



# Irish Aid South Africa Country Strategy Paper (2008-2012) Evaluation

## Final Report

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# Acronyms

ANC	African National Congress
APRM	African Peer Review Mechanism
ART	Anti-retroviral therapy
ARV	Anti-retroviral drugs
AsgiSA	Accelerated and Shared Growth Initiative for South Africa (AsgiSA)
AU	African Union
CBOs	Community Based Organisations
CHoiCe	CHoiCe Trust
CIDA	Canadian International Development Agency
CSO	Civil Society Organisation
CSP	Country Strategy Paper/Country Strategy Programme
CSVr	Centre for the Study of Violence and Reconciliation
DAC	District AIDS Council
DFID	(UK) Department for International Development
DWAF	National Department of Water Affairs and Forestry
ECDOE	Eastern Cape Department of Education
EU	European Union
GBV	Gender-based violence
GIZ	Deutsche Gesellschaft für internationale Zusammenarbeit (link German Aid)
GoSA	Government of South Africa
HCT	HIV Counselling and Testing
HIVOS	Humanist Institute for Development Cooperation
HQ	(Irish Aid) Headquarters
IA	Irish Aid
IAMS	Integrated Asset Management System
ICT	Information and Communication Technology
IDASA	Institute for Democracy in Southern Africa
IDIP	Infrastructure Delivery Improvement Programme
JGF	Joint Gender Fund
JIPSA	Joint Initiative on Priority Skills Acquisition
LAC	Local AIDS Council
LDoE	Limpopo Department of Education
LDoHSD	Limpopo Department of Health and Social Development
LIC	Low-income country
LINGO	A grouping of Limpopo Non-Government Organisations

LRC	Learner Representative Council
MDG	Millennium Development Goal
MIC	Middle- income country
MISTRA	Mapungubwe Institute for Strategic Reflection
MTR	Mid Term Review
NEPAD	New Partnership for Africa's Development
NGO	Non Governmental Organisation
ODA	Official Development Assistance
OtP	(Limpopo) Office of the Premier
PAC	Provincial AIDS Council
PEPFAR	The U.S President's Emergency Plan for AIDS relief
PITC	Provider Initiated Testing and Counselling
PMS	(Irish Aid) Performance measurement strategy
POWA	People Opposing Women Abuse
PSRP	Public Sector Reform Programme
RBM	Results Based Management
SADC	Southern African Development Community
SAIRR	South African Institute of Race Relations
SANAC	South Africa National AIDS Council
SANPAD	The South Africa Netherlands Research Programme on Alternatives in
SGB	School Governing Body
SIDA	Swedish International Development Cooperation Agency
SWAp	Sector Wide Approach
TLAC	Tshwaranang Legal Advocacy Centre
VCCT	Voluntary counselling and testing
WatSan	Water and Sanitation
WRC	Water Research Commission
WSA	Water Services Authorities

# Executive Summary

## *Purpose and Scope*

This report sets out the findings from an evaluation of Irish Aid support to South Africa under its current country strategy for 2008-2012. The ***purpose of the evaluation*** was to provide an independent assessment for all stakeholders of the extent to which the support contributed to a reduction in poverty and inequality there. The country strategy is implemented on the basis of Irish Aid's partnership with the Government of South Africa - led by National Treasury - with civil society; and with other donors.

The overarching evaluation question was: ***to what extent did the Irish Aid country strategy contribute to the reduction of poverty and inequality in line with the Government of South Africa's policies and targets?*** A set of indicative core evaluation questions to help address the overarching question were structured around the DAC criteria of relevance, effectiveness, efficiency, sustainability and (to the extent possible) impact.

## *Approach and Methodology*

The evaluation was ***conducted by a team of two independent evaluators***. The evaluation team consulted a wide range of stakeholders, chiefly between January and March 2012. This included in-depth discussions with responsible Irish Aid staff in Ireland and South Africa and interviews with key informants from a range of partners in South Africa in Limpopo Province and at the central level. The evaluation team drew significantly on documentation provided by Irish Aid and partners, including a series of case studies commissioned by Irish Aid South Africa and a Lesson Learning report on CSP experience conducted by the Embassy in Pretoria. Preliminary findings were discussed with the Embassy and with staff in Ireland prior to drafting of the report.

Throughout the evaluation, the evaluation team maintained a ***three-level perspective***: the overall strategy; the three strategic objectives (pillars) of (i) improving pro-poor service delivery in Limpopo (water and education focus), (ii) reduction of HIV and AIDS and mitigating impact, and (iii) preventing gender based violence (GBV) and reducing impact; and six specific sector and geographical bounded areas of engagement. Particular attention was given to two CSP approaches i.e. the effects and synergies of having a stand-alone programme pillar on gender-based violence; and the approach of supporting collaborative funding mechanisms to foster civil society partnerships and support improved partner results.

## *Key Findings and Conclusions*

The emphasis of the current strategy is on using innovative partnerships and approaches that add real value to the efforts aimed at improving the lives of the most marginalised and vulnerable. There have been ***some important successes*** in this regard through the engagement in Limpopo Province (where over 70% of total programme expenditure has been made). Of particular note are the forging of effective and high potential ***collaborative partnerships*** between civil society organisations in the HIV and AIDS sector as well as the water sector. Both of these sectors are important for improved service delivery outcomes. Support is also starting to make a difference within the education structures in Government, especially at the critical interface between (district level) circuit managers and School Governing Bodies.

There has been solid progress in addressing a relatively new area of engagement - gender based violence. This has led to the emergence of a strong platform at **national level** as well as a coherent set of key civil society actors in Limpopo Province. An innovative way of channelling funds has been set up through a Joint Gender Fund mechanism on HIV and AIDS. Irish Aid played a critical role in the establishment of this fund. Support has also helped to bring the concerns on vulnerability affecting women and children to a more prominent position within both the national dialogue and resourcing decisions.

The successes of the country strategy have been achieved within a **fluid operating environment**, both in respect to the economic crisis in Ireland which resulted in a significant cut (from 2009 onwards) of over 50% in the programme budget, and in terms of the challenging context of implementing programmes through the Provincial Departments in Limpopo. In 2011, faced with financial mismanagement in Limpopo the Government of South Africa cabinet took over the running of five provincial departments there, including education and health.

The country strategy design was thoughtfully focused and showed a high level of consistency with **Irish Aid policies and priorities**. However, there was and continues to be no specific policy position on working in middle-income countries to guide the country strategy planning. Specific targeted results were detailed. Indeed, South Africa was one of the first country programmes to engage with the results based management approach.

The country strategy has used a **wide range of funding mechanisms** consistent with the Government of South Africa's policies and priorities. In most cases this proved effective in engaging with civil society but has generally proved to be less effective in when working through government. Overall we found in practice a relatively limited return from the strong potential that the coherent mix and range of funding mechanism offered in 2008. The initial potential in the water sector in Limpopo was compromised by the decision in 2010 – in response to budget cuts - to phase out support for the Masibambane programme.

Given the strengths of the original country strategy design, the funding mechanisms chosen and the results focus, as well as the partnership between Irish Aid and the Government of South Africa could have expected higher levels of success. However, **it was difficult to predict** the deteriorating situation in Limpopo Province and how this would affect the operations of provincial departments, especially their ability to embrace new and innovative ways of working.

There was an initial disconnect between the ambitious strategy and available human resources. The **Irish Aid budget cuts** – with the exception of the phasing out of support for Masibambane/water sector in Limpopo – resulted in a better alignment of capacity in implementing and delivering on programme objectives. This provided more space and time for the Embassy team to engage with innovative programmes, such as the initiative to tackle gender based violence

The country strategy responded to broadly identified needs within the Provincial Government. However, in practice it has taken time to get a better understanding of what works or what does not work in the **'delivery chain' of the Province**; where improvements could conceivably make a difference to access and quality in service provision for the marginalised. The country strategy has proved to be increasingly relevant to the specific needs of civil society organisations for collaborative working. Beyond 2012, a critical space needs to be facilitated for civil society organisations to supplement the work of government on service delivery.

Our overall assessment is that through a five year engagement (over €28m of programme support) the country strategy has made a **small useful direct contribution** to some specific areas of the Government's development agenda, in particular and in strengthening the HIV and AIDS response - in fostering a platform for civil society actors actively engaged in building and sharing knowledge and experience on how best to tackle gender based violence.

Elements of the country programme continued to support the high quality work in Water and Sanitation, HIV and AIDS, and Education under the previous programme. The main change was to work with government in a different way. While the results across the portfolio were not at the level targeted there is **value in the broader learning of the Limpopo experience**. The country programme has provided a much clearer picture of what is needed/ may be possible through donor engagement and how the key to unlocking service delivery for poor communities in provinces like Limpopo may rest with the building of management competence.

In terms of efficiency of **operations**, the evaluation found a good, effective and efficient use of the human resources within the Embassy and examples of good support from headquarters. Overall, there is a stable and good quality team showing flexibility, cross working and appropriate use of skills. There is evidence that they may have struggled at times to adopt the strategic view that the declared high ambition of the programme demanded.

### *Lessons Learnt and Recommendations*

Ireland's experience in South Africa is a good illustration and provides **valuable learning** on the particular challenges encountered in providing aid to a middle-income country.

To ensure optimal use of funds, it is important to have a **clear view of real government capacity** at different levels and how this would make best use of different funding mechanisms, both to absorb support and to sustain initial learning or system improvements. Irish Aid has made a considerable effort with Provincial Government in Limpopo. However, while there have been some successful engagements with individuals there, the majority of the time has been taken up with operational minutiae. As a result there has been very little organisational impact at strategic levels.

The CSP experience is important in demonstrating that relatively small amounts of funding judiciously used by **carefully selected CSOs** and complemented by some adviser inputs can have a significant impact both in achieving immediate results and in promoting longer-term sustainable organisations at the micro level, as well as providing gains for national level CSOs.

Where engaged in **multi-donor funding mechanisms**, monitoring and quality assurance mechanisms should be put in place and more closely tracked. This is likely to require Irish Aid to be more specific about milestones, deliverables and demonstrable impact within 'silent partnerships' and/or contracted service arrangements.

There is a need for Irish Aid **to look differently at how it engages in a middle-income country**. Whilst South Africa may have more resources and better systems at implementation level compared to a low-income country, there may nevertheless be an equally more important need for continuing institutional and capacity development support. Moreover, the challenges for South Africa in establishing fully functioning institutions, particularly in those areas of the country that were particularly disadvantaged by apartheid, may in themselves be greater than those faced in a low-income country.

The Irish Aid programme is distinctive in the way it has positioned an initiative against **gender based violence at the pillar level**. This has enabled the allocation of dedicated human and financial resources to direct interventions, although on a relatively modest scale. It set specific targets on gender (albeit in the area of gender based violence only rather than more broad based gender equality and women's empowerment). While having this as a pillar raised the profile and policy attention to the issue within the Irish Aid programme, there is no evidence that it led to more comprehensive mainstreaming of gender across other areas of the programme. The message for country programmes generally is that having a dedicated gender pillar or programme and mainstreaming gender across the whole programme requires human and financial resources and a clear results-focused strategy.

The evaluation found evidence of a clear commitment to **'managing for results'** in the programme but its execution has been inconsistent. Whilst the Embassy team has engaged actively with the approach and there have been strong elements of 'learning by doing it', monitoring and reporting still appears to be a major challenge. In compiling the Results Annex the evaluation team found substantial gaps. The absence of a monitoring framework for the joint EU-SA Strategy complicated the development of a harmonised results-oriented monitoring framework for the CSP.

Nevertheless, the results achieved and the valuable learning provides a platform for moving forward. In terms of **next steps** Irish Aid has the basis for a niche role building selectively on some of the successes and learning of the programme. We recommend concentrating either one agenda or else a very limited number of agendas. One such opportunity would be a continued emphasis on the intersection of HIV and AIDS and gender based violence. This would support South African organisations to facilitate the linkages between national and local delivery, strengthening accountability mechanisms that build local constituencies for change and which are linked effectively to formal legislative processes. It would be important to complement with support for the National Treasury in overseeing the performance of national level institutions and programmes.

This evaluation found no immediate and/ or natural points of intersection between the 'development focus areas' of the **Irish Government Africa Strategy 2011** (e.g. enterprise and entrepreneurship) and the experience/ relationships/ poverty focus within the current country strategy. This would suggest a need for significant exploration of the context and of Irish Aid's comparative advantage in meeting the development challenges of South Africa.



# 1. Introduction and Background

The purpose of this evaluation is to provide an independent assessment for all stakeholders of the success of Irish Aid's (IA) programme for development co-operation in South Africa for the period 2008-2012. The Country Strategy Paper (CSP) is implemented on the basis of IA's **partnership** with the Government of South Africa (GoSA) - led by National Treasury - with civil society and with other donors.

## Context for Effective Aid in South Africa

### *International and regional context*

South Africa, a middle-income emerging market, is Africa's largest economy and accounts for 38% of the GDP of Sub-Saharan Africa. Despite this, the country has high levels of unemployment and is among the most unequal societies in the world with a widening gap between the rich and the poor. According to UNDP, 13% of the population live in poverty<sup>1</sup>.

Politically South Africa is a member of the group of 20 leading emerging economies (G20). Since 2010 South Africa is a member of BRICS<sup>2</sup>. It is also a prominent member of the African Union (AU) and the Southern African Development Community (SADC). As part of its participation in AU structures, South Africa participates in both NEPAD, the New Partnership for Africa's Development, and the African Peer Review Mechanism (APRM). It was the fourth member state of the APRM to be peer reviewed<sup>3</sup>.

South Africa is recognised as the key investor in the rest of Africa. While most inroads have been in sectors such as Information and Communication Technology (ICT), financial services, mining and retail, South African state-owned enterprises have become a key link in the development of the continent, whether in their own right, or as levers for private sector development.

South Africa has also been viewed as an emerging donor into Africa. While this is likely to be modest, there are moves to set up an administrative structure for development assistance, a process which is being supported by current development partners. This will further elevate South Africa's potential role on the continent.

### *Local political, policy and institutional context*

The African National Congress (ANC) is the dominant party in South African politics and has retained the most significant proportion of votes since the first post-apartheid democratic election in 1994. However, this dominance is being challenged with the emergence of opposition forces during the five years of the current CSP. A breakaway party emerged from within the ANC which captured a share of the national vote, as well as the merging of the official opposition party, the

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<sup>1</sup> <http://www.southernafricareport.com>

<sup>2</sup> BRICS is a group of leading emerging economies that as of 2012 includes Brazil, Russia, India, China and South Africa.

<sup>3</sup> The South African Government rejected the findings of the May 2007 report which listed 15 key threats to South Africa's stability, ranging from violent crime to unemployment, unintended consequences of black economic empowerment and the gap between the incomes of the rich and the poor. <http://www.africafiles.org/article.asp?ID=15042>

Democratic Alliance with a smaller but regionally influential party, the Independent Democrats. This merged party made some inroads into traditionally held ANC strongholds over the period.

South Africa is recognised as one of the countries with the most citizen friendly policies, legislation and strategies in the world. Its Constitution is recognised as groundbreaking – both in the process of development as well as content. The challenge of implementing this broad and progressive policy agenda has become increasingly clear during the lifetime of this CSP with some provincial authorities affected by poor management and lack of implementation capacity. In 2011 cabinet took over the running of five provincial departments, when the full extent of the Limpopo government’s financial mismanagement became apparent. The national press reported how *‘The Auditor-General’s general report on the outcome of the Limpopo government audit for the 2010/11 financial year ...described a province nearly R3 billion in the red and with civil servants fomenting rebellion. .... the Limpopo education, health and public works departments feature as the key transgressors’*<sup>4</sup>.

The challenge for GoSA - with the support of the donor community - to implement programmes effectively has become much more starkly evident. In particular, there is a perceived inadequacy of the efforts to address the equitable provision of services to poorer communities, as reflected by incidents of local protests (in 2008-2009) and continuing levels of citizen dissatisfaction. The CSP period was marked by moves towards holding Government departments more to account with the President appointing in his office a Minister for Planning Monitoring and Evaluation. This Ministry has produced a results-based national framework with responsibility for its implementation cascading down through the provincial Premiers’ offices. The new Minister established a National Planning Commission, a think-tank comprising leading thinkers, policy makers and academics across a range of sectors. In November 2011 the Commission unveiled its National Development Plan, *A vision for 2030*.

Overall, whilst the policies exist and adequate systems and processes are also often in place there appears to be a challenge to link action or accountability to these plans and processes. It seems that the need to redress inequity and racial imbalance at the top of most government departments has over the last 17 years, created the space for people to work in positions where they are not sufficiently held to account for delivery. The National Planning Commission identifies the following challenge in the public service: *‘The temptation of quick fixes has diverted attention from more fundamental priorities, particularly the deficit in skills and professionalism affecting all elements of the public service. At senior levels, reporting and recruitment structures allow for too much political interference in selecting and managing senior staff. The result has been unnecessary turbulence in senior posts in the public service and reduced confidence in the leadership, which undermines the morale of public servants and citizens’ confidence in the state’*<sup>5</sup>.

### *South Africa’s social and economic context*

Over the CSP period, South Africa has remained economically stable even though it did not entirely manage to avoid the effects of the global economic crisis of 2008-2009. South Africa’s prudent fiscal policy management and strong regulatory framework for the financial system helped to ensure stability. Despite this, the crisis did have an effect in the area of trade as a high percentage

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<sup>4</sup> Andrew Trench, Thanduxolo Jika and Jeanne van der Merwe, ‘How Limpopo went bankrupt’ *City Press*, 2012-01-22

<sup>5</sup> *National Development Plan, Vision for 2030*, National Planning Commission, November 2011, pg 364

of its exports were concentrated in 12 OECD countries.<sup>6</sup> This situation saw a contraction in local manufacturing and agricultural production and, by 2009, South Africa was adopting policies to mitigate the impact of the crisis, including further investment in infrastructure, accelerating a public works programme<sup>7</sup>, supporting industry and agriculture and providing focused expenditure to social assistance programmes.

While South Africa has a sophisticated infrastructure, a well-developed private sector and a stable macro-economy, it suffers inequalities, particularly with regards to access to quality education and access to quality health care. The latter, combined with the high prevalence of HIV and AIDS, explains why South Africa has not achieved some targets for those MDGs related to outcomes such as employment, income levels, and life expectancy<sup>8</sup>.

Unemployment remains a major problem, spiking at over 25% in 2010-2011 according to official figures. Even this high national figure does not accurately reflect the acute pockets of unemployment that exist particularly in rural and underdeveloped areas. Among young black African South Africans the figure stands at around 50%<sup>9</sup>. This is one element demonstrating that the poverty divide is deepening.

Limpopo province, where Irish Aid has focused a large portion of its CSP support, is thought to have the highest proportion of rural dwellers in South Africa, and conditions in the province are inferior to national averages, including a higher unemployment rate. Studies show that women, older people and those who have not completed secondary schooling are most likely to be among the unemployed in Limpopo<sup>10</sup>. The Children's Institute estimates that Limpopo has the highest proportion of children living in income poor households (83.3% of the province's children in 2008)<sup>11</sup>.

Over the period of the CSP, gender and gender based violence (GBV) has become more prominent on the South African national agenda. In 2009 a new Ministry of Women, Children and People with Disabilities was created. Whilst in terms of standard indicators on gender equality South Africa does well<sup>12</sup>, it is recognised that significant challenges remain<sup>13</sup>. The views of South Africans on sexual violence are considered by some to be compatible with an acceptance of sexual coercion and adaptive attitudes to survival in a violent society<sup>14</sup>. The experience of sexual assault and wider societal barriers to the limited choices that women often face has also been linked to risks for HIV infection<sup>15</sup>.

6 South African Reserve Bank, *Quarterly Bulletin*, March 2009, cited in Dlamini, 2010

7 This programme extension was designed to create both temporary and longer-term jobs in the social and municipal services sectors, and aimed also to build literacy and other skills among unskilled unemployed people.

8 UNDP, SA MDG report 2010. <http://www.undp.org.za/millennium-development-goals/mdgs-in-south-africa>

9 John Kane-Berman and Frans Cronje, South African Institute of Race Relations

10 Kwabena et al

11 Katherine Hall, 'Income and Social grants, children living in poverty', Children's Institute, University of Cape Town, July 2010

12 With 45% of women in Parliament, 24% women in the defence sector and 21% in the police, women are more represented on structures in South Africa than in most first-world countries.

13 The ANC's most recent policy discussion documents admit that "The inclusion of the term 'gender equality' in policy documents has not led to the redistribution of resources and power in ways that change structural forces on which women's oppression rests." Nikiwe Bikitsha, 'Glass half full now for SA's women', Mail & Guardian online, March 09 2012.

14 South Africa has among the highest rates of violence against women – in 2009/10 the South African Police Services reported 68,332 cases of sexual offences, and this category of crime is known to be seriously under-reported.

15 Ajuwon et al., 2002; CADRE/DoH, 2003; Dunkle et al., 2004b; Jewkes et al., 2006; Hink & Thomas, 1999; Wojcicki, & Malala, 2001; Wood & Jewkes, 2002, cited in Phaswana-Mafuya et al, 2010

South Africa's population of approximately 50 million people includes 5.7 million people living with HIV and AIDS, thus accounting for 17% of the global burden of disease related to HIV infection. The Southern Region is the epicentre of the disease. This burden has contributed to the significant reduction in life expectancy (in 2009, Stats SA set this at around 53.5 for men and 57.2 for women, which was up from the mid-40s in the early 2000's). Maternal mortality stands at 625 per 100,000 live births, and 43.7% of these deaths can be attributed to HIV. In terms of under-five mortality, HIV accounts for 35% of deaths (this was 59 in 1998 and rose to 104 per 1,000 live births in 2007). The HIV burden has also resulted in an explosion of TB co-infection and South Africa now has the second highest global per capita tuberculosis (TB) incidence (948 cases /100,000 population). Due to co-infection and poor treatment adherence (among other factors), South Africa has the fourth highest number of multi- and extensively-drug resistant TB cases globally<sup>16</sup>.

A legacy of the period from the late 1990s to mid-2000 (a time of AIDS denial) was a set of declining outcomes in relation to health-related Millennium Development Goal (MDG)<sup>17</sup> indicators, and a health system struggling to improve. A significant shift in leadership thinking took place around the national response to the HIV and AIDS epidemic following the ANC's National Conference in Polokwane in 2007. There, a set of wide-ranging resolutions were produced under the general rubric of 'Organisational Renewal', a number of which addressed issues pertinent to public health, and included HIV and AIDS targets for resource allocation and coverage.

In early 2010, the South African Government renewed its commitment to scaling up its response to HIV and AIDS and announced its National HIV Counselling and Testing (HCT) Strategy. This included a campaign to test 15 million individuals (30% of the total population) across all districts and provinces by 2011, and expand provider initiated testing and counselling (PITC) at all primary health centres. By June 2010, 4.1 million people had been tested for HIV and most screened for TB. Alongside the anti-retroviral therapy (ART) campaign, the National Department of Health has scaled up the provision of anti-retroviral (ARV) drugs, initiated treatment access from primary health care clinics (as opposed to hospital-only access), for greater access to ARV therapy for patients in need.

In the Education sector, although there have been significant gains in the period since 1994, the legacy of low quality education in the historically disadvantaged parts of the school system persists. This seriously hampers the education system's ability to provide a way out of poverty for poor children<sup>18</sup>. Public spending on education, total (% of government expenditure) in South Africa was 19.20% in 2010. Its highest value over the past 11 years was 23.45% in 2001, while its lowest value was 16.20% in 2008. South Africa is in dire need of good, skilled teachers. "*South Africa's education system is underperforming, especially in terms of maths and science results. When compared to many other developing countries, our expenditure on education is not matched by the results, and research shows decisively that good teaching is vital for better results*"<sup>19</sup>. The report also showed evidence that of those who are pursuing a career in the classroom, only two-thirds spend 46% of their time actively teaching and of those hardly any teach on a Friday, and that over

16 Figures in this paragraph have been drawn from the SA Health Review 2010

17 Progress Report on Millennium Development Goals, 2010

18 National Planning Report, page 281

19 Centre for Development and Enterprise (CDE), South Africa, Value in the Classroom, The quantity and quality of South Africa's teachers, September 2011

25% of newly qualified teachers immediately pursue other professions, or emigrate. Overall, it appears that while teachers may overall be better qualified, the quality of teaching has not improved, and the management of teachers is very poor.

## Irish Aid Support

Irish Aid has been providing bilateral aid to South Africa since 1994. The initial ten year agreement focused on assisting the process of transformation; addressing the concerns of those marginalised and disenfranchised during apartheid. In 2003 this commitment was extended and the 2004-2006/07 CSP continued support to the social sectors and good governance whilst also piloting a programme of support for local economic development through community based tourism. During this period there was an increased focus on Limpopo, one of the poorest of South Africa's nine Provinces.

Irish Aid's CSP for 2008-2012 centred on the reduction of poverty and inequality in line with Government of South Africa (GoSA) policies and targets. It set out to focus on four of the key development challenges facing South Africa; the skills and capacity gap, the lack of access to quality services and accountability, the effects of the HIV and AIDS pandemic on social and economic development, and tackling gender based violence. This aligned the CSP with two out of the three principal GoSA development objectives, and with two of the eight main development challenges<sup>20</sup> identified by a Joint EU-SA Country Strategy 2007-2013<sup>21</sup>.

## Evaluation Approach and Methodology

The approach to the evaluation was designed to provide an account for 2008-2012 and inform decision-making on the nature of future assistance by Irish Aid to South Africa. In particular, the methodology set out to:

- Provide a qualified judgement on results achieved at a programme level – in terms of contribution to outcomes. (*Effectiveness and sustainability*)
- Chart changes in context and other influences that have shaped the Strategy and programming; options considered and decisions taken. (*Relevance*)
- Assess how the delivery structure of Irish Aid has worked to deliver on the Strategy objectives. (*Efficiency*)

The overarching question for the evaluation<sup>22</sup> was: to what extent did the Irish Aid country strategy contribute to the reduction of poverty and inequality in line with the Government of South Africa's policies and targets? A set of indicative core evaluation questions to help address the overarching

<sup>20</sup> Fighting the growing HIV and AIDS pandemic. Strengthening the capacity to deliver and provide equitable access to basic social services, particularly at the local level, and promote social cohesion

<sup>21</sup> The EU-SA Joint Strategy has three high level objectives; political, economic and trade, and development. The Joint Strategy was agreed by GoSA, the European Commission and eleven Member States. It is also open to the other sixteen Member States to agree to operate within the strategy.

<sup>22</sup> See Annex 1 for Terms of Reference for the Evaluation.

question were structured around the DAC criteria of relevance, effectiveness, efficiency, sustainability and impact.

The evaluation was conducted by a team of two independent consultants<sup>23</sup>. It took place from January to April 2012 and involved a document review<sup>24</sup>, interviews<sup>25</sup> with Irish Aid staff in Ireland and South Africa, as well as key South African partners and stakeholders (governmental, non-governmental and other donors). The evaluation team visited South Africa from February 20<sup>th</sup> – 28<sup>th</sup> and drew on a series of case studies commissioned by Irish Aid South Africa and a Lesson Learning report on experience with the CSP conducted by the Embassy.

There were no significant constraints encountered in conducting the evaluation. The initial and partial use of the Results Based Management framework by Irish Aid (see later sub-section) meant that there was no solid results information at an outcome level provided to the Evaluation team at the start of the process. The absence of a monitoring framework – and associated baseline setting – for the joint European Union – South Africa (EU-SA) Strategy on which the bilateral strategies of the member states were expected to draw has been a contributing factor to this gap. Case study material provided by the Embassy to the evaluation team in the early stages of the evaluation process provided useful information but was limited in terms of results at the level of outcomes.

This report includes an Executive Summary and an Introduction and Background Section which situates the evaluation. An overview of the shape of the programme and patterns of budget adjustments' and expenditure is followed by a Findings section looking at the results achieved. The Conclusions section leads to the identification of lessons and a set of recommendations. The report is supported by a Results Annex (see separate volume).

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<sup>23</sup> With some remote support from a third specialist to strengthen the analysis on gender equality.

<sup>24</sup> See Annex 2 for a list of documents reviewed.

<sup>25</sup> See Annex 3 for a list of people consulted.

## 2. Programme Objectives and Structure

### Programme Design and Components

The CSP - as a programming framework – aims to maximise the impact of Irish assistance in the South African context by ‘providing strategic financial and human resource support in **areas of greatest need**’<sup>26</sup>. The Programme is constructed around three strategic objectives (pillars):

1. Improving pro-poor service delivery – focus on education and water and sanitation (WatSan) in Limpopo Province.
2. Reduction of HIV and AIDS and the mitigation of its impact, with a particular focus on women and children.
3. Prevention of gender based violence and the reduction of its impact.

The evaluation team constructed a map (see Results Annex) of the components and initiatives that make up the CSP, as **originally** conceptualised and designed<sup>27</sup>. This shows how the shape of the programme has evolved during the strategy period, indicating those elements that have been phased out, scaled up and/or scaled down following the early 2010 Mid Term Review (MTR) of the CSP.

In approving in 2008 a financial envelope of €65.4m over a five year period it was recognised that the key issue in South Africa was the provision of targeted resources (both financial and human) to unblock impediments to pro-poor growth and inequality in an innovative and flexible way. This was consistent with the view of the ‘value add’ of development support held with the Joint SA-EU CSP 2007-2013.

The shape of the programme has reflected a deepening of the focus on Limpopo Province building on the direction set by earlier support and the clear recommendation of the 2006 evaluation to capitalise on the gains already made. It has also reflected a balanced portfolio of working through government and through non-governmental organisations (NGOs)/ community based organisations (CBOs). This was consistent with the broad aim of GoSA<sup>28</sup> for collaborative partnerships between government and civil society to improve the quantity and quality of basic service provision. The CSP recognised that Government funding to NGOs and CBOs for service provision often goes through complex national and provincial structures and is commonly inadequate or not delivered on time, creating problems for civil society organisations (CSOs) particularly those that operate in the rural areas.

Recognising the changing context in South Africa, the CSP design stressed the importance of flexibility and responsiveness – with programming to be informed by a *‘comprehensive approach to addressing risk, results based-monitoring, audit and evaluation, and the process of lesson*

<sup>26</sup> Irish Aid South Africa Programme 2008-2012

<sup>27</sup> Schematic constructed from our reading of the CSP Annual Reports and other supporting documentation. It has not always been clear how different funded interventions sit under which components/ pillars.

<sup>28</sup> Together doing more and better, Medium Term Strategic Framework 2009-2014; GoSA July 2009

*learning and dissemination*'. In addition to the three “pillars”, the CSP had a component with associated funding on responding to emerging needs, providing an element of horizon scanning.

The total number of individual project/programme interventions is relatively high in proportion to expenditure over the strategy period. This includes five interventions which have been funded under the generic allocations for “Research” and “Emerging Needs”.

### *Re-shaping of the Programme*

The 2010 Mid-Term Review (MTR) recommended general scaling back of programme scope and partners to match available budget and absorptive capacity of partners. Over the strategy period the most significant changes in the shape of the programme have been:

- Reduction in the scope of support in components of the service delivery pillar; moving support away from government core business on the basis that this is/ or should be adequately funded by GoSA exchequer.
- Increased focus on innovative areas of support where Irish Aid can add value.
- Narrowing down the governance related work from a broad accountability approach.

From the Decisions Paper prepared following the MTR of the CSP and in reference to high transaction costs for Irish Aid<sup>29</sup> and available management capacity, it would appear that Irish Aid chose to exit from some well-performing initiatives that were showing promising results. Yet the programmes and partners that Irish Aid continued with (mainly GoSA) incurred equally high transaction costs for IA due to low levels of capacity of programme partners and subsequent slow implementation.

In 2011 Irish Aid revisited its original intention of supporting skills development and economic growth for previously disadvantaged sectors of South African society as set out in the Growth Path and other policy documents. Through the ‘emerging needs’ provision within the CSP, and when presented with viable options for support, IA engaged with new partners; the Law Society of SA, the South Africa Netherlands Research Programme on Alternatives in Development (SANPAD), the Mapungubwe Institute for Strategic Reflection (MISTRA), and the Department of Trade & Industry. Earlier interest (2008) in working with ASGISA – the Accelerated and Shared Growth Initiative for South Africa, and JIPSA – the Joint Initiative on Priority Skills Acquisition had been dropped given observations<sup>30</sup> on their limited delivery on objectives.

### *Management of the CSP*

Arrangements for implementing the CSP comprise of a Pretoria-based Embassy team under the leadership of the Ambassador who is supported by a Head of Development, with a Development Specialist and a team of Programme Advisors covering different technical areas, plus financial control and support. This in-country team is supported by an Ireland based Programme Countries Section and sector specialists. The CSP team operates under the business plan of the Embassy in

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<sup>29</sup> The issue of transaction costs associated with the CSP for GoSA was not covered by the evaluation.

<sup>30</sup> Irish Aid South Africa Annual Report 2008



Pretoria which covers the consular, political, economic and development arms of Ireland's engagement with South Africa<sup>31</sup>.

The embassy team for the implementation of the CSP 2008-2012<sup>32</sup> included the new positions of a Gender Advisor and a Polokwane based Limpopo Co-ordinator. The Advisors were configured explicitly as a 'Development team', with the Development Specialist leading the engagements in Polokwane Province. The Water Advisor resigned in late 2009 and, given reductions in Irish Aid support to the water and sanitation sector, was not replaced. The Education Adviser resigned and was replaced. In 2010 the Regional HIV and AIDS programme was closed and the Regional HIV and AIDS Adviser post based in Embassy Pretoria, who reported directly to Headquarters, was withdrawn.

In 2010 the responsibilities for management of the Zimbabwe Programme – with a Harare based Zimbabwe Programme Adviser - were assumed by Embassy Pretoria. Prior to this, while the Embassy was accredited to Zimbabwe, the Irish Aid development team in the Embassy in Lusaka, Zambia had managed the HIV and AIDS programme in Zimbabwe. The move in management of the programme to Pretoria consolidated the Embassy's role in the relationship with Zimbabwe. A Financial Adviser was recruited in 2010 to support programme implementation in Zimbabwe and to assist in backstopping audit support in the South Africa programme.

## Programme Expenditure

Based on a reading of the CSP Annual Reports, reconciliation between the programme structure and budget/expenditure has at times proved difficult. Table 1 (see overleaf) provides a summary of planned versus actual disbursements against original budgets drawing on documentation and information<sup>33</sup> provided.

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<sup>31</sup> In early 2012 the Embassy, relocated into a unified Embassy office space in Pretoria and the political, trade, economic, Consular and Development sections of the Embassy are housed in the same office space. In comparison with other IA programme countries the nature of the Ambassador's engagement in the development arm is different, given the overall scale of Ireland's (political & economic) engagement in South Africa.

<sup>32</sup> Series of Organograms; Irish Aid Programme South Africa (2007), Proposed as submitted with CSP documents to PAEG (2008), Current (2012) for Irish Aid South Africa and Zimbabwe.

<sup>33</sup> Source: Figures (€m) provided by Desk Officer/ refined based on Embassy breakdown.

Table 1: Actual and Estimated Outturn across programme components

	2008 €m	2009 €m	2010 €m	2011 €m	2012 (est.) €m	Total
WatSan	4.21	3.95	1.19	0.56	1.00	<b>10.91</b>
Education	2.05	0.00	0.00	0.00	0.00	<b>2.05</b>
HIV and AIDS	1.62	1.25	1.09	1.10	0.70	<b>5.76</b>
Gender	1.68	0.55	0.60	1.05	0.76	<b>4.64</b>
Governance	1.08	0.24	0.18	0.10	0.20	<b>1.80</b>
Emerging needs	0.58	0.08	0.00	0.45	0.51	<b>1.62</b>
	<b>11.22</b>	<b>6.07</b>	<b>3.05</b>	<b>3.26</b>	<b>3.17</b>	<b>26.77</b>
Programme Management	0.12	0.21	0.23	0.31	0.39	<b>1.26</b>
<b>Total</b>	<b>11.34</b>	<b>6.28</b>	<b>3.27</b>	<b>3.57</b>	<b>3.56</b>	<b>28.03</b>

### Budget Reductions

The Strategy period has been marked by significant reductions in the originally planned expenditure. This was due to both the reduction in the overall Irish Aid budget and the fact that there continued to be under-spending by some (e.g. education, gender) of the programmes supported. Based on an analysis of approvals and actual expenditures<sup>34</sup>, the budget reductions, overall, amounted to a change from an original PAEG approval of € 65.4 Million to Annually Approved IDC Budgets of €28.33 Million; that is a reduction of € 37.07 million (a cut of approximately 53%) over the years.

The most significant budget reductions were:

- Termination of the support to the multi-donor Water & Sanitation SWAp (Masibambane) – original allocation €20m.
- Reduction of support to Limpopo Department of Education – original allocation €10m.
- Reduction of support to Limpopo Department of Health & Social Development – original allocation €4m.

### Underspend

The strategy period has been marked by continued under-spending with some evidence that under-spending lessened with the reduced budget allocations. The detailed spend figures show that

<sup>34</sup> Original PAEG approvals compared to Original IDC allocations

as the budget cuts started to take effect and the challenges around the absorptive capacity of partners (especially government partners) became evident, “internal” budget shifts and re-allocations became more frequent.

### *Programme Management costs*

Programme management costs for the four years (2008-2011) totals €1.26m set against a total programme spend for the period of €26.77m (management costs averaging 4%). There was a significant shift in the proportion of management costs against programme spend with the reshaped programme from 2009 onwards. However it is recognised that even those parts of the programme for which funding ceased in 2010 and 2011, would likely have required ongoing management through 2012 until all funds had been spent or a formal closure took place.

## 3. Findings

### Contribution of the CSP to Development Outcomes

In terms of results, the gathering and interpretation of evidence has been focused on the outcomes level.<sup>35</sup> The CSP Logic Model is constructed around three intermediate outcomes to which a set of seven immediate outcomes relate. The CSP Strategic Objectives and the related Irish Aid programming documents correspond to the three higher level outcomes in the form of ‘three pillars’ covering core areas of pro-poor service delivery, HIV and AIDS and gender based violence.

To be able to bring into view for all stakeholders ‘the difference’ that the CSP (funding and dialogue) has/ and is making to development in South Africa the evaluation team has constructed its enquiry around the six areas of engagement (sectorally and geographically bounded) which reflects in outcome terms the thrust covered by CSP programming. Four of these are focused on development outcomes in Limpopo province and two with a national scale focus (see Figure 1 overleaf). They provide an appropriate reference point for assessing how effective the CSP has been<sup>36</sup>. This set brings into view the **contribution** that the investment through the CSP has made to a discrete set of GoSA led targeted changes. Changes that form part of South Africa’s development strategy and reflect the overarching goal of the reduction of poverty and inequality as shared by GoSA and its donor partners.

Our enquiry has recognised how specific objectives and immediate outcomes within the CSP logic model on improved accountability of government to citizens, the capacity and role of civil society to engage with policy, planning and implementation processes and improved capacity within government through public sector reform are – through specific initiatives - an integral and underpinning part of engagement within the six aforementioned areas. We have therefore chosen<sup>37</sup> to integrate such governance interventions into the flow of the main findings where they have more meaning, rather than treat them as a discrete programming/ outcome area.

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<sup>35</sup> As requested by the ToR for the evaluation

<sup>36</sup> The indicator set within the Revised CSP Results Framework (2010) helped the Evaluation Team to determine the scale and level of ambition of the CSP within each of these areas of engagement.

<sup>37</sup> An approach endorsed by the Reference Group for the Evaluation at the Inception Report stage.

Figure 1: The six areas of engagement

Sectoral area of engagement	Scale: Targeted 'reach'		
	National	Provincial	Local
1. Improved quality of an access to water and sanitation services in Limpopo		✓	✓
2. Improved quality of an access to services in education in Limpopo		✓	✓
3. Improved response in Limpopo to comprehensive HIV and AIDS service delivery		✓	✓
4. Improved institutional arrangements for the national response in HIV and AIDS	✓	✓	
5. Improved Government and civil society coordinated responses that link GBV with HIV and AIDS and gender equality in Limpopo		✓	✓
6. More harmonised scaled up donor response (national scale) to GBV campaigning, research and innovative programmes	✓		

### *Improved quality of and access to Water & Sanitation services in Limpopo*

Water and sanitation (WatSan) is an ongoing problem in South Africa – particularly in rural communities. National level goals are centred in the provision of clean water and sanitation systems to all communities and, within this, ensuring free basic water provision for poor households. The overall sector leader and guardian of the country’s water resources is the National Department of Water Affairs and Forestry (DWAF). However, service delivery for WatSan is the responsibility of local government, involving Water Services Authorities (WSA) at municipality level.

Irish Aid’s engagement was built around a coherent set of interventions working at different entry points in the sector (Government – provincial/ local, NGO consortium and a national research body). As a package, and underpinned by the results from a Public Sector Reform Programme (PRSP) - in the form of enhanced coordination and steering of departmental work by the Office of the Premier (OtP) - IA engagement was expected to contribute to systemic change in Limpopo; reflected in an improvement in the enabling conditions for water and sanitation services. The broad set of targeted outcomes were; an improved government capacity for implementing pro-poor policies that takes account of gender and HIV and AIDS, improved effectiveness of governance structures and systems, and improved capacity of civil society to engage and coordinate with government on water and sanitation service delivery and policy issues.

The CSP built strongly on the effective support provided under the previous CSP, including for the water sector sector wide approach (SWAp) entitled *Masibambane* (meaning ‘Let’s Work Together’). Masibambane was regarded as an effective SWAp in South Africa with sub-programmes in each province. Originally Irish Aid was to provide €20m to Masibambane over the

five years of the CSP 2008-2012. However funding was significantly cut after the first year. This was in response to the Irish Aid budget cuts and the result of consultation with the National Treasury. The decision to terminate support to Masibambane, based on Irish Aid funding priorities<sup>38</sup>, was taken against a background of a declining profile for the SWAp which some had come to view as a pool of funds for DWAF rather than an effective vision of sector partnership and way of working inter-sectorally<sup>39</sup>. Support to other partners in the Water & Sanitation Programme (LINGO<sup>40</sup>) and the Water Research Commission (WRC) continued through to the end of the CSP period (2012), but with reduced budgets.

The termination of funding for Masibambane in Limpopo transpired to take the heart out of the CSP programmatic approach in the water sector, compromising the potential leverage of linkages from the different levels of Irish A engagement. It also left specific and critical gaps in the delivery approach of Government that were not filled by alternative funding. Reduced IA funding for 2009 was not disbursed to DWAF until September of that year – this created problems for DWAF, who had already entered into multi-year contracts with service providers on the understanding that the CSP 2008-2012 agreement would provide for payments to be covered. Such problems were exacerbated by the with-holding by Irish Aid, in accordance with the organisations risk management practices, of the final 2010 tranche of exit funding in response to the non-resolution of issues raised in the Auditor General’s report on DWAF<sup>41</sup>. In sum this turn of events has been a factor in constraining the rate of progress on WatSan in the province. It also served to remove any engagement opportunity of IA to check what seems to be a slide away from the intended intensification of partnering between Government and NGOs/CBOs, something which the CSP was looking to broker.

There has been innovative practice through the work of the LINGO Consortium – a coalition of WatSan NGOs in Limpopo. This has improved access in specific communities but there has been no widespread uptake through provincial funding mechanisms. There is a strength and potential in the organisation such that the work of LINGO, using external funds, can act as a mirror to Government practice in the Province in relation to cost effective sustainable service provision. LINGO also reported interest from other provinces as well as their own ambitions to provide their joined-up services into neighbouring countries.

Through its support to the Water Research Commission, Irish Aid had hoped to strengthen the knowledge and information on issues of franchising of water services, sanitation sustainability and water quality management and monitoring. It was looking for this knowledge to be taken up by Masibambane at a national and provincial level. Progress has been made. For example, the franchising pilot project for the maintenance of school latrines in Eastern Cape Department of Education (ECDoE) was successful, resulting in the ECDoE inviting the franchisor to expand to the whole province. Subsequent payment issues constrained movement on this. Another successful pilot was a trial fruit planting on buried pit latrine sludge which attracted interest from a commercial forestry operator. Good practice models have also attracted interest internationally from UN Habitat and there is evidence of national influence on policy in the area of pit latrine maintenance but to date no evidence of a direct influence of pilots on wider practice in Limpopo. It

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38 Considerations included (amongst others) progress already made on capacity building; need for national ownership; doubts about DWA/F leadership; limited Embassy capacity due to departure of WatSan Adviser in 2009

39 Final Evaluation (EU) of Masibambane III

40 Limpopo NGO Consortium of water-service providers

41 Also late publication of annual reports and audits by DWAF and limited information on donor inputs

is not clear as to the extent to which there were expected linkages between the WRC support and service delivery improvement objectives in Limpopo. Changes were made to the disbursement procedures for research grants to WRC in 2009 to overcome delays resulting from channelling funds through DWAF.

In summary, the programme has had little effect on the systemic change of the provision of water and sanitation services in Limpopo province - which the coherent design and significant funding originally allocated to in the CSP was well positioned for. The termination of the funding of Masibambane and the subsequent constraints on coordinated action within the province has resulted in successful IA interventions (the establishment of the LINGO consortium, the activities of the Water Research Commission) being very limited in the extent of being able to influence targeted improvements in government capacity, uptake of research within provincial programmes, the quality of the discussion within sector co-ordinating structures, and increased engagement by CSOs in the governance of the water sector.

### *Improved quality of and access to Education services in Limpopo*

Education remains a key priority for GoSA<sup>42</sup>. An important goal is to raise quality within the system, resulting in higher attainment levels. Effective governance structures for schools/education are recognised as a key enabler. There are also nationally guided efforts to tackle the low levels of literacy. A Turnaround Strategy for the Improvement of Education in Limpopo was published in 2011. This was based on a solid analysis of the challenges in education in the province.

Irish Aid engagement was centred on a partnership with the Limpopo Department of Education (LDoE) the foundations for which were laid in the previous CSP. The focus of efforts was on a multi-tiered approach which covered a number of discrete areas: (i) improving the skills of all of the province's Education Circuit Managers to facilitate better and more efficient engagement between schools and the district and provincial levels of the Department<sup>43</sup>, (ii) the development of mother-tongue grade Reception to grade three curriculum support materials aimed at numeracy and literacy, and (iii) the improvement of educational planning and coordination within the LDoE.

These interventions were intended to be reinforced/ underpinned by three governance related initiatives that addressed; (i) better resource planning and management for infrastructure delivery at Provincial level, (ii) the dissemination of comparative statistics to provincial legislators to increase their knowledge base and engagement with social service issues, and (iii) the more strategic area of public service reform. As a package this was expected to contribute to systemic change in Limpopo as reflected in a set of broad outcomes in education related to; improved capacity (provincial and local government) for managing delivery of education services and improved government accountability in the delivery of education services.

Irish Aid has succeeded to some extent in maintaining a strategically-focused relationship with LDoE around these agreed areas of support. This was in the face of implementation challenges related mainly to delays in processing requests for procurement of services by implementing

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<sup>42</sup> Delivery of education services is a provincial responsibility set within a national policy framework. Syllabus is set nationally and exams are set provincially.

<sup>43</sup> This was part of a bigger effort to strengthen governance involving the school governing boards and learner representative council support.

agents on the ground. The financing model of the Education Trust<sup>44</sup>, when coupled with Irish Aid use of government systems, inadvertently contributed to the delays in the passage of funds through the government system element of the chain, thus frustrating rather than enabling the IA/Limpopo DoE partnership. Further delays in implementation were caused by the Auditor-General's disclaimer of an audit opinion on LDoE's finances for the year ending March 2010<sup>45</sup>.

Irish Aid's "flexibility" and "responsiveness" seem to have allowed it to mould its support around emerging priorities and needs in broadly agreed areas of support – and also to incorporate a focus within its support to education on its own priority areas of HIV and AIDS and GBV as opportunities for this arose. IA support has been instrumental in the development of an HIV and AIDS Strategy and Employee Wellness Programme in LDoE.

A key initiative designed to improve educational planning within the LDoE was the scholarship awards for master's studies outside of South Africa to six fellowship students. There were concerns that such investments whilst likely to be of value to the individual can often fail to provide a return in terms of progressing specific programme objectives. Following completion of their studies, the individuals have returned to the Department and they are now occupying a number of education-planning related positions in different directorates within the Department.

The Department has taken some important steps on tackling low levels of literacy through the development of local language curriculum material for Reception Grade to Grade 3 teachers. This has directly facilitated delivery on the national policy to teach in mother tongue up until the end of the foundation stage, filling a critical gap as there had been very little material available in Limpopo in mother tongues. The effect of the use of the new materials has yet to be assessed.

Through the Infrastructure Delivery Improvement Programme (IDIP)<sup>46</sup> support was provided to the LDoE for systems and capacity development of infrastructure planning and management. Various initiatives were planned for. Areas of progress centre on the putting in place and operation of a reliable asset register, a critical first step in developing an Integrated Asset Management System (IAMS) for the Department. Due to budget adjustments in 2009, a decision was taken by the Embassy not to continue support to IDIP. Indications are that GoSA stepped in to fill the funding gap.

The support to the 'Circuit improvement programme' has been focused on a modular training exercise delivered by local providers. Our observation is that this has been an important and timely intervention as in tandem with and building on the continuing work on school governing bodies (SGBs) and Learner Representative Councils (LRCs) it represents the critical interface between government and the community governance structures of schools.

In summary, the Irish Aid support has been successful in engaging with some valuable points within the LDoE turnaround strategy addressing institutional weaknesses but this has been at a

<sup>44</sup> The Education Trust was set up by LDoE to be a clearing house for private sector funding into the education sector. It was thought that IA funding could usefully go through the Trust thereby facilitating coherence and speed by which funding could be accessed.

<sup>45</sup> Transaction costs for the donor increases significantly if something like this happens – it requires relatively intensive engagement between programme staff and the development partner to resolve an issue such as this so as to prevent it from disrupting the programme too much. On the positive side, Irish Aid's support for the development of the Department's Asset Register is likely to improve subsequent audit outcomes.

<sup>46</sup> The IDIP – parent government partner is National Treasury and the implementing agent is the Development Bank of South Africa - aims to strengthen the capacity of Provincial governments to plan and manage infrastructure for service delivery. Departments in Limpopo targeted by IA support included the Departments of Public Works, Education, Health & Social Development and Provincial Treasury.



relatively low level in the system. There has been little effect in addressing systemic governance and management capacity. The successes have been largely at the level of building the capability of individuals rather than strengthening organisational capacity<sup>47</sup>. This is all set within a context of continuing challenges within the education system in Limpopo in respect to rural schools.

### *Improved response in Limpopo to comprehensive HIV and AIDS service delivery*

The broad aims of the National Strategic Plan 2007-2011 rolled out through Provincial Plans are designed to provide a government led multi-sectoral response between Departments and other stakeholders - ensuring universal access to treatment and addressing the social drivers of HIV transmission. This recognises the importance of civil society as an extension of government services given the scale of the problem and limited government resources, and involves a range of service delivery points - the formal health service /NGO extension services – reaching people living with HIV and AIDS and the wider community. The institutional structures of the Provincial AIDS Council, District and local AIDS Councils are expected to be the forums for informed reflection and debate and to drive effective delivery of the Strategic Plan. A key role of the Province is in the coordination of donor contributions to treatment, care and support.

In the design of the 2008 – 2012 HIV and AIDS programme which covers Irish Aid engagement in Limpopo and at a national level (see sub-section below), there was clearly an effort to take on board the recommendations of the 2004 – 2007 programme evaluation. In particular, that IA should consider more strategic interventions including research, while at the same time ensuring that it did not lose the value that has already been created through relationships of trust with existing partners. The continuing focus on civil society and under-resourced areas, coupled with the development of linkages to the South Africa National AIDS Council (SANAC) and the National Strategic Plan, were expected to provide an opportunity for IA to input into broader policy development. Indirectly, through the successful work with SANAC this has been achieved.

In respect to Limpopo, Irish Aid focused its engagement on AIDS Coordination structures, the strengthening of advocacy and networking abilities of CBOs, and the technical capacity for those CBOs engaged in home-based care<sup>48</sup>. This was to be reinforced through selected quality research projects and their dissemination, innovation and strong linkages between home-based care services and support for children.

To strengthen the provincial HIV and AIDS response in Limpopo, Irish Aid engaged with the Limpopo Department of Health and Social Development (LDoHSD), specifically with a view to strengthening the capacity of the Provincial Aids Council (PAC), the District Aids Councils (DACs) and Local AIDS Councils (LACs).

In strengthening the capacity of NGOs and CBOs that provide voluntary and confidential voluntary counselling and testing (VCCT), Home-Based Care and Support and other HIV and AIDS services, as well as their relationship and networking with the “official” health system, the key intervention has been the AIDS Collaborative Partnership. This involves the National AIDS Foundation of South Africa, the National AIDS Consortium and CHoiCe (a Limpopo-based NGO which has been a long-standing beneficiary of Irish Aid support). The collaborative partnership has proved to be an

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<sup>47</sup> The proposed Mid-Term Review of IA support to the Limpopo Provincial Education Department which was scheduled for the latter half of 2010 and to be conducted by the LDoE has not been completed.

<sup>48</sup> IA also provided direct support to NGO service delivery on home based care in Gauteng and KZN

innovative approach to strengthening the skills of home-based caregivers in communities in Limpopo; providing resources and technical skills to implement appropriate and effective HIV and AIDS home-based care and social protection interventions in their communities. The Collaborative Partnership was subject to a Mid-Term Review at the end of 2010. This led to the geographical expansion of their work from the 17 current CBO beneficiaries in Mopani District, to six further CBOs from Capricorn District. There was also a commitment – successfully delivered - to integrate issues of gender into the everyday practice and work of CBO partners.

In supporting the functioning of the District and Local AIDS Councils the Irish Aid support has targeted the responsible unit within the LDoHSD and has made some progress. One of the limiting factors has been the positioning of the responsibility for AIDS Councils within the Provincial administrative structure. The position it has been pegged at within the Provincial Administration has led to practical limitations in terms of authority to hold other government departments accountable in terms of their sectoral responsibilities and for the unit to have ready access to resources (cell phones, vehicles etc.) all of which would have helped to accelerate the pace of the work. There is a strong case for the responsibility of this agenda to be lodged within the Office of the Premier thereby giving weight to the push for multi-sectoral working.

In summary, the Irish Aid programme of support through the establishment of the AIDS Collaborative Partnership has been successful in strengthening the position of CSOs (technical and influencing capabilities) and bringing a confidence, momentum and innovative practice to CSO engagement within the HIV and AIDS response in Limpopo. There has also been some progress in strengthening the Provincial level structures of AIDS Councils this however has been constrained by capacity constraints within the LDoHSD which in turn are symptomatic of wider issues faced in the running of the Provincial Administration.

*Improved government and civil society coordinated responses that link GBV (with tackling HIV and AIDS and gender equality) in Limpopo*

The Irish Aid programme on GBV consists of provincial-level support in Limpopo as well as support to nationally-based CSOs (see sub-section below). This provides a range of diverse activities which are nonetheless connected through their focus on the wider aim of the prevention of GBV and the reduction of its impact. This was a new programming area for IA under the CSP 2008-2012 and at the outset there was a deliberate, cautious and incremental approach to the development of the programme. It acknowledged that as the programme evolved, there would probably be opportunities to engage with additional partners working to reduce GBV and this process would be guided by the MTR.

Provincial-level support of Irish Aid in Limpopo on GBV has been on two fronts; (i) strengthening of institutional mechanisms in the LDoHSD to plan and implement programmes leading to improved coordination within government in the Province on the GBV issue and between government and civil society, (ii) building the capacity of rural based and peri-urban CBOs to improve access to justice and provide support services to GBV victims. This reflects an awareness that focusing on legislation needs to be broadened to include a diversity of prevention strategies that result in cultural change and practice.

The focal point within the LDoHSD has been the Gender Unit. The Mid-Term Review of the GBV programme (end 2010) noted that despite considerable delays and unforeseen challenges, programme implementation within LDoHSD was beginning to generate outputs. However, despite a number of efforts to intervene to address the constraints (including a diagnostic report of the

National Treasury's technical assistance unit and Irish Aid engagement with Provincial management to boost buy in and ownership), there has been very limited progress. In this regard, we found the positioning of the unit relatively low down in the administrative hierarchy to be a contributing factor. The slow progress, including delays in the baseline activity, has served to frustrate efforts of committed stakeholders at the local level. District Coordinators were recognised as doing a good job but were also constrained by the level at which they were working, unable to leverage resources.

There are strong linkages between the HIV and AIDS and GBV programmes, especially around the HIV and AIDS programme's support to the SANAC Women's sector. There was also the expectation that research funded under the HIV and AIDS programme and GBV programmes in Limpopo Province would be mutually beneficial and should promote the links between gender based violence and HIV. There has been a positive recognition of this linkage at district level but we found no evidence of this having become a conscious part of the programming within the gender unit.

The AIDS Collaborative Partnership has been a success. The gender mainstreaming engagement of Irish Aid with the Collaborative Partnership has served to strengthen each of the member organisations in quite a fundamental way. For example, CHOICE has started to look at how to introduce these issues into their network engaging home based care workers on GBV awareness in communities. This is a promising model (regarding the linkages between GBV and HIV and AIDS) which the partners recognise as a slow and cumulative process.

In summary, Irish Aid support has been successful in seeding the linkage between GBV with the tackling of HIV and AIDS and gender equality, within the consciousness of key CSO and government actors in Limpopo province. The structures and incentives to hold and take this agenda forward are currently stronger within the CSO setting than with the government. The delays on the government led district focused work focusing on improving access to justice and support services for GBV victims has frustrated local stakeholders. In general this appears to be as a result of both capacity and skills constraints at the official levels.

### *Improved institutional arrangements for the national response on HIV and AIDS*

Tackling HIV and AIDS continues to be a national priority area. Two critical areas for improvement in respect to Irish Aid focus on the interests of vulnerable groups of women and children are: innovation and improved practice by CSOs delivering sustainable HIV and AIDS services; and national Government and CSOs engaging with more informed and improved policy, planning and decision-making. The National AIDS Council - SANAC is an apex organisation whose key responsibilities include the monitoring and evaluation of the national AIDS response.

Irish Aid engagement at a national level has centred on strengthening the functioning of SANAC and its linkages with provincial and district level structures, the dissemination – to SANAC and to civil society - of good practice on home based care services and support for children, and working with the Donor Coordination Group.

Irish Aid fully supported the formalisation of the secretariat for the Women's Sector within SANAC. Core funding was provided and this enabled the secretariat to look for other development partner support for specific programmes. IA provided similar support to the Children's' sector of SANAC. Of particular value to the sector was the IA support - including salaries for programme staff and secretariat coordination activities - which enabled the holding and facilitation of working

groups, general organisation and coordination, and attendance at key SANAC plenary and other events.

Irish Aid support enabled these two sectors to build a voice in SANAC, develop internal systems, provide resources for coordination and mobilisation, and for the sharing and dissemination of information. The sector representatives were clear that direct funding to their secretariat structures had been the most efficient and effective mode of funding; expressing the view that funding through SANAC would not have worked and *'would have held up the coordination process'*. The IA approach was commended by the sector representatives for the way in which this *'inspired confidence, because they believed in us... they allowed us to test cases and approaches and gave us the freedom to innovate – they were not prescriptive or constricting'*.<sup>49</sup>

Both sectors indicated that the voices of the women's and children's sectors were now much louder in the wider SANAC arena. It was reported that through their active participation in the SANAC high-level plenary meetings and Resource Mobilisation Committee for the Global Fund coordination, the representatives had managed to push the agenda for an increase in resource allocations to address issues of vulnerability.

Following the MTR, a decision was made to discontinue funding to a number of small NGOs that had been receiving long-standing support from Irish Aid. This decision can be justified from the point of view of a necessary reduction in transaction costs through reducing the number of partners and sharpening the overall programme focus on Limpopo. The NGOs that were affected by the discontinuation of funding were not based in Limpopo.

Irish Aid provided support for UNAIDS to engage with the National Department of Health in developing a monitoring and evaluation framework for monitoring the National Strategic Plan on HIV and AIDS implementation. There has been some progress in areas that are considered key to the bedding down of a whole multi-sectoral Monitoring and Evaluation (M&E) framework around HIV and AIDS. For example, a baseline exercise on 'most at risk' populations has been completed and work is continuing on the establishment and implementation of M&E frameworks in five provinces informed by National AIDS Spending Assessment Reports. This is a complex but critical area. Whilst IA support has been successful in delivering a set of activities - the pace of implementation and through this the desired wider uptake has been constrained.

In summary Irish Aid has engaged with very strategic points in the system where responsibility lies for shaping and implementing the national agenda. The expectations of the CSP on the delivery of areas of change and IA contribution to this have not been fully met. If there had been earlier success in the M&E area, this could have served to 'raise the game' across a number of actors, providing a better understanding of the status of the epidemic, and in turn informing the development of the new strategic plan launched by GoSA in December 2011.

*More harmonised scaled up donor response (national scale) to GBV campaigning, research and innovative programmes*

Although GoSA launched its '365 day Action Plan' on GBV in 2008 the sector is still developing. In 2008 responsibility lay with the National Prosecuting Authority. The responsibility for this agenda

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<sup>49</sup> Interview with representatives from the Women's and the Children's sector secretariats.

now lies with the Ministry of Women, Youth, Children and People with Disabilities. A Strategic Plan has been prepared for the period 2010-2013. To date progress has been slow and in our view the implementation process for the strategic plan does not as yet reflect the cohesive government response to GBV that the GoSA is committed to. There are clear links made to GBV within the National Strategic Plan on HIV and AIDS.

Irish Aid engagement has focused on; a donor joint-funding mechanism to scale up the response to reduce GBV, improving the evidence base and decision-making regarding GBV through research and collaborative dissemination of findings including on the links between HIV and GBV, and lesson learning and networking opportunities for key players in government and civil society. IA support has been instrumental in facilitating national level NGOs to work effectively with smaller CBOs (e.g. Tshwaranang Legal Advocacy Centre (TLAC), People Opposing Women Abuse (POWA), Centre for the Study of Violence and Reconstruction (CSVR), Sonke Gender Justice Network) and work on the evidence base (Gender Links). Donor interest in GBV appears to be on the increase with the UK Department for International Development (DFID) being the latest donor to launch a multi-sector programme aimed at strengthening South Africa's response to GBV, focusing on prevention and improved access to services.

A critical development with regard to tackling GBV has been the successful establishment of the Joint Gender Fund (JGF) by Irish Aid, together with CIDA<sup>50</sup>, SIDA<sup>51</sup>, Ford Foundation, and HIVOS<sup>52</sup>. This is now a well established funding mechanism for organisations involved in linked programmes for GBV, HIV and socio-economic rights. IA played a critical role in the formative period contributing in terms of early conceptualisation of the fund, development of systems and procedures, capacity development (including strengthened financial management), monitoring and through facilitating negotiation and cooperation ... *'enabling the advisory committee to work with an open mind, outside the box'*<sup>53</sup>. The JGF is now regarded as a working example of how donors can cooperate in one mechanism (*'it is the only project we co-fund that really adheres to "Paris"'*<sup>54</sup>). Key to this success has been consistent and frequent communication between partners, negotiation around beneficiary reporting frameworks, as well as establishing internal JGF reporting frameworks which address the Fund's needs and also align reporting back into donor country systems.

The fund comprises of both country donors and foundations, enabling engagement with and between government and CSO sectors. For Irish Aid, the fund has enabled the provision of resources to a wider range of organisations than could have been reached as a single donor. Looking ahead, the interest of larger donors in joining – for example, the UK Department for International Development (DFID) and the U.S President's Emergency Plan for AIDS Relief (PEPFAR), will need to be managed to minimise risk to the harmony established through hard work and active engagement of current Fund members.

We found numerous examples of JGF beneficiary organisations cooperating, and of how they became aware of each other and other key organisations in the sector (a number of which receive

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<sup>50</sup> Canadian International Development Authority

<sup>51</sup> Swedish International Development Cooperation Agency

<sup>52</sup> Humanist Institute for Development Cooperation

<sup>53</sup> Attested to by donors and beneficiary organisations and supported by Gender Programme MTR findings

<sup>54</sup> Joint Gender Fund donor partners interview

funds from Irish Aid) and the different services offered<sup>55</sup>. The organisations come together through the national network dealing with violence against women. This network has undertaken joint advocacy work such as establishing a national working group on the Sexual Offences Act to determine whether the government makes available adequate resources to support implementation of the Act at the level of the courts. Beneficiaries felt the fund has enabled innovative processes while respecting their desire to adopt a slow and steady growth.

There have been some small, emerging achievements that can be celebrated in particular within the work with NGOs/CBOs. Irish Aid support to GBV initiatives has been across a number of organisations – primarily based at national level – for a wide range of activities. These organisations were well chosen in that all have proved to be active partners who have delivered on their plans. While the results are not part of a coherently designed framework, they do contribute to the general raising of the profile of GBV issues and responses to this problem, and awareness on a range of levels

The linkage between GBV -one of the primary drivers of the pandemic - and HIV is particularly important in South Africa. The contribution and determination to link these elements within the Irish Aid programme is reflective of the CSPs focus on women as a vulnerable group. In the context of tackling HIV this has proved effective in the building of good practice in an area, before it was fully acknowledged as a policy necessity by relevant structures in South Africa.

The Irish Aid approach is a long-term investment which should yield slow but definite returns. Gender based violence outcomes are also difficult to measure, as there are always additional contextual factors for success. The Mid-Term Review of the GBV programme found that programme planning was too ambitious to expect delivery of the outcomes in the projected timeframe and in the context of uneven levels of capacity amongst partners. It called for more realistic indicators to be used to measure progress.

In summary, whilst it has proved challenging to get a new and complex GBV programme off the ground which brings bilateral donors and CSOs together in the sector, the Irish Aid support has been instrumental in achieving some critical early steps. The JGF is well positioned under the implicit leadership of IA to serve as the centrepiece of a harmonised donor response that continues to promote an approach supporting actions at different levels (national, provincial and local) and brokers' effective linkages and networking.

## Improving Pro-poor Service Delivery through CSP Governance Interventions

One of the main weaknesses under the delivery of the CSP in reference to its strategic objectives has been the absence of effective linkages between the technical interventions and governance related interventions across the outcomes targeted. Irish Aid engagement under Strategic Objective 1 included support for three different but complementary broad governance focused interventions; (i) The *Public Sector Reform Programme (PSRP)* which is aimed at enhancing the efficiency and effectiveness of the public service by improving structures and systems in a number of critical

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<sup>55</sup> For example, the Tusanang Advice centre is linked in with the Sinamandla Self Help Group, and draws down assistance from POWA, Tshwaranang Legal Services, and Sonke Gender Justice – ensuring a broad based and combined and cohesive response to GBV. With the introduction of Sonke, this approach also incorporates men at the place where GBV is most felt.

areas. (ii) The *South African Institute of Race Relations (SAIRR)*<sup>56</sup> a research, information and briefing service for a target audience focused on political decision-makers in the provincial legislatures, but also policy-makers, a targeted query service for legislators as well as advocacy groups and the media, and (iii) The *Institute for Democracy in Southern Africa (IDASA)* a well established SA-based NGO involved in the promotion of democracy and human rights in South Africa and in sub-Saharan Africa more widely.

The PRSP is a €28m long term programme (running 2005-2018) covering a number of areas including the ongoing development of public service policy and strategies, as well as M&E, the reform of human resource management in the public sector and improving service delivery in selected sectors including measuring the impact of activities. In November 2008, Irish Aid signed a Letter of Agreement with GTZ<sup>57</sup>, through which it became a “silent partner” in the PSRP. Irish Aid’s funding enabled the PSRP to extend its work to Limpopo that, until then had focused on Mpumalanga and Eastern Cape.

The PSRP support in Limpopo - earmarked for anti-corruption and public sector reform - has funded a number of PSRP ‘projects’ including a Citizen Satisfaction Survey (gauging citizens perceptions on government performance across the five districts of the province), Strategic Planning exercises with the Limpopo Office of the Premier and the Heads of Departments, organisational review of the Office of the Premier, organisational review of the Department of Public Works. In 2009 a scoping exercise to assess the needs of the provincial administration regarding the application of the Provincial Monitoring & Evaluation Framework was undertaken. This was a necessary follow on from the Presidency approved Government Wide M&E Framework. In 2010 as part of a developmental approach to the development of the framework, practitioners were trained and subsequently (in 2011) a number of M&E frameworks were developed and adopted by the Executive Committee. Due to time and resource constraints the departmental frameworks could not be implemented across all departments.

Under the CSP 2008-2012 SAIRR was contracted to continue the running of a Provincial Information Service project - extended to all nine provinces – until 2010/11. The objectives included the assistance of beneficiaries in monitoring service delivery, and to create informed discussion in the province around related policy and governance issues. The key vehicle for the dissemination of the SAIRR’s provincial data is through two publications, the South Africa Survey and Fast Facts<sup>58</sup>, and through presentations made by the Institute’s Provincial Outreach Officer and a specialist query service for Provincial Legislators.

An independent evaluation of Irish Aid’s support to the SAIRR was conducted in November 2011. It found that the primary impact of the project has been among the opposition members in the provincial legislatures<sup>59</sup>, using PIS information (which includes information and data on HIV and AIDS and gender) in ways that allows for comparisons over time and between provinces. In this way it is possible for provincial politicians to raise issues regarding governance, delivery and accountability through provincial legislatures and in the press; asking why a province had been less

<sup>56</sup> Established in 1929, the SAIRR was the first independent, multiracial national organisation to conduct research into race relations. It has been instrumental in creating public awareness of the impact of social and economic conditions on people from different racial groups and to promote interracial understanding in South Africa.

<sup>57</sup> During the Strategy Period GTZ became GIZ

<sup>58</sup> See <http://www.sairr.org.za/services/publications/south-africa-survey/>

<sup>59</sup> The ANC is the ruling party (in eight of the nine provinces)

effective than its peers in a particular service area. We understand that SAIRR was intended to build accountability through support to provincial legislators; for them to have good data to engage with service delivery issues. We found no evidence of any direct or indirect link being forged between SAIRR actions in Limpopo and the pursuit of the strategic objective of the CSP to improve pro-poor service delivery.

The Irish Aid support to IDASA<sup>60</sup> was specifically intended for the development of citizen leaders in Mopani district of Limpopo Province. It offered the potential of an enabling linkage with the district based work on GBV. However such a move was not evident in the original programme documentation, nor did it evolve through subsequent implementation. There were positive linkages with the HIV and AIDS Collaborative Partners work in Mopani where some of the graduates from the IDASA training were managers from the CBOs supported by the AIDS Collaborative Partnership.

## Distinctive Features of the CSP

Below we consider in more detail the effects of three of the distinctive features of the CSP – as identified in the evaluation ToR as being of wider interest to Irish Aid.

### *A Programme pillar on gender based violence*

Having a specific ‘stand alone’ pillar/programme on GBV has facilitated the allocation of dedicated human and financial resources to this policy priority of Irish Aid in South Africa (original allocation of €10.6m or 16.4% of CSP funding). It is a focused rather than a broad gender programme as each of the four programme objectives relate to GBV. It is a multi-faceted programme with many strands and partners (especially for Objective 1 on strengthened capacity of government and civil society on GBV) operating at national, provincial and local levels. As a result of this complexity, the programme has proven difficult to implement and oversee. The time investment needed to initiate implementation with partners, especially government, was not adequately anticipated<sup>61</sup>. Hard work and the flexibility of Irish Aid mitigated these challenges to some extent, but with a significant price to pay in terms of workload and ‘fire fighting’.

Working with a wide range of partners, including national NGOs (e.g. POWA, CSVR, Gender Links) and local NGOs (e.g. TLAC) the GBV engagement encompasses primary prevention (attitude and behaviour change to prevent violence before it happens) and response to violence (when it occurs). The partner organisations were well chosen in that all have proved to be active partners who have delivered within their frame of reference. While these results are not part of a coherently designed framework, they do contribute to the general raising of the profile of GBV issues and responses, and to awareness on a range of levels<sup>62</sup>. Effective strategies include twinning to enable skills transfer from NGOs to CBOs, peer learning exchange and facilitation of linking and networking between the national and local organisations.

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<sup>60</sup> IDASA is a well-established South Africa-based NGO involved in the promotion of democracy and human rights in South Africa and in Sub-Saharan Africa more widely.

<sup>61</sup> Gender Programme Medium Term Review (December 2010)

<sup>62</sup> Based on Evaluation interviews with partners, MTR of the Gender Programme (Dec 2010) and Irish Aid Lesson Learning (2012)



The Joint Gender Fund, co-established by Irish Aid is an innovative modality to strengthen attention to GBV and has helped to highlight the interconnections between GBV, HIV and AIDS and poverty. It has also provided a forum for donor engagement on these issues, with several partners indicating satisfaction with the practical nature of coordination and harmonisation and comparing it favourably to harmonisation efforts in other areas. The transaction costs of reaching common understandings and establishing such a mechanism were underestimated<sup>63</sup>. This is not unique to this joint mechanism<sup>64</sup>. The benefits in terms of increased funding, savings on administration and overhead costs are just beginning to materialise.

Gender mainstreaming across the Irish Aid South Africa programme is happening but is not being implemented systematically or coherently. This suggests a lack of clear strategy to guide staff (and onwards to partners) despite a gender equality policy and HQ provided guidance on 'how to mainstream gender'. There are acknowledged human resource constraints within Irish Aid SA (in terms of quantity rather than quality). This has sometimes resulted in misunderstandings and mixed messages to partners on mainstreaming of policy priority issues<sup>65</sup>. Mainstreaming of gender across the CSP has been most effective in terms of highlighting the overlaps between GBV, HIV and AIDS and poverty and less so in sectoral areas such as education and WatSan. Irish Aid was amongst the first to prompt and support partners to see these connections with HIV and AIDS and to address them in their interventions. Some useful lessons on gender mainstreaming by partners were identified through the two year support to CHoiCe for internal (institutional) and programmatic gender mainstreaming, which can inform future strategy<sup>66</sup>. More broadly, there are issues about partner conceptualisation of gender mainstreaming and how to 'do it' beyond mere counting.

The experience of the AIDS Collaborative Partnership demonstrated that to deepen gender awareness and to mainstream gender issues within organisations takes some resources - but more importantly, leadership willingness to drive and stay with the process and encouragement and support from external experts to provide input and learning opportunities. This further enables the organisation to understand the pace at which their partner organisations and/or extended service providers (Home Based Care practitioners) might be able to adopt new approaches. However, in an equally willing environment of the Water sector NGOs, the approach to gender mainstreaming remained at the level of numerical gender equality.

In terms of gender mainstreaming within government structures, our assessment is that the Gender Unit in the Provincial government structures stood little chance of broader and upward influencing. This was evidenced by the way it was located between two directorates, and the extent to which it struggled to get sufficient priority and decision making attention given to its programmes and the plans for making the two local coordinator posts permanent. This affected both the work at the district level where there was a recognition that the task was far bigger than they the local coordinators could impact on, and that their interventions therefore were sporadic and unsupported. The Reference Group NGOs would also have been more open to collaboration if the scoping research had been completed and further projects rolled out from which they could have benefited.

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<sup>63</sup> Irish Aid 2012 Lesson Learning Report page 29

<sup>64</sup> See, for example, OECD (2011) How DAC Members work with CSOs in Development Co-operation

<sup>65</sup> Irish Aid (2012) Innovative Partnerships for pro-poor Development: Lessons learned from Programme Implementation of the Irish Aid Country Strategy in South Africa 2008-2012

<sup>66</sup> Irish Aid 2012 Lesson Learning Report pages 35-39

The CSP and programme indicators for GBV and for gender equality are numerous. Many indicators are compound with no obvious means of verification or a baseline from which to measure progress<sup>67</sup>. The Performance Measurement Strategy (December 2010 reviewed) reflects this, with much of the status report indicating activities and actions (at best outputs) rather than progress towards objectives and outcomes.

Addressing GBV is very much an emerging area of work and Irish Aid, which benefiting from a dedicated gender adviser has positioned itself well in terms of knowledge and reputation is considered a leader in this area in South Africa. Despite the limited progress made in working with government, progress made with civil society on raising the profile and focusing attention on GBV is important and significant. A recent cross national study using data from 70 countries over 30 years found that the size and strength of the women's movement was the single greatest predictor of a government's level of responsiveness to GBV across all regions and models tested<sup>68</sup>. Irish Aid has helped build the momentum for this through supporting the dialogue and linked actions of diverse organisations within this maturing sector. Ongoing championing and support – with now a heightened focus - is needed to sustain and build on early results.

The Irish Aid Lesson Learning Report (2012) identifies a need for 'a clearly articulated strategy for the mainstreaming of Irish Aid policy priority issues, clear communication with partners on why these policy priorities are important and support for partners on how to mainstream them'. While there are acknowledged problems in the conceptualisation of gender equality and understanding of why it is important, the greatest need during the CSP appears to be 'how to' mainstream gender. Irish Aid has responded positively to this evident weakness by designing in 2011 in collaboration with the University of Pretoria, a gender mainstreaming course which will help to better equip IA staff and partners.

There is need for more rigorous capacity assessment with respect to the understanding of gender equality and capacity to mainstream gender to support realistic programming and to challenge assumptions, for example, regarding levels of political will.

### *Collaborative funding mechanisms for civil society engagement*

The support to collaborative funding mechanisms to foster civil society partnerships and support improved partner results has been an important feature of the CSP and has built from the general platform of the funding of NGOs and CBOs being a response to the needs these organisations address in society – often working as extensions of government services, particularly in the health and water sectors. Government funding to these organisations has been commonly inadequate and often badly timed in terms of the flow of funds. Over the CSP period there has been a growing acknowledgement from government that delivery of extension services is highly dependent on the NGO sector. However, while individual departments make their own plans, there is not yet a government wide framework for engagement and maintenance of good relationships with the NGO sector. There has been some positive movement in the CSP on this in respect to the work of the LDoHSD with the line department establishing good processes to support home based care and HIV and AIDS-related activities, and in particular the provision of funds to pay volunteer stipends. Systems for accessing funds are in place, although the process is slow. In contrast, in the water

<sup>67</sup> This point was emphasised in the Medium Term Review (Dec 2010) of the Gender Programme

<sup>68</sup> Htun, M & L Weldon (April 2011) Sex Equality in Family Law: Historical Legacies, Feminist Activism and Religious Power in 70 countries Background paper for the World Development Report 2012.

sector in Limpopo things have deteriorated, with an increasing gap between community need and government's ability to cover the cost of practical delivery, and funding processes that appear to be working counter to the policy of increasing NGO involvement.

Within this operating environment in Limpopo, the CSP has been supporting moves by CSOs to work together through consortia. Most notably through the LINGO Consortium (in the water sector) and the AIDS Collaborative Partnership (HIV and AIDS and building awareness about the inter-connectedness of social issues to both GBV and HIV). The CSO coalitions formed have built organisational capabilities and opened the potential for these organisations to engage in bigger projects. In both the HIV and AIDS and water and sanitation sectors, the CSO partners were cautious and very realistic about the challenges involved in expanding or extending activities beyond their current remit.

The AIDS Collaborative Partnership is moving to engage gradually in more Limpopo districts, and the LINGO consortium is looking at work in KwaZulu Natal within South Africa and in other African countries. The LINGO consortium has been somewhat frustrated in its efforts to grow their influence on local Water User Committees. To date this has proved time consuming and with little return. An important element in the AIDS Collaborative Partnership has been the forging of an effective linkage between very locally based organisations with larger, nationally based and more powerful organisations.

In the HIV and AIDS sector the collaborative funding mechanism by Irish Aid has been successful in creating the platform by which the CSO community can become more effective and influential in shaping service provision at the district level. This is evidenced by contact with PEPFAR at the local level facilitating the AIDS Collaborative partners to become provincial rather than district service providers. In contrast, in the water and sanitation services sector in Limpopo the space for CSOs to become more effective and influential seems to be shrinking (or at best static). Our enquiry suggests that within the period of the CSP there has been an erosion of trust in Limpopo in this sector between the government and civil society. Gaps remain in terms of efforts to solidify structures such as the water users associations, information and data base management and integrity, as well as providing sustainability support for those NGOs installing primary water systems.

The experience in Limpopo has shown that the provision of donor support in building consortia arrangements between CSOs - involving support both financial and technical for training and capacity building - can help to mitigate impediments these organisations may be facing and enable upward influencing. Whether this translates into better service provision from a user perspective is unknown. Anecdotal evidence from the evaluation suggests that there are gains. For example, through the enhanced support to home based carers and therefore the quality of service they are offering.

#### *A results-based management approach to CSPs*

The CSP embraced the corporate approach – 'A results-based management approach to Country Strategy Papers' - in terms of the format, and to some extent providing the content. The Embassy team has put in considerable effort at some specific points in the CSP period to engage with the new agenda including the retro-fit of the results frameworks to the CSP in late 2008 and the subsequent revision of the results frameworks in 2010. In turn this has generated some valuable learning of the team on the application of the RBM approach within iterative processes of planning and target setting. However, notwithstanding the positives of the above, we found no evidence of the RBM approach serving as a driver for decision making – one could have expected a more

drastic revision of targeted results for the CSP (in terms of outcomes and outputs) at the time of the MTR. The Annual Progress Reports have continued to highlight the internal and external challenges that affected/ are affecting programme implementation, but this appears to be “disconnected” from interpretation in terms of implications for programme results (in terms of progress towards outcomes) and how targeted results could be revised or refined in order to accommodate and reflect these changes.

The efforts of the team on RBM have proved valuable in bringing a clearer view within the working of the Embassy team on the results chain<sup>69</sup> within each of the interventions. This has ‘rolled out’ to the NGO partners with some partners reporting an increased awareness of the value of measuring outcomes rather than activities. We found no evidence of a shift in the nature of the ‘results’ dialogue with government partners.

Whilst we found a clear commitment within Irish Aid South Africa to ‘managing for results’, the execution has been inconsistent. It has proved challenging for the evaluation team to get a real sense of changes in the direction and content of the overall CSP based on the Results Framework (November 2010) and how it relates to the pre-MTR Performance Measurement Strategy (PMS update 2009) and post-MTR PMS (2010). Monitoring and reporting appeared to be going reasonably well until the 2009 PMS update; then (in November 2010) it appears that the Results Framework was revised and, while the overall results (objectives, immediate outcomes and intermediate outcomes) remained largely intact, there were significant changes in indicators. These changes are not reflected in the PMS update of December 2010. Given the above it has proved difficult for the evaluation team to get a sense of progress towards the achievement of (revised) results based on analyses of the Results Framework and PMS updates.

Results-orientated monitoring and reporting clearly still appears to be a major challenge. Reporting against many indicators is patchy at best, often simply “dropping off” without any explanation. Also, it is often difficult to reconcile what is reported against the essence of the indicator. Review of the CSP Annual Progress Reports suggests that the reporting to Dublin still appears to be activity/output-oriented. In compiling the Results Annex the evaluation team found substantial gaps for most programme components in terms of what was originally envisaged on results reporting.

## Relevance of Approaches

### *Addressing the needs of beneficiaries*

The CSP has operated in a way by which the direct beneficiaries of the programme are partners in Government and NGOs/CSOs; these parties engaging in ways to help strengthen their respective parts in improving delivery systems through which the users of services targeted for improvement will ultimately benefit. We found that whilst Irish Aid engagement with the Limpopo Provincial Government did meet specific identified needs – this was one of the CSPs strengths – the wider conditions across the Provincial Government operation has meant that the approaches adopted became effectively ‘locked’ into the limitations of the wider system. This has provided limited room for manoeuvre in ways that might have been more geared towards systemic change. In our view the

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<sup>69</sup> Results chain relating to the progressions from inputs/ activities to outputs to outcomes to impact

effectiveness of the Irish Aid engagement with the strengthening of accountability structures has been limited. The focus on accountability shifted post MTR to include increased engagement on the governance of partners (e.g. review of Education Trust and high level political engagement on institutional shortcomings, involvement of National Treasury on diagnostics of gender programme within the LDoHSD).

The approach taken with NGOs/CSOs of providing consistent and open support has been more successful, facilitating organic growth of organisations and prompting innovation. We see this as being increasingly relevant to NGOs/CSOs (and to reaching indirect beneficiaries) given apparent limitations with donors engaging with the entry point of improving government delivery through government led change in their operating systems, processes and partnerships for policy/ strategy delivery, and the resultant trickle down of improvements to beneficiaries.

### *Strategies used*

In delivering the CSP Irish Aid has been engaged in a number of different partnerships across Government. With national Government this engagement has been limited both in terms of direct engagement (in line with expectations) and in terms of engagement through the EU structures. With Limpopo Province the partnership for IA with the Office of the Premier (DG Office) has been indirect – through GIZ silent partnership – and passive in terms of IA wider engagement with the province at this strategic level. Where it has been strong – genuine, active and mutually challenging – for IA, and has had some positive effects, has been with the ODA coordination unit within the Office of the Premier.

With the Provincial Line Departments – education & health – the partnership has been active in terms of the regular interaction with the respective operational units but limited formal engagement with the Head of Department level and at that level concerned with unblocking programme implementation. In sum, there has been considerable effort put into the engagement at the Provincial level. This has been at times largely dominated by operational minutiae (interactions on Programme administration), with very limited organisational engagement at the strategic level (direction setting) or tactical level (engagement with senior management on oversight of strategy/ programme delivery)<sup>70</sup>.

With NGO/ CSO partners we find the engagement to be active, pragmatic, equal and set within a long term vision. This has been a relatively small effort in terms of the time of the Embassy team but with some strong examples of being effective and an approach that is seen as having facilitated innovation and risk taking amongst the partners. In this we recognise that at specific points in the process (e.g. setting up of consortia) the Embassy inputs have been pretty intensive and as such valued by CSO partners.

Irish Aid has deployed a mix and range of aid modalities (see Results Annex for detail). Our assessment of the appropriateness is based on three criteria; (i) extent to which the modality is aligned with national and/ or provincial priorities and strategies, (ii) is coherent in terms of the level of resources available and the institutional setting, and (iii) is effective in terms of

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<sup>70</sup> A constraining factor in terms of continuity and building effective relationships between IA and key counterparts within the Provincial administration has been the frequency of staff changes within Provincial structures at the senior management level. There have been five Heads of Department in the Limpopo Department of Health and Social Development and four Members of the Executive Committee within the space of four years, each post holder bringing their own particular set of priorities and approach.

functionality – channelling funds on time, realising the connection points between different modalities.

We found that across the wide range deployed there was a strong alignment to GoSA policies, priorities and programming. The modalities reflected generally coherent sets of Irish Aid funded interventions which were well positioned within the institutional landscape taking into account the maturity of a sector. In respect to effectiveness on channelling funds and forging connections, the work with the NGOs/ CSOs was relatively good with some disruption as a result of the budget cuts. In contrast the forging of connections with government was generally poor. In sum, we conclude that based on the evidence outlined above the potential of the thoughtful mix and range of modalities promised has not been fully realised.

### *Irish Aid policies and priorities*

The CSP was consistent with Irish Aid policies and priorities in 2008. Of particular note is the focusing of Irish Aid resources on better basic services for poor people addressing both supply and demand (accountability). The CSP was also in tune with the corporate focus on spending a growing aid budget and in doing so reflecting policy priorities of gender equality and combating HIV and AIDS. In respect to the aid effectiveness agenda, the CSP reflected wider moves to look to channel funding through government systems and investing time and effort in linking with the EU Joint Strategy. A notable absence was any policy position or steer on working in middle-income countries.

The MTR in 2010 represented no significant shift in Irish Aid policy direction but was an effective ‘about turn’ on funding, with immediate and sustained budget cuts required. The main consideration in decision-making about the direction and focus of the Country Strategy for the remainder of the implementation period was South Africa’s challenges in meeting with MDGs. However, the linkages between initiatives that were either discontinued or continued (or scaled up or down) and the MDGs and South Africa’s role in the region do not appear to be clear, and neither are their implications for regional development. In practice it seems that the nature of the MTR cuts was more heavily influenced by a ‘line item view’ rather than a more strategic assessment. This despite the well structured efforts to prepare for and take a strategic view, including the framing of different scenarios within the MTR process.

## Managing Programme Delivery

This evaluation considered the broad approach of the South Africa Country Programme Team, and looked at the way it worked, how it was perceived by partner organisations, how core capabilities were used and how communication occurred. It also considered the extent of teamwork employed in spending and non-spending capacities (in this also recognising the team’s role in the Zimbabwe programme<sup>71</sup>) and in managing the relationship with Irish Aid Headquarters (HQ) to deliver on the strategy and achieve programme results. It did not look explicitly at the effectiveness of the HQ role in delivery of the CSP. Our observations have raised a question on whether the HQ has acted at strategic points in the life of the CSP as a sufficiently strong thought leader or challenge function for the South Africa team, particularly in terms of bringing a broader regional or international

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<sup>71</sup> Responsible for programme management from 2010

context view. A number of the advisory inputs from HQ based staff have been highly valued by the South Africa team.

### *The programme team*

The advisory team has worked well together. We found a sense of cohesion and engagement across the sectoral responsibilities during the evaluation interviews and joint briefing sessions. There was evidence of advisors supporting each other at a programme level and also evidence of joint problem solving. As a result, Limpopo HIV NGOs for example, have had the benefit of the HIV and AIDS and the Gender advisor's inputs, advice and thinking over the CSP period.

Where the Irish Aid engagement with the South Africa partner struggled, our sense is that IA persevered and demonstrated a strong commitment to implementation of the different interventions. This can be seen particularly in Limpopo, where spearheaded by the Limpopo Co-ordinator the IA team engaged at both very practical and administrative levels to support programme delivery.

Staff changes over the period mean expertise in the water sector has been lost. Governance capacity – a critical element in the CSP delivery - also appears to have been lost due to the shift in job profile from Gender/governance to Gender. Given the challenges within government, the input and advice on governance issues as well as constructive criticism on ineffective strategy could be a key 'value-add' from a small development partner such as Irish Aid.

## 5. Conclusions

This section – building on the findings of the evaluation – draws conclusions on three main areas; (i) the overall performance of the CSP taking into consideration the results achieved, approaches taken, the operating context and the efficiency of programme delivery, (ii) the position of the CSP within the development landscape of South Africa, and (iii) what the combination of performance and position means in terms of framing how Ireland may move forward into the next phase of development cooperation in South Africa.

### Overall Assessment of CSP Performance

#### *Assessment of contribution of the CSP to wider changes*

The Table (overleaf) provides a summary against each of the Strategic Objectives (CSP Pillars) of our judgement on the expected contribution to wider changes to be made by Irish Aid CSP programming by the end of the current strategy in 2012. It maps the areas of engagement and overall spend to each of the three Strategic Objectives, provides an assessment of how the results achieved have matched the expectations of the CSP design also highlighting any specific gains of note and signals key examples of innovation and/or influence generated by the CSP.

There have been some notable areas of programme implementation success and resultant good practice. Three significant examples are:

- Stimulating the emergence of a national platform to support GBV initiatives – through the JGF – has provided opportunities for grassroots organisations to share good practice and create linkages, gain access to useful services, and build community awareness about GBV. Irish Aid is becoming recognised as a key player in this field.
- Building strong and motivated local consortia of CSOs – in the water and the HIV and AIDS sectors – through careful selection, measured investment and critical inputs of adviser time. This localised good practice has the potential to be expanded to scale, as the CSOs have built both systems and individuals who can implement effectively and have confidence through their collaborative working.
- The enabling of specific sectoral voices (women and the children’s sectors) within SANAC structures and strategy processes.

Building on the previous CSP, Irish Aid’s approach was to have a mix of different forms of funding. At provincial level this was via government systems as well as direct to CSO beneficiaries. Funding via government was for a range of purposes, including the understanding that government would procure local providers through their systems in contrast to IA directly funding service provision by external agents (‘on behalf of Government’) as evident in the previous CSP.

Channelling Irish Aid funding through government systems in Limpopo Province has proved to have limited value in terms of delivering on the strategic objectives of the CSP. The amounts of IA funding have not been sufficient to influence a kick-starting of improvement to government



processes. The net effect has been to tie IA funds up in what has proved to be slow and inefficient government systems, practically frustrating delivery as well as payment of providers. This has served to disadvantage small scale service providers, and in some cases - because providers know the funding comes from IA, the donor becomes perceived as equally inefficient or unwilling to listen to provider concerns. This has not served to strengthen the interface between citizens and Government.

Where an approach of mixed funding – part through government/ part direct to other providers - did have a strong potential to bring substantial benefits in respect to the CSP objectives was in the WatSan sector. Irish Aid provided funds for Limpopo within the national Masibambane programme including a focus on supporting the coordination of stakeholders in the sector, and providing funds direct to sector CSOs who were providing direct services and building valuable lessons about approaches and sustainability in different communities. Also in the mix was the support to the Water Research Commission and its links with the public, private sectors and civil society on research and improved practice. Unfortunately this ‘package’ could not be exploited in the way that was possible (even if not explicit in the design) in Limpopo as IA funding cuts to Masibambane III resulted in the critical coordination function effectively disappearing from the equation. It is likely that this had further knock-on effects as the micro good practices being built by CSOs within the LINGO Consortium and others could not be shared and the potential to develop to scale was not explored in the province.

Table 2: Achievements against CSP Strategic Objectives (by EOP – 2012)

Strategic Objective	Related areas of engagement	Resourcing (2008-12)		Influence/ innovation/ leverage	Assessment contribution (programmatic)
		Planned <sup>72</sup>	Actual <sup>73</sup>		
1. Improving <b>pro-poor service delivery</b> in Limpopo Province	Improved quality of and access to Water and Sanitation services, Education services and comprehensive HIV and AIDS (linked to GBV) service delivery in Limpopo.	€41.75m	€14.76m	<p><b>Innovation:</b> LINGO, HIV AIDS collaborative partnership</p> <p><b>Influence:</b> (poised) critical interface between Circuit Managers and SGBs.</p>	<p>Will fall short of expectations.</p> <p>Valued gains; positioning, learning and potential of the NGO partnerships.</p>
2. Reducing <b>HIV and AIDS</b> and mitigation of its impact	Improved institutional arrangements for the national response in HIV and AIDS.	€9m	€5.76m	<p><b>Influence:</b> (valued) SANAC women and child sectors strengthening.</p>	<p>Will meet expectations in some areas.</p> <p>Valued gains; intervention in an important and under-resourced area (SANAC).</p>
3. Prevention of <b>gender-based violence</b> and reduction of its impact	More harmonised scaled up donor response (national scale) to GBV campaigning, research and innovative programmes.	€10.6m	€4.64m	<p><b>Innovation:</b> Joint Gender Fund – a collaborative partnership</p> <p><b>Influence:</b> (potential) through the dialogue and linked actions of diverse organisations within a maturing sector.</p>	<p>Will meet (less well defined) expectations.</p> <p>Valued gains; positioning of IA knowledge and reputation within a sector that is still forming.</p>

<sup>72</sup> Planned figures excludes €3.05m budgeted for Responding to Emerging Needs and €1m budgeted for Limpopo Programme Management.

<sup>73</sup> Figures reflect actual expenditure for period 2008 – 2011 plus approximate expenditure for 2012. The figures exclude €1.62m spent on Emerging Needs and €1.26m spent on Limpopo Programme Management.

As the Summary Table indicates, there are some positive examples of innovation within the CSP. In many of these instances (e.g. Gender Mainstreaming within organisations, Joint Gender Fund projects supported), relatively small amounts of funding were provided over a period of time. Organisations were allowed to struggle with forms of implementation, learn lessons and gain insights in the process. These approaches did yield results such as extensive and deepened gender awareness and more gender equitable practices within HIV and AIDS NGOs.

The Limpopo earmarked support of Irish Aid to the PSRP through a silent partnership with GIZ has – in practice and from the perspective of the CSP - lacked provincial strategic coherence. Given the nature of the PSRP and the mandate to which it is operating<sup>74</sup> there is no ‘provincial strategy’ within which the PSRP is delivered. Within the ‘silent partnership’ of Irish Aid with GIZ there appears to have been limited discussion and no formal position established as to the strategic consideration of the IA investment in PSRP in terms of what IA through the CSP is trying to achieve<sup>75</sup> in Limpopo on pro-poor service delivery. The GIZ evaluation of the programme (wider than Limpopo) found that the *‘development path leading to strengthening of public service has been established (that is, PSRP is moving in the right direction)...that impact in view of the overarching development result is still modest... [and that] impact has been on public servants (focus on frameworks and policies), less so on citizens.’*<sup>76</sup> The PSRP focus in Limpopo is on building systems and initiating processes for the improvement of public service delivery to citizens. Our evaluation found little evidence to date of such actions feeding a structured dialogue (OtP – GIZ – IA) on capacity constraints within the Province<sup>77</sup>.

### *Operating context*

The swiftly changing and deteriorating administrative context of Limpopo Province was difficult to predict. Whilst the CSP was predicated on engaging with systemic change the programme has struggled to find the space and level of engagement required to deliver successfully on this. Much of the energy of the Irish Aid team has been taken up by considerations of how to implement the programme (the spend). This aspect was actually eased by the budget cuts which in turn created space for the successful initiatives with civil society.

In 2010, the MTR provided an important opportunity, which we feel was not fully exploited, for reflection on the nature of the challenges in Limpopo. In particular, a consideration of the precise nature of the problems that the programme was encountering and observing, and implications for how Irish Aid - sighted on outcomes - needed to engage with the Provincial Administration at a strategic, tactical and operational level. Our sense is that whilst the budget cuts imperative provided an opportunity to review the programme, the focus was placed on looking at component parts of the portfolio, rather than the CSP’s strategic objectives and the present and emerging contextual drivers. For example by 2010, there was a sense that good governance at Provincial Government level might be declining, and it was definitely clear from 2009 onwards (as evidenced

<sup>74</sup> The PSRP works to five Key Result Areas (KRAs) which derive directly from the 12 National Outcomes of the GoSA. PSRP supported implementation activities in Limpopo were rigorously based on request by the Office of the Premier.

<sup>75</sup> The PSRP programme aims at improving service delivery via enhanced efficiency and effectiveness of structures and systems. It approaches this through programmes to build capacity providing input training in areas such as corruption, monitoring and evaluation and administrative justice.

<sup>76</sup> PSRP evaluation presentation 28 February 2012. Discussions with PSRP evaluators.

<sup>77</sup> An illustration of where such an approach could potentially have added value to the CSP is IA support into the Provincial Department of Health to build the capacity of the District and Local Aids Councils. Our enquiry suggests that more progress would have been achieved in this setting, if sufficient internal capability in the LDoHSD had existed at both management (tactical) and execution (operational) levels.

in various Irish Aid internal reports, as well as reallocation of money) that ‘capacity issues’ in Health and Education were already a problem.

While Irish Aid always acknowledges the important role of Civil Society in governance and democracy in South Africa, it would appear that the budget cuts and the need to reduce transaction costs by reducing the number of partners led to the termination of support to reputable organisations that have a good partnership track record with Irish Aid in working on broad accountability issues. Specifically, IA ended its support for IDASA and SAIRR. At the time their work was not considered to be central to the specific issues the CSP (post MTR) was trying to address.

### *Sustainability*

Our assessment of the likelihood of CSP results enduring beyond 2012 has considered a number of factors; *finance* – the ability/ the willingness to continue to fund, *institutional conditions* - need recognised, and enabling context and *organisational capability* – strength of the system and the depth of capability. Across the majority of results areas we conclude that there is medium likelihood of results enduring with the key dependency varying between funding and strategy developments. In the other results’ areas the likelihood is limited by uncertainty about the political will within the Provincial Government structure.

The GBV sector is a unique case as it is still forming and an external supporter/ strong champion is needed at both the national and provincial level to allow early results to endure. A Table providing detail of a sustainability assessment for each area of Irish Aid engagement is included within the Results Annex.

### *Efficiency*

The CSP appears to have been efficiently delivered, with good use of both human and other resources. The relatively small, but evidently very capable team undertook delivery in a consistently energetic and engaged manner. Generally activities were focused towards achieving individual project objectives but with a limited view on whether the objectives were joining up and contributing towards desired programme outcomes.

The CSP’s transaction costs for Irish Aid have been relatively heavily weighted towards providing advisory and Technical Assistance (TA) support. What the TA-type support did achieve was to facilitate organisational transitions at CSO levels. There was some but more limited success in terms of building capacity at the individual and team level within government structures. These transaction costs are in retrospect adequate to the revised budget. It is very probable that the programme’s HR resources would not have been able to disburse the original €65.4m, particularly in the context of the very low capacity of Provincial Government partners to absorb funds. Moving more funds through these channels would have required much greater locally-based capacity.

### *Overall assessment of performance*

Overall, the evaluation assesses performance on delivery of the CSP as ‘fair’ in terms of achievements (contribution made), coherence and relevance given the starting position of the context in 2007/08. Elements of the CSP continued high quality work achieved in the previous CSP in areas of Water and Sanitation, HIV, and Education. The specific shift within this CSP compared to earlier support was to work with government in a different way. While the results across the portfolio were clearly not at the level targeted the combination of some successes in

terms of micro level results and broader learning are important gains. The CSP has provided a much clearer picture of what is needed and what may be possible through donor engagement in the future; how the key to unlocking service delivery for poor communities in provinces like Limpopo may rest with the building of management competence.

The CSP appears to have made one critical underestimation: given South Africa's relative sophistication at the policy level, it was assumed that its implementation capability at provincial level would be becoming more able to manage and absorb different levels of support. This potential definitely does exist: while budgets are always decried as too small, South African provincial budget allocations are substantial and often not expended and this suggests there is a lot of room to optimise the return on investment. Most government departments have a significant percentage of vacant posts in a context of high unemployment (often of educated and sometimes experienced people), and this suggests that there is room here too for improvement through smart recruitment and citizen-focused performance management. This potential has been relatively consistently undermined through systemic weaknesses including poorly capacitated and inexperienced management.

## Shaping of the Strategy and Positioning of the Programme

The CSP 2008-2012 was drafted in the midst of a push to focus aid through bilateral channels, and in the context of the development of the Joint EU strategy. What does not appear strongly at the time was any focus on the emerging considerations about what the difference in approach should be in middle-income countries.

There was provision within the CSP through a dedicated fund to enable the Embassy to remain flexible and responsive to an evolving context. In particular to emerging initiatives in governance and human rights, to support South Africa's role in the region, to support economic growth and skills development, and to promote lesson learning, exchange of best practice and programme visibility. However, while certain projects were funded from the 'emerging needs' budget line, these appeared to be sporadic and responsive<sup>78</sup>, rather than targeted at projects which would pinpoint new priorities for unlocking or unblocking barriers to development. Certainly, the documentation does not provide a sense of conscious scoping or targeting of this budget. The responsibility for emerging initiatives does not appear to have been specifically allocated in role descriptions, and the scoping potential of this fund may have therefore become effectively lost between the Embassy in Pretoria and HQ.

While the CSP was a coherent programme, we did not find evidence to suggest that monitoring and reflection on results was undertaken at the programmatic as well as the project level. The RBM approach was still bedding down at the time of the MTR. However, subsequent to this implementation of the this potentially useful instrument has remained a relatively static reporting tool, bringing some value to tracking implementation of components but not providing as a whole a mechanism for gaining strategic insight across and into the programme.

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<sup>78</sup> These included – early on in the programme – four small grants to civil society organisations in the area of good governance and human rights, as well as various allocations to skills development in education.

The conjunction of the Regional AIDS programme and the CSP funding on HIV and AIDS in South Africa had provided a vehicle for an effective cross country perspective on HIV and AIDS. With the closure of the Regional Programme this effectively focused the South Africa programme inwards, and may have served to have constrained regional issues from influencing programme thinking. In particular, given South Africa's 'gateway' status in Africa – both in terms of economic but also developmental leadership, it might have been politic to begin to explore how Irish Aid viewed its programme in relation to South Africa's regional and international influence.

The CSP has enabled positive results, and has – critically - facilitated building a space for innovation and deepening organisational competence in ways that is supportive of building the space for effective involvement of civil society. This has involved engagements between beneficiaries (e.g. Joint Gender Fund beneficiaries, Reference group for Gender-Based-Violence baseline study), introspection and internal development within CSOs (e.g. Limpopo HIV and AIDS consortium partners), improving linkages between government and citizens (Limpopo circuit manager training), and providing opportunities for CSO work in areas that are not being paid for from other sources (e.g. Reception grade teacher curriculum development).

## Moving Forward

When preparing the CSP, part of the rationale of the Country Strategy was the need to focus on South Africa's challenges in meeting the MDGs. However, often these challenges relate to shortcomings around governance, capacity, accountability and political will (not directly related to lack of money) rather than to issues of access (where more money could make a difference). In Limpopo, for example, provincial government structures were seen to be 'relatively new and fragile' in 2008. In the intervening five years, these structures have bedded down. They can no longer be said to be new, and the fragility experienced in Limpopo during the CSP period is more to do with problems of management, and misuse of systems and processes.

There is a need to look differently at a strategy and engagement in a middle-income country. MICs are typically much less aid dependent (lower ODA/GNI ratio), and as a consequence donor leverage through policy dialogue and conditionality's is limited and not expected. This position is stated clearly by GoSA Treasury – that donors need not be concerned with policy development, but rather with problems of implementation. Irish Aid consciously framed its CSP 2008-2012 to meet Aid Effectiveness requirements targeting significant portions of its CSP budget to be channelled through the Education and Health Departments in Limpopo province. However, part of the rationale for channelling money through government systems is to strengthen them, enable the institution of good practice and facilitate recipient countries building skills in planning and managing implementation. This situation does not pertain in a MIC, where the percentage of the national budget made up by ODA will be far less than in LICs. With ODA making up less than 1% of South Africa's budget, pushing these small amounts through government financial systems are unlikely to spur different approaches to managing money and optimising financial flows.

The experience of the CSP suggests that the 'value add' of Irish Aid may be stronger when it more actively pursues 'what works' and enhancing the influence of other stakeholders such as CSOs who, compared to their counterparts in LICs, tend to have higher capacities and sometimes (but not always) more voice to express their concerns. The work in the CSP through vertical, "single issue" programs has yielded results that could be built on, and which start to provide a solid counterpoint to government inefficiency – yet another way of holding to account. South Africa for instance is probably the country with the largest number of poverty stricken HIV and AIDS victims in the

world, and thus also a suitable location to fight the disease and help the poor. As befits the definition of public goods, this will both help the sufferers, but, by containing the spread of the disease, will also benefit healthy people in the country and elsewhere in the world

The problems in Limpopo province of the functioning of management and implementation systems, good governance and accountability mechanisms is placing increasing pressure on under resourced and under capacitated local government. NGOs and CSOs continue to be used to extend services to citizens, and often these organisations struggle to obtain relevant funding. Government procurement is also increasingly unreliable in terms of payments to these service providers eroding trust between government and civil society at a provincial level. In some respects South Africa has 'hidden' development needs – only once there was real engagement with Government Departments through the CSP could the real extent of confusion, poor implementation and fragmented and ineffective operations become evident. This suggests that if similar strategic objectives are to be pursued, a critical element will be the readiness to engage at the tactical level; enabling staff to translate good policy into good practice and operational delivery that improves service provision to the poor.

Irish Aid is in a position to be influential in the South African context, providing a value-add in specific spaces, through careful targeting with particular sectors. In their engagement with CSOs, in Limpopo IA has demonstrated what is possible, and at the same time was able to hit some key points in the 'system' – (the 'value chain') - critical for quality of pro-poor service delivery as an extension of government. These points include: affordability, speed of delivery, mainstreaming capability, development of good practices, and deepening competence at micro level.

In determining the shape of future cooperation, it will be necessary for Ireland to determine how it positions South Africa in its future engagement with this changing continent. Ireland's Africa Strategy will no doubt inform this process. The Strategy envisages a more advanced relationship, where mutual political, economic and development interests carry a more equal weight, but with the Irish Aid programme remaining untied but nonetheless linked to promotion of Ireland's economic interests. However, we found very few obvious points of intersection between 'focus areas' of the Africa Strategy (e.g. enterprise and entrepreneurship) and the experience, relationships, and poverty focus established within the CSP 2008-2012.

The overarching question for the evaluation was: to what extent did the Irish Aid country strategy contribute to the reduction of poverty and inequality in line with the Government of South Africa's policies and targets? Our overall assessment is that through a five year engagement (over €28m of programme support) the country strategy has made a small useful direct contribution to some specific areas of GoSA development agenda. In particular: in strengthening the institutional arrangements for response in HIV and AIDS - through good (local) practice on collaborative working and well targeted national support; in fostering a platform of civil society/ NGO actors, with local, national and regional links, actively engaged in building and sharing knowledge and experience from different entry points on the challenge of tackling gender based violence. The CSP may have also made a potentially valuable indirect contribution to the challenge that GoSA with the support of the international community faces in reducing poverty and inequality. The experience of Irish Aid in working in an embedded way within the delivery structures of the Provincial Administration in Limpopo has generated valuable learning in terms of the complexities of effectively using external support to strengthen service delivery of key services for poor and vulnerable people.

## 6. Lessons Learnt and Recommendations

### Lessons

The CSP experience provides a number of lessons considered to be of value in shaping the future engagement of Irish Aid in South Africa. Some of these have wider value in respect to Irish Aid engagement in middle-income settings or countries which are rapidly transitioning towards this.

1. To ensure optimised use of funds, it is important to have a clear view of real government capacity at different levels in respect to the pursuit of programme outcomes and how this capacity would be able to make best use of different funding modalities - both to absorb support and to sustain initial learning or system improvements.
2. Advisors playing a hands-on technical assistance role should be factored into future programmes designed to support the implementation of improvements within government systems at a Provincial level. The Limpopo provincial level programme would not have achieved the results it did without the ongoing presence of a coordinator.
3. Relatively small amounts of funding judiciously used by carefully selected CSOs and complemented by some adviser inputs can have a significant effect both in terms of immediate results and promoting longer-term sustainable organisations at the micro level, as well as for national level CSOs.
4. Positioning GBV at the pillar level can enable a wider mainstreaming of gender but progress can be hampered by a lack of detail on / and application of a clear emergent strategy to guide Irish Aid staff, and onwards to partners. Overcoming barriers, such as political will, and building a strong, inclusive and vibrant women's movement (a prerequisite for government responsibility on GBV) requires intensive and on-going championing and support from government, civil society and the donor community.
5. An Emerging Needs Fund is a valuable asset of a CSP within a dynamic MIC setting and should be used in a strategic and targeted way to unlock strategic priorities as they emerge. It is important to more purposefully link the use of the Fund to areas of Irish Aid comparative advantage or areas where leverage or shift could be potentially attained with minimal investment.
6. Where engaged in multi-donor funding mechanisms, monitoring and quality assurance mechanisms related to desired results for Irish Aid should be put in place and more closely followed. This is likely to require IA to be more specific and engaged about milestones, deliverables and demonstrable impact within 'silent partnerships' and/or contracted service arrangements with UN agencies.
7. There is a need to look differently at the engagement within a middle-income country. Whilst an MIC like South Africa may have bigger resources and systems, at implementation level compared to an LIC there may be an equally bigger need for continuing institutional and capacity development support. Moreover the challenges of getting this right may in turn be bigger than those faced in a low-income country – the process of monitoring and controlling



larger budgets is more complex, and requires higher levels of skill and management capability through a number of levels.

## Recommendations

We offer below some points for consideration in terms of determining what Irish Aid could do next; based on our analysis of the performance of the CSP, the context of South Africa and the positioning of Irish Aid within this. We also provide recommendations on where it needs to strengthen how it operates in order to deliver a strong set of results.

1. Future support as a development partner should focus on one (or a very limited number of) agenda(s) which are reflective of a strategic view about South Africa in the region, continent wide and at a global level. One such opportunity would be support to the intersection of HIV and AIDS and gender based violence.
2. This degree of proposed focus reflects the recognition that in South Africa it is largely the tactical and operational levels where the challenges in terms of implementation capabilities lie, and those that need most support; set within a generally positive policy environment and established institutional structures at the strategic level.
3. In ensuring that the shape of the future Ireland's 'partnership for development' demonstrates a link or continuity between the valuable lessons learned and strategic advances made in CSP 2008-12 - future support should exploit niche areas where Irish Aid has an opportunity to exert some leadership within harmonised funding structures. An expanded Joint Gender Fund would be one such area for building influence and creating a recognised and effective intervention methodology across donors in a specific field.
4. In shaping the engagement within a particular focus area, the efforts and successes of the CSP 2008-12 in terms of points of leverage within the SA system should be considered; supporting SA organisations in consortia to facilitate the linkages between national and local delivery, supporting accountability mechanisms which help to build local constituencies for change linked in to the formal legislative process.
5. In each of the discrete areas of engagement identified, engage with the direction set by the National Treasury on pushing the accountability agenda for effective use of GoSA development resources. Look at ways whereby Irish Aid M&E practice on a results agenda could complement and feed into the National Treasury approaches and the linkage between monitoring at national, provincial and local government level. For example using and sharing more outcome focused monitoring from across the IA funded programme and recognising the potential value of more 'qualitative 'evaluation processes' building from the input/ output led (budget year) monitoring of government.

Irish Aid should review and capture lessons for other developing countries approaching middle-income status in terms of the different - more dialogue and less aid-based - relationships and the demands of such environments.

6. In respect to how Irish Aid delivers we propose:

- In utility of MfDR there needs to be a more rigorous appraisal of options with decisions based on evidence of programme level results at regular points.
- In support of RBM, clear targets are needed, along with a useful and used Performance Management Framework/monitoring plan. Resources, including human resources, should be commensurate with the level of ambition and the demands of a challenging context.
- For Emerging Needs funds, focus attention on areas where leverage or shift could be attained with minimal investment, and ensure monitoring points in the MfDR framework.
- For joint funding ventures, particularly where Irish Aid is a silent partner, ensure a more rigorous and deliverables-based agreement.
- Continue to be open to a range of aid modalities including well placed Technical Assistance.

# Annex 1: Evaluation Terms of Reference

# **Terms of Reference**

## **For the**

### **Evaluation of the Irish Aid South Africa Country Programme**

#### **(2008-2012)**

#### **1. Introduction**

South Africa is a middle-income country with a diverse and well developed economy, good infrastructure and government institutions. Despite this, South Africa is one of the most unequal countries in the world and many of its people are poor.

Official Development Assistance (ODA) comprises approximately 1% of the Government's budget and is therefore of little significance in macro terms. The Government of South Africa foresees that it will become even less significant over the coming years but nevertheless, considers that ODA has important roles to play. Within certain sectors, departments or geographic areas, aid may represent a significant proportion of non-recurrent expenditure. In addition ODA is directed to funding activities which government departments would not normally support e.g. risk-taking pilot programmes and innovative approaches.

Irish Aid has been working in South Africa since 1994, providing bilateral aid to assist the process of transformation to a democratic, non-racial government. The current programme of bilateral aid is provided for in the Irish Aid South Africa Country Strategy Paper (CSP), 2008-2012. The overall goal of the CSP is ***“to contribute to the reduction of poverty and inequality in line with the Government of South Africa’s policies and targets”***. The CSP focuses on three specific objectives which help address poverty and inequality:

- 1) Improving pro-poor service delivery with a focus on **education and water and sanitation** in Limpopo Province;
- 2) Contributing to the reduction of **HIV and AIDS** and the mitigation of its impact, with a particular focus on women and children;
- 3) Contributing to the prevention of **gender based violence** and the reduction of its impact.

The programme has a particular focus on Limpopo Province which is made up of five districts – Capricorn, Vhembe, Mopani, Greater Sekhukhune and Waterberg. This Province was disadvantaged under the apartheid regime and is one of South Africa's poorest provinces.

The programme is implemented on the basis of various partnerships and using a mix of aid modalities. Irish Aid partners include; National, Provincial and Local Governments and the National Treasury (which is the coordinating body for all donors); Civil Society Organisations (CSOs), International Organisations and other donors.

For more information on Irish Aid's work in South Africa please visit: [www.embassyireland.co.za](http://www.embassyireland.co.za).

## 2. Purpose of the Evaluation

The purpose of the evaluation is to provide an assessment to all stakeholders that funds disbursed under the South Africa CSP 2008-2012 were used to good effect and in keeping with the overarching goal of the CSP, and also, to identify the lessons learned which will inform decision making with regard to the nature of future assistance by Irish Aid to South Africa.

## 3. Scope of the Evaluation

The evaluation will assess how successful the Irish Aid programme was in achieving its objectives taking cognisance of Irish Aid's (a) *working directly with Government*, (b) *working through national level frameworks* and (c) *working through civil society partners in programmes that sought to be innovative*<sup>79</sup>. It will set out the lessons learned from each of these approaches, having regard to the reality of the South African context.

In addition, the evaluation will examine and assess two features of the CSP which may be of wider importance or relevance to Irish Aid and development partners in South Africa as follows:

- a. The ***approach of having a stand-alone programme*** pillar on gender based violence; and
- b. The ***approach of supporting collaborative funding mechanisms*** to foster civil society partnerships and support improved partner results (specifically the AIDS Collaborative Partnership, the LINGO Consortium, and the Women and Children civil society sectors of the South African National AIDS Council).

In addition to gathering information from field work, there is a significant number of reviews, evaluations and case studies that have already been conducted which can be drawn on by the evaluators.

## 4. Evaluation Questions

The overarching question for the evaluation is ***to what extent did the Irish Aid country strategy contribute to the reduction of poverty and inequality in line with the Government of South Africa's policies and targets?*** A set of indicative core evaluation questions which will help address the overarching question will be structured around the standard DAC criteria of relevance, effectiveness, efficiency, sustainability and impact.

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<sup>79</sup> See framework list attached at Annex 1

**Relevance**

- How relevant was the Country Strategy Programme 2008 – 2012 and its approaches to the needs of the beneficiaries given the problems, priorities and changing policies of South Africa?
- How relevant was the CSP to Irish Aid's key policies and priorities
- How relevant and how effectively was the programme's results framework applied including its revision following the Mid-term Review?

**Effectiveness**

- To what extent did the Irish Aid Country Strategy Programme contribute to its stated objectives?
- How effective was the approach to partnership adopted in the CSP?
- How aligned, coherent and effective was the mix and range of aid modalities adopted?

**Efficiency**

- How efficiently did the Irish Aid team apply its human, financial and other resources in furthering development results and the strategic objectives contained in the country strategy?
- How efficiently were difficulties or problems which arose during implementation of the programme anticipated, identified or responded to?

**Sustainability**

- To what extent are the results and achievements to date of programmes undertaken with government departments and NGOs likely to endure in the longer term?
- What lessons can be learned from the approaches taken that can influence future programme designs and ensure greater sustainability?

In view of a subsequent dialogue between the Evaluation and Audit Unit and the appointed contractors a final set of core evaluation questions may be agreed.

**5. Impact**

Measuring the impact of programmes is difficult and must be initiated in the programme design. While the primary focus of the evaluation is not on the impact of the programme it is expected that where evidence of programme impact is available (positive or negative) that this will be documented.

**6. Methodology**

A significant amount of review, lesson learning and evaluation of elements of the country programme has already taken place. Prior to the country programme evaluation, it is proposed that 4 case studies will be prepared, drilling down into the experience of programmes to identify lessons learned and results achieved. These case studies will be on Irish Aid's support to the Children's and Women's sectors of the South African National Aids Council (SANAC), the Limpopo AIDS Collaborative Partnership, the Limpopo Department of Health and Social Development Gender Programme and to the Joint Gender Fund.

*Phase 1* of the evaluation will begin with a desk top study of existing documentation which should summarise and consolidate the findings of reviews, evaluations and case studies.

*Phase 2* will involve field work. In order to maximise the relevance of the evaluation to planning the next Country Strategy Paper, it is proposed that the CPE field work will focus on aid in the specific South African context. That is to say that the evaluation will focus on a sample of programmes outlined in section 3 above.

*Phase 3* will involve report writing.

## 7. Outputs

The expected outputs of the assignment are as follows:

1. At the end of the review of documentation and interviews with key HQ and Embassy informants (first phase), an **Inception Report** (10-15 pages) will be submitted setting out preliminary findings and summarising key issues to be addressed during the second phase of the evaluation. The inception report will include a work plan for the remainder of the assignment.
2. A **final report** (maximum 40 pages excluding appendices and including an executive summary) providing an overall assessment (supported by evidence at the outcomes level) of the extent to which the Irish Aid's South Africa country programme has achieved its stated goals and strategic objectives and contributed to poverty reduction. This report will present findings, analyses (including financial analyses), key lessons and recommendations.
3. At the completion of the consultancy a short 3 to 4 page informative report in plain English will also be required for dissemination to the Minister of State, Irish Aid Senior Management, the Audit Committee and the Oireachtas<sup>80</sup>

The final report should demonstrate familiarity with the revised OECD-DAC *Evaluation Quality Standards* and be written to a high standard, ready for publication.

## 8. Evaluation Team and Selection Criteria

Expertise required: A small team of one international and one South African consultant is envisaged. It will have relevant and demonstrable experience in the following areas:

- Programme evaluation, particularly in relation to bilateral development cooperation and an ability to analyse the strategic direction of the programme.

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<sup>80</sup> The Oireachtas is the Irish House of Parliament

- Human development including water and sanitation, education, gender equality and HIV/AIDS
- Capacity Development
- Engagement with the Paris Declaration on aid effectiveness and the AAA
- Some familiarity with PFM issues.

The selection of the contractor for this evaluation will be through the ‘mini-tender’ process established as part of the main Framework contract for future evaluation services for the Evaluation & Audit section of DFAT. Contractors accepted under the Framework Contract procedure have already provided information related to methodology and proposed teams. For this country specific evaluation, contractors are now asked to make a submission (not exceeding 10 pages) providing the following additional information;

- A brief statement of their understanding of the South Africa country-specific context
- A brief re-elaboration of the methodology they envisage taking cognisance of the context and their understanding of Irish Aid’s South Africa country specific programme and any other methodological information and requirements indicated in this ToR. The methodology should name the evaluation tools that will be used. If an evaluation framework or matrix is to be used, an overview of what that framework/matrix will look like should be provided.
- A time-specific plan to implement the evaluation, within the outline timeframe indicated.
- The proposed team for the evaluation with details of the responsibilities of each team member. A short ToR for the team leader should be provided (if not already provided in the main submission). If the details of the team members have been already provided in the original framework submission, there is no need to re-submit this information.
- Costs- with details of proposed consultancy days/costs across team members.

The service provider must be able to demonstrate how it can assure quality control of both the process and the outputs described above.

Consultants will be selected according to the following criteria:

- Understanding of the Terms of Reference (10%)
- Proposed methodology and planning of the assignment (20 %)
- South African country experience and understanding of the South African Development context (15 %)
- Experience of the team in the evaluation of bilateral development cooperation programmes (10 %)
- Overall balance and complementarity of team in respect of the desired expertise (10 %)
- Experience and suitability of the Team Leader (10%)
- Cost (25%)



## 9. Timeframe

In order to maximise learning and utility for planning of the next CSP cycle for Irish Aid in South Africa, this evaluation exercise will start as soon as the relevant procurement processes are completed. Immediate availability of the contractor will therefore be important in order to expedite a rapid start of the process. The Evaluation & Audit unit anticipate that the first phase of the evaluation Work on the documentation review and inception report could be undertaken in December 2011 - January 2012 with the field visit taking place in the week commencing the 20<sup>th</sup> of February 2012. It is estimated that the first draft report could reasonably be expected to issue by mid March with the final report completed by latest, mid April 2012. The service provider must be able to confirm that they can meet this timeframe. A maximum of 70 consultancy days will be available for this assignment.

## 10. Management Arrangements

The evaluation will be an independent, external exercise managed by an officer from the Evaluation and Audit Unit of the Department of Foreign Affairs and Trade (DFA&T) in collaboration with the International Development Co-operation Unit of the South African National Treasury and the Embassy of Ireland in South Africa. A Reference Group (made up of staff from Evaluation & Audit unit of DFA&T, and the Programme Countries desk, Policy Planning & Effectiveness section, Emergency and Recovery section of Irish Aid and a member of the South African National Treasury), will support the overall exercise. Other key stakeholder points of contact will be clearly identified.

The Irish Aid staff in the Embassy of Ireland in Pretoria, South Africa will assist with all arrangements and logistics for the field visit. Irish Aid HQ and Pretoria will provide all necessary briefing material related to Irish Aid programmes and policies. The consultant should make clear its own internal management arrangements to DFA&T and identify the points of contact for management, administration and logistics, and quality assurance.

The Evaluation and Audit Unit will also draw up and manage a **Communications Strategy** for the evaluation process and end products.

Evaluation & Audit Unit  
2 December, 2011

## Annex 1: Country Programme Evaluation - Irish Aid Country Strategy Partners in South Africa

Level	Partner	Funding Focus and Type	Target Area
Government	Department of Water Affairs	SWAp with funding targeted at provincial level	Limpopo Province
	Limpopo Provincial Department of Education	Grant Agreement on education	Limpopo Province
	Limpopo Province Department of Health	Grant agreements on HIV and Gender Based Violence	Limpopo Province
	GIZ/Office of the Premier in Limpopo	Grant agreement with GIZ to support strengthened governance in Limpopo	Limpopo Province
	Development Bank of Southern Africa /Provincial Treasury	Grant agreement with DBSA to support management of planning	Limpopo Province
	National Department of Education	Grant agreement to support skills development	National
	Department of Trade and Industry	Procurement of technical support for economic growth	National

Level	Partner	Funding Focus and Type	Target Area
National Level Frameworks	Women's Sector of the South African National AIDS Council (SANAC)	Grant Agreement with NGO Secretariat for Women's Sector	National
	Children's Sector of SANAC	Grant Agreement with NGO Secretariat of Women's Sector	National
	UNAIDS	Grant Agreement with UNAID for technical support to strengthening M&E of National Strategic Plan on AIDs at provincial level	Limpopo, Mpumalanga, Free State and Kwa-Zulu Natal Provinces
	Water Research Commission	Grant for innovative research	Pilots in Eastern Cape & KZN
Civil Society	Institute for Democracy in South Africa	Grants to support strengthened governance	Limpopo
	South Africa Institute of Race Relations	Grant to support capacity building of CBOs on community care in HIV sector	Limpopo
	AIDs Collaborative Partnership:	Grant to support capacity building of CBOs working	

Level	Partner	Funding Focus and Type	Target Area
	Choice Trust	with children affected by HIV	Limpopo
	AIDS Consortium		
	AIDS Foundation		
	Children in Distress Network	HIV Grants	Kwa-Zulu Natal
	Community AIDS Response	HIV Grants	
	Khanya Family Centre		Gauteng Province
	Friends for Life		
	Joint Gender Fund	Pooled fund on GBV (grant to HIVOS fund manager)	National & provincial
	People Opposing Women Abuse	Grant to build capacity to respond to survivors of violence	National & Gauteng Province
	Tshwaranang Legal Advocacy Centre	Grant for advocacy on GBV	National, Limpopo & Mpumulanga

Level	Partner	Funding Focus and Type	Target Area
	Centre for the Study of Violence and Reconciliation	Grant for research and action on GBV	National and Limpopo and Gauteng provinces
	Sonke Gender Justice	Grant for prevention focus on GBV	National and Limpopo Province
	Gender Links	Grant to examine causes of violence	National & Gauteng Province
	HEARD – University KZN	Grant for research on home based care as an entry point for responding to GBV	Limpopo Province

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## Annex 3: People Interviewed

Name	Role
<b>Irish Aid</b>	
Brendan Rogers	Director General, Irish Aid
Áine Hearn	Evaluation Manager, Evaluation & Audit Unit
William Carlos	Director of Evaluation and Audit Unit
Donal Murray	Evaluation & Audit Unit
Patrick McManus	Evaluation & Audit Unit
Anne Barry	Evaluation & Audit Unit
Liam MacGabhann	Director Programme Countries
Margaret Ryan	Country Desk Officer, Evaluation & Audit Unit
Finbar O'Brien	Director of Multilateral Section (former Head of Evaluation & Audit Unit)
<b>Irish Embassy Pretoria</b>	
H.E. Brendan McMahon	Ambassador of Ireland, Pretoria
Cáit Moran	Head of Development, Embassy of Ireland, Pretoria
Frank Kirwan	Development Specialist, Embassy of Ireland, Pretoria
Tamara Mathebula	HIV & AIDS Adviser, Embassy of Ireland, Pretoria
Ayanda Mvimbi	Gender Adviser, Embassy of Ireland, Pretoria
Rose Machobane	Education and Skills Adviser, Embassy of Ireland, Pretoria
Mandla Msimanga	Financial Manager, Embassy of Ireland, Pretoria
Ottília Nyamaka	Financial Adviser, Embassy of Ireland, Pretoria
Joy Summerton	Limpopo Programme Coordinator, Embassy of Ireland, Pretoria
<b>National Treasury</b>	
Robin Toli	Chief Director, International Development Co-operation

Name	Role
Luyanda Yaso	Senior Policy Analyst, International Development Co-operation
Andile Kuzwayo	Senior Policy Analyst, Social Cluster, International Development Co-operation
<b>Limpopo Department of Education</b>	
Reggie Mothata	Programme Manager
Thomas Mabitsi	Programme Manager
Charles Mosehli	Programme Manager
Stanley Shilote	Programme Manager
M. J. Mametja	District Senior Manager, CIP
Miranda Malele	Senior General Manager Corporate Services
Martin Mashaba	Chief Financial Officer
Ben Tladi	Inter Governmental Relations and Donor Funding
Selaelo Nkube	Inter Governmental Relations and Donor Funding – Limpopo Education Trust Secretariat
<b>Department of Health</b>	
Dr. Shilumani	General Manager, HIV and AIDS, STI and TB – HIV Programme, Limpopo Department of Health
<b>Department of Water Affairs</b>	
Group meeting	Polokwane Region Office
Debbie Prinsloo	Masibambane Region Office
<b>Office of the Premier, Limpopo</b>	
Dudu Setlatjile	Public Sector Reform Programme
Mashudu Mudau	Manager: ODA (Donor Coordination)
<b>Other</b>	
Jay Bhagwan	Water Research Commission

Other	
Richard Young	First Counsellor, Head of Development Cooperation, European Union
Christopher Larose	First Secretary, Head of Sector – Governance and Social Sectors, European Union
Jozet Müller	Project Manager, European Union
Judah Mphela	Formerly Senior Manager: ODA (Donor Coordination), Office of the Premier
Education: Group discussion, Programme Service Providers to Limpopo Department of Education	Ndivhuwo Chauke – Talent Emporium, Nosipho Kwenaithe – Thakasa Training and Consulting, Dr Teresa Ogina – Business Enterprises, University of Pretoria, Link Community Development
Gender: Group discussion, Programme Service Providers	Sibongile Ncongwane – Gender Manager, Limpopo Provincial Department of Health Gender Programme, Mr. Shipalana – Senior Manager, Gender Programme.
Gender: Group discussion, Joint Gender Fund beneficiary NGOs	Jessie Nhlapho – Thusanang Advice Centre, Xolile Gule – Sinamandla,
Gender: Group discussion, Gender Programme Partner NGOs	Nonhlanhla Mokwena - People Opposing Women Abuse (POWA), Angelico Pino - Sonke Gender Justice, Fiona Nicholson , Thoyandou Victim Empowerment Programme and Centre for the Study of Violence and Reconciliation, Lisa Vetten – Tshwaranang Legal Advocacy Centre, Kubi Rama – Gender Links
Gender: Group discussion, Gender Partner Donors	Ria Schoeman - Sida, Dumisani Ghandi – CIDA, Tamara Braam – HIVOS.
Robert Mukwevho	Vhembe District Co-ordinator, GBV
Lydia Rapetsoa	Mopani District Co-ordinator on GBV
Fancy Malapela	Vhembe District Reference Group on GBV
Norman Mudau	Vhembe District Reference Group on GBV
Vincent Maake	Vhembe District Reference Group on GBV
Marothi Letsoalo	Vhembe District Reference Group on GBV
Penelope Ngoasheng	Programme manager, GAAP Unit
Mary Kings	LINGO Implementing Agent Manager, Limpopo Water and Sanitation Collaboration  Partnership of Choice Trust, AIDS Foundation of South Africa, AIDS Consortium

Other	
Group Discussion with LINGO Consortium Members	Elim Care Group, Tsogang
Vicky Muvhali	Akanani Rural Development Association
Rets Dolamo	Tlhavhama Training Institute
Felicity Gibbs	Operation Hunger
Meeting with DTI (technical assistance programme for development of special economic zones - Kaya Ngcaka	DTI
Greer Schoeman	SANAC Women's Sector – teleconferences
Julia Zingu	SANAC Children's Sector – teleconferences
Dr. Hartmut Krebs	GIZ Programme Manager, Public Sector Reform Programme
Mokgapi Malepa	Governance Adviser, Public Sector Reform Programme
Maren Lieberum	GIZ, Development Partners Forum Co-chair
Henry Damisoni	UNAIDS
Sakumzi Ntanyiya	UNFPA
Geetanjali Narayan	UNICEF
Andy Simpson	Imani Consulting
Sandra Pellegrom	Head Economic Affairs, Embassy of the Kingdom of the Netherlands
Angela Bester	Director, Communication Works
Peter Kerby	Deputy Head, DFID – Southern Africa



## Annex 4: Management Response

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<p>7. Future support as a development partner should focus on one (or a very limited number of) agenda(s) which are reflective of a strategic view about South Africa in the region, continent wide and at a global level. One such opportunity would be support to the intersection of HIV and AIDS and gender-based violence.</p>	<p>Management agrees with this recommendation and acknowledges that the level of ambition and scope of the previous programme was too broad.</p> <p>Work is currently underway to develop a focused strategic programme suited to the South African context- with the particular development challenges associated with its gap in equality and the role the country plays on the continent.</p> <p>The proposed programme will limit itself in sectoral engagements and will have a much smaller number of partners. A more strategic focus will allow Ireland to contribute in a value added way with a modest budget for niche support to South Africa’s development. Based on the successes of the last CSP, the proposed programme will include interlinked</p>	<p>Development of a new three year Country Strategy Paper (CSP) for the period 2013 – 2015 by the Embassy in partnership with DFAT HQ, the South African National Treasury and relevant SA line departments and civil society partners.</p> <p>Pursue agreement internally within DFAT and with SA government on a small number of areas and partners which Ireland can most usefully support to achieve development results in niche areas within the available human and financial resources.</p> <p>Endorsement of draft Country Strategy Paper by the Ireland-South Africa Partnership Forum in November, 2012.</p> <p>Submission of draft CSP to Irish Aid Project</p>

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	<p>programmes on HIV and AIDS and Gender Based Violence. In response to the particular context of South Africa, an innovative engagement on promoting economic growth and skills development is proposed which will be based on sharing best practice from Ireland on particular areas which have been successful in driving Ireland’s economic development. This new programme area will be a practical delivery of Ireland’s Africa Strategy and will reflect a more strategic approach to evolving co-operation with South Africa. The South African National Treasury, as ODA Co-ordinator, has been consulted on this approach and has provided positive feedback on the proposed programme. Reflecting the value attributed by the Government of South Africa (GoSA) on the use of Overseas Development Assistance, the new programme will endeavour to pilot a small number of initiatives which if successful could then be taken up by GoSA. These niche pilots, if successful may have wider application in the country.</p>	<p>Approvals and Evaluation Group in February, 2013 and subsequent approval by Minister of State for Trade and Development.</p>
<p>8. This degree of proposed focus reflects the recognition that in South Africa it is largely the tactical and operational levels where the challenges in terms of implementation</p>	<p>It is acknowledged that South Africa has a strong policy environment and challenges are largely around capacity for implementation.</p>	<p>The Embassy will work in partnership with National Treasury and line Government departments to identify strategic entry points where Irish Aid can be most effective in addressing</p>

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<p>capabilities lie, and those that need most support; set within a generally positive policy environment and established institutional structures at the strategic level.</p>	<p>The new CSP will be cognisant of this in identifying entry points and will seek to fully assess capacity before engagement with potential partners having regard also to what has been successful in the past.</p> <p>The new CSP will include a component promoting economic growth and skills development. This is likely to include the sharing of Irish expertise at an operational level.</p>	<p>capacity challenges and institutional weaknesses.</p> <p>A capacity assessment of partners as well as careful planning of the institutional arrangements for programme implementation in advance of engagement will be undertaken to inform the level and type of support to ensure that it builds capacity sustainably.</p> <p>The new CSP will have a monitoring and evaluation plan and results framework in place with clear indicators and targets agreed with partners to ensure that implementation capabilities are closely monitored and that difficulties can be identified and addressed in a timely manner.</p>
<p>9. In ensuring that the shape of the future Ireland ‘partnership for development’ demonstrates a link or continuity between the valuable lessons learned and strategic advances made in CSP 2008-12 future support should exploit niche areas where</p>	<p>This is a valuable recommendation and will be taken on board in the development of the new CSP.</p>	<p>Embassy to continue to engage in donor co-ordination fora on HIV and Gender issues, including engagement with the South African National AIDS Council and emerging National Council on Gender Based Violence.</p>

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<p>Irish Aid has an opportunity to exert some leadership within harmonised funding structures. An expanded Joint Gender Fund would be one such area for building influence and creating a recognised and effective intervention methodology across donors in a specific field.</p>	<p>The Gender programme represents a key opportunity for Ireland to take a sectoral lead on an issue, both programmatically in harmonising assistance through the JGF and in engagement with non-financial mechanisms such as the development partners forum on gender and the newly established Council on Gender Based Violence.</p>	<p>Embassy proposes to include the Joint Gender Fund in the new CSP programme component on Gender Based Violence and is actively working to expand the number of donors involved in the JGF and to promote the strategic engagement of the fund with government and with non funding partners.</p>
<p>10. In shaping the engagement within a particular focus area the efforts and successes of the CSP 2008-12 in terms of points of leverage within the SA system should be considered; supporting SA organisations in consortia to facilitate the linkages between national and local delivery, supporting accountability mechanisms which help to build local constituencies for change linked in to the formal legislative process.</p>	<p>Funding and supporting the establishment of consortia was a key success point of the CSP from 2008 – 2012. The Embassy will continue to support consortia which can leverage engagement from local to national and build strong and accountable policy by using local implementation best practice experience.</p> <p>With a reduced budget and reduced sectoral focus it will not be possible to continue to support all consortia currently funded, but it is proposed to continue to support consortia arrangements in the HIV and Gender sectoral programmes.</p>	<p>The Embassy will use appropriate civil society consortia mechanisms in the areas of HIV and GBV programmes in the new CSP and will include in programme design the opportunity for promoting engagement from local implementation to national policy level. Choices of partners will be based on potential for success and ability to deliver results.</p> <p>In order to measure performance the Results Framework for the new CSP will set targets to measure the effect of such consortia in achieving change in respect of such leverage.</p>
<p>11. In each of the discrete areas of engagement</p>	<p>The Embassy acknowledges the interest of the</p>	<p>The Embassy has noted National Treasury interest</p>

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<p>identified, engage with the direction set by the National Treasury on pushing the accountability agenda for effective use of GoSA development resources. Look at ways whereby IA M&amp;E practice on a results agenda could complement and feed into the National Treasury approaches and the linkage between monitoring at national, provincial and local government level . For example using and sharing more outcome focused monitoring from across the IA funded programme and recognising the potential value of more ‘qualitative ‘evaluation processes’ building from the input/ output led (budget year) monitoring of government.</p>	<p>National Treasury in Irish Aid’s approach to results based management.</p> <p>While the Embassy can facilitate information sharing on the IA approach to results based management with Government of South Africa, the size of the new programme and management capacity of Irish Aid means that a substantive engagement on this issue will not be practicable or feasible. The Embassy’s views on this take into account Ireland’s comparative advantage and the more active involvement of a number of other donors (EU, GIZ, UK) in providing support to the Department of Monitoring and Evaluation located in the SA Presidency.</p>	<p>in monitoring and evaluation expertise of Irish Aid and the Embassy will share information on Irish Aid’s approach to results based management with the IDC Unit but the Embassy needs to be realistic about its ability to engage more substantively on the issue given the limited human and financial resources available and the need to focus on a small number of sectors.</p> <p>In relation to the niche areas of support proposed for the new CSP, we will engage with relevant partners to agree indicators/set targets and this will be reflected in the M&amp;E plan and Results Frameworks for the CSP.</p>
<p>12. Irish Aid should review and capture lessons for other developing countries approaching middle income status in terms of the different - more dialogue and less aid-based -relationships and the demands of such environments.</p>	<p>The importance of reflecting carefully on how Irish Aid should engage with Middle Income Countries and to learn lessons from our experience in South Africa for engagement with other emerging MIC country partners is well made and noted.</p>	<p>Irish Aid will reflect on how best to adapt programme for a middle income context, including how best to implement the Africa Strategy at country level in that respect.</p>

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	<p>Irish Aid, in planning the new Country Strategy Paper, is specifically looking at how best Ireland can respond to the specific challenges of the equality gap in a middle income country like South Africa. The future programme budget will be modest in size but will facilitate dialogue on strategic issues of importance for South Africa and work on a more evolved partnership model.</p> <p>Implementation of the Africa Strategy is a key consideration in evolving Ireland’s relationship with programme country partners to reflect a more evolved and broader partnership.</p>	<p>Lessons learned from implementation of the new CSP approach in South Africa will be documented to inform other Irish Aid engagements in countries at or approaching middle income status.</p>
<p>13. In respect to how IA delivers we propose:</p> <ul style="list-style-type: none"> <li>In utility of MfDR there needs to be a more rigorous appraisal of options with decisions based on evidence of programme level results at regular</li> </ul>	<p>Management agrees with these comments. However, it would be important to note that many of the challenges IA faced in implementing RBM in SA are shared across IA Programme Countries, in particular in relation to setting and tracking realistic indicators and the process of reporting and monitoring. In this</p>	<p>Further consideration may be given to the RBM approach. Although work has been done to streamline the CSP and MTR processes further work is needed to ensure that results frameworks are fully utilised during M&amp;E processes (including annual reporting).</p>

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<p>points.</p> <ul style="list-style-type: none"> <li>• In support of RBM, clear targets are needed, along with a useful and used Performance Management Framework/monitoring plan. Resources, including human resources, should be commensurate with the level of ambition and the demands of a challenging context.</li> <li>• For Emerging Needs funds, focus attention on areas where leverage or shift could be attained with minimal investment, and ensure monitoring points in the MfDR framework.</li> <li>• For joint funding ventures, particularly where IA is a silent partner, ensure a more rigorous and deliverables-based agreement.</li> <li>• Continue to be open to a range of aid modalities including well placed Technical Assistance.</li> </ul>	<p>regard it would also be important to note that during 2011 both the CSP and MTR processes were revised and simplified addressing some of the issues which have been raised in this evaluation.</p> <p>However, implementation of the Managing for Development Results agenda was particularly challenging for the South Africa CSP because of the retrofitting of the Results Framework (post CSP approval) which led to problems accessing accurate baseline information which could be monitored throughout the programme period.</p> <p>Irish Aid has learned valuable lessons on the implementation of the current programme and future programming will take a more realistic approach to results targets and take account of the organisational and human resources required to properly implement an MfDR approach across each and every programme component.</p> <p>Development of the new CSP will be open to</p>	<p>The new CSP will include a robust and well thought through logic model, results framework and measurement framework which are fit for purpose in the programme context and reflect realistic results targets based on consultation with partners and alignment with partner objectives and results.</p> <p>The Emerging Needs category of support in the next CSP will be focused on a small number of carefully chosen initiatives that will be reflected in the results framework of the new CSP.</p> <p>The next CSP does not envisage further silent partnerships at this juncture given the more focused approach in the new programme.</p> <p>The Embassy will propose well considered funding models, including technical assistance if and</p>

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	<p>considering all funding models, including, as suggested, the use of appropriate Technical Assistance, in areas where Ireland can add value in a niche way and within resource limits.</p>	<p>where appropriate in the new CSP, having regard to human resource limitations</p>