, scattered villages or areas where much of the population is poor. The target audience may have no access to education or media. Kumar (2021)

Strengths and limitations of the tool

Strengths

- **Promotes freedom of expression and citizen interests:** Stories created by citizen journalists reflect what is going on in local communities. Citizen journalism functions as 'an alternative news channel for reporting on politically sensitive information and facilitating the development of an online public sphere, therefore, enabling ordinary citizens to make their voices heard.'[27]

- **Becomes a bridge between citizens and policymakers:** Once citizen journalists are adequately trained they can become reliable sources of information for their communities, bridging this gap.

- **Fact checking:** This tool can play an important role in identifying and verifying information in chaotic situations.

- The tools used by citizen journalists are less expensive, efficient, and easy to operate.

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[27] Xin (2010)

Limitations

- **The most impacted may never have their stories heard:** In some cases citizen journalists have limited audiences.

- Politicians, journalists, citizens, and scholars may only accept what they believe or feel is true based on emotional drive or interest. This itself is an ethical challenge for journalistic activities in producing news in the post-truth era.[28]

- It may not support self-regulation or keep to ethical standards: This could also lead to the spread of misinformation.

- **It could lead to threats against the individual:** There may be risks to the physical safety (assault, kidnapping, imprisonment, or extra-judicial killing) or digital safety (online harassment, surveillance, a lack of safe and secure communication) of the citizen journalist.[29]

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[28] White A. (2017) Ethics in the News: EJN Report on Challenges for Journalism in the Post-truth Era.

[29] Digital threats can come from citizens or the state: Digital safety

Using and adapting the tool

At what stage in the CCT process can this tool be used?

Different CCT processes are used in different contexts. This tool is ideal for use at the stage where the communities, with the church, have conducted their needs assessment, identified the problems and opportunities in their communities, and are mobilising resources to address the problems. If some of the problems identified and prioritised have to do with government service delivery, this tool can be used to gather the evidence on the extent of the problem, create awareness of the problem in the community and even seek answers from those responsible on what they are doing to address the problem.

Below are examples of some CCT approaches and suggestions of where the tool can be used:

CCT approach	CCMP	Umoja/Parivartan/Unidos	Sangsangai
When citizen journalism tool can be introduced	**Stage 2:** Church and community description **Stage 3:** Information gathering **Stage 4:** Information analysis **Stage 5:** Decision making	**Stage 2:** Envisioning the community **Stage 3:** Dreaming dreams and taking action (planning for action) **Stage 4:** Taking action	**3rd cycle:** The community

The church and community can be trained in citizen journalism using the tools below.

Using the tool

You can see a citizen journalism template at the end of the guide to this tool.

> **To download a zip file of working templates which you can adapt for your context, please visit learn.tearfund.org/sa-tools and click on Social accountability tools: Templates under the 'Download resources' section.** ↗

Key steps to undertake citizen journalism:[30]

1. **Pick the issue of interest based on the community mapping done during CCT.** This will ensure that the story has community backing and will provide a level of protection for the citizen journalist (see physical and digital safety in 'limitations' above).

2. **Research and be clear about your rights as a citizen journalist:** Some key questions to ask as you consider using this tool would be:

   a. Is there a right to information law?

   b. Are there any other laws that can support the capturing of the information we need in the format we want such as capturing video footage?

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[30] Adapted from Mare et.al (2018)

3. Be a responsible citizen journalist operating within ethical guidelines:

    a. Be accurate.

    b. Avoid plagiarism.

    c. Respect people's right to privacy.

    d. Understand the contextual sensitivities of a community or the people involved.

    e. Ask for necessary permissions (eg to capture video or audio footage, take pictures, use names or other identifying information).

4. Set out your story:

    a. What is happening/has happened?

    b. Who, where, and when?

    c. Why is it happening/has it happened?

    d. How is it affecting people and why is this important?

    e. What needs to happen now?

    f. Who can help address the problem and are they aware of the problem?

5. Think through the dissemination channels and be creative (see ideas in the template in the annex)

Impact of the tool
Case study

The Alliance for Community Action (ACA) in Zambia,[31] has a vision to see a 'Zambia in which all her citizens enjoy the full and equitable benefit of all her resources'. They hope to achieve this by growing the routine and systematic demand for public resource accountability by citizens in Zambia. One approach they use to achieve this is the training of young people as citizen journalists who are able to call those responsible to account for how public resources are managed. Citizen journalists produce content using mobile phones, ready for broadcast and distribution without the need for a computer or studio editing. The stories are aired on local radio stations partnered with the ACA, as well as ACA social media platforms.

Here is an example of a news report developed by a young citizen journalist trained by ACA under its Speak Up Youth project

Watch online

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[31] Alliance for Community Action

Further guidance

As you plan to support the specific church and community to use this tool, you need to do some background work to get a basic understanding of the local socio-political governance context and establish if it allows for the use of such a tool.

Do some basic research on the media landscape in the community:

- Is there a right to information law? Or any other laws that can support the capturing of information?

- Is there a community radio station?

- Is the community radio station willing to partner with citizen journalists to take up the stories?

- Are they willing to conduct some of the training sessions to teach the citizen journalists?

- Have a mix of citizen journalists so you have people who are able to read and write in the local languages as well as in the official language.

Links to more documents and tools on citizen journalism

a. **Participation guide: Citizen Journalist**

b. **Service-Learning Guide for Citizen Journalists**

c. **Citizen journalism**

d. **Citizen Journalism Guidelines**

e. **Media Literacy: Citizen Journalists**

f. **Advocacy and social accountability toolbox**

g. **Local media survival guide**

h. **Citizen journalism practice**

i. **Female Zambian citizen journalists**

Glossary of terms

Budget: An estimate of income and expenditure for a set period of time.

Citizen: A person who is a member of a particular country, owing it allegiance, and who has rights to the state's protection because of being born there or because of being given rights.

Community-managed development: A process where community members come together to take collective action and generate solutions to common problems.

Government: The offices, departments, and groups of people that control a country, state, city, or other political unit.

Journalism: The work of collecting, writing, and publishing news stories and articles for broadcast in media channels.

Plagiarism: The practice of taking someone else's work or ideas and passing them off as one's own

Plan: A set of decisions about how to do something in the future.

Public policy: Public policy is understood as a course of action, authorised by a government, to achieve certain goals. This may take many forms. It could, for example, take the form of a law, a strategy or a programme. Even a speech made by a president or a minister could outline a government's planned course of action.

Social media: Interactive technologies that facilitate the creation and sharing of information, ideas, interests, and other forms of expression through virtual communities and networks.

Traditional media: Media channels that originated prior to the internet, including newspapers, radio, and broadcast television.

Example template

Citizen journalist story template

Country	Date
Administrative name of catchment area	
Community/village name	
Issue being reported	
Report made by	
Necessary permissions have been granted	
☐ **Yes** ☐ **No**	

Setting out of story

Key questions	What do I already know?	Who can help answer the questions I still have? (Information sources)	Responses	What steps have you taken to verify the Information?
1. What is happening/has happened?				
2. Who, where and when?				
3. Why is it happening/has it happened?				
4. How is it affecting people and why is this important?				

5. **What needs to happen now?**				
6. **Who can help address the problem and are they aware of the problem?**				

What is the best way of sharing this information gathered?					
1. **How will the content be set out?**	Video	Audio	Photography	Article	Cartoon	Other
2. **How will the content be shared?**	Online (eg social media)	Radio	Television	Print media		Other

This is an example of the template for the citizen journalism tool.

To download a zip file of working templates which you can adapt for your context, please visit **learn.tearfund.org/sa-tools** and click on Social accountability tools: Templates under the 'Download resources' section.

Community scorecards tool

📷 **Jean Bosco Sindayihebura, part of the Diocese of Matana, records information about the villagers' health and nutritional status in Songa.** Tom Price/Tearfund

In this section

About this tool • **Using and adapting the tool** • **Further guidance**

Example template • **Editable template**

tearfund

About this tool[32]

> **The community scorecard is a citizen-driven accountability tool that facilitates monitoring and evaluating the performance of services, projects and even government administrative units (eg district offices) by the local community themselves.**

Purpose of the tool

To promote transparency, efficiency and quality in the delivery of public services to communities. The tool seeks to achieve this by facilitating:

1. tracking the availability of services

2. monitoring of the quality of services or projects

3. comparison of performance across facilities or districts

4. generating a direct feedback mechanism between service providers and users

5. building local capacity

6. strengthening citizen voices and community empowerment

This tool is designed for use at a local level, especially monitoring specific facilities, eg clinics, schools or utility companies.

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[32] Adapted from the Evangelical Fellowship of Zimbabwe's Social Accountability Manual.

Strengths and limitations of the tool

Strengths

- **Promotes common understanding** through direct dialogue between citizens and service providers.

- **Increases joint responsibility** between service providers and citizens, as citizens are more engaged in a participatory process to deliver quality and efficient services.

- **Allows for agile management** of public projects.

- **Relatively easy to use** and flexible in application.

Limitations

- Local government officials **may not be receptive** to citizen participation and may be threatened by citizen feedback.

- Local government officials **may have limited capacity** to implement citizen feedback.

- **Requires an excellent facilitator** between citizens and local government to ensure all stakeholders are actively engaged and conflicts are amicably resolved.

- **Can create unrealistically high expectations.**

Using and adapting the tool

At what stage in the CCT process can this tool be used?

Different CCT processes are used in different contexts. This tool is ideal for use at the stage where the communities, with the church, are undertaking their needs assessment, identifying the problems and opportunities in their communities and mobilising resources to address the problems. The community is already experiencing a mindset shift, recognising their own agency. They also have a map of their resources and have identified areas of need.

If some of the problems identified and prioritised have to do with government service delivery, this tool can be used to gather evidence on the extent of the problem and it can be presented during interface meetings with the relevant government institution or facility. The community access the public services and are well placed to share their perceptions of the quality of service delivery and give feedback on how improvements and changes can be made within the available resources at local and national level.

Below are examples of some CCT approaches and suggestions of where the tool can be used:

CCT approach	CCMP	Umoja/Parivartan/Unidos	Sangsangai
When the community scorecard tool can be introduced	**Stage 3:** Information gathering **Stage 4:** Information analysis **Stage 5:** Decision making	**Stage 3:** Dreaming dreams and taking action (planning for action) **Stage 4:** Taking action	**3rd cycle:** The community

Using the tool[33]

There are example templates at the end of the guide for this tool.

> **To download a zip file of working templates which you can adapt for your context, please visit learn.tearfund.org/sa-tools and click on Social accountability tools: Templates under the 'Download resources' section.** ↗

There are six main stages in the implementation of the community scorecard:

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[33] Adapted from The Community Score Card (2013)

Stage 1: Planning and preparation

This stage uses information from the CCT process. The problems have been identified and prioritised and issue(s) needing government involvement have been identified.

Support the community to identify the specific issues/problems they have with the particular service(s). For example, if the issue identified during the CCT process is 'the poor quality of healthcare services provided by our local clinic', they must be supported to break this down and explain what constitutes 'poor quality health care'. Use an exercise to clarify this perception and make use of the reasons they give. (This information will be readily available if the community has done good community mapping, information gathering and analysis during the CCT process.)

Community's perception on quality of healthcare services at local clinic[34]

Very Satisfied	Satisfied	Neutral/ not sure	Dissatisfied	Very dissatisfied
☐	☐	☐	☐	☐
Reason for answer				

Use the information given to develop indicators and create the scorecard.

---

[34] Adapted from the Evangelical Fellowship of Zimbabwe's Social Accountability Manual

Stage 2: Using the scorecard with the community

The scorecard is administered to the community members. Depending on the issue being addressed, it is encouraged to do this through desegregated focus groups, eg women alone, men alone, young people alone, as their experiences of the same service may be very different. So data collection should be planned for. Below is an example of what the scorecard may look like. You can find a template to which can be adapted to suit each situation and context at learn.tearfund.org/sa-tools.

Issue	Priority	Reasons
The local clinic never has drugs	High	We are always given prescriptions instead of medicine so we have stopped going to the health centre when we are ill

Indicator	Score				
	Very bad =1	**Bad =2**	**Okay =3**	**Good =4**	**Very good =5**
Availability of drugs at the local clinic					
Reasons					

Stage 3: Conducting the scorecard with service providers

To promote collaboration, the service provider must have the opportunity to 'tell their side of the story'. Therefore, they must also have the opportunity to develop a scorecard with the problems as they see them. 'What services do we offer? What are the main challenges? What can be done to improve?'

Below is an example of a scorecard with indicators developed by healthcare service providers.

Issue	Priority	Reasons
The local clinic never has drugs	High	• Community members refuse to pay the user fee. • Community members wait until they are severely ill but the clinic only has 'first line drugs'. • The population of the community has grown, but the drug allocation from the Ministry of Health has remained the same.

Indicator	Score				
	Very bad =1	Bad =2	Okay =3	Good =4	Very good =5
Payment of user fees					
Early access of healthcare service					
Allocation of drugs by the Ministry of Health					
Reasons					

Stage 4: Consolidating the results

Work with the data collectors/representatives of the community to consolidate the data, do the analysis and prepare a report setting out the results. As part of promoting trust and collaboration, and depending on the context, it may be helpful to share the main findings with the service providers before the meeting takes place so that they do not feel 'ambushed'.

	Focus group	Village 1 average score	Village 2 average score	Village 3 average score	Consolidated average score by focus group	Reason
Indicator 1	Youths					
	Women					
	Men					
Consolidated scores by village						

Stage 5: Interface meeting and action planning

- After consolidation of the results, a meeting between service providers and the community is facilitated by a neutral and trusted facilitator.

- The meeting is intended to provide a platform for the sharing and discussion of the scorecards and reasons for the scores given.

- Ensure key decision makers are in attendance to allow for immediate feedback and commitment to action.

- Facilitate the creation of a joint action plan between the community and service providers with a list of changes that can be made immediately, in the medium term and long-term plans if any. This is important so as to manage the expectations of the community.

Stage 6: Action plan implementation and monitoring and evaluation (M&E)

During the meeting it should be made very clear on who will be responsible for what actions and when they will be completed.

It is important that this is not treated as a separate process from the other work being done under your CCT approach, so the monitoring mechanisms used for other aspects of your approach will apply here.

Impact of the tool
Case study

Church leaders and community champions in Zimbabwe worked together to address issues of water supply, sanitation, and waste management in their community with local government officials through community feedback meetings and budget consultations. After being sensitised to the needs of children with disabilities in their community, community members and local government officials collaborated together to improve public services for these children.

📷 **Community champions being trained by the Evangelical Fellowship of Zimbabwe.**
The Evangelical Fellowship of Zimbabwe

Across several communities in Zimbabwe, people didn't have access to clean water. Their water taps had stopped working and many couldn't afford to buy water. Instead, they had to walk to a faraway river to fetch water, which would often carry diseases.

Local community champions helped community members to understand their rights and responsibilities. They also monitored public spending and used other social accountability tools such as scorecards and citizen journalism to gather information about local problems and concerns. Church leaders also played an essential role in encouraging their congregations throughout the communities to engage in these social accountability processes.

Once enough data had been collected through community scorecards, the community champions and church leaders met with local government officials to discuss the communities' water sanitation and supply issues. The government officials were very open to having the community champions and church leaders join their budget consultations and monitor their progress in addressing the communities' problems.

In a few months, the communities were glad to have clean water coming through their taps again.

Further guidance

As you plan to support the specific church and community to use this tool, you need to do some background work to get a basic understanding of the local socio-political governance context and ensure the community has clearly identified the service delivery issue they would like to address. Do some basic research on who has the responsibility to deliver the identified service and what the minimum expected level of service delivery is.

Take some time to think ahead around what advocacy and actions will need to take place to follow up on commitments made towards improving the service delivery. Below are resources you can review to learn more about the tool.

Links to more documents and tools on community scorecards

a. **Example 1: Community Score Card for Mafanikio Dispensary, Kufikia County 4 2 2 1**

b. **Participatory Budgeting, Community Score Card, Citizen Report Card Toolkit, IEA, 2015, p42**

c. **Community scorecard implementation Steps**

d. **Social Accountability Topic Guide**

e. **Advocacy and social accountability toolbox**

f. **Manual on Social Accountability for Civil Society Organizations and Municipalities in Palestine**

g. **Community scorecard training guide, pp12–19**

h. **Community scorecard slides, pp12–26**

Glossary of terms

Budget: An estimate of income and expenditure for a set period of time.

Community-managed development: A process where community members come together to take collective action and generate solutions to common problems.

Government: The offices, departments, and groups of people that control a country, state, city, or other political units.

Plan: A set of decisions about how to do something in the future.

Public policy: Public policy is understood as a course of action, authorised by a government, to achieve certain goals. This may take many forms. It could, for example, take the form of a law, a strategy or a programme. Even a speech made by a president or a minister could outline a government's planned course of action.

Example template

1. Community scorecard template

Country	Date
Administrative name of catchment area	
Community/village name	
Focus group (eg women/men/boys/girls)	

Identified issues	Priority level (low/medium/high)	Reasons

Indicator	Score					Reasons
	Very bad =1	Bad =2	Okay =3	Good =4	Very good =5	

2. Matrix template to consolidate scores

Country	Date
Administrative name of catchment area	
Community/village name	

	Focus group	Average score	Average score	Average score	Consolidated average score by focus group	Reason
Indicator 1	Youths					
	Women					
	Men					
Consolidated average score, by focus group						

	Focus group	Average score	Average score	Average score	Consolidated average score by focus group	Reason
Indicator 2	Youths					
	Women					
	Men					
Consolidated average score, by focus group						

These are examples of the templates for the community scorecards tool.

> **To download a zip file of working templates which you can adapt for your context, please visit learn.tearfund.org/sa-tools and click on Social accountability tools: Templates under the 'Download resources' section.** [↗]

Public expenditure tracking survey tool

📷 **Participants and their children suffering from malnutrition attend the food security and nutrition project in Mutaho village, Burundi.** Tom Price/Tearfund

In this section

About this tool • **Using and adapting the tool** • **Further guidance**

Example template • **Editable template**

tearfund

About this tool

This is a method by which citizens track the flow of public resources (eg finances, materials, machinery, human resources) from the highest levels of government, through administrative structures at different levels, all the way to the frontline public service providers.

Purpose of the tool

For citizens to assess the amount of funds allocated for implementation of activities by frontline service providers. Establish how much has been spent, is being spent and the outputs that have been achieved through the funds that have already been spent.

This tool can be used at all levels of government where allocation and expenditure of funds take place.

Strengths and limitations of the tool

Strengths

- Good at keeping up to date with what citizens are concerned about.

- Able to focus accountability on local issues as well as wider systemic ones.

- Fights corruption and inefficiencies in service delivery.

Limitations

- There can be problems if data does not exist, is not accessible, or is in an unusable format, whether intentionally or not.

Using and adapting this tool

At what stage in the CCT process can this tool be used?

Different CCT processes are used in different contexts. This tool is ideal for use at the stage where resource mapping has been done: communities, with the church, have conducted their needs assessment, identified the problems and opportunities in their communities, prioritised the problems they want to focus on and have begun to mobilise resources to address those problems. If the government has already prioritised an identified problem, this tool can be used to ensure that problem is addressed in the best way possible with the available resources. This tool will help the community track how those funds are being used.

Below are examples of some CCT approaches and suggestions of where the tool can be used:

CCT approach	CCMP	Umoja/Parivartan/Unidos	Sangsangai
When public expenditure tracking tool can be introduced	**Stage 4:** Information analysis **Stage 5:** Decision making	**Stage 3:** Dreaming dreams and taking action (planning for action) **Stage 4:** Taking action	**3rd cycle:** The community

Using the tool

Conducting a public expenditure tracking survey (PETS)

You can see an example of how this tool has been used below (template 1). The church and community can conduct a public expenditure tracking survey using the blank tool (template 2).

> **To download a zip file of working templates which you can adapt for your context, please visit learn.tearfund.org/sa-tools and click on Social accountability tools: Templates under the 'Download resources' section.**

The following are the key steps to take in the process of public expenditure tracking using this tool template.

1. Form a PETS team: If possible, the team should be elected by the community. Teams vary in size, but usually have between nine and 14 members. It should include women and men, and people of different ages, ethnic groups and status within the community.

2. Background research: Try to find out what laws and policies there are in your country relating to expenditure transparency. For example, there may be laws that say people are free to access information regarding public expenditure.

3. Build relationships: It is very important to try to build relationships with people in the relevant government department or local authority, and with community leaders.

4. Agree on the issue/project to monitor based on the priorities set during the CCT problem identification and prioritisation exercise.

5. Gather the public expenditure information you need. Try to get hold of the local authority plans, budgets and expenditure information that you need. Once you have received all the documents, read them carefully. Don't worry if you have questions about things that you don't understand – it is fine to ask the people in the office or authority that provided the budget.

6. Find out what is actually happening: Are the funds for the project being spent as they should be?

7. Analyse all of the information – does it all add up when you look at the amounts allocated, amounts spent and the progress made?

8. Feedback to your community and those responsible for the budget and its use, and decide on how to follow up. Collect all your information, analyse it, set it out in a report and hold a community meeting to make sure everyone has the opportunity to hear your findings, and to be involved in any follow up.

Impact of the tool
Case study

Through church and community transformation training in Uganda, a local church supported their village to engage a hesitant local government to provide much-needed health services. With support from the local church, the village and their local government officials collaborated to strengthen national and local government accountability through public expenditure tracking. Together, they ensured funds that were allocated to the community's health services efficiently reached the community.

Further guidance

As you plan to support the specific church and community to use this tool, you need to do some background work to get a basic understanding of the country's local and national expenditure cycle to build your confidence on the subject. Then do a similar exercise with the community and together acquire a more detailed understanding of the expenditure framework locally.

Key questions to be answered:

1. When are budgets approved in the country at local and national level?

2. What form of government is in place? Is it centralised or decentralised?

3. What resources are sent to the local level, when, how often?

4. What routes are available to access expenditure information?

5. What are the key dates for disbursements, expenditure and reporting?

Links to more documents and tools on public expenditure tracking

a. **PETS slides pg 28–39**

b. **PETS training guide pg 20–27**

c. **Detailed PETS guidebook**

Glossary of terms

Audit: An official inspection of an organisation's accounts, typically by an independent body.

Budget: An estimate of income and expenditure for a set period of time.

Centralise: To create a system in which one central group of people gives instructions to regional groups.

Citizen: A person who is a member of a particular country, owing it allegiance, and who has rights to the state's protection because of being born there or because of being given rights.

Community-managed development: A process where community members come together to take collective action and generate solutions to common problems.

Corruption: Dishonest or fraudulent conduct by those in power, typically involving bribery.

Disbursement: The payment of money from a fund.

Expenditure cycle: The set of activities related to the acquisition of and payment for goods and services. These activities include the determination of what needs to be purchased, purchasing activities, the receipt of goods, and payments to suppliers.

Fiscal year: A period of twelve months (not always January 1st to December 31st) for which a government or business plans its management of money.

Government: The offices, departments, and groups of people that control a country, state, city, or other political unit.

Plan: A set of decisions about how to do something in the future.

Public policy: Public policy is understood as a course of action, authorised by a government, to achieve certain goals. This may take many forms. It could, for example, take the form of a law, a strategy or a programme. Even a speech made by a president or a minister could outline a government's planned course of action.

Public service: The service responsible for the public administration of the government of a country. It excludes the legislative, judicial, and military branches. Members of the public service have no official political allegiance and are not generally affected by changes in government. The business of supplying an essential commodity, such as gas or electricity, or a service, such as transportation, to the general public, with or without charge.

1. Public expenditure tracking survey (PETS) tool – example[35]

User details				
Name/group	Mustafa G.			
Gender	Male:	✓	Female:	
Age/years in operation				
Organisation/ category	Project steering committee			
Sub-county of residence	Kufikia South Sub-County			
Ward of residence	Kushiriki Ward			

Sector under review	
Health	
Area under review	**Name**
Sub-county	Kufikia South Sub-County
Ward	Kushiriki Ward
Village	Mafanikio
Date of survey	
12 December 2018	

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[35] Adapted from GAF public expenditure tracking survey tool: County Toolkit

Project implementation FY 2017/2018

Project details and type of implementation
Construction of new Health Centre at Mafanikio
Amount approved in budget
3,000,000
Amount allocated
5,217,419
Amount used
? unable to determine
Difference/variance
?
Implementation progress
Not yet completed
Community feedback
Construction was completed to roofing stage, but then the contractors stopped coming to work and the building has remained unfinished for several months.

Qualitative survey questions – example

No.	Description	Yes	No	Detailed explanation
1	**Were community members involved in the selection of this project?**	✓		Yes, this project was wanted by the community for a long time.
2	**Are community members happy with the location of the project site?**	✓		Yes, the chosen site is suitable.
3	**Have you seen the plans of this project?**		✓	The plans were not made available to the project steering committee.
4	**Name of company awarded the contract/tender**			M/S Koi-Mag General Constructors Ltd
5	**Was the ward development committee involved during tender/contract award?**		✓	
6	**Have you experienced any integrity related issues associated with the contractor?**	✓		The contractor has stopped attending the site and the project has stalled.

7	If there were any complaints related to the project, were these shared?	✓		Yes, the absence of the contractor was reported to the MCA, so far nothing has been done.
8	Is the project on time as per planned schedule?		✓	Completion date was set as 13 June 2018. It is now December 2018 and the project is still only 60% complete.
9	If not complete, do you know why?		✓	No, the contractor stopped coming to the site and there is no explanation for why construction has stopped.
10	Rate the project implementation on the following scale (tick one) and justify why.	Excellent:		
		Good:		
		Poor: ✓		The building has been left in a state of partial completion with the roofing only partially complete, so it is exposed to the weather, which is not good, especially after the recent rains.

Public expenditure tracking survey (PETS) tool – template[36]

User details				
Name/group				
Gender	Male:		Female:	
Age/years in operation				
Organisation/ category				
Sub-county of residence				
Ward of residence				

Sector under review	

Area under review	Name
Sub county	
Ward	
Village	
Date of survey	

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[36] Adapted from *GAF public expenditure tracking survey tool:* County toolkit

Project implementation FY   /

Project details and type of implementation
Amount approved in budget
Amount allocated
Amount used
Difference/variance
Implementation progress
Community feedback

Qualitative survey questions

No.	Description	Yes	No	Detailed explanation
1	Were community members involved in the selection of this project?			
2	Are community members happy with the location of the project site?			
3	Have you seen the plans of this project?			
4	Name of company awarded the contract/tender			
5	Was the ward development committee involved during tender/contract award?			
6	Have you experienced any integrity related issues associated with the contractor?			

7	If there were any complaints related to the project, were these shared?			
8	Is the project on time as per planned schedule?			
9	If not complete, do you know why?			
10	Rate the project implementation on the following scale (tick one) and justify why.	Excellent:		
		Good:		
		Poor:		
11	If it is safe to do so, take a photo of the project and insert it here to evidence the progress of its implementation.			

The first template demonstrates how the tool has been used, and the second is a blank example of the template.

> **To download a zip file of working templates which you can adapt for your context, please visit learn.tearfund.org/sa-tools and click on Social accountability tools: Templates under the 'Download resources' section.**

Social audit tool

📷 **A peacebuilding workshop in Kenya, with most attendees being peacebuilders from South Sudan.** Diane Igirimbabazi/Tearfund

In this section

About this tool • **Using and adapting the tool** • **Further guidance**

Example template • **Editable template**

Social accountability tools guide

tearfund

About this tool

This tool should not be confused with financial or operational audits. It also has a broader scope than citizen report cards or community scorecards. Social audits collect evidence from various stakeholders to provide accurate feedback on all stages of the outworking of government policy, including financial management, access to information, and participation.

Purpose of the tool

To provide accurate feedback to service providers and communities on the level of achievement and areas of improvement in service provision. This tool supports the prevention of corruption by:

- potentially exposing it

- informing the public about the possible impacts of public policies

- bolstering citizens to voice needs and make demands of their government

- measuring consistency between policy or programme promises and results

This tool can be used at all levels of government. It can range from a specific local project, to a government department, to a multiple national programme.

Strengths and limitations of the tool

Strengths

- Supports citizens' awareness of government policies, programmes and projects and connects this to the impact on them.

- Clarifies the relevance and impact of government policies and programmes.

- Increases government transparency and efficiency in delivering programmes and implementing policies.

Limitations

- Requires willingness of all stakeholders to conduct all phases of the process.

- It is more effective when there is legal protection for the right to information.

Using and adapting the tool

At what stage in the CCT process can this tool be used?

Different CCT processes are used in different contexts. This tool is ideal for use at the stage where resource mapping has been done: communities, with the church, have conducted their needs assessment, identified the problems and opportunities in their communities, prioritised the problems they want to focus on and have begun to mobilise resources to address those problems. If the government is already implementing a project to address an issue identified and prioritised by the community, this tool can be used to ensure the problem is addressed in the best way possible to bring about the intended outcome. This tool will help the community establish if the activities, projects or programmes are achieving positive results.

Below are examples of some CCT approaches and suggestions of where the tool can be used:

CCT Approach	CCMP	Umoja/Parivartan/Unidos	Sangsangai
When social audit tool can be introduced	**Stage 4:** Information analysis **Stage 5:** Decision making	**Stage 3:** Dreaming dreams and taking action (planning for action) **Stage 4:** Taking action **Stage 5:** Evaluation	**3rd cycle:** The community

Using the tool

The church and community can be trained in facilitating social audits using practical tools like the social audit template. An example is shown at the end of the guide to this tool.

> **To download a zip file of working templates which you can adapt for your context, please visit learn.tearfund.org/sa-tools and click on Social accountability tools: Templates under the 'Download resources' section.** ⬀

The key steps of the social audit process:

Step 1: Identification of the problem

The first step is identifying the specific problems that people face in their interaction with the public service/authority as highlighted and prioritised during the problem analysis in the CCT process.

Step 2: Identification of relevant information

This is much easier if the country has a right to information (RTI) law or an open data collection culture, which is essential for effective participatory budgeting and accountability. The rules and procedures that public officials must abide by, and facts and data relevant to specific problems that need to be addressed, must be kept in mind while seeking information.

- Access budgets, plans and policies: Social audits are an instrument to compare how a government programme or service is working on the ground against how it should be working according to the government/project objectives, budgets, documentation, policies and reports.

- Compare the actual expenditure against budgets.

- Evaluate the quality and experiences of services/programmes provided by the government.

Step 3: Procurement of information

- Find out whether the right categories of information are being generated, by whom and where they can be accessed.

- Develop a list of questions to guide citizen monitoring. In order to collect the correct information, participants must develop a list of questions that will give them the answers they are looking for regarding the programme/service they are auditing. This is set out in the social audit tool, viewed below.

- Train participants, residents and/or the community on the methods. The exercise is carried out by large groups of people/residents, and it is necessary to train them. Participants are trained to help them to:

  a. Understand government policy and budget documents.

  b. Learn to collect and understand information during the audit.

  c. Interpret information and formulate questions.

Step 4: Accessing the information

The next step is to access the information required or identified. In several countries, the bureaucracy is extremely secretive about public agency functions and information.

1. Systematically identify and analyse relevant documents and ensure certified copies of the documents are obtained.

2. Conduct inspections of documents to help identify the gap between what was budgeted for and what was actually spent. The inspection will seek to answer the questions: 'Has the money been spent on the right things in the budget?' 'Is this the best product we can get at this cost?'

3. The inspection would require people with the technical expertise and knowledge of local conditions.

Step 5: Scrutiny of information

1. Collate and simplify the information into an accessible format before individuals and the community go through the documents. Some citizens may not have the technical know-how to understand the original document. At this stage, complicated information obtained from project records should be summarised in a simple format.

   - Verify the information with the members of the community who are important sources of that knowledge.

- The field investigators must have a thorough knowledge about the issue in advance, the problems involved and the manipulation involved in instances of corruption.

Step 6: Audit of information

This step involves facilitating an audit of information for grievance redressal.

After having acquired evidence of the instance of corruption, attempts are made to address the problem and redress the grievances of the people. Two possible options are:

1. Approach the institutional mechanisms available for grievance redressal with copies of relevant documents.
2. Citizens can approach forums provided for under the law for facilitating such an audit.

Step 7: Public hearing

This is the most important stage of the social audit, as this is when the collective scrutiny actually takes place. It is the culmination of the social audit process.

- The public hearing needs a neutral facilitator to lead the discussions.
- The goal is not to publicly shame people, but to promote quality service delivery.

- Participants or the social audit team present their findings to local authorities and to the broader community. These public hearings allow the community to talk about their experiences of the programme/service under audit.

- Local authorities have an opportunity to listen to the findings of the community to establish where there are opportunities to make improvements.

- Action plans with timelines are created to remedy identified problems.

Impact of the tool
Case study

A local early-childhood development and education centre was being constructed in a county supported under USAID's _Agile and Harmonised Assistance for Devolved Institutions_ (AHADI). The community wanted to ensure that this treasured resource would fulfil their needs and expectations of improving their access to quality education in a safe environment. Therefore, the community conducted a social audit.[37]

After thorough scrutiny of the project documents, community members unanimously agreed that there was a worrying discrepancy between the building works and the plan. The citizens raised their concerns with the County Early Childhood Development and Education Director and the area Member of County Assembly. The county leadership in turn summoned the contractor to a public meeting to explain the discrepancy.

The contractor accepted liability, demolished the defective works and reconstructed the education centre, keeping to the approved design and bill of quantities in the contract. The construction was completed with close supervision from the County Public Works Engineers and the school Board of Management.[38]

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[37] This first social audit assessed the quality of the physical building-**output**. Another social audit will need to be conducted after a year of using the infrastructure to assess if the intended **outcome** of providing quality education in a safe environment is being realised.

[38] County toolkit

Further guidance

Before you start using the social audit tool with the community:

- Ensure you have a good understanding of the CCT approach used in the community where you will use this tool.

- Conduct some preliminary research answering the following questions:

  1. Is there a right to information law in place?

  2. Are government institutions willing to share information? If not, some work needs to be done to address this as it will be difficult to conduct social audits without key documents concerning the project earmarked for auditing.

Links to more documents and tools on social audits

a. **Social Accountability Topic Guide**

b. **Advocacy and social accountability toolbox**

c. **Social Audit: A Toolkit A Guide for Performance Improvement and Outcome Measurement**

d. **Manual on Social Accountability for Civil Society Organizations and Municipalities in Palestine**

e. **Manual on Social Accountability: Concepts & Tools**

Glossary of terms

Audit: An official inspection of an organisation's accounts, typically by an independent body.

Budget: An estimate of income and expenditure for a set period of time.

Community-managed development: A process where community members come together to take collective action and generate solutions to common problems.

Corruption: Dishonest or fraudulent conduct by those in power, typically involving bribery.

Fiscal year: A period of twelve months (not always January 1st to December 31st) for which a government or business plans its management of money.

Government: The offices, departments, and groups of people that control a country, state, city, or other political units.

Plan: A set of decisions about how to do something in the future.

Public policies: An institutionalised proposal or a decided set of elements like laws, regulations, guidelines, and actions to address problems, guided by a conception and often implemented by programmes.

Example template

Social audit tool[39]

Country	Date
Administrative name of catchment area	
Name of project	
Financial year	**Quarter**
Sector	

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[39] Adapted from Gikonyo (2008)

A. Social audit: Preliminary and management-related questions

Question	Source(s) of information	Response/comment
1. Did the community participate in the process of selecting this project?		
2. What problem(s)/issues was the project intended to address? (What were the projects' social objectives?) Review project document or CCT documents for this information		
3. What is the role of the local authorities in managing this project according to the law?		

4. **What supporting documents are required for the release of money to a project?**		
5. **What is the role of the various structures in the management of the project (internal and external)?**		
6. **What important documents are maintained by the local authorities in the management of the project?**		
7. **What important documents are maintained by the project managers/projector contractors?**		

	Question		
8.	What are the key milestones the project contractor must achieve for payments made? (See the contract if available)		
9.	Which reports are prepared by the various institutions in the project management structure?		

B. Procurement-related questions for the project social audit

Question	Source(s) of information	Response/comment
1. What are the important steps in the procurement cycle according to guidelines and legislation?		
2. What is the procurement system that is employed in the management of projects?		

3.	How do projects conduct procurement in your constituency?		
4.	What are the different types of procurement?		
5.	Name some of the important procurement documents, including mandatory tender documents, relevant to the procurement process		
6.	What are some common abuses of procurement?		
7.	Give recommendations on how procurement can be strengthened in reference to the observed shortfalls in (6) above		

C. Key social audit questions

Question	Source(s) of information	Response/comment
1. Why has this particular project been selected for social audit from the CCT prioritised problems list? (Social objective)		
2. Match activities with objectives: What are the main activities of the project and can they logically lead to the achievement of the objective?		
3. What are the specifications of the project according to procurement and set standards? Have they been met?		

4.	Did money allocated to a specific project actually get to the project?		
5.	Is the quality and quantity of materials used as per the specifications? Keep in mind that 'materials' include human resources. If the project has required the employment of staff, are they qualified for their roles?		
6.	Did all workers receive their payments as indicated?		
7.	Was the project completed within the specified time?		
8.	Was a completion assessment and certification given, if applicable?		

9. Who are the managers of the project?		
10. Have project managers kept good records?		
11. Was the cash allocated for the project used for the purposes for which it was intended?		
12. Has the community been sufficiently involved in the project?		
13. Have project managers given the public the necessary information to help the public monitor the project?		
14. Has there been any abuse of funds in the project?		

This is an example of the social audit tool template.

To download a zip file of working templates which you can adapt for your context, please visit learn.tearfund.org/sa-tools and click on Social accountability tools: Templates under the 'Download resources' section. ↗

Appendix: Key stages of a generic government development cycle

This chart includes tools found in this guide, as well as other information and tools which can be used during the cycle.

Key stages of a generic government development cycle
Monitor and influence the strategic planning and budgeting
1. Participatory planning process
2. Participatory budgeting
3. Budget tracking
4. Citizen journalism
5. Community scorecards
6. Memorandum of Understanding (MoU)
7. Right to information (supports social audit tools as it makes the other tools effective)
8. Service charters

Monitor implementation of projects and programmes

1. Budget tracking
2. Citizen journalism
3. Complaints handling process
4. Memorandum of Understanding (MoU)
5. Public expenditure tracking surveys
6. Social audit
7. Right to information
8. Service charters
9. Social contracts (used at specific points, eg during the campaign period for elections)

Monitor the development outcomes

1. Budget tracking
2. Citizen journalism
3. Community scorecards
4. Citizen report cards
5. Right to information

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'But let justice roll on
like a river, righteousness
like a never-failing stream!'

Amos 5:24

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