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COMPACT CASE STUDY

JANUARY 2026

Citizen-Based Monitoring (CBM)



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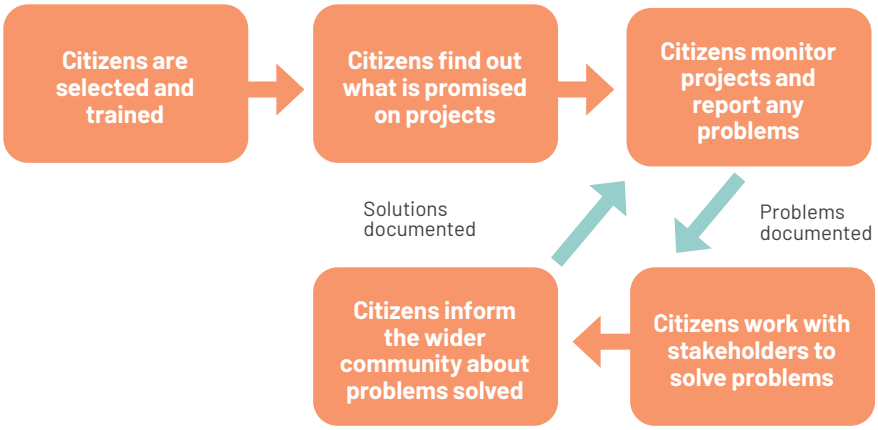
1. INTRODUCTION AND BACKGROUND

Citizen-Based Monitoring (CBM) is an approach that supports citizens to track the delivery and performance of government-funded projects. The COMPACT CBM approach was co-designed by Integrity Action, the Public Affairs Research Institute (PARI), and the South African Local Government Association (SALGA) as part of the COMPACT Toolbox.[1] Building upon Integrity Action's experience designing and supporting citizen-centred accountability mechanisms in other countries, the approach was developed and piloted with two municipalities to support the aims of COMPACT and to suit the South African municipal context.

Citizen-Based Monitoring (CBM)

A collaborative method for **local citizens** and **public officials** to work together on improving the provision and performance of infrastructure and public services.

The monitoring approach offers a new way for communities to engage with government in its planning and service delivery at the local level, thereby enhancing public participation and local government accountability. It is a bottom-up approach where ward committee members are selected to champion the monitoring approach in their wards and lead on the monitoring of water and sanitation infrastructure projects. As ward committee members are representatives of their communities, they are well positioned to represent the interests of their communities related to service delivery and project performance, and to engage with municipal government to strengthen these areas. The diagram below shows the different stages of the CBM journey.



Monitors visit project sites and observe what has been delivered and whether there are any issues with project delivery. Monitors can also gather feedback on the projects from the wider community. Monitoring data is recorded on the Kobo app or on a paper questionnaire and shared with the municipal government responsible for delivering the projects. The monitoring data can also be displayed publicly online on a dashboard. If problems are found on the projects, such as issues with the quality of resources or the standard of work delivered, then the monitors are encouraged to raise the problems with the relevant stakeholders through the appropriate reporting protocol. They are encouraged to discuss the problems with the responsible authorities in collaborative fora, in order to agree on a solution. Once the problems have been resolved by the authorities, monitors can record this on the app through their ongoing monitoring.

1 COMPACT is a partnership between the Public Affairs Research Institute (PARI), the South African Local Government Association (SALGA) and Integrity Action, together with 12 partner local municipalities in South Africa. The overall goal of the COMPACT programme is enhanced local government service delivery and accountability. The specific objective of the project is that public participation in municipal integrated development planning (IDP) processes is meaningful and contributes to service delivery which better meets low-income residents' socio-economic needs. See https://pari.org.za/compact/

2. PILOTING CBM WITH TWO LOCAL MUNICIPALITIES

Following the action research phase of COMPACT and a period of planning and design, the COMPACT team began to pilot citizen-based monitoring (CBM) in January 2024 in **Kouga Local Municipality** and **Oudtshoorn Local Municipality**. A selection of ward committee members, including some ward assistants in Kouga LM, were trained to carry out monitoring and use the Kobo app.

In January 2024, introductory workshops were held in the two municipalities to share the CBM approach with selected monitors and equip participants with the skills and knowledge to monitor local IDP projects and effectively communicate the outcomes. A refresher session on CBM was also held in the two municipalities in March 2025. A Citizen Monitor's Handbook (also available in Afrikaans and isiXhosa) was developed. The training introduced the idea of CBM and walked participants through the monitoring approach. Participants were engaged in interactive exercises, to facilitate their understanding on the exact aspects of monitoring and to map out how they would apply the approach in practice in their wards. The following topics were covered: understanding motivation; engaging stakeholders; discovering what is promised; monitoring problems; problems are fixed; and spreading the word. The workshop facilitators stressed that citizen monitors are not engineers, but observers who monitor using factual evidence, such as specifications. It was agreed that to support the resolution of any problems with implementation, monitors would follow appropriate protocol to report the specific problem. They will share the information with the ward committee through ward committee meetings and WhatsApp, and inform the ward councillor. The ward councillor should then share this with the Municipal Manager, who will share this with the CFO and/or the Project Manager. The monitors will follow up on this process to support resolution.





Following the citizen monitor training, the process of monitoring began in the municipalities. Between July 2024 and January 2026, a diverse array of projects were actively monitored in Kouga LM, including the Kwa Nomzamo Wastewater Treatment Works, the Hankey 990 Housing Project, the Seekoei Estuary Causeway Reconstruction, and the Donkerhoek & Humansdorp Water Project, which covered Wards 4, 5, 6, and 15. Oversight also extended to improvements at the Hankey Water Waste Treatment Works in Weston, the Kwanomzamo Wastewater Treatment Works serving Wards 1, 6, and 15, the Rising Main project in Wards 4, 5, 6, and 15, the Thornhill Wastewater Treatment Works in Ward 7, and the Human Settlement Project in Jeffrey's Bay, reflecting a broad scope of government-funded initiatives aimed at enhancing service delivery and accountability at the local level.

In Oudtshoorn LM, project monitoring focused on Wards 2, 9, 10, 11, and 12, where all initiatives formed part of the overarching Klein Karoo Rural Water Supply Scheme (KKKRWS) project, which encompassed the replacement of asbestos cement pipes, road refurbishments, and upgrades to the rural water supply system within these wards.















During the piloting phase, the COMPACT team regularly communicated with trained monitors to support the monitoring process. Members of each local municipality were engaged to champion the approach and support monitors. This includes the Municipal Manager, IDP Manager, Public Participation Officers (PPOs) and municipal engineers. These municipal staff members joined the training of monitors and helped to facilitate monitoring visits. Ward councillors attended some of the training workshops and were kept up to date on the monitoring work. Water project contractors were also engaged to support monitors to carry out monitoring visits.

3. CHALLENGES ENCOUNTERED

Despite careful planning and collaboration among key stakeholders, the piloting of CBM encountered several challenges that slowed implementation and influenced overall progress. Rather than being seen as barriers to implementation, the following challenges provide valuable lessons and highlight areas for improvement.

Firstly, there were some institutional barriers with **challenges related to project availability, scheduling, and access to information on projects.**

- **Institutional barriers:** Changes in municipal management caused delays in getting CBM fully operational, as the appointment of new officials in partner municipalities affected continuity. When changes occurred in the offices that are directly linked to Public Participation, CBM co-ordination and planning was significantly hindered.
- **Ensuring consistent access to information:** The uneven distribution of project documents between the municipality, contractors and monitors limits transparency and accountability. Missing project details also affected the COMPACT team greatly, disrupting monitoring plans. Unless all monitors receive the same level of access, disparities may undermine the credibility and effectiveness of CBM processes. The information access challenges, if not timely addressed, hinder monitoring coordination. For example, there were missing instrumental project details such as "project names, start dates, or location", which made it difficult for monitors to then assess whether projects were on track or how much they were delayed.
- **Stalled/delayed projects and limited project availability:** The number of stalled/delayed projects was unexpected and made it difficult to monitor active water projects. This was incorporated into the model (monitoring of stalled projects). Differences in the availability of projects to monitor led to a variance in take up in the two sites. In Kouga LM, there were initially no projects available to monitor. In Oudtshoorn LM, there were active projects in 2024, which meant that more monitoring was carried out, although this was mostly done offline. At the start of the pilot in Kouga LM, no active water projects were available despite several being planned. This created delays between training, which took place in February 2024, and monitoring taking place in July 2024 while being limited until 2025. The lack of projects also meant that some monitors did not have any projects to monitor as the active projects were located too far away, and monitors were sometimes monitoring projects that were not located in their own wards, which may have lessened their ownership of the approach and their incentive to monitor. In 2025, the COMPACT team attempted to manage this challenge by introducing the monitoring of projects that have been delayed or stalled at the contracting stage. This hasn't yet been introduced as it was decided to support current monitoring before introducing a new aspect, but could be good to introduce this for future citizen monitoring in other municipalities as it seems to be a key issue.
- **Scheduling weaknesses on municipal projects:** Persistent project delays and unclear timelines from the municipality and contractors' side resulted in coordination and planning challenges. Although some projects have recovered from delays, the persistence of stalled or unclear timelines signals systemic weaknesses in project planning and management on both municipality and contractor level. These unveiled that municipalities face the challenge of aligning contractor timelines, funding flows, and community expectations to sustain progress. This challenge is further compounded by the disconnected relationship between the Public Participation Unit (PPU) and the Project Management Unit (PMU). While the PMU is responsible for technical oversight and delivery, the PPU plays a critical role in managing community engagement and expectations. CBM is reliant on the strong coordination between these two units to be effective, however when project timelines are unclear or are delayed, the PPU struggled to provide accurate information to the COMPACT team and monitors to enable the tracking of projects. When project schedules were inconsistent or poorly communicated, monitors struggled to verify projects, report accurately, and maintain community confidence in the monitoring process.

Challenges related to monitors – including **monitor retention, motivation and geographic issues** - were experienced and proactively addressed during the piloting. Addressing these issues is crucial to ensuring the success of CBM:

- **Perception of citizen monitoring:** CBM approach was designed to be citizen-led and owned, but at some points it seems that monitors interpreted the approach as municipality-owned. This was particularly the case in Kouga LM. This was likely due to the strong relationship between citizens and the municipality in Kouga LM. Monitors initially thought that it was the municipality's role to lead the monitoring process and to make sure it happens, rather than the monitors leading the process. The high involvement of the municipality in COMPACT means that it was important to communicate the different stakeholders' roles and to emphasise that this should be a citizen-led process. There is also the question of how independent and citizen-led the CBM can be on a programme like COMPACT where the municipality is so involved. For the Integrity Action team, based in the UK, it was a surprise how institutionalised local government and citizen interactions are in the municipalities, with many protocols in place. This differs to other contexts Integrity Action has worked in and had both positives and negatives. Sometimes it hindered the process but sometimes it supported the process through the clarity of the steps to take and monitors' close access to ward councillors and municipal staff.
- **Monitor retention:** Several monitors dropped out due to relocation, new jobs, or loss of interest due to the delay between the initial training and the monitoring starting. This left gaps in certain wards and necessitated training and induction of new monitors. Monitors also shared that the lack of monetary compensation was a deterrent.
- **Lack of motivation to monitor:** Although some monitors were very engaged, others required prompting to carry out monitoring activities. In some cases, this happened after a long period of delays hence the lack of motivation. Where CBM has worked well in other contexts, the monitors have been motivated to monitor projects because of the impact this has on their lives and communities when projects are improved. In this pilot, it's possible that monitors did not see the same benefits to their communities from the monitored projects. Because of the lack of projects, monitors were not always able to monitor projects local to them, and the water reconstruction projects may not feel that relevant to their lives. This would have been improved by the availability of more projects to monitor, and taking more consideration over what type of projects are important and interesting to the monitors.
- **Economic and geographical disparities across municipalities** was another factor that contributed to limited engagement. Monitors represented different demographics within the two municipalities, living in both affluent areas and marginalised communities such as townships and rural areas. This meant that some monitors were better equipped and resourced to carry out monitoring activities than others, creating uneven participation.
- **Consistent relationship with COMPACT team was hindered by geographical barriers:** Another factor that may have affected monitor motivation was the limit to direct engagement between monitors and the COMPACT team (based in Pretoria, Johannesburg and London). It was a challenge building a strong, consistent relationship with monitors due to distance. The two pilot sites were selected because of their willingness and the strong engagement of ward committees and municipal staff. However, the distance of these sites from where the COMPACT team are based made it difficult to build a strong relationship with monitors and to keep a consistent engagement with them. In other contexts where Integrity Action has piloted similar approaches to CBM, implementing partners have been located close to the monitoring areas, which has made it easier to build a strong relationship through regular visits. On COMPACT, monitors seemed to be less engaged when not actively prompted by the COMPACT team. More regular communication and visits early in the piloting stages may have helped encourage more active participation in monitoring.

There was a considerable **lack of youth participation in monitoring phases** across the two municipalities. While there was a significant presence of young people during training and refresher sessions, most could not be retained for ongoing monitoring. This was largely due to the voluntary nature of the role, combined with the challenges discussed earlier. As a result, the majority of monitors were older women who, despite these constraints, demonstrated exceptional commitment and dedication to the process.

Finally, there were challenges specifically in relation to the use of the **Kobo app for monitoring**:

- **Low uptake of the CBM mobile application:** The CBM mobile app, designed with offline filling features to accommodate connectivity shortfalls remained underutilised despite positive feedback. Monitors often defaulted to WhatsApp and made a request for offline monitoring, citing a need for easy capturing, integrated coordinating into council input leading to the introduction of a paper-based template and sending photos of this to the COMPACT team to upload. In Kouga LM, this preference was shaped by practical barriers: several monitors lived in remote areas, some did not own smartphones, and long travel distances to project sites affected both participation and retention. The initial plan of completing forms offline and uploading them later at the municipal offices in Hankey or Humansdorp proved unsustainable when one office lost WiFi access, and by the time monitoring resumed after the refresher session, monitors had informally designated one individual per project to handle all uploads. These logistical constraints, compounded by transport challenges and declining monitor availability, contributed to the limited adoption of the app. In Oudtshoorn LM, however, a different trajectory emerged. Some monitors actively used the offline paper form and later recorded the information into the Kobo app at the municipal office, where they were provided with a laptop and internet access. Over time, this offline template evolved into the monitoring close-off template, becoming a practical bridge between manual and digital processes. These sitespecific variations show that low app uptake was not due to resistance to the tool itself but rather to uneven digital access, varying levels of municipal support, and the broader logistical realities shaping how monitoring could be carried out in each location.
- **The paradox of CBM app acceptance without adoption:** Despite monitors frequently conducting monitoring visits, many did not record their activities using the CBM app. When asked for feedback, monitors generally responded positively about the app, making it difficult to identify the reasons behind its limited use. Although the COMPACT team considered lack of mobile data as a potential barrier, the app was designed with offline capabilities. Monitors could download forms, complete them offline, and later upload their responses using municipal office Wi-Fi. Furthermore, the active use of COMPACT WhatsApp groups by many monitors indicated that they did have some level of internet access. This pattern suggests that the preference for WhatsApp may stem from its familiarity and ease of use, rather than from actual issues with the CBM app itself. The widespread use of social media in daily life, and the convenience it offers, may outweigh the motivation to adopt a new application with useful features. This challenge highlights that access alone is not enough; understanding and influencing user behaviour is crucial, especially when feedback is limited. Additionally, some monitors used older mobile devices that may not be compatible with current connectivity demands and social media data bundles may have further encouraged the use of platforms like WhatsApp over the CBM app.

4. SUCCESS AND OPPORTUNITIES

Despite the challenges, there were also many successes and opportunities that arose from piloting CBM in the two municipalities. In terms of what worked well during the CBM piloting, the following issues were identified:

Training on the CBM approach was well received by attendees. Attendees gave positive feedback:

> *"This training was mind opening for me. It gave me power and made me have more interest on the Compact programme together with its stakeholders." "This was an inspiring training. Very fruitful."*

The **involvement of the municipal staff was positive**. The PPUs in both municipalities were engaged and interested in the approach - joining trainings, meetings, and supporting CBM by providing transport for monitors to visit project sites.

Monitors did take up the approach and carried out monitoring, particularly in Oudtshoorn LM, with some examples of solving problems. Monitors shared that the monitoring process allowed them to see problems on projects and incentivised them to solve problems. Monitors successfully resolved a longstanding service delivery issue when they escalated a water project that had stalled for years. By raising the matter directly with ward councillors through the CBM WhatsApp group, the issue was formally addressed: the municipality reviewed the situation, terminated the underperforming contractor, and committed to appointing a new service provider. This demonstrated how CBM empowered monitors to surface persistent problems and trigger concrete action from local leadership.

Monitors shared that engaging in community-based monitoring helped to **strengthen ward committees**. The skills developed around tracking projects and negotiating with stakeholders supported them to better engage in project meetings and carry out their role as ward committee members.

Although there were challenges in engaging and retaining monitors, **many of the monitors carried on their role** and returned for the refresher training in January 2025. This shows that many monitors did want to be involved despite the challenges in getting monitoring started. Despite some monitors feeling discouraged that the initiative had no financial benefit for them, there was quite a high level of commitment from the monitors who remained part of the project. They demonstrated strong levels of civic responsibility, willingness to fight for their communities' well-being and development.

The **use of WhatsApp as a communication tool** between municipal staff and citizens was positive. WhatsApp groups were established in each of the two pilot municipalities, bringing together the monitors and the municipal champions, and some ward councillors. Despite the limited use of the CBM app, the WhatsApp groups were actively used. Citizens made municipal staff aware of issues on projects through the WhatsApp groups and uploaded photos of projects. Municipal staff used the WhatsApp groups to share information about upcoming meetings.

Monitors shared that **the training and the monitoring process equipped them with useful skills for their jobs**:

> *"I feel empowered with all knowledge I gained with this training, even for my work-related matters I'm now able to say I can do it without fear."*

The training and materials provided by COMPACT also raised participants' awareness of other roles and how to engage in municipal processes, leading one CBM monitor to take up the role of Community Liaison Officer.

The CBM pilot had **wider reach than was planned, which was an unexpected benefit**. It seems there may have been cases where monitors used the skills and role to hold the municipality accountable for projects that weren't included in the CBM process. For example, on the CBM WhatsApp group one of the monitors shared an issue related to a project that was not part of the CBM pilot. This issue involved delayed project progress going on for more than 8 months, exacerbating water shortages and dirty water for the community. This led to higher water rates payment further disturbing communities, who believed that the contractors were not skilled for the job and should be removed and another contractor be hired. After this was escalated on the group, the relevant councillor came back and confirmed that the matter was addressed by terminating the contractor and a new service provider will be appointed to rectify the issue. This was quite an interesting event as it showed that the community-based monitoring activity in this ward was encouraging ward committee participation and accountability on the councillor's end.

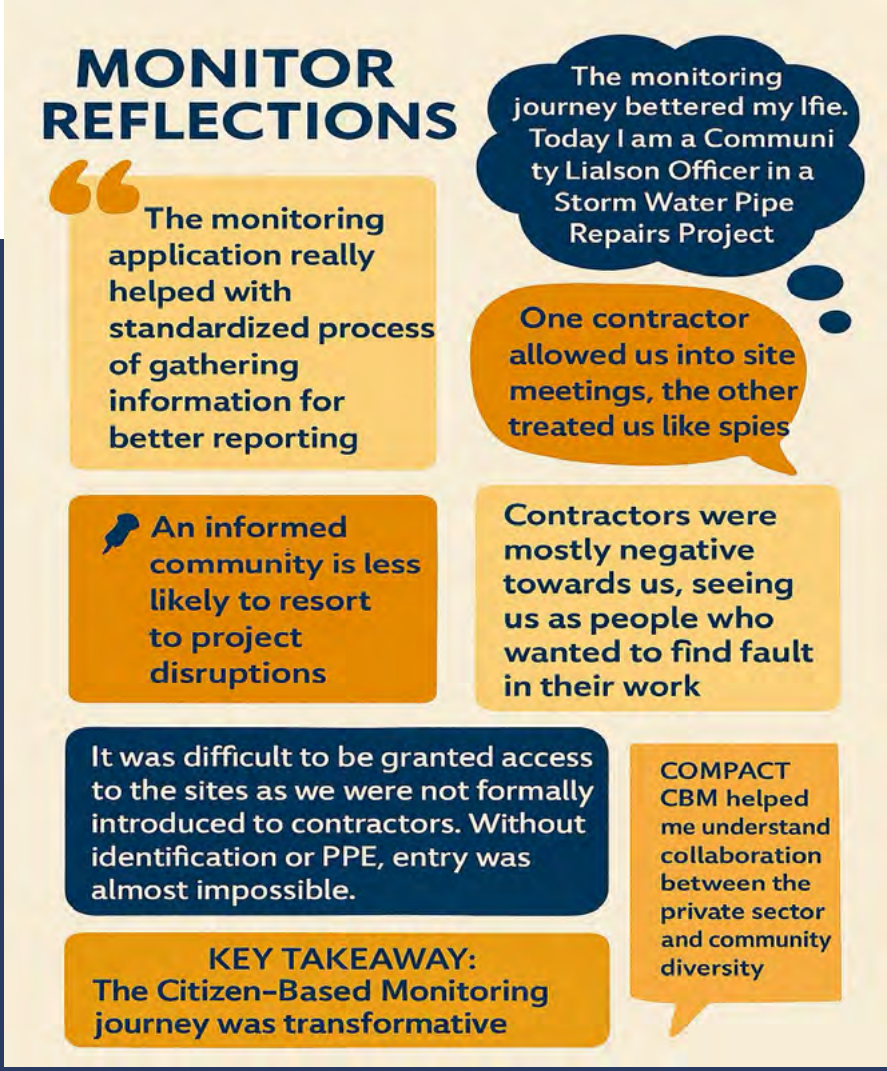


5. MONITOR REFLECTIONS

The CBM pilot demonstrated that when citizens, municipalities, and civil society collaborate, monitoring has the potential to strengthen accountability and improve service delivery. Effective training, municipal support and communication platforms supported engagement and relationship-building between citizens and municipalities.

Unexpected outcomes, including monitors holding municipalities accountable beyond CBM projects, showed the wider impact of the approach. At the same time, challenges such as project delays, uneven access to information and the need to reinforce citizen ownership highlight the importance of refinement. Overall, institutionalising CBM within municipal systems offers a sustainable pathway to overcome these challenges, provided municipalities commit to supporting monitors with adequate resources and capacity build. COMPACT has developed a guide to institutionalising CBM in municipalities.

Insights from the infographic of monitors' reflections further emphasise the positive experiences and lessons learned during the pilot. Monitors consistently valued the opportunity to directly observe project implementation and appreciated the platforms that enabled open communication with municipal officials. They highlighted a sense of empowerment gained from being able to raise concerns and witness tangible responses from decision-makers. However, the infographic also captures monitors' calls for greater transparency around project information and more frequent, structured feedback sessions. These visual reflections underline the critical role of ongoing engagement and transparent processes in building trust and sustaining meaningful citizen participation within the CBM framework.



6. LESSONS LEARNED

Several key lessons were learned from the piloting of CBM in Kouga LM and Oudtshoorn LM. These are summarised below:

- **More time for monitoring is needed**: starting the monitoring earlier on in the four-year programme. Year 1 of COMPACT was dedicated to action research and programme planning, the CBM approach was designed in Year 2 and piloted in Year 3. Sufficient time was needed for CBM approach design, but the approach design could have been started in Year 1 rather than Year 2 to allow more time for the pilot to run. Devolving and delegating COMPACT team responsibilities in Year 3 (assigning specific people from PARI and SALGA to be involved in the CBM) allowed things to move more swiftly alongside other programme activities.
- **Ensuring that monitoring visits take place as soon as possible** after introducing the approach in the first training. Where projects were not available, we could have expanded out to more sectors or monitored whether or not planned projects were active.
- **Offering refresher training was important**, which wasn't originally planned. Monitors commented that they found the refresher training particularly helpful because unlike the initial training, they had now had the experience of putting the approach into practice and so came to the training with a fresh understanding.
- **More trust-building and relationship-building with citizens is needed to encourage uptake of the approach**. Kouga LM and Oudtshoorn LM are areas of high civic engagement with active ward committees, yet engaging citizens in the CBM process still remained a challenge, so relationship building with citizen monitors will be even more important to focus on in municipalities where citizens are less engaged.
- **The importance of ensuring that there are enough active projects to monitor or including monitoring of stalled/inactive projects**. This might require monitoring projects from more sectors than just water and sanitation. There should be preparations for monitoring to happen as soon as possible after the approach is introduced, to build on momentum. There should also be careful consideration of which projects are important to and local to the monitors.
- **The uptake of a new tool, such as the CBM monitoring app, requires consistent support and encouragement**. CBM tools must be paired with digital literacy support, training and ongoing mentorship to encourage consistent use. Offline and low-tech options were provided and remain important for inclusive implementation. It may have been beneficial to involve monitors more in the design of the app and overall approach, with more rounds of feedback and adjustments. In this case it was challenging to do because of the distance between the COMPACT team and the monitors, and the fairly short duration of the monitoring period.
- **Engagement is sustained when communities see evidence of impact**. Embedding feedback loops where municipal responses are tracked and communicated strengthens trust and long-term participation. A more consistent and systematic approach to tracking municipal responses to the issues emerging from projects and providing timely feedback to communities would have enhanced accountability, facilitated the escalation and resolution of issues by relevant stakeholders and visibly demonstrated the impact of monitoring interventions thereby laying foundation for monitoring post-COMPACT.
- **Proximity matters**: Partnering with local organisations or designating municipal focal points helps maintain consistent engagement where distance is a constraint.
- **Effective CBM requires stronger integration with municipal project management systems to ensure monitoring aligns with project milestones**. CBM needs to be supported by the Project Management Unit (PMU) so that monitors have all the required project information. CBM models should anticipate delays by including stalled or planned projects, sustaining engagement and ownership. This widens opportunities for engagement and sustains community ownership even when new projects are delayed.

- **A clearer process is needed for resolving problems.** Legislatively guided structured processes for resolving issues must be embedded, to ensure that issues are escalated and resolved appropriately. This process needs to be clear to monitors, and more support provided to guide monitors through this process.
- **Retention strategies must be built into CBM, including ongoing support, recognition, and flexible participation options to sustain participation motivation.** Municipalities could establish partnerships with institutions of higher learning and afford students in relevant disciplines such as project management, local government, etc an opportunity for practical learnings while supporting their host municipalities as monitors.
- **Preparation and compliance build confidence:** The monitoring exercise showed that careful preparation creates a strong foundation for effective CBM. All monitors received formal permission to conduct their work, and nearly all were provided with safety instructions. This level of preparedness translated into high confidence, with monitors consistently reporting that they felt safe, sported, and ready to fulfil their role.
- **Relationships are key enablers of progress:** Relationships with stakeholders were varied. Where these were positive, they created space for constructive dialogue, and where they were negative this hindered the monitoring process. Feedback from some of the monitors highlighted how they were seen negatively by contractors, and this relationship needs to be carefully managed for CBM to be successful. Positive collaboration with municipal officials and site managers emerged as a strong success factor in some of the pilot sites, with a number of monitors describing their relationships with stakeholders as either "positive" or "very positive," suggesting that in some cases trust, cooperation and open communication channels are well established. These relationships reduce barriers to monitoring and create space for constructive dialogue.
- **Municipalities must commit to timely and consistent sharing of information with all monitors:** While most monitors were able to access the information needed to perform their duties, a gap remains in terms of whether they received full and accurate copies of documents. This distinction is important: access without documentation can limit monitors' ability to track changes over time or hold stakeholders fully accountable.



7. CRITICAL SUCCESS FACTORS FOR IMPLEMENTING CBM

Drawing from the lessons of the pilot, some enabling conditions emerged as decisive for the success of the CBM approach in municipalities. Future implementation of the CBM tool hinges on avoiding past mistakes, therefore anchoring the process with several corrective measures is necessary. Highlighting these factors provide a basis for guiding its replication and adaptation across other municipalities in South Africa.

- **Inclusive training from the onset:** Councillors should be trained alongside monitors from the outset to ensure shared understanding and support. This does not only aid in strengthening seamless relationships but also maximise impact by ensuring that the monitoring outcomes find expression in council.
- **Stronger coordination:** Municipal-level coordination must be tighter to avoid confusion about leadership roles and responsibilities between the Project Management Unit (PMU) and the Public Participation Office (PPU), particularly around logistics such as travel arrangements and overall monitoring communication. Knowing who should be approached for what issue establishes clear roles and communication lines. Monitors, municipal coordinators and project staff should have clearly defined responsibilities, reinforced by consistent communication from the relevant office in municipalities (considering the highly regulated nature of the local government in South Africa).
- **Engaged PPU staff and active ward committee members:** dedicating time to carrying out/ supporting the monitoring, and with a clear understanding of the full approach and how it fits in with their current processes
- **Sustaining monitor engagement:** While monitors report high levels of satisfaction and positive stakeholder relationships, maintaining this momentum requires consistent responsiveness to concerns raised. A key success factor for municipalities is to demonstrate that identified issues are addressed in real time, keeping trust strong over the long term.
- **Availability of information about projects to monitor** including projects are planned, where they are located, contract information and project meetings. This information can be supplied by the PMU/PPU, so this again links to the importance of the commitment of the municipal staff to support monitoring. It would be challenging for citizens to monitor if they are not able to find out where projects are and what is planned.
- CBM has been designed so that **few actual resources are needed** for implementing or continuing the approach. Although an app was used in the pilot, the monitoring survey can be carried out offline and the results discussed between municipal staff and monitors. So even where there is no data or not smartphones, the steps of the CBM approach can be carried out. The key success factor for implementing CBM is the commitment of the stakeholders.





- It was clearly stated during the planning phase that there would be no monetary incentive for monitors, as this approach would not be sustainable beyond the pilot. As such, functional ward committees were appointed as monitors, since they were already serving in their municipalities and received a stipend from the municipality. However, **the lack of additional monetary gains emerged as one of the greatest challenges**, resulting in delays and a less fruitful initial pilot phase at one of the sites. Even though the municipality supported monitors with transport to the locations, this support was not sufficient to overcome the challenges posed by the absence of monetary incentive. The ward committee stipends vary per municipality and seem to not be sufficient. This suggests that providing monetary support for monitors could help to incentivise monitors in the short term. In the long term, municipalities are recommended to increase the municipal stipend to ward committees, in order to allow them to carry out their roles fully, including the monitoring of municipal projects beyond the pilot.
- **Embedding CBM institutionally would secure its continuity**, making it a sustainable tool for accountability. We recommend that CBM is embedded under the Public Participation Unit (PPU), with clear Terms of Reference that require collaboration with the Project Management Unit (PMU). Having the CBM initiative officially embedded into the municipality's operational functions makes for a seamless execution, replication and sustainability across the sector. COMPACT has therefore developed a CBM institutionalisation guide for use by municipalities.
- **Institutionalising standard protocols:** Municipal staff should formalise safety briefings and distribute information packs to all monitors. By consistently recording issues as reported by monitors, staff can ensure that safety and operational concerns are systematically addressed. This uniform approach enhances consistency, reduces oversight risks, and enables the replication of effective monitoring practices across different municipalities. This demonstrates the value that CBM brings by embedding reliable standards into routine operations.
- **Strengthening issue recording and rapid response:** As monitors share challenges and project bottlenecks, municipal staff are encouraged to document these issues immediately. Creating a structured record of issues supports the development of a rapid response plan, enabling municipalities to proactively address minor operational concerns, such as maintenance needs for fire hydrants or water access problems before they escalate. This process highlights how CBM acts as an early-warning system, allowing for timely interventions and more resilient project delivery.
- **Providing targeted support for at-risk projects:** Using real-time feedback from monitors, municipal staff can identify and track projects that are stalled or at risk. Systematically recording these concerns and implementing clear escalation pathways ensures that unresolved issues are promptly addressed. This active use of CBM data allows for more targeted troubleshooting, helping municipalities maintain momentum on key projects and deliver improved outcomes for communities.

8. CONCLUSION

When carefully and strategically implemented, CBM has the potential to resolve governance challenges that frequently manifest as protests, service delivery disruptions and community dissatisfaction stemming from a lack of transparency and weak performance monitoring. The CBM pilot supported ward committee members to have a better understanding of municipal water infrastructure projects, observing project implementation first-hand through site visits and communicating about their delivery with project stakeholders. The CBM process also supported citizens' observation of municipal projects to be publicly available online, strengthening government transparency and community oversight. In some cases, monitors were able to identify issues on projects and to raise these with councillors for effective resolution, strengthening and enforcing collaborative service delivery.

Therefore, institutionalising CBM within local government offers a practical and legislatively supported solution to strengthening accountability and collaboration towards enhanced service delivery. The Constitution (1996) and the Municipal Systems Act (2000) both emphasise the duty of municipalities to involve communities meaningfully and to build their capacity for participation in performance monitoring. Embedding CBM under the Public Participation Unit (PPU), with clear Terms of Reference that require collaboration with the Project Management Unit (PMU) in municipalities, would provide a structural basis for consistent and transparent project monitoring. COMPACT has developed a CBM institutionalisation guide for municipalities.

Such an approach directly addresses recurring challenges in municipalities, where weak oversight and limited citizen involvement often fuel service delivery protests and erode trust. This case study provides recommendations for how to implement CBM effectively, based on the challenges encountered in the CBM pilot. Carefully implemented, CBM can bridge these gaps by enabling communities to track projects, monitor resource use and hold municipalities accountable. Importantly, its institutionalisation should prioritise capacity building in resource management, equipping both communities and municipal officials with the skills and knowledge to interpret budgets, monitor expenditure and assess project performance. Such investment directly addresses the legislative requirement to allocate resources and support citizen participation, ensuring that public involvement is not symbolic but a driver of efficient and democratic service delivery. In this way, CBM moves beyond ad hoc initiatives to both a constitutional imperative and a pragmatic governance solution that empowers communities, strengthens municipal accountability and restores public trust in the South African local government systems.











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