Acknowledgements

The Uganda Social Protection Platform (USPP) is grateful to Development Research and Training (DRT) for not only hosting the platform but also providing technical support and guidance to the members on matters of social protection knowledge building and advocacy. Acknowledgement goes to Roselinda Oyuu, Moses Mwesige, Evelyne Bukirwa, Anna Lomonyang, Gilbert Wachal, and Sam Jamara for collecting invaluable information that fed into this report. We also thank the SAGE implementation teams in Apac, Kaberamaido, Kiboga, Kyenjojo, Napak and Zombo districts for sharing with us invaluable information and allowing us to participate in the SAGE implementation process alongside them. Special thanks go to Ms. Jannet Kuteesa Walakira for supervising the field teams, Ms. Sanyu Phiona for reviewing all the field notes and to Mr. Paul Onapa and Beatrice Mugambe for their useful comments. Thanks also goes to David Lambert Tumwesigye for his advice and updates on social protection developments in Uganda, and professional support during the implementation and completion of this action learning process. Not least is Mr. Charles Male without whose logistical support this process would have been impossible to complete.
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<tr>
<td>BDR</td>
<td>Birth and Death Registration</td>
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<tr>
<td>CAO</td>
<td>Chief Administrative Officer</td>
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<tr>
<td>CBO</td>
<td>Community Based Organisation</td>
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<tr>
<td>CDD</td>
<td>Community Driven Development</td>
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<tr>
<td>CDO</td>
<td>Community Development Officer</td>
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<td>CSO</td>
<td>Civil Society Organisation</td>
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<tr>
<td>DDP</td>
<td>District Development Plan</td>
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<td>DRT</td>
<td>Development Research and Training</td>
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<td>ESPP</td>
<td>Expanding Social Protection Program</td>
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<tr>
<td>FAL</td>
<td>Functional Adult Literacy</td>
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<tr>
<td>FORDIPOM</td>
<td>Foundation of Rural Disabled Persons’ Organisation of Moroto</td>
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<tr>
<td>HDI</td>
<td>Human Development Index</td>
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<td>HDR</td>
<td>Human Development Report</td>
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<td>MGLSD</td>
<td>Ministry of Gender Labour and Social Development</td>
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<td>MPI</td>
<td>Multidimensional Poverty Index</td>
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<td>MTN</td>
<td>Mobile Telephone Network</td>
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<td>NAADS</td>
<td>National Agricultural Advisory Services</td>
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<td>NDP</td>
<td>National Development Plan</td>
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<td>NGO</td>
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<td>NUSAF</td>
<td>Northern Uganda Social Action Fund</td>
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<td>SAGE</td>
<td>Social Action Grant for Empowerment</td>
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<td>SCG</td>
<td>Senior Citizens Grant</td>
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<td>UNHS</td>
<td>Uganda National Household Survey</td>
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<td>Uganda Social Protection Platform</td>
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<td>VFG</td>
<td>Vulnerable Family Grant</td>
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Photo Credits

The photos used on the cover page are of SAGE beneficiaries in Nebbi and Nakapiripirit districts and disbursement points in Zombo district. We would like to thank all the individuals and groups in the pictures for allowing us to use their pictures in this report.

Cover Pictures From Left to Right, Top to Bottom:

Pictures 1-3: The SAGE payment process being carried out in Zombo District.
Picture 4: Female SAGE beneficiaries in Nebbi district during a government inspection on of the project.
Picture 5: SAGE beneficiaries in Nakapiripirit.
Picture 6: Elderly SAGE beneficiaries in Nebbi district during a government inspection on of the project.

Organisation Support

This work by the Uganda Social Protection Platform (USPP) was made possible by the generous financial contribution of Expanding Social Protection Program (ESP) and technical support from Development Research and Training (DRT). The views expressed in this report are those of USPP and should not be attributed to ESP or DRT.
Executive Summary

This action learning process by the Uganda Social Protection Platform examines the Social Action Grant for Empowerment (SAGE) in six districts of Uganda. SAGE is a pilot direct income support component of the Expanding Social Protection Program (ESPP) of the Ministry of Gender Labour and Social Development (MGLSD). It is implemented in 14 districts, with hope of expanding to the rest of the county over time.

Against the background that civil society has a role and interest in the success and expansion of social protection provision in Uganda, the objective of the process is two-fold: (1) Learn about SAGE program to inform future advocacy work; and (2) Identify implementation gaps and make recommendations for improvements.

This review is not a programme evaluation or audit. Any matters relating to SAGE implementation are included in this document only in as much as they contributed to our understanding of the entire SAGE program, and for informing USPP’s advocacy efforts in future. The action learning focussed on five main areas of the SAGE program – some of which are not necessarily stipulated in the implementation guidelines, but are important for USPP’s learning.

The areas are:
1. Grievance mechanisms
2. Integration of social protection at local government level
3. Impacts of SAGE at household and community levels
4. Linkages with local social support systems
5. The role of civil society

Findings confirmed that grievance mechanisms are robust and widely operational. Majority of grievances reported pertain to payment service providers and related issues. ESPP/SAGE is already using the emerging issues in an attempt to improve operations. Major challenges with the mechanism pertain to lengthy processes that delay feedback, causing complainants to almost give up on the program. Other issues pertain to “fear of beneficiaries to express their grievances” thinking that they will be penalised for complaining by being excluded from the program. This relates to the inherent Ugandan culture of “fearing to antagonise our benefactors.”

Regarding integration of SAGE in local government processes, this has been achieved directly through the district community development function, right from preparatory processes, targeting, financing, implementing, monitoring, communication and documenting for future learning. Beyond this, the discussions about integrating social protection (other than SAGE) in local government plans and processes reveal a hesitancy and apathy about the success of such a possibility. District leadership – both technical and political are more concerned about lack of resources than generating real demand through their plans and budgets.

There is evidence of emerging impact at household level, especially first cohorts to benefit. They are able to invest their grant in household livelihood assets like crops and livestock. Others have invested in plots of land and constructed modest shelter for their families. There is also information about changing community practices from being wasteful to investing the little money that people have i.e. the non beneficiaries who see that lives of beneficiaries are being transformed with only an income of Ugx. 24,000 a month. Long term impacts may not be assessed at this time as the program is still rolling out in many of the districts.
Executive Summary

To date, the role of civil society has been limited at district level, though not insignificant. They have participated in understanding the operations of SAGE; supported some beneficiaries in understanding the grievance mechanism, created awareness of beneficiaries’ rights and responsibilities and began conversations with sub-county and district councillors regarding integration of social protection in sub-county and district plans and budgets.

In view of the foregoing observations, the following recommendations are proffered:

SAGE Implementation

1. SAGE grant amount needs to be revised upwards to take care of increasing cost of living and consider transportation to/from pay centres.
2. Consideration for alternative payment procedures (electronic versus manual) and alternative service providers for grant payments, preferably those whose system will not have to depend on a telephone network.
3. The role of district-based politicians in SAGE needs to be clarified or elaborated to them.
4. Eligibility criteria for the VFG needs to be articulated to the communities
5. Accessibility of the grievance mechanism to the most vulnerable should be promoted by building the capacity of existing community advocacy structures comprising of civil society and beneficiary representatives
6. Parish and sub-county officials involved in the management of grievances need regular refresher trainings on effective documentation and information management.
7. In the expanding of social protection programs, there is need to consider creative combinations of state-based and community-based social protection systems, rather than the full extension of formal social protection schemes.

The role of civil society

1. Generate and share evidence on social protection - USPP needs to go beyond monitoring the grievance mechanism to critically looking at the other elements of the program for example the training strategy, operational monitoring, managing changes, evidence and advocacy, among others.
2. District-based USPP members should attend the SAGE coordination meetings (social protection sub-committee meetings) at district level to regularly exchange feedback of their respective interventions with the implementing teams. This would be in fulfilment of the guideline on role of NGOs in the SAGE implementation manual (pp. 38).
3. Engage stakeholders to support expansion of social protection – do this through stimulating bottom-up demand.
4. The platform needs to pursue members’ capacity strengthening through updating themselves on current national, regional and international social protection issues, and continually increase their knowledge levels on these matters.
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1.0. Introduction

As a partner in advocating for expansion of social protection in Uganda, the Uganda Social Protection Platform (USPP) sought to educate themselves about content and process of implementing the Social Action Grant for Empowerment (SAGE). This took the form of action learning along SAGE implementation process; which included monitoring of the SAGE grievance mechanism as a key component. The objectives of the action learning process were:

1. To learn (acquire the necessary knowledge and information) about SAGE program to inform USPP’s advocacy work.
2. To identify implementation gaps and make recommendations for improvements.

Action learning was hinged on the following questions:

1. How effective are the grievance mechanisms: Are they working to expectation? How responsive and effective is the local administration system to resolve grievances?
2. Does the mechanism allow or facilitate, when appropriate, complainants’ pursuit of external and independent means to redress their grievances?
3. What actions would increase effectiveness of the mechanism?
4. What kind of demonstrable change and improvement is the mechanism producing in project operations, management systems, and benefits for communities?
5. How can SAGE in particular and social protection in general be mainstreamed in the district planning process?
6. How can SAGE / social protection be understood by communities as contributing to, and not a recipe for breaking the existing social fabric?
7. How can SAGE beneficiaries be integrated into other social services and development programs, e.g. NAADS, community health, etc?
8. What is the effect of SAGE on gender relations of beneficiaries at both household and community levels?
9. What is the role of civil society in contributing to effective and efficient implementation of SAGE? What could they do better?

The overall intention of USPP was to gain understanding of the SAGE program, and generate recommendations for improving its design or implementation; and ultimately contribute to helping government implement social protection programs better, now and in the future.

1.1. Participating Organisations

The process was conducted in six out of the 14 districts where SAGE is implemented. As much as possible an even spread of the districts across the country was done for representativeness. The districts are Apac in northern Uganda, Kaberamaido in the east, Kiboga in the central, Kyenjojo in the west, Napak in Karamoja sub region, and Zombo in west Nile sub region. Civil society organisations involved were Apac NGO Forum, Kaberamaido NGO Forum, Kiboga NGO Forum, Kyenjojo NGO/CBO Network, and Foundation of Rural Disabled Persons’ Organisation of Moroto (FORDIPOM) and Life Concern Zombo. These were provided with technical support and supervision by Development Research and Training (DRT).

1.2. Methodology and approach

The approach used was based on standard action research methodology, which used participatory approaches to obtain and analyse data. Specifically, the following was done:
1.0. Introduction

Development of action learning and monitoring tools by USPP with technical support from DRT; and review of the same by ESP.

1. Training of process participants, including USPP members – who included representatives of district NGO Forums, some SAGE and local government officers from the six districts, and opinion leaders, e.g. religions and cultural leaders. Key subjects covered in the training included:

   (i) Meaning of action research and monitoring;
   (ii) Using the action learning and monitoring tools;
   (iii) Reporting on findings of the action research and monitoring processes.

   Data collection. This was done using:

   (i) Observation of the implementation processes and informal face-to-face conversations. This was mostly done at pay points on pay days. Data was collected from beneficiaries, their relatives, MTN agents and local leaders who were present on these days.
   (ii) In-depth key informant interviews – these were mostly the SAGE implementing staff and local government officials directly involved in the program at all levels, namely, the district, sub-counties, parishes and villages to establish various facts about the program.
   (iii) Review of success stories of the beneficiaries documented by the SAGE implementing teams.
   (iv) Reflection on and discussion of information gathered with SAGE implementation team at district level.

   The key data collection instrument used was an informant checklist and a set of questions to guide the discussion as outlined earlier in this section.

4. Reporting. Documentation of information from the above processes, using photographs whenever appropriate was done. Each of the six districts wrote and submitted to DRT a report about their findings and reflections on SAGE, including the grievance mechanism. Before consolidating the reports into one, DRT carried out a field visit to interact with a cross section of beneficiaries and SAGE implementing teams in the six districts to validate information and fill information gaps in the district reports. DRT then compiled this report.

1.3. Limitations and challenges

USPP’s entry into the SAGE implementation process at district level was quite late, close to a year after the program was first introduced into the districts. This meant that a lot of time was spent negotiating appropriate space for civil society involvement. Actual work commenced rather late.

Having missed the district trainings provided to stakeholders that are involved in SAGE implementation, members of USPP that were involved in this process had major knowledge gaps. It is possible that this slowed down their involvement – having to move back and forth to check their information with the SAGE implementation teams.

Initially, USPP was misunderstood by the SAGE implementation teams at the district level as having come to “audit” the latter. This was later solved among the partners (USPP and ESP secretariats) and work commenced smoothly thereafter.
2.0. Social Protection in Uganda

2.1. Background

Uganda has made great strides in reducing the poverty headcount from 38.8% in 02/03 to 24.5% in 09/10. Also, poverty gap is reported to have narrowed from 11.9 in 02/03 to 6.8 in 09/10; and severity of poverty is reported to have reduced from 5.1 in 02/03 to 2.8 in 09/10 (UNHS 2009/10). But even with this glossy picture, there are reports of persistent and extreme poverty and vulnerability among a significant number of individuals and households. The report further indicates that 94.4% of all national poverty is found among rural people, which translates to 7.98 million Ugandans! Moreover, there has been significant worsening of inequality as shown by increased Gini coefficient from 0.408 in 2005/06 to 0.426 in 2009/10.

Although Uganda’s HDI has slightly improved from 0.446 in 2011 to 0.456 in 2013, the country still ranks very poorly at 161 out of 187 countries; and is below the regional (sub-Saharan Africa) average of 0.475 (HDR, 2013). This indicates that Uganda has serious gaps in well-being and life chances for its population. The report further puts the country’s Multidimensional Poverty Index (MPI), i.e. the measure of multiple deprivations in the same households in health, education, and standards of living, at 0.367. This translates to 69.9% of the population suffering multiple deprivations and an additional 19.0% vulnerable to deprivations. The intensity of deprivation, which is the percentage of deprivation experienced by people in multidimensional poverty, is 52.5% (HDR, 2013). The same report further indicates that the multidimensional poverty headcount is 38.8 percentage points higher than income poverty. This implies that many individuals living above the income poverty line still suffer deprivations in education, health and other living conditions namely, water, sanitation, electricity, among others.

2.2. Conceptual Understanding

In Uganda, Social Protection is widely and variously defined, with different perspectives across Government, civil society and development partners of the objectives, major interventions and priority target groups. The National Development Plan (NDP, 2010) defines social protection as “all public and private interventions that address vulnerabilities associated within being or becoming poor.”

To harmonise understanding and prepare for development of a social protection policy and subsector in Uganda, the Social Protection Sub-Committee in June 2011 arrived at a definitional consensus of social protection. It outlined the objectives and scope of the social protection Sub-Sector in Uganda to include the following core social protection instruments:

1. Social Transfers which provide regular and predictable transfers in cash or sometimes in food to chronically poor and vulnerable individuals and households.
2. Social Insurance, which provides income support on the basis of previous individual and / or employer contributions to mitigate the impacts of income shocks such as unemployment, retirement, ill-health, etc.
3. Personal care services, which provide care and protection for vulnerable individuals who are unable to fully care and protect themselves; e.g. care services to persons with disability.

This is the understanding that USPP carries in its awareness raising and advocacy work; and which informed the platform’s interaction with SAGE during the action learning process.
2.0. Social Protection in Uganda

2.3. The Social Assistance Grants for Empowerment

A report on chronic poverty in Uganda (DRT, 2005) recommended that a key approach to reducing chronic poverty and vulnerability would be through social protection. Basing on this recommendation and subsequent discussions on chronic poverty and social protection (for example Obot 2010; Barya, 2009; Diwakar, 2009; and, Lwanga-Ntale, Namuddu, & Onapa, 2008), the government of Uganda through the Ministry of Gender Labour and Social Development (MGLSD), and with support from development partners designed the Expanding Social Protection (ESP) Program in Uganda. ESP is designed around two components: (1) Policy support, whose objective is to develop the capacity of the Government of Uganda to lead on Social Protection and Policy Framework for Uganda that guarantees and guides implementation of social protection in the country; and (2) A pilot Direct Income Support programme - SAGE which provides Senior Citizens Grants (CSG) and the Vulnerable Family Grants (VFG). SAGE specifically targets labour-constrained individuals and households, and generates evidence on the impact of social grants in Uganda as well as providing an opportunity to learn how social grants programmes can be most effectively implemented in the Ugandan context.
3.0. SAGE Action Learning

3.1. The grievance mechanism

SAGE considers and has two forms of grievance reporting. Complaints relate to the program operations, including process of service delivery. Appeals are targeted related seeking to respond to issues of legible beneficiaries that have been excluded. Generally, the grievance mechanism is robust, though not without challenges.

3.1.1. Actors involved

Local government structures are used in the handling of the grievance mechanisms. Specifically, the village chairpersons are responsible for receiving complaints and forwarding them to the Parish chiefs or sub-county Community Development Officer (CDO). This process involves filing and lodging a SAGE complaints form. The sub-county CDO provides feedback on what can be and is resolved at that level and forwards the rest to the district CDO responsible for SAGE. The district CDO works with the SAGE technical team to solve the grievances and send feedback to the communities through sub-county and parish respectively. Payment service providers are also involved in grievance management through their local agents. Situations have arisen where beneficiaries have filed their complaints with police, especially where theft of cards or money is involved. It was noted that the process is not followed as clearly or logically as it is stipulated in the SAGE implementation guidelines. Especially due to delayed feedback, some respondents have resorted to filing their complaints directly with the SAGE technical office at the district level.

3.1.2. Awareness

Regarding SAGE in its entirety, many beneficiaries were of the view that a lot of relevant facts and information about social protection were not communicated. For example, they did not know their rights within the program and how to claim them. Many did not know their responsibilities as well. On the other hand, community members and beneficiaries alike misconstrue the SAGE program as “the President’s ‘gift’ for voting him back into power in 2011.” Others call it salary for the elderly. And some political leaders have taken advantage of this ignorance to confuse the citizens as a strategy for 2016 election campaigns.

Initially, beneficiaries were not necessarily aware of the presence of the grievance mechanism or what its functions are. Progressively, all beneficiaries have been sensitised about the mechanism by SAGE implementers in their respective districts. USPP members in the six districts of our involvement complemented this awareness by educating beneficiaries about their rights and responsibilities within this mechanism and the program as a whole. However, due to limited time and resources, this was only done in the two sub-counties nearest to the district headquarters in each of those districts.

3.1.3. Nature of grievances

Most commonly occurring grievances are of a complaint nature. They include:

1. Faulty and / or missing MTN cards. This arises out of many problems the most common of which is poor MTN network, faulty cards sent for rectification and not returned for many months, and, lengthy process of replacing lost or stolen cards.

2. Registered beneficiaries not receiving their grants for many months due to missing or faulty MTN cards. This has caused many to want to give up hope of ever getting their money. For example, in November 2012, Kabajungu Ruth of Kisakara Village, Kihuura Parish in Kihuura sub-county hoped she...
3.0. SAGE Action Learning

would receive cash for the first time after missing out for 5 months. When she was told that her card had not been returned from the SAGE Unit at the district level, she retorted, “Am about to give-up and tell them to cancel out my name because am tired of coming here, wasting my time and energy yet I have gained nothing.”

3. Inadequate communication about the pay day. Communication concerning pay days was sent to beneficiaries through sub-county and parish chiefs, and village chairmen. Beneficiaries felt that the communication sent to them announcing pay days was too late and sometimes not confirmed. This meant that they sometimes moved to pay points only to find that no payments were being done, or almost missed payments as they got the information when they had not prepared to travel.

4. Very long distances to pay points. This affects beneficiaries in two significant ways. (1) Many are too old to move the distances to and from the pay points on the same day. Moreover, the payment process often begins and ends late. (2) They often have to pay for transport costs, which “eat” into their grant, by half in some instances! This, according to majority of respondents talked to, is “unfair.” They feel that the grant should be able to factor in transport costs if it is to be meaningful to them.

5. Poor roads and transport systems. For instance in the rainy seasons some pay points become inaccessible due to slippery roads, broken bridges, and floods.

6. Language barrier between MTN service providers and beneficiaries. This is a problem peculiar to Napak district.

Appeals pertain to some community members feeling that they or their peers have been excluded from the program while many undeserving members were included. This mostly affects the VFG where proper targeting is reported to be a great challenge.

On one hand, where community based identification and registration of beneficiaries was done based on agreed rigorous criteria, approval of appellants also has to go through a community consultation process. The system (SAGE implementers) cannot approve someone that the community has disqualified. While it is suspected by many beneficiaries and appellants that their exclusion was politically or otherwise motivated, our assessment of this process indicated that it is transparent, participatory and uses consensus. An elders’ council comprising opinion leaders and elders is also consulted to confirm information in legible beneficiaries, thus promoting public accountability. In addition, appellants are requested to provide their own evidence of appeal (documentation, peers / age mates), which is carefully and critically assessed before any decision to approve or disapprove is reached. For example in Zombo district, many appellants presented baptism cards for Nebbi diocese – which is a quite new diocese compared to the age of eligible beneficiaries. This implied that these appellants are much younger than they claim to be if they were baptised within Nebbi Diocese. Eligible beneficiaries are those whose baptism happened within the older / wider Arua diocese.

Many times if most eligible beneficiaries were absent during the verification process, they were not confirmed but kept pending in case they filed their appeals. A complicating factor is that initially, the appeal process was continuous. Currently however, the appeal period has been given a limited time frame, which has in fact expired in all the districts of our interaction. Unfortunately, affected members do not know about this or the reason for it and continue to feel “unfairly excluded.”

On the other hand, as was reported in Kiboga, but also observed in the other districts, many households with steady incomes and meaningful labour productivity are benefiting from the VFG, and this is perceived as denying a chance for the more vulnerable families to benefit! This is partly a result of the misleading numerical scores that determine eligibility. For example, not all disabled persons are unproductive, some have jobs and earn salaries and hence less vulnerable to falling into chronic poverty.
3.0. SAGE Action Learning

Also, there are older persons who retire from active employment and are receiving pension who benefit from SAGE as well. A discussion with three pensioners in Kiboga, Zombo and Apac revealed that pensioners find SAGE grants more reliable than pensions, which are often late and infested with lots of challenges and inconsistencies.

3.1.4. Use and effectiveness

Apart from the grievances discussed above that are brought to the grievance management officers, implementers of the SAGE program indicated that, there are other issues that beneficiaries could complain about but are hesitant to do so. This is explained in two ways. First, most of the beneficiaries think that they can only complain in case they are not getting money. Secondly, majority would rather not complain about other issues for fear of being disqualified from the program.

It was generally agreed that the grievance mechanism is good, provides opportunity for checks and balances and fairly effective. Issues with its effectiveness arise from the fact that the SAGE implementation team are not directly responsible for rectifying the problems reported – specifically those relating to MTN service delivery. In addition, the process involves a lot of paper work. Unfortunately, the responsible local government officers at village and parish levels either have literacy challenges or are unable to manage large volumes of information within a short period of time. As such they often do not help the beneficiaries to fill the forms and follow up their complaints.

For example, in Zombo district, the SAGE technical team discovered that one of the reasons for delayed resolution of appeals was that the parish forwarded unverified information to the sub-county, who also submitted to the district without verifying, assuming that verification was done at parish level.

In the case of Napak district, the grievance mechanism has challenges which affect its efficiency and effectiveness. These pertain to the traditional culture where people prefer to hold meetings and openly discussing and solving their issues as opposed to reporting one’s problems to an officer who writes them down. It was reported that there is a “negative attitude towards writing people’s information and chronic fear of having to sign documentation.” The design of the grievance mechanism thus keeps away many would-be complainants in such communities.

In terms of response, issues of delayed feedback abound. So, according to the beneficiaries, while it appears easy to file a grievance, it is not guaranteed that feedback will be provided within decent time. Sometimes, promises of feedback are regularly made but nothing happens beyond the promises. This is
3.0. SAGE Action Learning

especially so where grievances have to be escalated from parish to district levels. According to SAGE technical teams, delayed feedback often arises from bigger volumes of information that have to be reviewed, and having to depend on other agencies (in this case MTN) for correct, informed response.

3.1.5. Impact of the mechanism on policies, procedures, and operations

Evidence from the field suggests that the system (ESP/SAGE) is learning from the grievance mechanism, and using this learning to modify its operations. Most of these modifications are only very recent. It is therefore too early assess their impact.

In response to complaints about long distances beneficiaries move to and from pay points, and reduce on the waiting hours for payments, many districts have created more pay points closer to beneficiaries so that people walk shorter distances. This is especially in the more recently rolled out sub counties in all the districts. In some of the districts, SAGE officials have supported service providers with transport, and sharing a payment plan for them to prepare in advance. To take care of challenges caused by MTN network failures and faulty cards, manual payments have been made to beneficiaries to cover arrears, while discussions are being held with the service provider to determine a possible and lasting solution.

A complaints desk has been established during the pay days where grievance mechanisms are being reported. This was done as a way to improve the efficiency and effectiveness of the grievance mechanism, specifically in terms of speed and length of time between reporting and receiving feedback. In Zombo district, a continuous communication strategy has been developed. It involves a pre-payment address on pay days. This is in a bid to consistently and regularly provide information and reduce on complaints that would be based on inadequate or unqualified information.

3.2. Integration of social protection in local government budgets and plans

There is evidence of good working relationships and coordination between SAGE and the local government. The SAGE unit is directly linked with the community development function; and district annual plans and budgets include SAGE. Until recently, SAGE funds have been channelled through the district accounts. The Chief Administrative Officers (CAOs) are accountable for program delivery and funds. A district SAGE unit exists that is under the supervision of the District Community Development Officers (DCDOs). At the sub county, the program is coordinated by the sub county CDO. At lower local governments the sub county and parish chiefs as well as village chairpersons and village heath teams all have responsibilities to the program, which include coordinating different functions like communication, change management, and grievance management, among others.

Like other programs, SAGE supports and works closely with other government programs. For example, under the planning unit SAGE supported the Birth and Death Registration (BDR) exercise. Beneficiaries have also been encouraged to organise themselves into functional groups that can benefit from other programs for instance CDD and NAADS. For example, in Atwaka Sub County, Zombo district, two groups of SAGE beneficiaries were reported to have registered to benefit from CDD. Senior citizens in different districts have been advised to enrol into the FAL classes to learn basic literacy skills like reading and writing.

Evidence of support and bottom up (village to district) demand for expanding social protection, particularly the SCG abounds. However, while there is a lot of demand from the community, it is not yet felt
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at district and national levels, except verbatim, with limited efforts to articulate this demand. This suggests that local government councils have not played their role in reflecting people’s demands for social protection in the sub-county and district plans and budgets. Although there is general support of social protection, particularly the SCG by district councils, many councillors expressed insufficient knowledge of what social protection is, and felt incompetent to advocate for something they do not understand. In Napak district, politicians that DRT spoke to alleged that they “only hear about SAGE being implemented in their areas” and expressed concern that they are not directly involved in the SAGE work. In essence they do not know much about it and questioned their role in the campaign for expanding social protection. This sentiment was reflected in reports of other districts as well.

On the other hand, Local governments perceive themselves as lacking the financial capacity to implement social protection programs. As such they lack impetus / motivation and are hesitant to think ahead and express demand for social protection financing through their own planning processes. The exception was found in Kyenjojo where the district community development department with support from CAO’s office is in advanced stages of developing a “social protection proposal” for the district. The proposal includes various instruments – not only direct transfers. They hope to not only include this in the coming annual plan and budget, but are exploring ways of attracting prospective donors who might be interested in financing such a program at district level. In Kaberamaido district, it was suggested that local governments could consider lobbying the central government for additional allocation of funding beyond the pilot period, so that SAGE can be supported with a conditional grant like other government programs.

Another factor preventing local governments from prioritising social protection in their district development plans (DDP) and budgets is the limited knowledge of what social protection is beyond direct transfers / SAGE. Because of this, all discussions with politicians and technical staff at the districts brought out the fear that local governments would never be able to afford social protection and therefore it would be futile to plan and budget for it. It was argued that continued funding and sustainability of social protection programs can only be defined by the central government as local governments have low local revenue bases that cannot accommodate costs of delivering social protection.

Further arguments pointed to the need for a social protection policy. The continuity of the program can only be guided by the presence of a policy with guidelines for implementation at all levels. It is thought that in presence of the policy all local government structures will be mainstreaming and implementing social protection programs even beyond the pilot period.

3.3. Impacts at household and community level

While it is widely perceived by the general population that the grant amount in the SAGE program is too small to have any significant impacts on chronic poverty and vulnerability, evidence from the field indicates the contrary. For a peasant aged 60 years and above to get Ugx 24,000 regularly for a prolonged period of time is in itself an achievement. Many go for many months without getting even Ugx 5,000. Moreover, direct income support has advantages over provision of in-kind support to beneficiaries in that people have complete freedom to spend money on what is best for them. Beneficiaries are able to quickly adapt to new circumstances and needs. The grant reduces the impact of key deficits affecting chronically poor households by increasing the household purchasing power.

3.3.1. Livelihoods

Overall, we noted that SAGE is contributing to improvement of key human development indicators among
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beneficiaries, particularly, health, education, nutrition, and sanitation. Although the primary beneficiaries in both the VFG and SCG are adults, there is a significant impact on child nutrition and development since older people tend to invest a large proportion of their entitlements on meeting their children and grandchildren's feeding and schooling needs.

Majority of beneficiaries indicated that they have bought livestock and other productive assets including pigs, hens, goats, a few cows, and trade - or example in Lwamata sub-county in Kiboga district, 8 beneficiaries had started family businesses. It is foreseen that SAGE will have a sustainable impact on livelihood assets at household level as most beneficiaries are investing in livestock and are able to afford youthful labour to cultivate their gardens.

For example, in the Karamajong culture, one does not need to have money to hire labour. Instead, a person or family needing labour makes a special brew for young men who get together to drink after work. A number of beneficiaries in Napak district use their money to buy sorghum and make brew which then attracts youthful male labour. As such, these beneficiaries are able facilitate crop cultivation on bigger acreage.

Others spend money on immediate needs, namely, food, and medical bills, thereby contributing to life expectancy of beneficiaries. For example, Mr. Cleophas (in this picture) of Kibiga Sub-county in Kiboga district reported that before he received the grant from SAGE, he was very ill and had failed to afford treatment. His leg had become rotten and he feared for his life. When he obtained the grant, he and 11 other men formed a group through which they save Ugx. 10000 per month, and share their resources collectively through a cash round monthly. It was interesting to note that only half of these group members benefit from SAGE. This therefore is a good example of how the grant is contributing to community cohesion and inclusion of older persons in community processes. When Mr. Cleophas received his cash round, he got Ugx. 120,000 which he used to seek treatment at Hoima hospital. He was able to pay for his medical bills and his leg has greatly recovered. In the subsequent months, he used his money to buy iron sheets (in the picture) and some animals. He hopes to generate more resources to build a better (iron-sheet-roofed) house to replace the one he has now (in the picture).
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Beneficiaries also reported that they spend their grant on school fees, household items and debt prepayment, as well as construction of housing – as is the case of Agatha of Kyenjojo district. A homeless and widowed mother of four, Agatha was registered under the Vulnerable Family Grant. By the time of our interaction with her, she had been in the program for over 15 months. In the first 10 months, Agatha saved Ugx. 20,000 of her grant monthly to raise Ugx. 200,000. She used this to buy a plot of land. She informed her friends that she needed to build a house. They helped her to prepare the soil for building. She started building the house herself. Every now and then, some kind villagers joined to help her. By this time she has also joined a village savings and credit group – not necessarily for SAGE beneficiaries. In a few months, she received a cash round of Ugx. 100,000 which she used to pay for grass and labour to roof her house. During the time when she was not building her house, she worked in other people’s gardens from where she obtained banana suckers, cassava cuttings and coffee seedlings. She planted these in the part of her plot where she had not built the house. By the time DRT visited her, her crops were doing well, her children were at school and she was very happy with her new status in the community.

Although the SCGs targets older people, the grant benefits other categories people. There is indirect community benefit, particularly to traders and farmers from whom beneficiaries purchase many of their items.
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3.3.2. Gender and social cohesion

SAGE does not discriminate in gender; it considers all people equally and is perceived to be contributing to overall empowerment of women and social cohesion. Generally, relationships between men and women within households and with their extended families have improved. Because they now have a reliable and regular income, older persons are perceived no longer as “chronic dependants” but people who can also contribute to family income and wellbeing. There are also reports of broken families getting back together. For instance, it was reported in Jangokoro community in Zombo district that many of the elders who had been divorced were remarried when they began getting the grant.

Grants are reported to promote joint planning and enhance opportunities and power for women to participate in household decision making processes. This is especially true for female beneficiaries both under VFG, and SCG where both men and women within the same household receive the grant.

In other communities, for example in parish in Lorenegcora Sub-county in Napak district, it was reported that overall community outlook has changed. Having observed the lifestyle and wellbeing on (of) one beneficiary, change from being a drunkard to investing in health and nutrition, many community members are now changing their lifestyles to be like her. They are saving their little incomes to invest in improving their well being, and feeding better- improving their nutrition.

In almost all the districts visited, it was reported that on pay days relatives of beneficiaries come from far away communities to receive some money from beneficiaries. While in some places it was seen as a positive thing, in others it was reported as negative. In the former case, beneficiaries were happy to contribute to the wellbeing of their relatives particularly daughters and grand children who otherwise had no support. In this way, the SAGE program was seen as strengthening relational ties. In the latter case, it was noted that relatives and caretakers of some beneficiaries demand for compensation from the recipients in consideration of previous support they offered before SAGE. This forced some beneficiaries to share the little money with their care takers just for purposes of convenience and shelter.

Similarly, despite the positive impact of SAGE on gender and social cohesion, the empowerment of women through cash incomes and freedom of decision making does not augur well with cultural norms in certain communities. In Kyenjojo district, it was reported that some people think that SAGE program targets the cursed people who call themselves vulnerable and that the Government wants women to become superior to men.

“I am really overjoyed with the introduction of this SAGE programme. It has changed my life enormously. With the first payment, I bought a pair of bed sheets at Ugx. 6,500/=.. With the second payment, I bought sorghum cereals for home consumption as food. With the third I plan to sit down with the four orphans that I take care of to decide what we should do with the money. Nowadays, people from my village and neighbouring communities are both surprised and happy that my lifestyle has changed. I used to be a terrible drunkard and malnourished. I did not take care of the orphans responsibly and they were in poor health. People had given up trying to help me become better. Now, I have given up drinking. I use the money from SAGE to buy food for the family, and our health has improved a lot.”

Lokongo Maria, Lobul-Lolet, Lorenegcora Town Council, Napak District
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There is rising tension between men and women in some of the households. In Kaberamaido district, it was noted that a significant proportion of male beneficiaries does not share their money with their wives but expect the women to foot all household bills. Some men were reported to have stolen their wives’ money or used their cards to withdraw the grants. For example, in Otuboi Sub-county, one male beneficiary stole his wife’s card and went to the pay point claiming that the wife was sick. He was allowed to withdraw the money on behalf of the woman, but did not take it to her. He instead spent it in a bar with his friends.

3.4. Linking social protection and informal support systems: assumptions and evidence

There is increasing recognition of social protection as a main contributor to social cohesion and development. At the same time, informal support systems still play a crucial role in mitigating social risks and vulnerability to chronic poverty. It is therefore important to link formal (social protection) and informal (social support) systems, and understand the interplay between the two. The former comprise SAGE, formal pensions and national social security arrangements, and others like various components of NUSAF, for example public works. The latter comprise community- and family-based social protection mechanisms. These processes cannot be exclusive of each other especially in the rural poor communities. The interplay between these mechanisms also includes relationships between different actors for example, the government, civil society, communities, and family. These different mechanisms and relationships can complement each other to contribute towards effective and efficient overall level of social protection desirable for the chronically poor.

Generally, there has not been much emphasis on creating these linkages in the beneficiary communities. This is because so far, the emphasis is to ensure that the SAGE program sets of and rolls out to all sub counties successfully. A few attempts have included the following:

1. Traditional solidarity mechanisms: A key example is the older persons associations. - In Kiboga and Kyenjojo, beneficiaries of the SCG were encouraged to form local older persons’ associations through which they would advocate for expansion of social protection and other benefits. In other places, the grant is contributing to the strengthening of those that were already in existence but with weak membership.

2. Rotating saving and credit associations: In all the six districts, many beneficiaries have started rotating saving-and-credit groups. Every member is expected to save an agreed amount with the group. In some of the groups, members can use this saving when confronted with a risk to avert any major consequences and protect themselves from falling into further poverty. In other groups, members chose to have a cash-round where respective members get a stipulated amount of money from the saving to use for personal or household development. Both the cash-round and saving go on concurrently. In Kyenjojo district, Agatha, a VFG beneficiary in such a group used the money from the cash round to buy a plot of land at Ugx 200,000 and build a house for her family. Previously, she and five children were homeless.

3.5. The role of civil society

Civil society interaction with ESPP is through the Uganda Social Protection Platform (USPP). The core business of USPP is to promote social protection in a strategic and harmonised approach. Being a member of the social protection subcommittee, USPP contributed and subscribes to the agreed emerging social protection policy thrust. Specifically, civil society’s interaction with SAGE to date has been through:
3.0. SAGE Action Learning

1. Learning about SAGE through trainings by ESPP and the MGLSD, and through the action research process. Monitoring of the grievance mechanism for its efficiency and effectiveness was also part of this process.

2. Awareness creation to beneficiaries especially on their rights and responsibilities. This was done by the USPP members in participating districts. The awareness sessions were done on pay days in most of the communities to minimise logistical issues of convening community meetings. USPP also carried our awareness to the media and general public about the meaning and importance of social protection. In some of the districts, USPP played an important role in encouraging beneficiaries to put their money to good use by joining savings groups and spending on items that would contribute to wellbeing of their households.

Lobbying and advocacy for government’s commitment to fund social protection was also and continues to be a core component of USPP’s dealings. While the core work of civil society should be advocacy and social mobilisation, it was noted that visibility of USPP was stronger at national than district level. The reason for this could be that not only did USPP first organise at national level but it also made a rather late entry into the district social protection process, i.e. after implementation of SAGE had began. This affected to a significant extent the duration of interaction with the processes and therefore the effectiveness of the USPP intervention. For example, it is reported by CSO actors in at least four of the six districts that it took them a while to smoothen their working relationship with the SAGE units at the districts, and by the time that happened, a lot of valuable time had gone by.

Nevertheless, SAGE staff at the districts generally acknowledged and appreciated the participation of CSO in monitoring and awareness creation. They reported that civil society contributed to community level and beneficiary understanding of social protection, especially through radio programs and discussions with beneficiaries on pay days.
4.0. Conclusions

This action learning process along the SAGE program was commissioned with two key objectives for the USPP:

1. Improve knowledge and understanding of the USPP members concerning SAGE
2. Provide an independent eye to the implementation process so as to suggest possible improvements

The discussion in this report is based on interactions with the SAGE program in six districts out of 14 that implement the program, and focuses on: (1) the grievance mechanism; (2) integration of social protection at local government level; (3) emerging impacts in the community and households; (4) linkages with local social support systems; and (5) the role of civil society.

The grievance mechanism is robust but not without challenges. There is considerable awareness about it among beneficiaries. It is largely used, with majority (not all) of grievances filed pertaining to operations of the payment service providers. The system (ESPP/SAGE) is already making use of the lessons emerging from the grievance mechanism by modifying some of their operations; for example mode of payment and distances to pay points. The level of satisfaction of the mechanism among beneficiaries still needs to be worked upon especially in relation to duration and process of feedback, and successful resolution of grievances.

There is evidence of integration of SAGE within the local government operational structure – through the community development function. However, this is as far as integration goes and understood. There is hesitancy, almost a phobia by technocrats and politicians alike, of considering inclusion of social protection as a core need in the Sub County and district plans and budgets. This is affected by limited understanding of what social protection is beyond SAGE, and a chronic lack of resources to finance social development programs.

While direct income from SAGE is not necessarily the solution to all of the household problems, it is effective in helping them restart key livelihood activities. There is already evidence of positive impact of SAGE at household and community level. Beneficiaries are investing in household livelihood assets like livestock and crops; and affording to pay for their children’s scholastic and nutrition needs. Many have better health outcomes as they are now able to obtain specialised healthcare, which is much needed for older persons. Overall gender relations were reported to have improved, with a few skirmishes in some households where men felt their power to financial resources was being challenged by women obtaining the grant and participate in making financial decisions in the household.

Linkages between social protection and social support systems have been attempted but at a very limited scale. Efforts have concentrated on encouraging older persons to constitute themselves into groups for advocacy and / or saving-and-credit. Those who have gone into these groups have “extended” benefit including social capital on which they can draw in time of shock and great need. The reason for limited venture into these linkages is because for the period since SAGE implementation began, the focus has been on ensuring that the program sets off and rolls out successfully. At the same time, it is viewed that civil society needs to play a greater part in stimulating and supporting these linkages.

Civil society involvement in the SAGE program has so far been very limited, although not insignificant. The USPP was not involved in the districts initially when SAGE was launched and rolled out, thereby missing all the important trainings that happened. Nevertheless, when the civil society, through USPP got involved, they contributed towards understanding of issues affecting the grievance mechanism, educating some
4.0. Conclusions

beneficiaries about their rights and responsibilities, and interacting with local governments to begin discussing issues of generating bottom-up demand approach for social protection through the local government planning and budgeting process. Part of the civil society involvement has also been generating their learning about the program.
5.0. Recommendations

5.1. The Social Action Grant for Empowerment:

5.1.1. Grant Amount

The amount of grant needs to be revised upwards to take care of inflation and cost of living. In addition, consideration should be made regarding transportation costs that beneficiaries incur, which currently eats into their grant by nearly half.

5.1.2. Service Providers

Consideration for alternative payment procedures needs to be made. Payments through MTN have brought out a lot of challenges that were not initially foreseen – as earlier noted in this report. A comparative analysis study of electronic versus manual payments (which have been temporarily adopted to respond to electronic challenges) needs to be done. This will help decide which procedure is appropriate in what situation, and how to make most efficient use of the respective procedures.

To respond to challenges of language barrier between service providers and beneficiaries, especially in the Karamoja region, the MTN service providers should be from the district, ensuring that they can communicate in the local language.

While it is appreciated that MTN was chosen through a highly competitive bidding process, following the challenges earlier discussed, ESPP could consider alternative service providers for grant payments. Specifically, in all the six districts, it was pointed out that a payment system which does not have to depend on a telephone network should be adopted. A consistent example given was the system used to pay the army in remote areas through a mobile bank in the form of bullion vans that use solar energy, going to communities on pay days.

5.1.3. Program Monitoring

The role of district based politicians in SAGE needs to be clarified. Councillors at LC IIIIs insisted that they should be involved as policy monitors and advice government on what direction to follow. What is not clear is whether this function should be facilitated by USPP/SAGE or the district. It is therefore necessary for SAGE staff at districts to have a dialogue with the politicians to iron out the following issues: (1) The extent to which politicians at local governments can be involved in SAGE implementation; (2) What the mandate of these people is; and, (3) Who should be facilitating them to carry out their mandate.

5.1.4. Criteria for VFG

Eligibility criteria for the VFG needs to be articulated to the communities to remove doubts and allegations that non-deserving households are benefiting and deserving outs excluded. Physical assessment of the prospective households should be part of the selection process.

5.1.5. The Grievance mechanism

As stipulated in the SAGE implementation guidelines, accessibility of the grievance mechanism to the most vulnerable should be promoted by building the capacity of existing community advocacy structures. Through these, beneficiaries can contribute to understanding of the grievance mechanism and hastening of information exchange between them and mechanism managers. To achieve this, we propose that
5.0. Recommendations

Beneficiaries are allowed (and facilitated) to select representatives to parish and sub county coordination meetings. These representatives would be responsible for holding organised discussions with their colleagues to obtain information to share in the coordination meetings, and vice versa.

Parish and sub county officials involved in the management of grievances need regular refresher trainings on effective documentation and information management. Specifically, they need to know how to best capture and relay all relevant information from the complaints; and adhere to the standards provided for addressing grievances.

5.1.6. Linkages between social protection – social support systems

When thinking about expansion of social protection, there is need to consider creative combinations of state-based and community-based social protection systems, rather than the full extension of formal social protection schemes. Suggestions include community-based systems of risk pooling for purposes of developing a collective disaster-avoidance strategy. Community members can be encouraged come together to form a long-term ‘partnership reservoir’ which can be tapped in times of shocks. This can be effective in fending off risks of ill-health and food insecurity. Other social support systems that can be encouraged or boosted include reciprocity networks through which villagers can pool their risks through, for example, exchange or sharing of labour, seeds, durables or cash. What is key is a well designed combination of efforts and systems from government, civil society and the communities to deal effectively with the various types of risks affecting the chronically poor.

5.2. The role of civil society

5.2.1. Generate and share evidence on social protection

Having acknowledged the critical role of civil society it is necessary that USPP continues to interact with SAGE both to monitor and provide positive feedback to implementers, and also to generate and share evidence of how social protection can transform people and communities. To achieve this, USPP needs to go beyond monitoring the grievance mechanism to critically looking at the other elements of the program.

Because USPP might not have capacity to monitor all the 11 elements of the SAGE program, it is suggested that they monitor those where civil society contribution is paramount. These include management and coordination, targeting, payment, managing changes, grievance mechanism, operational monitoring, and evidence and advocacy. At the end of the monitoring process, USPP should write short context-specific discussion papers on the evidence of what works, what does not work, and what can be improved in future designs.

It is also necessary that district-based USPP members attend the coordination meetings at district level to regularly give feedback of their monitoring processes to the implementing teams.

5.2.2. Engage stakeholders to support expansion of the social protection

Anecdotal evidence shows that there is grassroots demand for extension of SAGE, specifically the SCG to universal coverage. To highlight this demand, USPP ought to engage stakeholders involved in planning and budgeting both at national and district levels.
5.0. Recommendations

At national level USPP needs to:

1. Participate in Civil Society Budget Advocacy Group (SCBAG) activities to embed issues of social protection in civil society budget demands.
2. Seek audience to petition parliament through the Speaker on the civil society budget demands specifically, and scale up of SCG in particular.
3. Publicise these demands to the general public through print and electronic media campaigns, supplements, articles, discussions.
4. Organise lobby meetings with and make presentations to policy actors on impacts of SAGE so far, and discuss strategies for universal expansion of the SCG specifically.

At local government level USPP needs to:

1. Be involved in the district planning cycle and budget conferences and use these opportunities to influence inclusion of social protection in districts plans and budgets.
2. Sensitise sub county and district councillors on the meaning and importance of social protection; specifically to understand social protection beyond SAGE.
3. Support bottom-up planning processes to include social protection as a priority planning and budget item in their investment and annual plans.

5.2.3. Enhance citizen demand for social protection

Civil society should support communities to demand for expansion of social protection through self-advocacy. This will require creating awareness and mobilising communities to articulate their need for social protection. Specifically, USPP should:

1. Contribute to strengthening of the grievance mechanism by supporting beneficiaries to file their complaints and appeals to the parish and Sub County, and monitor for timely response.
2. Reflect with community members on the meaning and benefits of social protection beyond SAGE. This should culminate into community expression of social protection as a priority need that they require their parish development committee to include in the plans that are submitted to the sub county.
3. Work with electronic and print media to regularly articulate demand for expansion of social protection. This will involve supporting media to have learning tours in SAGE districts to enhance their understanding had interest in social protection.
4. Mobilise and support older persons' groups at district levels to demand and articulate need for expansion of social protection, specifically the SCG.
5. Support beneficiaries and communities to express their grievances without fear that they would be disqualified from the scheme. This will include sensitising them and reminding them of their rights and responsibilities as beneficiaries.

5.2.4. Capacity strengthening

USPP should ensure that they are officially recognized in the district as partners in the promotion of social protection. The platform's representation on the national social protection subcommittee should be extended to the district level.

In order for civil society to engage usefully with SAGE, they need to have an understanding of the
5.0. Recommendations

the background and content of the program. They ought to be conversant with the design and implementation guidelines and process. This requires that USPP members should have been included in the district trainings particularly District Trainings 4 and 5 (DT4 and DT5) for Sub-county partners – as stipulated in the SAGE implementation guidelines. Because they missed this, they need to have such a training either specially organised for them prior to their subsequent engagement with SAGE in future, or for them to be included in the sub county partners’ refresher training. Where sub county roll out is still on-going, USPP should be included and facilitated to participate in the trainings.

Relatedly, for them to make sound contribution, members of USPP must be updated on and oriented to current national, regional and international social protection issues, and continually increase their knowledge levels on these matters. They can do this through continuous research, reading new publications, and also participate in national, regional and international learning events on social protection. This will help the platform to keep up-to-date with new developments in social protection processes, and enhance their knowledge and advocacy skills.
6.0. References


7.0. Appendices

7.1. List and profile of USPP-SAGE Action learning partners

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<th>No.</th>
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<td>Apac NGO Forum Link</td>
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<td>Sam Jamara</td>
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<td>2.</td>
<td>Kaberamaido NGO Forum</td>
<td>Kaberamaido</td>
<td>Roselinda Oyuu</td>
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<td>Kyenjojo</td>
<td>Moses Mwesige</td>
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<td>Foundation of Rural Disabled Persons' Organisation of Moroto</td>
<td>Napak</td>
<td>Anna Lomonyang</td>
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<td>Life Concern</td>
<td>Zombo</td>
<td>Gilbert Wachal</td>
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<td>7.</td>
<td>Development Research and Training</td>
<td>Kampala</td>
<td>Janet Kuteesa</td>
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