EVALUATION

OF

SOUTH AFRICA MEDIA AND GENDER INSTITUTE (SAMGI)

REPORT COMMISSIONED BY HIVOS

Shamillah Wilson
Sue Howell

November 2008
PREAMBLE

We wish to acknowledge SAMGI for agreeing to engage in this process of self scrutiny. Thanks to the staff, Board and all the persons interviewed and organisations visited for making the time available and for their patience in enduring all our questions.

All persons interviewed seemed to be motivated by a positive and constructive attitude aimed at building the organisation. Their frank and open contributions and insights were invaluable in creating as rich a picture as possible.

We hope that the story that emerges on these pages will help the SAMGI team to grapple with their existing challenges as they forge ahead with their vision.

The questions provided by HIVOS have formed the basis of the institutional evaluation. Each question asked by HIVOS has been answered and these answers are based on the documents provided by SAMGI, interviews with the Board, director, finance and administration staff, the management committee, the auditors and staff in general. As the original contract between SAMGI and HIVOS did not call for a separate audit, the financial section of this evaluation takes the form of the questions asked as if an audit were taking place. In other words this evaluation has been commissioned to ascertain that the funds provided to SAMGI from HIVOS were spent in a manner conducive to the agreement reached between the two parties. Where additional financial indicators not covered by the guiding questions provided by HIVOS, the evaluator has inserted these.

The scope of the institutional and financial evaluation is straightforward and in depth and has been approached in an open manner with SAMGI. SAMGI is aware that they have their systems in place and that their challenges lie in maintaining and strengthening their funding base for the longer term. It is clear that SAMGI has a market niche, but that their marketing itself needs strengthening.
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EXECUTIVE SUMMARY

The Southern Africa Media and Gender Institute (SAMGI) is a South African based feminist organisation whose core function is to fulfil the communication, gender awareness and critical media consumption needs of the Southern African Region. SAMGI does this through monitoring reporting on gender issues, training and building capacity of journalists and civil society in order to produce alternative media and critique existing media.

The evaluation looked at the mission and vision, capacity, financial systems, institutional linkages, relationship with target groups and also assessed the core programmes of SAMGI, their effect and impact. To achieve this, the evaluation was conducted using a qualitative approach. Interviews with programme staff, beneficiaries and stakeholders were conducted. This was supported by a desk-study of available documents.

The findings of this evaluation relate to the implementation of the workplans of SAMGI and the outcomes (intended and unintended).

Among the key achievements for the organisation is an impressive track record and evidence of stellar quality publications attesting to its work. Institutional partners and beneficiaries alike, sing the praises of the organisation and note that SAMGI as an organisation fulfils its mandate of empowering people to transform social relations of power. The organisation has also managed to create a solid institutional foundation from which to launch itself even further as it moves forward as an organisation.

While this evaluation does not claim to be an impact assessment, from the interviews and documentation, the evaluation was able to discern several indicators of change and impact. The work of SAMGI has contributed to shifts in definitions as women and youth in rural areas and prisons have been able to redefine their identities and also express through voice and production of their own media. Groups that had previously been excluded were also participating in and producing analysis and knowledge which put their own experience at the centre. This is known as a shift in behaviour. Thirdly, shifts in engagement has occurred as a result of SAMGI work that includes more aware media agents and activists as well as members of communities who now champion the issues of the marginalised and used their own experience as a basis to do so. Finally, SAMGI's work has been a critical instrument (especially in media monitoring reports) in advocacy and lobbying efforts for policy transformation.

Key challenges and recommendation from the evaluation include:

Stakeholder relationships: The organisation has indicated that it is sometimes difficult to get buy-in many groups were resistant or came with their agendas. The organisation has to come up with an effective strategy to get buy-in and commitment from stakeholders and participants and coordinators.

Sustainability: the organisation needs to develop a sustainability plan that addresses programmatic and financial sustainability. This would involve actively and consistently assessing impact, conducting trends assessment and assessment and understanding the changing local/regional/global environment. Also finding a resourcing strategy that includes income generation and a diverse funding base.
Succession: the organisation needs to come up with a succession plan that looks at identifying strategies and criteria that would support in diversifying the leadership of the organisation organically.

Human Resources Function: SAMGI needs to appoint a qualified Human Resource Board member to guide the organization with respect to staff development, hiring new staff, and termination of staff where funding is not available and performance not adequate.

Reporting: non-timely reporting and inconsistent quality of reports is a key issue and SAMGI needs to as an organisation link reporting to its appraisal system and ensure that standards are set for quality of reporting.

Realigning processes, policies and procedures: there is a need for SAMGI to go through all processes and realigning it in terms of organisational goals and programmes.

Evaluation and Reflection: While SAMGI is good at critiquing and producing media, it also needs to develop the rigours of reflection and recording this in a space that leaves a trail to show how these reflections contribute to the practice within the organisation. The recommendation is that SAMGI combines an impact assessment much more broadly of its work with a trends mapping that will also highlight technological trends in terms of reaching and communication with mobile phones for example.

Ensuring Follow-up: As an organisation, it would be important for SAMGI to ensure much more enduring impact of their work by devising a consistent and concrete follow-up strategy. The investment of resources in processes is a strategic one and needs to be backed up with time and ongoing resources over a longer period of time.
1. INTRODUCTION
1.1 Background: Southern Africa Media and Gender Institute (SAMGI)

The Southern African Media and Gender Institute (SAMGI) was founded in 2003 and is registered in South Africa as a non-profit making Non-Governmental Organisation (NGO).

SAMGI was founded as a result of the expanded activities of the Women’s Media Watch. The Women’s Media Watch has its origins with a group of women who in 1994 saw the need to get the least represented female voices heard in the media. The small group of women who started the Women’s Media Watch drew into their circle women from grassroots organisations who were able to convey their problems and that of their communities to the group. This was the first Women’s Media Watch in the Southern African region and there was no role model from which to draw on. The small volunteer-staff component and the struggle for funding soon saw the vibrant project shrink and hibernate. In 1996, a new director was appointed to take the project through a radical change process. The value of the Women’s Media Watch was recognised and the project was re-established, funded and an expert co-ordinator in gender and media appointed. In 1997, the Gender and Communications course was added to the Women’s Media Watch. Women’s Media Watch concentrated on advocacy, lobbying and activism. The Gender and Communications course was initiated to teach the skills required to deconstruct the media, develop critical media awareness skills, monitor the media, develop information technology skills and develop writing skills to a wider audience. The organisation enjoyed a high level of recognition and the ability of the organisation to attract funding ensured that the Women’s Media Watch was able to fulfil its terms of reference and grew into a well-received project with good potential to replicate itself in the Southern African Region. A change of management in the parent organisation in late 2000 signalled the end of the project when it decided to re-build its image, remerge with its former parent NGO, the Community Arts Project and abandon its gender projects. However, the will for the existence of the Women’s Media Watch and the role it plays in gender transformation, the constant pressure from its beneficiaries and a few committed staff members of the project ensured that it was to survive.

It was in 2003, through a rapid diversification of the Media Watch activities, that a trust in the name ‘The Southern African Media and Gender Institute’ was set up with the Women’s Media Watch as a project. In 2003, an Evaluation of the Women’s Media Watch also provided the basis for building a solid foundation of what was to become SAMGI. The transition into SAMGI allowed the organisation to fulfil a critical role in communication, gender awareness and critical media consumption of the Southern African Region. While the Women’s Media Watch as a project of SAMGI continued to focus on the purer activities of deconstructing, monitoring and bring about constructive transformation in and by the media, SAMGI as an organisation was also able to fulfil the role of building capacity of communities and enable their expression of voice to the media industry. The ‘new’ Women’s Media Watch (SAMGI) concentrated on training on gender and media for gender activists for campaign strategies, have also trained youth in media and gender awareness including looking at the impact of HIV/AIDS, domestic violence and poverty on their lives. A basic media production module was developed and this included print, radio and photography skills. Finally, New Information Technology was added to the skills training programme of SAMGI.
SAMGI promotes human rights by increasing the range of voices heard in Southern Africa through participatory education, advocacy, lobbying and media production to improve the status of women. It is a human rights media-monitoring body whose objective is to empower women and engage in the transformation of the media. SAMGI runs the following programmes: Justice for Gender, Citizens in Dialogue, GenMeDem (Gender Media and Democracy).

1.2 The socio-political context of the organisation

The Southern African landscape is characterised by the following issues which could either act as inhibitors or accelerators to the work of SAMGI:

(i) Violence against women

The high levels of gender violence in the region are a direct threat to women’s rights in the region. In addition, gender violence is increasingly being recognised as a developmental constraint that, according to the Millennium Taskforce on Education and Gender Equality “retards economic growth and poverty reduction”.

Campaigning by human rights activists has resulted in Heads of State signing (August 2008) the Southern African Development Community (SADC) Protocol on Gender and Development, which included six (out of a total twenty-three) targets specifically addressing gender based violence. The Protocol requires that states, by 2015, review and reform criminal laws and procedures applicable to cases of sexual offences and gender based violence. This includes eliminating gender bias and ensuring justice and fairness to survivors in a manner that ensures dignity, protection and respect. In SADC, Botswana, Malawi, Mauritius, Namibia, Seychelles, South Africa and Zimbabwe (or about half the SADC countries) have domestic violence laws. Yet, only five countries (Lesotho, Namibia, South Africa, Tanzania and Zimbabwe) have sexual offences legislation in place. At least eight countries do not recognise marital rape as an offence. Only Mozambique has passed specific legislation on human trafficking, while other countries are either drafting or have included trafficking as part of other legislation. There is particular need to quicken the process to pass relevant legislation in South Africa. With World Cup 2010 drawing closer, there are fears that South Africa, as the host country, could experience increased rates of trafficking of women and children for sexual exploitation.

Even with government affirmative programmes in place, cultural, social and economic practices that entrench patriarchal systems still make women more vulnerable to gender based violence. Economic disparities mean that women may stay in abusive relationships for economic reasons.

(ii) HIV and AIDS

Sub-Saharan Africa remains most heavily affected by HIV, accounting for 67% of all people living with HIV and for 72% of AIDS deaths in 2007. The feminization of the pandemic can account for the fact that over 50% of infected is women. This is not

helped by the fact that the deadly connection between violence and HIV has not been take up by key actors. The fact that women are vulnerable to infection because of violence and women who are infected likewise face greater risk of violence is not news, yet this has not resulted in comprehensive interventions that go to the heart of these issues. Furthermore, the reality of sex work and transactional sex in the region and the fact that this group find it difficult to access health services because of stigma and discrimination does not bode well for prevention efforts. In addition, the increasing rise of Christian fundamentalisms is another issue of concern as religious and traditional leaders play a key role in perpetuating stigma and discrimination. The increasing clampdown and criminalization of non-heterosexual expressions sexuality is another key issue impacting on HIV. Finally the clubbing together of HIV and AIDS in terms of analysis and what is needed to respond has meant that there has been an over focus on the disease aspect and a lack of response in the socio-sexual aspect where more attention is needed to transform the dynamics of this epidemic.

(iii) Economic Poverty

Poverty remains one of the biggest challenges with women and children being mostly affected. Poverty in turn contributes to young women getting involved in transactional sex, which increases their vulnerability to HIV. In addition, poverty has resulted in South Africa for example in poor people turning on each other in xenophobia outbreaks in 2008. The global food crisis has particular significance in the Southern Africa region as many of the agricultural economies has also participated in using land to produce bio-fuel thus resulting in more food needing to be imported. The current global economic crisis and its links to a neo-liberal paradigm all has implications for how communities cope with and respond to it at the local level.

(iv) Political landscape

Southern Africa is politically diverse as region. For example, in Zimbabwe the current impasse regarding formation of government has had an adverse effect on people’s access to basic needs such as food, health and education. The current political transitions in South Africa and an alarming trend of inciting hate speech by opposition parties has particular implications for women as it signals a potentially violent election in 2009. In Malawi the country is emerging from dictatorship and struggling to build democracy. While in Swaziland and Lesotho we have struggling ‘kingdoms’ with no resources. At the heart of most of this is resources distribution and power. The question of where women are located and the implications for women’s organising are important considerations in the region.

(v) Media

The Media Institute of Southern Africa have noted that since 2005, there has been a steady decline in media freedom in the region\(^2\). The persecution and arrest of journalists in Lesotho, Swaziland and Zimbabwe illustrates the alarming trend of the deterioration in the relationship between governments and the media. This bad relationship is demonstrated through threats made on journalists and media organisations, and the enactment of unfriendly media laws. In addition, Tanzania is also going through a media legislative process whose consultations are not satisfactory.

The media also is part of the global communications network that has an impact on public policy and individual attitudes and behaviour alike. But, generally the media has been accused of the following:

- Very few images and voices of women, particularly as leaders, shaping opinions, as positive role models, or of ordinary women voicing their needs and putting forward their solutions to problems.
- Stereotypes. Often women are portrayed as frivolous, dumb, sex objects, passive or just good mothers.
- Issues that concern women are relegated to the inside pages of newspapers, are not highlighted or are presented as deserving of charity.
- Sensational reporting on violence against women which is not really meant to advance solutions to the problem, but to sell newspapers.
- Black women feature less than their white counterparts in news, features or as opinion leaders. They tend to be seen more as recipients of aid or as “victims” of something.
- Some of the women in leadership positions who have taken a firm view on issues are lampooned and portrayed negatively.
- Negative messages directed at women and girls. For example “be submissive”, “be a good wife”, “be a good mother”, and “those who fight for women’s rights are bad women”. But the media, organisations and campaigns are also necessary parts of the enabling environment they need.

According to Gender Links, baseline data from research done prior to the policy roll in 2005 out showed that HIV and AIDS constitutes less than three percent of all coverage in the region; that only four percent of sources are People Living with HIV and AIDS and that the gender dimensions of the pandemic are not well understood or reflected in the media. A similar study on media in three French speaking countries in the SADC region conducted in 2007 produced similar results showing that HIV and AIDS constituted a very low average of 2.1% of all coverage and that such coverage lacked depth. The Gender and Media Baseline Study (GMBS, 2003) showed that coverage of gender equality issues constitutes two percent of all coverage; that women comprise only 17 percent of news sources and that women are portrayed in a narrow range of roles, most often as sex workers or victims of violence.

1.3 Geographical Coverage of SAMGI

SAMGI has extended its work beyond the borders of South Africa to include the Southern African region. Whilst operating from its urban base in Cape Town, the organisation works in many of the rural areas surrounding the Western Cape as well as Knysna, Beaufort Wes, Rivieronderend, Wellington and Worcester. Within Southern Africa, SAMGI’s reach has gone as far as Swaziland, Lesotho, Zambia, Namibia, Angola, Kenya, Tanzania, Malawi and Zimbabwe. SAMGI’s coverage is motivated by the organisation’s commitment to ensure that it gives voice to marginalized members of society across the boundaries of class, race, ethnicity, social location, age, sexual orientation and ability. Those indirectly impacted by the work of SAMGI include men of all ages and sexual identities, economic situations and ethnicities as well as children.
2. THE EVALUATION

During the period 2005 to 2007 HIVOS provided support to SAMGI to address the following:

- Regional New Media for Advocacy Training
- Human Rights – Mambo Comic booklet development and publication
- Homeweek Programme
- Prison Programme

The purpose of the evaluation is to assess the effectiveness of the programmes implemented by SAMGI towards realizing its stated goals and objectives and addressing the needs of its beneficiaries. Further this evaluation is meant to give insights into SAMGI’s programmes and activities and provide recommendations that will assist the organization to improve its organizational and programme effectiveness.

The evaluation is also not an impact assessment as SAMGI. For the evaluation, the following elements were assessed:

(i) Vision, mission, long-term objectives and strategies;
(ii) Capacity (including systems, structures, governance);
(iii) Financial and Management Resources;
(iv) Institutional linkages
(v) Relation with target groups
(vi) Assessment of core programmes of SAMGI

The evaluation will in turn inform HIVOS on the nature and effect of its cooperation with SAMGI.

2.1 Evaluation methodology

The methodology applied in carrying out the evaluation involved the following major elements:

(i) The evaluators met with the ED to discuss TOR and the her story of the organisation
(ii) Desk review of available documentation on the work of SAMGI was conducted.
(iii) Interviews with SAMGI staff to review their experiences and achievements and challenges in implementing the work of the organisation.
(iv) Interviews with the SAMGI board and other key actors in the women’s movement in the form of focus group discussions. This afforded the evaluators the opportunity to get direct feedback on key issues and perceived quality of delivery of SAMGI programmes.
(v) Interviews were held with target groups and beneficiaries of SAMGI programmes and activities.
3. EVALUATION FINDINGS

3.2 Vision, Mission, Long-Term Objectives And Long-Term Strategies

One of the unique aspects of the work of SAMGI is the fact that the organisation has grown out of a history of giving voice to women on the margins. The strategy to develop capacity of marginalized communities to deconstruct the media, develop critical media awareness skills, monitor the media and produce their own media is an important one as it is a sustainable strategy for transforming gender relations.

3.1.1 SAMGI Vision

Although the mission of SAMGI is well-expressed and visible in many documents and communications from the organisation, the vision was not. When asked what the vision was:

- To see Africa free of all discrimination.

The organisation has just emerged from a strategic planning process that saw the reorganisation currently has a strategic plan that goes up to 2012. The reorganisation divides the work areas into: Justice for Gender (advocacy function), Gendocracy (capacity building function) and Citizens in Dialogue (promoting citizen participation). Currently, the strategic plan for different areas of work is broken up into the comprehensive details of the long-term picture and how the organisation, however the full written and comprehensive strategic plan was not available at the time of this evaluation. In terms of articulating the picture of the organisation by 2015, we were told the following:

- SAMGI will have her own premises that will house her resource/media centre. Her sources of income will be quite diverse, the majority of which will be self generated through training, media production and communication strategies for clients. Although her focus will still be on women in the SADC, she will strengthen her relationships through the Gender Connection Network with organisations in sub Saharan Africa. She will also seek accreditation for her Gender modules.

- SAMGI will by then have de-Microsofted all its computer equipment and instead be utilising open source software e.g. Ubuntu (Mark Shuttleworth). She will also by then upgrade all her equipment to ensure that the organisation has the best tools to achieve her desired standards of professionalism particularly in her media and communications work. She will also by then has moved away from a Telkom landline and be reliant totally on VOIP.
• She will also have completed her research/study on the achievements toward the MDG3 goal in SADC.

• Most importantly for SAMGI her goals and objectives would be mainstreamed through all the activities and programmes including her succession plan.

3.1.2 Values

The values of SAMGI are:

Equality, Non-discrimination, celebration of diversity, participation, consultative, trust, commitment, respect, supportive, transparency, accountability and tolerance.

“These values form an element of the organisational culture. They were workshopped in 2006, that is the last documented event of the SAMGI values apart from a mere mention in the 2008 strategic planning where it was noted that the organisation would have to re-workshop its core values. These are the values that each member of the organisation team subscribes to. However, with the diversity of cultures in the organisation, it is also sometimes a source of conflict.” (Judith Smith Vialva, Executive Director, SAMGI)

As noted, SAMGI needs to revisit their core values and particularly link it principles of working. For example linking the values to the impact of gender based violence, the portrayal of women in the media, the effect of HIV on women and girls, and empowering men in changing behavior of men towards women is critical. Recommitting to these core values is an important step in increasing their area of expertise throughout the region and look where it could be duplicated elsewhere. The SAMGI grassroots approach could, for example work throughout the Global South, the Middle East and North Africa (MENA), and Eastern Europe and Central Asia to coincide with the levels of violence against women, HIV and child trafficking in these areas. This is an opportunity for SAMGI to hold trainings with organizations in other regions.

SAMGI could increase their networks to include broader networks further afield whilst remaining grassroots. There are a plethora of more academic gender institutions; SAMGI has its niche – the gap is still there and they should capitalize on this.

3.1.3 Strategies

In order to achieve its objectives, the organisation’s strategies have included:

(i) Media Monitoring and research in order to provide empirical data on media’s role in enabling gender equality. This particular function is critical in advocacy and lobbying for greater media accountability and transforming media.

(ii) Capacity building in order to build capacity of communities to monitor critique and ultimately produce their own media in their own voice.

(iii) Media production which forms a critical component in publicising and promoting community media and to challenge media patriarchy as well as to educate other women, men and youth in challenging gendered power relations within society.
These strategies have been critical in achieving the following:

- Creating visibility of the experiences of women within their communities and beyond;
- Community organising and action where participants in SAMGI interventions have taken leadership in producing media to educate their communities on key issues affecting them;
- Awareness of mainstream media of the need to include a gender sensitive approach in their work.

The evaluation found that the organisation is clear about its core business. However, the inclusion of income generation for sustainability purposes should be approached with caution as it has the likelihood of steering the organisation from non-income generating work that is more aligned with its core business. The organisation has not necessarily introduced new issues in its work, but has re-organised its work such that there is greater accountability and integration of work areas.

### 3.1 Relevance and quality of the work of SAMGI

The fact that gender relations within society is a dynamic process that changes over time also ensures that an organisation like SAMGI will always have relevance within society. Secondly, the media, organisations and campaigns are also necessary parts of creating an enabling environment needed to transform gendered power relations. The organisation’s existence is in tune with the need to ensure that ordinary women’s voices are heard, especially on issues that concern them. Secondly, work of SAMGI is critical in contributing to an environment where media reports positively and challenge stereotypes and myths. Finally, SAMGI’s relevance is further ensured through ensuring that information is made more accessible, woman-friendly and affordable to women no matter where they are.

### 3.2 Capacity

#### 3.2.1 Human Resources

(i) **Staff Competence and Qualifications**

SAMGI has adequate formally and tertiary trained staff as well as some good staff that has grown through the community development ranks.

Staff qualifications are as follows:

- Two staff members have Masters degrees, one in Communications and the other in Development Studies;
- Three staff members have Post graduate degrees with Honours
- One staff member has an Undergraduate degree
- Some staff has a long history of working in development and has gained their skills through life experience. These staff have been active throughout the South African liberation struggle and had no opportunity to study formally when they were at a younger age. Some have up to 30 years experience in the field of media and grass roots communities.
Three staff members have come from the communities in which SAMGI works and were offered “learning on job” opportunities whereby SAMGI played a role in mentorship and offering beneficiaries skills that would make them more employable within their own communities.

The significant balance that SAMGI has been able to strike is to have qualified personnel that can mentor others that have had less opportunity as well as having staff that originate directly from the communities that SAMGI works with. This has involved investment by SAMGI in assisting some of the grassroots staff achieve a satisfactory level of competence within the organisation. This is important as SAMGI still has as their primary focus, grassroots communities who through the use of media are able to get the voiceless a platform to hold leadership accountable for their promises.

Examples of training and development provided include training of staff in Portuguese which has enabled SAMGI staff to work with grassroots communities in Mozambique and in Angola. Two staff members have attained fluency and a further 2 attained basic communication capabilities. Another initiative was the advanced course offered by CDRA on Planning, Monitoring and Evaluation, whereby staff were equipped to be better able to implement those learnings into their projects. Previously, SAMGI monitored the staff in a casual manner but have now implemented regular quarterly appraisals. SAMGI has also implemented monitoring mechanisms that monitoring project objectives and the attainment of these objectives in more formal and constructive manner.

SAMGI is a gender organisation whereby it is mainstreamed through all their work. Gender and media are the focus points combined with grassroots media production and consumption. All staff is able to carry out their duties in all areas of SAMGI with gender as the focal point.

(ii) Contracts and Assessments

All SAMGI staff is in possession of contracts and job descriptions which are reviewed annually. SAMGI has made the mistake in the past of issuing one staff member with a three year contract and subsequently found themselves having to support this person who holds them to the contract. Since this experience, staff are issued with 6 months and 1 year contracts renewable depending on funding and on performance. Staff contracts are comprehensive and are in line with the South African Labour Law and the South African Basic Conditions of Employment ACT. This includes reference to all of the categories listed by HIVOS, for example, letters of appointment, period of employment, probation, remuneration, working hours, leave, conflict of interest/ external work. SAMGI is currently re-developing their job descriptions. The organisation has changed over the past three years and this process is now being re-developed taking into account the learnings of the organisation.

In 2005, 6 and 7 Assessments or staff appraisals were an annual exercise but in 2008 a decision was made to make it a bi-annual activity and in 2009 quarterly. This will coincide with the appointment of an Operations Manager who together with the Board Member responsible for Human Resources will conduct these appraisals. Appraisals will be applied on a peer basis, vertical as well as horizontally.

It is of the opinion of the evaluators that the Board needs to make more decisions to hold staff accountable to their Terms of Reference and that a period of 6 months should NOT
be blanketly applied to all staff, but only to those who are being given a special chance to grow, such as community members from grassroots communities who work at SAMGI to learn skills that they will take back to their communities once their tenure is over. The current staff (in number) is adequate, however, the appointment of the Operations Manager, and a deputy director to take some of the pressure off the director is essential for the organisation to continue through its learning and to process such learnings into practice that can take the organisation to a new professional level.

Staff Development has taken place with staff attending a range of training programmes including facilitation training, events management, home week, planning, monitoring and evaluation as well as job description development.

3.2.3 Corporate Governance

For purposes of this evaluation, the minutes of 14 Board meetings were reviewed covering the period 2005 to 2008. From the minutes the following general observations are made:

- One Board member has remained throughout the process. Board members hold tenure for a period of two years that may be renewed;
- The quorum is met or else it would not be considered a Board Meeting;
- The role of Chairperson, Acting Chairperson, Treasurer, Secretary, Human Resource Portfolio and Community Representative is represented;
- The board currently comprises: 3 women, 3 men and 1 woman advisor (The advisor is a qualified chartered accountant); The Board of SAMGI is the highest decision making authority
- The minutes reflect a process dealing with financial reporting, programming updates, funding and staffing.

Furthermore, it seems that:
- The Director plays a significant role in the report backs together with the Finance Manager;
- Resignations happened due to board members having served long terms on the SAMGI Board and that of its predecessor, The Women’s Media Watch;
- New members are energetic but need development;
- During the interviews with the board members, they came across as confident decision makers. However, the Director and Finance Manager believe that the board needs development to get them to be a more mature board and for them to make quicker decisions more pertinent to the needs of the organisation;
- Two new Board members that have vision for the organisation are being sought;
- The board needs members that are well networked with donors and gender leaders;
- There is a good working relationship between the Board and the Director and the Finance Manager;
- The Board is weak in human resource management and this portfolio must be sought as soon as possible
3.2.3 Systems

(i) Control or Management processes

Currently control or management processes take place in a number of ways: the Board of Trustees is the final authority on all activities (policy, projects, programme and financial issues) within the organisation. The Director is tasked with control and management of these functions on a day to day basis. The Board is an advisory board and through this support the Director takes the lead in implementing these decisions in the organisation. Planning, monitoring, reporting and assessment – internal planning and monitoring takes place during “Homeweek” (which is further outlined in item 5 of this questionnaire) where the organisation together plans and monitors the projects and assesses the achievement (or non-achievement) of the objectives of the organisation as well as the objectives of the projects and programmes.

Reporting, which previously took place quarterly has now been changed to reporting (individually) on a monthly basis and linked to the identified outcomes and indicators in the project proposals and individual terms of reference. Since 2008, staff are now being monitored closely on their activities and have been set a number of mutually agreed achievable goals against which they will be measured and assessed every quarter. All staff are accountable to each other and the organisation and indirectly or directly report to the Director.

The reports are collated and presented to the Director for her approval and comment and then returned to staff for discussion. Quarterly, staff are assessed and appraised based on their activities, achievements, challenges and lack of achievement. The outcomes of these appraisals are linked to a performance reward system and those that consistently fail to achieve are given mentored and assisted to give them a fair opportunity to help them in achieving their organisational goals.

Staff development needs are identified at these appraisal sessions and recommendations for development are made to assist staff to improve their ability to work more efficiently and to the standard demanded by the organisation.

Should staff not measure up to the indicators set after all opportunities of support and assistance have been exhausted, then an exit strategy will be discussed with the staff member. The Board of Trustees have recommended that staff be given a 6 month period after the staff appraisal outcome to improve their work performance. Thereafter policy regarding exit strategies will be implemented.

(ii) Collection of base-line-data, including gender-disaggregated data, as an input into planning, programme design and monitoring

The organisation regularly collected gender disaggregated data which informed their planning, programme design and monitoring activities. For example, SAMGI regularly conduct media monitoring exercises to establish the position of men and women as represented in the media. This then provided a basis for action and planning for future programmes, projects. It also provided a benchmark to measure improvements against and during the monitoring processes. Base-line date is collected at the beginning of a new project or programme. This was done in 2006 at the beginning of the Women! Turn
up the Volume project. This project has successfully run for three years and received a
good evaluation through an EU appointed evaluator in 2007.

(iii) Sharing of information within the organisation and its peers

Information is shared in a number of ways. SAMGI does this through regular staff
meetings (every Monday) and Management Committee meetings (monthly). The Board
has recently taken a decision to meet 8 times per year as opposed to the mandatory 4
meetings per year. Information is also shared through the website, Homeweek,
newsletters and on line blog. Regular reports are shared on the internal server and hard
copies of reports, evaluations, proposals and other documents are kept in the resource
centre for use by visitors, beneficiaries and researchers.

(iv) Utilization of information generated for lobbying and advocacy

SAMGI relies on its partners to disseminate information and to use the outcomes of their
media monitoring and research for advocacy and lobbying purposes. SAMGI has taken
a lead role in the Global Media Monitoring Project since 2000. SAMGI is the Southern
African lead country coordinator and were the hosts of the 2005 planning committee
meeting. SAMGI also provides a forum for their beneficiaries to interact with the media
on a face-to-face basis through press and media forums and visits to media houses.

3.3 Financial management and resources

(i) Adequacy of budgetary controls, financial management and financial planning
systems?

SAMGI has yearly budgets updated on a quarterly basis. At board meetings the annual
budget is presented, actual and variances are presented. The systems are more closely
spelt out in the budget monitoring section and financial management section below.

SAMGI’s Auditors are: MGI Bass Gordon (16
th
Floor, 1 Thibault Square, 1 Long Street,
Cape Town).

Auditors provide a management report on things that SAMGI can improve on. These
tend to be small things that the auditors keep track of from year to year to ensure that
SAMGI takes on Board their recommendations. 2005/6 SAMGI obtained clean audits.
For 2007 SAMGI needs to pay their staff taxes for 2007, being SITE and PAYE tax.
SAMGI has undertaken to pay this in 2008 before the new audit. This has been paid
now from income generated funding.

(i) The functioning of the accountability system

SAMGI uses the Pastel Professional Package which is probably amongst the best
packages for South African non-governmental organisations. There is a separate office
for the Finance Manager and the financial computer as well as the assets. This office is
locked at all times when not occupied by the Finance Manager. The computer is modern
and up-to-date with a back-up system. The Pastel Finance System is updated on a
yearly basis and is re-licensed annually. Pastel remains the best system available to
non-governmental organisations in the South.
(ii) **Budget monitoring**

SAMGI generally keeps in range of budget allocation. Whilst the Administration costs went over budget it suffers from funding deficiencies. Variances are generally less than 10% with no evidence of under-expenditure. SAMGI does renegotiate with donors where over expenditures occurs. One of SAMGI’s donors, the EED has a reserve budget – that allows SAMGI to first seek approval for over-expenditure.

(iii) **Financial management**

All equipment is subject to three quotations and is approved by the Treasurer of the Board of Trustees.

Salaries are generated by the Pastel Payroll package. They get requisitioned by the Financial Manager, approved by the director and authorized for payment by the Treasurer of the Board. The Finance Manager processes the salaries and attaches the pay slip to the requisition. The staff member gets copy and a copy is filed by the Finance Manager. The computer and backup house the electronic copies of the payments. All salaries are deposited direct into the bank accounts of the staff. All staff has bona fide work permits/refugee status.

Monthly reconciliations are drawn up which the treasurer signs off. The Treasurer also checks the bank statements against the expenditure and the reconciliations. The General Ledger and bank reconciliation are checked by the Treasurer of the Board monthly. Journals are very seldom passed and this would only happen in case of an error. The Treasurer has to approve all journals should they occur.

Note, For the HIVOS funding: Where there was no separate bank account required, SAMGI did a separate General Ledger. Pastel places the captured inputs into the format of the donor contract categories. HIVOS was sent a financial acquittal twice annually. Tranches from HIVOS were paid over to SAMGI after the SAMGI activity reports as well as work-plans, finances, annual reports and audits were sent to HIVOS.

(iv) **Review the adequacy of the various procedure manuals (human, administration and finance etc)**

Documents reviewed include:

- SAMGI’s HIV Policy
- Financial Policy and Procedure Manual
- Information Technology Policy and Procedure Manual (work in progress)
- Creative Guideline Manual (work in progress)

Only pre-approved budget items are purchased. All equipment is approved first by the Treasurer of the Board who has access to the donor contracts.

In terms of expenditure for travel, venue hire, accommodation, workshop costs, training materials, rent, telephone, salaries, all vouchers are kept on record and are available for inspection at any time. A walk through revealed that all such documents were present and available for the 2005/6/7/8/ years.
SAMGI has strict policies that ensure that expenditure incurred is in accordance with approved budget headings and within available budgetary allocation. Some donors also requested separate audits, for example, the EED, NIZA, The Foundation for Human Rights and the Conference Workshop Cultural Fund. SAMGI was able to handle adequately this extra financial work to obtain clean audits for each donor’s funds.

(v) **Utilization of funds**

In 2006 Administration and salary costs were 50% of overall expenses. In 2007, it was 43%. All Programmes in SAMGI have to share the rental and overheads. Where there have been shortfalls, SAMGI has had to borrow from its income generating business, for example, the graphic design studio and courses paid for through tenders.

There was very little on the exchange gains throughout the years reviewed; where this did occur, the donors were informed and minor adjustments were made to the budgets. The amounts were negligible.

SAMGI has had proper audits for the years indicated as evidence that the funds were utilised in accordance with the signed agreements.

(vi) **Capabilities of staff in the Finance Department**

The current Finance Manager has held this position since 2006 at SAMGI. Prior to this, she held similar positions in 3 other NGOs and has very solid experience. She is a responsible and trusted person who is working together with the Director and the Treasurer to ensure all systems are adhered to. Her filing is meticulous and all her slips are in easy to view systems. She has taken all the organisations that she has worked for to trial balance and through unqualified audits. She is an asset to SAMGI. In addition, SAMGI has appointed a new advisor to the Board who is expected to review all of the systems and bring them up to date if and where necessary. This will be done in conjunction with the Treasurer.

Smaller systems are also in place, for example, mail is opened by 2 Admin staff and incoming mail is date stamped, recorded in the incoming mail book before it is distributed.

(vi) **Fixed assets**

An asset register is available on demand and is up-to-date. The purchases include donations as well as equipment purchased: The fixed asset register is updated monthly, and asset spot checked by Finance person and Treasurer.

The following was verified and accounted for:

Donations: 20 x Dell Computers
Purchases: 5 x SAMSUNG towers and keyboards and software, Data projectors x 2, Laptop x 1, Equipment for internet radio

Also verified was office desks, chairs, photocopy equipment and printing equipment, low technology printing equipment.
SAMGI has Insurance from SANTAM for all equipment,

All equipment is relevant and used by the staff in their programmatic work. There have been no disposals at SAMGI and depreciation is done annually through the auditors in line with South African Company Law.

(vii) Income Generation:

SAMGI has been able to income generate some funds for their sustainability portfolio. This income generation has been in the form of:

• Computer courses
• Gender Facilitation for the Commission on Gender Equality
• Gender facilitation for the Department of Arts and Culture
• Advocacy on HIV and AIDS Manual research, writing and design for VSO
• World AIDS Campaign Mobilisation Toolkit
• Scribing for Gender Advocacy Project
• Production of a CD ROM for the Development Bank Southern Africa
• Gender training at Pollsmoor Prison
• Graphic design
• Design of a handbook for the Children’s Institute at UCT
• Department of Health – media publications

(viii) Compliance with grant agreement terms

In terms of the institutional and financial compatibility, the evaluator finds favorable compliance overall in respect of the agreement between HIVOS and SAMGI.

(ix) Review prior audited financial statements and management reports

The evaluator highlights 3 examples from the management reports:

i. The bank name had to change as SAMGI changed its name from the Women’s Media Watch, to the Southern African Media and Gender Institute;
ii. There needed to be a segregation of duties in the finance department. So the Financial Manager and the Treasurer have especially demarcated duties;
iii. Casual labour needed salary documentation. SAMGI now issues casual labour (perhaps a cleaner in a rural town hall where a workshop takes place) with a proper salary slip and not through the petty cash.

3.4 Institutional linkages

SAMGI like many other organisations working for social transformation cannot do it alone. The need for strategic institutional partnerships cannot be disputed. In this area, institutions who have worked with SAMGI in some form or the other noted that SAMGI has a critical role to play as a key instrument in advancing gender equality. This
particularly as most of the partners that SAMGI has collaborated with understands that the media is a powerful platform for informing public opinion.

In terms of the unique value add by SAMGI, the following was expressed by partners:

- **SAMGI plays a critical role in highlighting critical issues that we also need to take up. Their monitoring data provides us with a basis on which to advocate.** (SAMGI institutional partner)
- **SAMGI is trying to rectify imbalances of past by empowering people that would otherwise be on the margins. Their focus on prisons, refugees and bringing in the media is a critical focus that very few groups bring to the table.** (Partner organisation)
- **SAMGI’s mission is to teach people who are unemployed to create employment.**

SAMGI seems to have good and collegiate relationships with its institutional partners. Several key issues are important to note when considering institutional relationships.

Firstly, some institutional partners also noted that SAMGI could do more to let their partners know what they are up to. One partner noted that it was important not to only be contacted when a report is launched for example. This is a critical issue and points in the direction of follow up and sustaining partner relationships. There are two possible issues to consider in relation to this. The first is that many organisations in South Africa are so busy that they do not always respond when invited to information and networking sessions. Many organisations seem to respond much more if there is something concrete that relates to their own work. The other issue is that the amount of work that an organisation like SAMGI has done is quite impressive, yet it is not as visible in a concrete way to partners beyond a project by project basis. This is a key area that SAMGI needs to focus on.

The fact also that SAMGI is seen as making people more employable to address their economic survival needs is an indirect outcome of its work.
3.5 Relation with target groups

SAMGI has liaison persons that it works with in different communities as well as in all the institutions where it has programmes. SAMGI seems to have really good relationships with its target groups.

Beneficiaries of SAMGI interventions have been instrumental in conceptualising SAMGI agenda. While they do not participate directly in the planning processes of SAMGI, the experiences and feedback of beneficiaries are factored into any future activities. The following quotes provide some indication of perceptions among beneficiaries:

- …SAMGI meets the objective of giving a voice to the voiceless.
- SAMGI is there to improve one’s skills in a way that is positive and helpful.
- SAMGI helped me to be able to know more about what is happening in my community and showed me how I can do something about it.
- Through the newsletter it allowed us to feel that we have something to say – that we have a purpose or role. [Participant in Prison Programme]
- Through the SAMGI programme I was able to change my point of view, my perspective and understand how the media functions. That is very powerful. [Participant in Prison Programme],
- If we are not economically empowered, how can we challenge the status quo? Human rights go hand in hand with economic empowerment.[Interviewee]

With communities that are in hard to reach areas, SAMGI has ensured that it visits at least once a year. Most of the target groups noted that the skills gained from SAMGI was just the beginning for them. Some noted that they could use it immediately in writing. For others who are unemployed and do not have access to equipment or computers, they felt that the training was useful but they are not able to use it.

Overall, SAMGI seems to have a good relationship with its beneficiaries. However, several issues emerged from the interviews. The first issue is that very few of the beneficiaries had a concrete sense of broader SAMGI identity and mission beyond the activity that they were involved in. The fact that SAMGI is trying to achieve its objectives of social transformation through innovative approaches like computer training sometimes combined with its Gender and Communications course means that the organisation has to put emphasis on its broader agenda. Although SAMGI claims that gender is integrated in all its work, from the interviews with beneficiaries (even upon deeper probing) this was not always apparent. It is recommended that SAMGI not only make explicit its own broader agenda of social transformation and the role of SAMGI in achieving that. It is also worthwhile SAMGI reviewing their materials to once again assess how gender is integrated into that and then testing it with a new audience. In its shorter interventions such as computer training, for example the organisation could include a 1 hour session on how the computer training contributes to social transformation as well as why the focus on gender. Examples and exercises in the courses could once again remind participants of this such that it does not feel like an awkward add-on to the broader programme.

Secondly, the lack of or inconsistent follow up was another issue that was raised. Some beneficiaries noted that they have had contact and have been actively involved in producing newsletters; while others indicated that there has been no follow up with them.
Finally, selection of participants for interventions was also raised. While SAMGI relies on local or institutional liaison people to support this process, the issue was still raised by some of the beneficiaries and stakeholders that there are different levels of literacy and understanding of issues. In fact the fact that the programme does not have an advanced level or follow-up means that the investment SAMGI is making is likely not to pay off in the ways envisaged. Another issue that emerges from these discussions is that SAMGI as an organisation that has invested in these communities (unlike many others) have created expectations. These expectations are to be expected, however, the strain on resources to fully fulfil all expectations is a natural unintended consequence of this work. One of the ways that SAMGI can address this would be to seek or source other partners that could work with some of the communities in building on the work done.

3.7 Assessment of core programmes of SAMGI

3.6.1 Core Programmes Assessment

The core programmes under review in this particular evaluation include:

(i) Regional New Media for Advocacy Training

For the period under review SAMGI has conducted media for advocacy training in Botswana, Zambia, Malawi, Namibia, Swaziland, Lesotho, Tanzania and Kenya.

Objectives of these training processes include (a) challenge and change the perception of community media, (b) to strengthen the communication and media liaison skills of NGO’s, CBO’s, Community Activists and organized citizens, (c) to provide a forum for community activists and media to engage each other positively and (d) to increase gendered materials in mainstream and community media.

Achievements of these processes include the collection of visible and tangible stories from each of the contexts contributing to a body of information. The workshops pushed participants to engage with an ideology of change and examine their cultural concerns. Participants in these processes were taken through a process of exploring the relationship between media and their personal stories in deeper and broader ways, especially from a gender perspective. Tangible outcomes also include comprehensive campaign and strategic plans for organisations to implement in their broader social transformation work. In addition, these trainings also provided SAMGI with the opportunity to network with organisations and individuals to organise participants to attend future workshops and also to support any follow up activities.

From the feedback we received from participants, all participants felt the courses that SAMGI offered were of value to their jobs at the time and that they had learned from the interventions. It was also felt that the scope of the trainings was adequate and that SAMGI’s materials are well constructed and helpful and good for an organization to also use in in-house training as well as with other local networks. Herewith some feedback from participants in the programme:

• “The various programmes help to deepen my understanding of gender issues while deepening my media literacy”
• “New Media gave one participant the confidence and competence to be able to design and layout a newsletter”
• “I really understood the relationship between HIV/AIDS and gender for the first time after attending the Gender Media & Democracy workshop. This was extremely valuable since I was working with an organisation that was addressing HIV/AIDS issues”.
• “The training encouraged me; build my self-confidence which helps me with interviews.”

Participant Concerns:
• Most participants would have liked the training to continue to build on their skills learned through the SAMGI inputs;
• Longer term involvement with SAMGI would be more pertinent;
• SAMGI needs to ask the networks where they need further development in gender and media.

Participant Issues:
• SAMGI needs to keep up the correspondence with their partners that have been trained. In some instances responders indicated that they had had no further contact with SAMGI;
• The participants questioned how future training from SAMGI will go forward and suggested that SAMGI keeps the same partners for up-skilling (as opposed to SAMGI looking for new partners);
• All responses included their need for SAMGI to keep in touch with them after the practical inputs.

It is critical that SAMGI as a matter of course add all participant names to the database and send out their newsletters and matters of interest to such beneficiaries. As an institute, SAMGI is a holder of knowledge and this must be disseminated more broadly.

(ii) Human Rights – Mambo Comic booklet development and publication

South Africa has the world’s most exciting and innovative Bill of Rights, and a complex State Institutional structure with differing procedures and forums to enforce or protect these rights. But these can only be effective if people are aware of their content, existence and potential. The Mambo Comic booklet takes account of the literacy levels of communities and the lack of understanding of our Constitution by making the Bill of Rights available in a format that breaks down the Bill of Rights into easily digestible chapters, the contents of the Constitution.
Research by SAMGI translated the content of the constitution into a comic book to further encourage citizens to understand the process of democracy. The booklet is indeed an easily accessible tool to audiences of various literacy levels as well as ages. The language of the booklet is also simple plain language meaning.

This booklet was launched in Worcester, on Human Rights Day 2007. It was the beginning of SAMGI’s intervention in Zwelethemba and was used to do human rights training with the youth (the young journalists). 5000 copies were printed and distributed it in the Worcester area and an additional 2000 copies distributed in Gugulethu where it was used to test the exercises when developing the manual. SAMGI is currently fundraising to take the project to other areas in the Western Cape in 2009 and then in all provinces by 2011.

(iii) Homeweek Programme

"A Learning Organisation is one in which people at all levels, individuals and collectively, is continually increasing their capacity to produce results they really care about." (Richard Karash)

SAMGI is indeed a learning organisation where through a process called Homeweek it seeks to achieve collectively and individually an increase in their capacity to deliver on their aims and objectives thus increasing their potential to achieve their goals. When SAMGI sought to create and establish her learning rhythm that would improve the organisation’s practice, the Board carefully considered several options. One option that stood out above the rest was a process that has been successfully used by the CDRA (Community Development Resource Agency) in Cape Town. They implement their process of learning through Homeweek.

SAMGI has used the Homeweek methodology for two years now. At its inception all staff attended a workshop facilitated by the CDRA to inform all staff on the implications, benefits and challenges of Homeweek. All staff present was excited and anxious to implement this innovative strategy that would seek to improve their knowledge, skills and communication internally and externally. After one year of successful implementation and accompanied by the exit of certain key staff members and the arrival of new staff members the commitment to the Homeweek sessions presented some challenges.

There was great resistance to this process by new members joining the organisation that could not see the value of the process and thus stalled the progress that this sought to achieve. Once again SAMGI management had to ask consultants to facilitate the process to enable all staff to get back on track. Since then, Homeweek has once again become an integral part of the SAMGI rhythm and has been instrumental in setting a pace for the institutional reorganisation and an opportunity for realignment of programmes.

SAMGI places considerable emphasis on developing strategies and techniques for sharing information and creating new knowledge in order to improve their ability and competence to deliver on our mandate and goals.

"Home Week is the practice where one week a month (or as often as an organization deems necessary) an organization schedule’s time to consider where it has been, the way manner in which it practices it practice, consider any new learning’s, what worked
and what didn’t work, and in both instances ask the question why? Learning to ask the right question is a very important of any practice, therefore, re-examining our questions are of significant importance to the development of the organization, ourselves and our stakeholders. Home Weeks have been stimulating and productive. The first Home Week experience completely surpassed expectations. We have continuously used the time to develop programmes and administrative processes. Additionally, we have been purposeful in our approach which allows us to share of ourselves and our experiences”.

(Staff Member)

(iv) Prison Programme

The prison training programme is aimed at strengthening communication skills of inmates by providing training and follow up support in Life skills, basic computing and producing low tech print media. SAMGI proposed use of media as a tool for development and supported inmates with the production of their own newsletters and other print media on an ongoing basis. Training for this programme has been ongoing and has been done in both the Worcester Female Centre and the Hawequa Youth Correctional Centre. All of those liaising with SAMGI to implement this programme are very enthusiastic about its impact. It was noted that SAMGI has made a significant contribution in empowerment and giving voice to those who considered their voices not worthy of being listened to. SAMGI was described as the only NGO that is really effective to the Department of Correctional Services.

Some of the achievements of this programme include:
- More self-esteem among offenders;
- Increase in skills (that inmates can use outside of prison environment);
- More motivated to participate in communal activities;

In implementing this programme though, SAMGI faces certain challenges:
- It does not have a database of learners it has trained and could end up seeing the same people twice;
- Lack of follow up and building on training provided;
- Supporting participants to connect their participation in the training programme to broader social transformation;

(iv) Other programmes

During the period under review SAMGI also had a very active and vibrant Women’s Media Project whose aims were to use the media to deepen democracy and entrench gender equity as well as to produce and distribute media that serves as a voice for our members and portrays positive images of women. Activities included the production of SAMGI quarterly newspapers as well as media monitoring reports on (a) Sexual Violence and HIV&AIDS Reporting (2007), (b) Women and Religion. There is also evidence of advocacy and lobbying activities such as SAMGI leadership in initiating marches around key issues impacting on women’s rights. In addition, a Men’s Unit also piloted several interventions around Men, Media and Democracy.
3.6.3 Observations from Programmatic Assessment

(i) Quality of SAMGI work

There is no doubt that the quality of SAMGI outputs is of extremely high quality. The evidence of the multitude of publications shows that SAMGI has taken seriously its commitment to produce and distribute media that serves as a voice for members and portray positive images of women.

(ii) Planning and Conceptualisation

As is evidenced in systems and structure, SAMGI has grown significantly in how it conceptualises and plans its activities. Many of its work is planned annually and broken down in incremental pieces quarterly. As mentioned earlier as well, the experiences with beneficiaries are critical contributors in the actual planning processes of SAMGI. The current planning process also allows individual staff members to take the lead and put forward ideas which are then part of a broader process of engagement.

The current planning documents for its 5 year strategic plan does have some form of outputs and success indicators identified. However, it is the opinion of this evaluation that not enough reflection of change proposed to see has gone into the planning process. This is also evident in the section on reporting and evaluation.

(iii) Reporting and Evaluation

SAMGI seems to have been really good in terms of ensuring documentation and reporting of its different programme areas. However, as one staff member noted, a lot of institutional memory has also left the organisation with staff who exited as the nature of recording information was not consistent. In the reports reviewed, it was noted that it provided a clear indication of the actual proceedings that took place. In some of the reports of workshops, there was some reference to lessons, reflections and observations. However, this was not consistent. Some of the reports had this as headings and yet it was not filled in. This raises the issue of self-evaluation and reflection as a team. Although the Home Weeks provide a good space for reflection, if the analysis is not recorded it is not really useful in capturing the organisation’s evolution.

The issue of impact and evaluation is a critical issue to consider as organisations interrogate the assumptions they make in terms of strategies, target as well as expected results. Evaluation of impact can be assessed in various ways. Firstly is the visible transformation of people in terms of attitudes and awareness before and during a workshop. Another one is tangible stories and outputs. Finally, SAMGI has indicated that it sends out forms to beneficiaries of processes. There is also evidence of an interview that was done with three participants in a Lesotho workshop. It is not clear whether this type of interview is standard or whether this was an exception. One of the programme team members noted that evaluation at the personal and organisational level needs to be more streamlined and related to the organisation’s vision and learnings. Another proposal was for the organisation to do baseline research to determine attitudes and then to do endline studies that could take the form of focus group discussions.
Although by no means as evaluators would we propose that change is a linear process that can be attributed to one organisation’s work and interventions, it is useful for an organisation to map the trajectory of the environment that it is acting in and the different role players and all of their contributions to the envisaged change and transformation that the organisation is working towards.

It is important that SAMGI takes seriously the need to evaluate the impact of its work and such an assessment to include the following:

(i) **Behaviour outcomes.** In the prisons for example there has been some indication of behaviour change. However a more systematic study of this is needed.

(ii) **Knowledge outcomes.** Once again there seems to be knowledge outcomes as reported by all of the beneficiaries interviewed. However the extent of this would be useful for SAMGI to ascertain across a representative sample of beneficiaries over a period of time.

In addition it terms of wider impact, the following (in terms of those interviewed) is evident in the work of SAMGI at this formative stage:

- Firstly, shifts in definitions have occurred as women and youth in rural areas and prison have been able to express their voice through producing their own media.
- Secondly, shifts in behaviour resulted as the voice of groups who had previously been excluded from participating in the analysis and production of knowledge around their experience have been recognised.
- Thirdly, the work of SAMGI has resulted in a shift in engagement with groups previously not engaged in activism have engaged with it through expression of their own experience to raise broader consciousness.
- Finally, SAMGI’s work has been a critical instrument (especially is media monitoring reports) in advocacy and lobbying efforts for policy transformation. Once again, it is critical that SAMGI just a tracking to see what the direct and indirect impacts of this has been over the last 5 years.

**Recommendations to SAMGI, as they start moving forward:**

- Record the stories of the shifts in behaviour and engagement that has occurred.
- Previously SAMGI had indicated that staff had attended an advanced course offered by the CDRA on Planning, Monitoring and Evaluation, whereby staff were equipped to be better able to implement those learnings into their projects. This has meant that SAMGI has been able to implement regular quarterly appraisals. SAMGI has also implemented monitoring mechanisms that monitoring project objectives and the attainment of these objectives in more formal and constructive manner. Once again it is imperative that SAMGI applies this with rigour and also evaluate its effectiveness. Another recommendation would be for the organisation in its Homeweek to share other monitoring and evaluation tools and to see how it can integrate it with the existing one to ensure that it is a dynamic tool that adds value to the work of SAMGI. Groups like the Women’s Funding Network for example has spent considerable resources in developing tools that could further assist an organisation such as SAMGI in effectively monitoring and
measuring the impact of its work.

- Start developing indicators for an impact assessment to be conducted in its next phase.

4. CONCLUSIONS OF THE EVALUATION

4.1 Organisational Challenges

- Getting buy-in and commitment from stakeholders and participants and coordinators. The organisation has indicated that it is sometimes difficult to get buy-in as many groups were resistant or came with their agendas. The organisation has to assess how it manages this dynamic if it is to further entrench itself as a key actor.

- The xenophobic attacks in South Africa are likely to cause possible resistance from participants in other countries to come to South Africa.

- The need to develop a structure with clear timeframes and commitments that are ultimately enforced.

- Most of the communities that SAMGI works in are impacted on by issues of poverty and unemployment. It is critical for SAMGI to carefully evaluate how it can address this. While it is not realistic to expect SAMGI to address these issues, it is important that SAMGI finds out who is doing work on poverty alleviation strategies in the communities it works in and explores potential partnerships such that the work that the organisation is doing is sustainable and grows as the communities grow. The task of social transformation is big one and as such there are many other role-players including government who need to work together. It is important for SAMGI to bear this in mind in particular in regards to designing follow-up interventions.

4.2 Achievements of the Organisation

SAMGI has certainly clocked up many achievements since 2003. This includes but is not limited to:

- Building a strong and credible organisational track record. Over the past few years, SAMGI has placed empowerment at the heart of its work as it recognized that education is critical in achieving the transformation we seek;

- SAMGI has been a leader in producing a diverse range of published materials for the different identified target groups that it has kept in mind. Many of the documents it has produced have been the product of its own involvement in research, public discussion, lobbying and advocacy work.

- SAMGI has networked widely within South Africa and especially within the Southern African region. Outside of the South African borders, the organisation has reached journalists and community activists instilling in them a critical understanding of why the media is an important enabler for social transformation;
- SAMGI has managed to create a solid organisational base with the necessary structures and systems in order to move forward strategically. After assessing the documents and conducting the relevant interviews, it is clear that the systems and controls of SAMGI are well developed and adhered to in a professional manner. In addition, the agreement that constitutes the signed contract between HIVOS and SAMGI in respect of fiscal adherence has been achieved.
- SAMGI has managed to get ordinary women to question and look at the media more critically.

4.3 Sustainability

The first issue relating to sustainability has to do with ownership of the organisation. The organisation is owned by not only the Director, but the Board and the staff. The other issue relating to ownership relates to ensuring that the work being done currently is sustainable in terms of long terms impact. As mentioned in the programmatic assessment of SAMGI, the issue of assessing impact is a critical area for action. This impact assessment is also needed to understand the changing environment globally and explore trends for doing the kind of work that the organisation has become known for. In an era of technological advancement and use of technology and media collectively, it is critical that an organisation such as SAMGI remains at the forefront of innovation in order to remain relevant and cutting edge.

However financial sustainability is another battle. The work SAMGI does seldom receives 100 percent funding so therefore the income generated by SAMGI is used to top up the funds so that the full extent of the projects can mostly be realised. SAMGI seems to have managed to create a credible means with a range of stakeholders of generating an income, thus ensuring that the organisation’s survival is not wholly at the mercy of funding cycles and agendas. However, the issue of funding sustainability is of serious concern as the over-emphasis and desperation that goes hand in hand with funding insecurity could result in the organisation losing focus of its broader agenda and core business. While the organisation is also exploring models of creating broader responsibility of programme staff for resource mobilisation, this strategy is one that could lead to a lot of insecurity among staff and could result in a loss of focus on the work and the results desired.

In terms of a sustainability plan, we would recommend that SAMGI identifies an appropriate balance between income generation and resource mobilization. This ratio could for example be 40:60; therefore creating a means by which the organisation not only tops up its existing resources, but create a discretionary fund that would ultimately contribute to longer-term sustainability.

We also strongly recommend that SAMGI secure core funding and if this was the case, the organization would become a major organization that can concentrate on their core work as opposed to spending a lot of time looking for funds. Support should be given to SAMGI to raise such funds for the medium to longer term.

Our final recommendation is that SAMGI could put together a resource mobilisation task team to support the organisation in identifying a diverse source of funding to ensure that the organisation is able to grow in terms of its programmatic impact.
4.4 Succession

Overall, the Director of SAMGI is the pivotal person of the organization and takes the initiative to innovate and guide the organization. She has also taken all the responsibility to fundraise for the organization to date. The organization should take cognizance of their current plans to diversify some of the functions currently undertaken by the Director as well as putting in place a succession plan. The process should look at identifying strategies and criteria that would support in diversifying the leadership of the organisation organically. Any succession strategy would need to ensure that future leadership of the organisation will continue to be in capable hands of someone who holds dear the vision, mission and values of the organisation and who is able to build on the work of the current organisational leadership.

4.5 Human Resources Function

SAMGI needs to appoint a qualified Human Resource Board member to guide the organization with respect to staff development, hiring new staff, and termination of staff where funding is not available and performance not adequate. This should not be the sole duty of the Director. SAMGI could appoint a Human Resource Advisor to the Board to take them through some of the areas that will need improvement. This could be a short term solution and the involvement of the Board would allow for the sharing of the responsibility especially in any actions whereby staff may feel compromised.

4.6 Reporting

Some areas that SAMGI can improve on are indicated below:

- Not reporting on time; some narrative reports were submitted late. This was due to staff handing in their reports late. This activity must be linked to the appraisal system and there needs to be consequences for such actions.

- Standard of reporting; not all staff produce professional reports. It is suggested that SAMGI enlist the help of a professional to run a workshop on report writing. If this is an essential component of a job description, then again it must be linked to the appraisal system and such a staff member must bear the consequences of lack of performance.

While SAMGI as an organisation has recognised that legitimacy based on knowledge, expertise and visibility, it is as important to retain the legitimacy by prioritising an investment in training of staff as much as possible.

4.7 Cash-flow management

Delays in transfers of funds; – donors have holidays and organization is not in control of when donors pay over funds. This has caused cash flow problems. SAMGI needs to
build up a buffer of funds to avoid cash flow hiccups. Once again this refers to enlisting the services of an expert to assist the organization in reaching new donors, writing up of financial reports and perhaps budgets.

4.8 Managing Change

Although SAMGI has been going through a period of change, there is a complex paradox between what is needed and what is wanted. Staff has been responding to demands for change in the working environment whilst simultaneously responding to a need for stability (that is, non-change). This has contributed somewhat to a mild resistance to the changes introduced and the changes that the learning organisation expects in the future. The proposed assessment planned in March 2009 (through the staff appraisal system) and every three months thereafter will be a useful space to gauge how much has been achieved and what still needs to be done.

4.9 Realigning processes, policies and procedures

During the next year SAMGI will go through a process of realignment of its goals to its programmes and in so doing will update where necessary and introduce where applicable the following:

- Updated Policies, procedures and rules
- Realign institutional goals and measurement thereof
- Introduce in-house ceremonies for achievement
- Realign management diversification
- Develop the Board of Trustees
- Commit to rewards and recognition
- Introduce a new internal and external communication strategy
- Adjust their physical environment – move to compact premises
- Apply the new organisational structure
- Write up SAMGI’s core values

4.10 Evaluation and Reflection

While SAMGI is good at critiqueing and producing media, it also needs to develop the rigours of reflection and recording this in a space that leaves a trail to show how these reflections contribute to the practice within the organisation. The recommendation is that SAMGI combines an impact assessment much more broadly of its work with a trends mapping that will also highlight technological trends in terms of reaching and communication with mobile phones for example. Furthermore, this should also do a mapping and trajectory of the playing field of different actors to provide some way to assess the different contributors to the change that SAMGI is envisaging and the organisation’s differentiating leverage.

4.11 Ensuring Follow-up

As an organisation, it would be important for SAMGI to ensure much more enduring impact of their work by devising a consistent and concrete follow-up strategy. The investment of resources in processes is a strategic one and needs to be backed up with time and ongoing resources over a longer period of time.
Appendix 1

Draft Terms Of Reference (Tor) For The Evaluation Of The Southern African Media And Gender Institute (Samgi) July 2008

The Southern African Media and Gender Institute (SAMGI) was founded in 2003 and is registered in South Africa as a non-profit making Non-Governmental Organisation (NGO). SAMGI promotes human rights by increasing the range of voices heard in Southern Africa through participatory education, advocacy, lobbying and media production to improve the status of women. It is human rights media-monitoring body whose objective is to empower women and engage in the transformation of the media.

SAMGI runs the following programmes:
Justice for Gender
Citizens in Dialogue
GenMeDem (Gender Media and Democracy)

During the period 2005 to 2007 HIVOS provided support to SAMGI to address the following:

- Regional New Media for Advocacy Training
- Human Rights – Mambo Comic booklet development and publication
- Homework Programme
- Prison Programme

11. The Purpose of the Evaluation
The purpose of the evaluation is to assess the effectiveness of the programmes implemented by SAMGI towards realizing its stated goals and objectives and addressing the needs of its beneficiaries. Further this evaluation should give insights into SAMGI’s programmes and activities and provide recommendations that will assist the organization to improve its organizational and programme effectiveness.

The evaluation will also inform HIVOS and SAMGI on the nature and effectiveness of their cooperation.

- Is SAMGI able to articulate its vision, mission and long-term goals? Are they formulated in a gender specific way? If so, are inequalities between men and women acknowledged in terms of: welfare, access, values, and participation, control?
- Is there a clear relationship between mission and long-term objectives? Have long-term objectives been formulated concerning SAMGI’s own organisational structure, human resources and financing requirements?
- To assess the effectiveness of SAMGI’s strategies towards the attainment of its aims and objectives. Have strategies been defined to cover the achievement of the organization’s own organisational and financing objectives? Have strategies been defined to address gender inequalities?
- To assess and comment on the relevance and quality of the services offered to clients by SAMGI and what impact these have had on the clients.
- Is service delivery done in an effective and efficient manner?
• Has there been a marked shift in the programmes/projects/activities of the organization?
• Examine the extent to which SAMGI has engaged with all stakeholders including men in the quest for gender justice.

Capacity

- **structure:**
  
  To assess the effectiveness and efficiency of SAMGi's decision-making bodies and the division of responsibilities/powers.
  
  Are there any conflicting structures or is there a potential for conflict in the power relations?
  
  Are there any necessary tasks that do not have a responsible person/unit?
  
  Assess the composition (including gender composition) and functionality of the board.

- **Systems:**

  How do the control or management processes function? Attention to planning, monitoring, reporting, assessment.
  
  Does the organization collect base line data, including gender-disaggregated data, as an input into planning, programme design and monitoring?
  
  How is information shared within the organization and its peers? To what extent has SAMGI and its partners been able to utilize the information it generates for lobby and advocacy and what have been the achievements in this respect?
  
  Assess the adequacy of budgetary controls, financial management and financial planning systems?
  
  Is SAMGI a 'learning' organization? If so, what has been the result of such learning in terms of changes in objectives, strategies and institutional re-organisation/re-engineering?

**Human resources and staff skills:**

Do staff at SAMGI have job descriptions and contracts? Comment to be made on the comprehensiveness of these together with the assessment mechanisms and how whether these are objectively applied?

Comments should be made on the gender expertise available within SAMGI?

Is staff satisfied and motivated to work?

Are there any staff development programmes to help align staff capacities to the needs of the various programmes implemented by SAMGI?

Financial management and resources

**Corporate Governance**

- Assess the structure of the board for appropriateness, specifically considering composition, quorum, frequency of meetings and authority limits;

- Obtain board minutes and consider significant issues discussed at meetings

- Assess the working relationship between management and the board

- Review the external audit function in relation to appointment, independence, approval of audits and issues raised by the Auditors (inclusive of meeting with Auditors)
• Check the functioning of the accountability system

**Budget Monitoring**
• Assess the methods employed to monitor budget variances and their adequacy.
• Compare actual expenditure incurred with the budget over the contract period (in relation to the annual budget), and obtain reasons for over expenditure and management efforts to contain such;

**Financial management**
• Review the procurement procedures to establish whether major purchases/contracts are/were subject to competitive bidding and whether the amounts paid for the goods and services are in accordance with the tender/quotation
• Review the management of human resources, payment systems and general administration and perform walk through tests to test whether the described procedures are operating effectively, including reconciliations,
• Review the adequacy of the various procedure manuals (human, administration and finance etc)
• Assess procedures in place to ensure all goods paid for are for the organization’s benefit;
• Vouch items of expenditure to relevant supporting documents;
• Confirmation that expenditure incurred is in accordance with approved budget headings and within available budgetary allocation;
• Review the level of administration costs as compared to the total costs for reasonableness
• Determine whether donor funds are properly maintained in accordance with the provisions of the donor agreements (including separate bank accounts where applicable)
• Check the organization’s records for any exchange gains and interest received and assess the reasonableness of allocation of such income to different donors;
• Assess if funds were utilized in accordance to project plans and the signed agreements.
• Assess basis for the allocation of organization overheads among the different projects
• Review the accounting system in place and its adequacy for meeting internal and external requirements

**Human resources management**
• Review adequacy and capabilities of staff in the Finance Department
• Review employment contracts and verify on a sample basis whether these are being adhered to

**Fixed assets**
• Verify the existence of fixed assets purchased over the last 2 years and the existence of an asset register and whether it is maintained.
• Check the usage of fixed assets in relation to benefits to the organization
• Review procedures for disposal of fixed assets

**Terms of the agreement**
• Test compliance with grant agreement terms;
• Obtain and review prior audited financial statements and management reports and note key issues arising and whether these have been satisfactorily addressed;

Institutional linkages
• What strategic linkages does SAMGI have with other agencies in advocating for the rights of women and that it works with in realising its vision and goals? (a selection of SAMGI’s partners to be interviewed including institutions working in the areas of rights, and gender) and the nature of linkages and the results attained
• Assess SAMGI’s links with governmental programmes and private sector institutions and their effectiveness?

Relation with target groups:
• Comment on SAMGI’s beneficiaries and target group?
• To what extent does the organization address the rights and needs of its perceived beneficiaries and target groups?
• Have beneficiaries been differentiated according to size, nature of activities, gender, ethnicity, religion, geographic location, income and age?
• Have the organizations changed perception of the target groups over time? Please comment.
• In which way does the target group participate in the ownership, governance and implementation of the activities of the organizations?
• Do the beneficiaries regard the outputs as relevant to their needs and demands?

Assessment of Core Programmes of SAMGI - their effect and impact

6.1 Nature of the programme /projects:
• Is there a clear relationship between SAMGI’s programmes and long-term objectives (would more programmes be required to fulfil all objectives;
• The evaluators should state the results achieved by SAMGI and the extent to which they are relevant to the beneficiaries?

6.2 Consistency of the programmes/projects:
• Are inputs, activities and outputs of each programme in line with each other?
• Have verifiable indicators for output and effects (results) been stated for all the programmes? Are sources of verification mentioned?
• Is there a distinction between output and effect/outcome indicators?
• Is the project structure compatible with programmes and expected outputs

III. Conclusions of the Evaluation
Recommendations based on the findings of the evaluation. Recommendations to also address issues of sustainability of SAMGI and its programme in terms of medium to long-term financial and institutional viability

Approach and methodology
Desk review of relevant documents both at Hivos and SAMGI
Individual and institutional interviews with members, Board members, staff and other stakeholders from SAMGI’s partner organizations, the private sector and the Donors.
Focus group discussions with beneficiaries.

Interviews in other countries using SKYPE

Namibia, Swaziland, Lesotho, Malawi, Botswana, Zambia

**Reporting and debriefing**

The team will produce the first draft and submit it to Hivos and SAMGI for comment.
(5) Copies of the report should be produced in English and submitted to Hivos together with an electronic copy. The final payment to the consultants will only be made after the final report has been received and approved by Hivos.
**Staff and Board Interviewed:**

Julia Daries, Board Member  
Thenjiwe Kona, Past Board Member  
Alan Lewis, Acting Chair of Board  
Shiko Diala, Treasurer of Board  
Gideon Mncube, Acting Human Resources Portfolio Board Member  
Crystal Gertze, Finance Manager  
Fiona O’ Brian, Advisor to the Board  
David Donninger, Auditor  
Judith Smith, Director  
Adovica Davids, Administrator  
Gertrude , Administrator  
Martin Stevens, Trainer/Field Worker  
Enesto Vialva, Men’s Unit  
Elly Mwalo, Graphic Designer

**Institutional Stakeholders and Beneficiaries Interviewed:**

Gail Thungani, Worcester  
Andiswa Thonyama, Worcester  
Rozetta Minnaar, Riversonderend  
Christina Lenders, Riviersonderend  
Cynthia Sawyer, Parow, Cape Town  
Evelyn Smith, Wellington  
Patricia Dyata, Stellenbosch  
Noxolo Dayimani, Knysna  
Esme Smith, Beaufort West  
Dora Mars, Wolesly  
Rochelle Maans, Beaufort Wes  
Iris, Worcester Women’s Centre  
Eugene, Hawequa Youth Centre

Tobeka Memzanro, Hawequa Youth Centre (Liaison person)  
Ms Dlikilli, Skills Practitioner, Worcester Women’s Centre (Liaison person)  
Mrs Martinus, Worcester Women’s Centre  
Nolitha, Provincial Coordinator Commission on Gender Equality  
Sandra Newman, Dept Health
**Regional Networks contacted:**
The scope of the evaluation allowed for the regional evaluation to be conducted electronically. The questionnaire was emailed to 60 of SAMGI’s beneficiaries in the region. The response rate was 18.

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<th>Respondents</th>
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<td></td>
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<td>• New Media for Advocacy</td>
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</tbody>
</table>
No responses were received from Lesotho.

**Selection of Participants:**
Participants were selected from the Women’s Networks active in the region as well as SAMGI’s network data base. SAMGI has actively attended conferences and network meetings and developed a data base from where they can disseminate SAMGI information, research, newsletters and up-coming workshops and courses.
Documents Reviewed

- Board Minutes (2005 – 2008)
- Staff Meeting (Monday Meeting) Minutes (2005-2008)
- Audited reports (2005-2008)
- Audited Management reports (2005-2008)
- Asset register
- Assets
- Order book current
- Order book 2006
- Stationary request book
- Mail register
- Computerised financial package
- Hard copies of payment verification
- Quotations for equipment
- Financial acquittals
- Bank Statements
- General ledger
- Monthly reconciliations
- Leave register
- Staff Daily Attendance register
- Employment contracts
- Job Descriptions
- Human resource Policy and Procedure Manual
- Financial Policy and Procedure Manual
- Information technology Policy
- HIV and AIDS Policy
- Donor contracts/agreements
- Funding proposals
- Staff reports
- Annual reports
- General donor correspondence and HIVOS Contract with SAMGI
- Computerised tracking printout of internet usage
- In-house publications
- January – Sept 2008 Director’s report

Publications:
MAMBO: The Bill of Rights
Daddy Appreciation Day Booklet, June 2006
Daddy Appreciation Day Booklet, 2005
National Media Monitoring Project 2005
Femicide Report: 2004
Knysna Newsletter Elethu Ikzwi
Riviersonderend Newsletter
Beaufort Wes Newsletter Thetha Nathi
Ikwezi
The Change
Project pamphlets including SAMGI Pamphlet