

MID-TERM EVALUATION OF THE EQUAL SPACES HOUSING TO END SPATIAL APARTHEID IN SOUTH AFRICA PROJECT

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Executive Summary

This report presents the findings of the mid-term evaluation of the *Equal Spaces: Social Housing to End Spatial Apartheid in South Africa* project. The objective of the evaluation was to determine the level of effectiveness and efficiency of the capacity building strategies of the project in terms of the impact they have made to date on the South African Social Housing Sector.

This evaluation has concluded decisively that Equal Spaces, in close partnership with the National Association of Social Housing Organisations (NASHO) and others, has brought about very positive, multifaceted changes that serve to support the long-term sustainability and development of the sector. Equal Space's four capacity building strategies have effected powerful outcomes both in terms of expanding the capabilities of people in the sector and in influencing social housing and urban regeneration policy in the public sector (particularly in the municipal sphere).

The wide scope of support provided by the Long-Term Technical Advisors (TAs) has resulted in increased levels of confidence, a stronger sense of purpose and, most critically, greatly improved practical skills for those in the sector with whom they have engaged. These skills speak to meeting some of the greatest challenges of the sector in terms of the implementation of programmes and projects, planning and, in particular, in day-to-day management. In the municipal sphere the impact has been experienced in terms of a much greater recognition of the value of social housing by key figures and of the central role social housing can play in urban regeneration efforts. While the impact of Short-Term Technical Advisors was more complex to assess, the evaluation found sufficient indications to conclude that their support had been experienced as very valuable particularly around community development and engagement.

The evaluation found that locally engaged consultants had provided support and products of great utility which spoke to priority sector concerns in relation to, inter alia, sustainability and better management. The work undertaken on gender equality was highly valued by many in different ways. While this particular Equal Spaces intervention was not received with a near-universal high level of enthusiasm of other interventions, the evaluation found that it had brought about not only a greater awareness of gender equality issues but had also impacted planning and practice.

The outcomes of the series of workshops and of the Canada study visits could be almost described as exceptional. The approach to delivering these interventions in an empowering, peer to peer mode was one of several factors contributing their success. The evaluation found that the implementation of both of these strategies has built capabilities in ways not previously experienced in the sector. Ways in which to further broaden the positive impacts of the Canada study visits were also identified.

A core identified theme was that of the great value-add of all interventions in terms of the practical application of knowledge in addressing the sector's challenges. While the evaluation did not have the scope to measure outcomes directly in relation to expenditure, strong qualitative findings indicate that Equal Space's programming has been extremely cost-efficient in terms of securing a high level of capacitation and wide-reaching change in the context of a small budget and very limited human resources. Key to the success of Equal Spaces has been its highly collaborative approach and the way in which it utilised and enhanced the strengths of existing capacity, channels of support, professional relationships and networks rather than imposing their own structures.

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1 Background

The Equal Spaces: Social Housing to End Spatial Apartheid in South Africa Project is a four-year initiative that started in April 2016. The intent of the project is to revitalize inner-city urban communities using well-managed, affordable and secure social housing development to provide access to socio-economic opportunities that will both alleviate poverty and contribute to local economic growth. The project has focused on institutional strengthening of SHIs to ensure their independent financial viability and to scale-up their ability to develop and manage inclusive social housing. This has included developing and implementing a coordinated sector-wide capacity building strategy with the SHRA, NASHO and other sector stakeholders.

In August 2018 a consultant was retained to carry out a rapid and limited short-term evaluation to determine the level of efficiency and effectiveness of the capacity building strategies adopted by the project. These strategies are:

- Long- and short-term technical advisors (TAs) who provide mentoring, formal training and other forms of support including joint development of financial and other operational tools/documentation;
- Local consultants working on issues such as business scoping for the provision of development and management services to SHIs, financial templates for mixed use housing developments; and developing a gender equality strategy for the social housing sector;
- National workshops, many utilising new teleconference “learning hubs”;
- Study visits to Canada to exchange social housing and urban regeneration experiences.

This evaluation aimed to determine the extent to which the four strategic interventions listed above, as implemented to date, have been successful in facilitating greater capacity for participants, their institutions and the sector around social housing development and urban regeneration practice.

The Government of Canada, through Global Affairs Canada, is the primary funder of Equal Spaces. Rooftops Canada - Abri International is the executing agency and is contributing to the project in-kind. It is expected that the project will leverage considerable South African resources for social housing and urban regeneration activities and capacity building.

The National Association of Social Housing Organisations (NASHO), where Equal Spaces is based, helped design the programme, initiated a network and programme base into which the project has channelled its support and has provided Equal Spaces with strategic inputs and logistical support.

While Rooftops Canada - Abri International is the executing agency for this evaluation, the opinions expressed in this report are the responsibility of the author.

2 Methodology

The evaluation utilised a mixed-method approach: document review and semi-structured interviews (see Appendix 1) with selected stakeholders. The interviews provided a much greater amount of material for the evaluation than the document review, the latter of which was mainly used for the

researcher's orientation, for context and background information. The documents reviewed included Equal Spaces work plans, semi-annual and annual reports, steering committee minutes, reports produced by consultants, workshop and study visit evaluations.

In consultation with NASHO, Rooftops Canada identified 35 candidates for interview, including the NASHO Executive Director and the two long-term TAs. Several considerations informed the targeting of the remaining 32 candidates including:

- The depth of engagement with various Equal Spaces capacity building measures;
- Representation from organisations across the sector including SHIs, the SHRA, NASHO (staff), consultants, municipalities and national government;
- Racial and gender balance; and
- A mix of senior executives, senior and middle managers.

A total of 34 of the 35 identified were interviewed by the researcher (see Appendix 1). On three occasions respondents were interviewed in pairs. The researcher drafted a semi-structured interview schedule into which Rooftops Canada and NASHO made inputs and changes before approving. The schedule had four sections corresponding to Equal Space's four modes of capacity building strategies (see Appendix 2.) The interview format was flexible and respondents only engaged with the sections and questions which were relevant to their experience. The research for the evaluation took place between August and October 2018.

3 Limitations and Risks

The method of identifying candidates for interview was self-selecting and could be viewed as not sufficiently controlling for bias. However, it quickly became clear to the researcher that Equal Spaces fully appreciated the value of the lessons from situations in which capacity building efforts were falling short in addition to those which have been successful. Equal Space's practice of rigorous self-assessment and holding themselves to the highest standards was particularly evident in the document review phase of the evaluation as demonstrated in the steering committee minutes, reports and other documents.

In this evaluation there was nothing resembling a control group - experimental group scenario in which one group has undertaken capacity building activities while the other has not. Nor was there any form of pre- and post-testing of interventions to identify changes in knowledge and capabilities. The evaluation relied, in large part, on people's perceptions of change. These perceptions took on significant gravitas in the evaluation as many cited activities, outputs and outcomes indicating increased capabilities attributed to participation with Equal Spaces programming.

In the Evaluation Framework submitted to Equal Spaces before the evaluation began in earnest, the researcher cautioned that the quality of the evaluation would largely be contingent on the level of commitment to the process by stakeholders in all categories. The researcher had also noted that, given the short period of time in which the interview phase of evaluation was to be undertaken, some stakeholders targeted for interview may not be available. Neither of these risks manifested. The level of enthusiasm was extremely high and 34 of the designated 35 interviews took place.

4 Findings

4.1 Long- and short-term Technical Advisors

The piece of the evaluation aimed to assess the impact of Equal Space’s long-term and short-term technical advisors (TAs) in terms of the full range of their capacity-building work. Although their roles were broad the two long-term TAs had different foci with Lizette Zuniga working primarily on the issue of urban regeneration (which brought her into the municipal arena) and with Jo Ferris-Davies focusing on the business aspects of social housing.

Overwhelmingly, participants from across the sector articulated how, in many different ways, their engagement with the long-term TAs has made a positive impact in terms of their own professional development and the strategic direction and capabilities of their institutions. A clear picture also emerged as to how the TAs have contributed to a mind-shift in the sector as a whole. For many stakeholders this meant coming to understand what is possible to achieve through social housing.

There was a strong consensus that the support provided by the long-term TAs was well-grounded in their experience, very relevant to the contemporary challenges of the sector and delivered in highly appropriate modes for the South African environment. One SHI CEO asserted:

“The TAs have a depth of experience that is valid and valid for us. They can package their support in a way that is both relevant and useful to us. They can contextualise. We have been able to interpret this in ways that can be used practically.”

The CEO added that the experience with technical assistance in the past is that “people can only offer what they can offer –but not necessarily what we need.” This stands in contrast with the assistance provided by the Equal Spaces TAs who have directly addressed priority challenges and helped develop workable solutions. The CEO concluded: “In social housing there are too few people to undertake huge tasks. We have no time for things that are not value-added.”

4.1.1 Municipalities

Drawing from the document review and discussions with Equal Spaces the researcher understood that the work with metropolitan municipalities has yielded mixed results with some seemingly benefitting more than others. However, interviews with nine officials at three metros (all at different stages of integrating the TA’s inputs) revealed the strong and positive impact of Equal Space’s efforts in relation to changing mindsets and in developing new policies and strategies in all three. One official concluded that: “Equal Spaces is having a gradual but powerful effect on public policy.”

A major strength of the work in the municipal space has been not just in motivating the creation of policy but also in helping create the strategies, tools and processes for their implementation. The shift in thinking in municipalities has been notable. Through direct TA mentoring (and also through the workshops and study visits) supporters of social housing in municipalities have been empowered to advocate for change within their own settings. One official explained:

“(The metro) did not have much of a historical commitment to social housing. Without the support of Equal Spaces we would not have made progress we have in the last 18 months. This is especially true in terms of internal education.”

Along similar lines another official explained that:

“We knew what we had to do but did not know how to articulate to council people who might have reservations. To have Lizette in our environment helped us make the case to many point people in the broader metro. Navigation around this was very difficult for us and Lizette helped by breaking it down in a way which everyone could understand.”

One official explained that most departments outside of Human Settlements did not understand what social housing entailed let alone appreciate how it could contribute to the City’s spatial restructuring and urban regeneration agendas. With support from Lizette social housing supporters in metros were able to engage other key officials and departments, educate them on the features of this intervention and demonstrate how well-aligned social housing is to a host of other objectives. In Cape Town this process resulted in tangible outcomes vital for the sustainability of the sector including rebates on rates and a non-commercial water tariff rate.

Another municipal official reflected that: “With the support of Equal Spaces we positioned ourselves to influence the City’s IDP and from there the Spatial Development Framework. We came to understand which space works for what, the precinct plan, land area plan, etc.” Reflecting a sentiment expressed by others one municipal official emphasised the “powerful effect of having an outside, independent and credible voice” to support them to effect change in other directorates. Another observed that there has been “change not only in ideology but in behaviour.”

Respondents (both within and outside of local government) noted that Equal Spaces has helped establish the importance of social housing as a core consideration in the development of precinct plans. One national official maintained that:

“We talk about precincts but we don’t really drive them. We seem to only get involved once planning has been done. But Lizette’s work with the municipalities elevated the issue beyond human settlements so that we are part of the initial planning process.”

This and other respondents expressed the sense that key members of staff outside Human Settlements in municipalities with whom Lizette has worked are coming to understand that social housing not only brings a subsidy but is also a vital component in broader urban regeneration. Most municipal participants emphasised, however, that there are still many challenges to address even as steady progress had been made. The need for further education and organisational change was emphasised by an eThekweni official who asserted:

“To get more traction we need Equal Spaces to help us access more key figures in the metro. We still need to frame social housing as an anchor in the City’s broader urban development plan and get people to understand how we can recreate a neighbourhood. “

Underlying the challenge of the task ahead the official concluded: “At higher levels the strategy has been accepted but execution is tricky. Equal Spaces is helping us navigate.”

4.1.2 National impact

A senior national government official asserted that the support of Equal Spaces has been very helpful in terms of mediating a pathway between national, provincial and local government. The official further explained there has been an evolving understanding of social housing in National Treasury as an appropriate programme in terms of “allocative effectiveness”, that is, the right kind of good for the right kind of service for an expanded urban economy.

While the effects may have been largely secondary the official credited the TAs and NASHO in helping create an organisational space which is conducive to achieving higher levels of functionality within the programme. Another respondent argued that the TAs and NASHO had contributed significantly, both directly and indirectly, towards changing mindsets in various public body structures. A particularly pertinent indication of the impact of Equal Spaces and NASHO on the critical policy dialogue in government was noted by a senior national official who asserted: “Their message is becoming part of the lexicon as to how money is invested to achieve urban change.”

4.1.3 Social Housing Institutions (SHIs)

Respondents from SHIs asserted that the support provided by Jo Ferris-Davies was focused on addressing real practical challenges in a very collaborative way which utilised a peer-to-peer learning model rather than a traditional trainer–learner paradigm. Many respondents remarked on the engaging manner in which Jo delivered her support. Typifying this general sense one stakeholder asserted: “She has a way of ensuring that we all made progress. This was very refreshing. She also has a way of getting the best out of people. Through her skills in facilitating sessions she can get people to contribute and really engage.”

Another example cited which demonstrates the core theme of moving from the theoretical to hands-on implementation was that of the establishment of a reference group which focused on women’s issues. One stakeholder asserted that “Through this process the SHRA took ownership of two KPIs so these are not just documents. Jo made it tangible. We saw woman actually becoming involved and excited.” The increased ability of SHIs to address client service challenges effectively was another important outcome of the TA’s support cited by some respondents.

At least seven respondents reflected on the TA’s efforts around the development of the back-office proposal, something which one SHI senior manager described as being of “massive value.” Noting the vast amount of time that SHIs spend dealing with such matters as utilities this respondent maintained that centralising key functions would be a major component in ensuring the sector’s sustainability.

Several respondents also expressed the sense that TAs have played a central role in bridging gaps between key stakeholder organisations. One also added that: “Equal Spaces has been a critical integrator and has bridged the gap between the social housing market and the SHIs.”

4.1.4 Modes of delivery

Participants reflected on the question of whether the format, style and the methods used by the TAs were optimal for facilitating learning and capacity building. There was wide agreement that the range

of modalities through which support and mentoring are provided are appropriate and work well in different situations. The face-to-face session format was the seen as the most effective modality of all to facilitate learning. Reflecting a sense expressed by others, however, one respondent maintained that it was the very combination of forms of communication that made the learning sessions so strong. Each format, including one-to-one, workshop-style sessions and remote interaction (hub / Skype) were all seem as important and appropriate for different situations.

But beyond the format and delivery perspectives a theme that emerged was the value of the human connection dimension of the TA's work. Some expressed the general sense that the engagement, regardless of format, occurred in such a way so as to transcend a service delivery paradigm and build relationships highly conducive to learning. This was captured by a participant who said:

“It's so relational this work. It's not contractually bound but deeply embedded in trust with organisations. There's an openness which I don't often see. There's nothing formally binding us but we are in partnership. There is a uniqueness in the ways partners interacted.”

It should be noted in this context that Equal Spaces has Memoranda of Understanding (MOUs) with the Metropolitan Municipalities and with NASHO, but not with individual SHIs.

4.1.5 Short-term TAs

The work and impact of the short-term TAs Josie Adler and Jim Duke proved to be more difficult to assess than that of the long-term TAs. These two figures have been present in the sector for many years and it was difficult for some respondents to be sure which particular pieces of support were provided under the Equal Spaces banner and which were not.

It became clear, however, that the work the short-term TAs have done around community development has been very well received. It is likely that their historical engagement with NASHO and the sector has been a key ingredient of their positive contribution. One respondent cited the positive impacts of work undertaken by the TAs with more junior ranking staff noting an example in which an SHI caretaker “felt it was life changing in the way he saw his work and integrated it into daily routine.”

One respondent asserted that the short-term TA's community development work has had a major impact where it has been undertaken, greatly improving tenant relations and building a stronger sense of community. In Cape Town, the Development Action Group (DAG) in particular underlined the important role the short-term TAs had played in mentoring staff, building their capacity to undertake community engagement and then in providing ongoing support through the community engagement process.

4.1.6 Relevance of the TA's support and ongoing needs of the sector

Respondents were asked to consider if there were any aspects of the TA's support that were not as relevant as they could have been. Some respondents referenced the work on gender issues but this is addressed in the section of this report on consultants engaged through Equal Spaces.

Overall, the sentiments expressed ranged between experiencing every aspect of the support as relevant to *almost* every aspect as relevant. There was little the researcher could identify that the participants did not regard as helpful and relevant even when drilling right down to the details in the

interviews. The few issues cited along these lines were more isolated examples rather than relevant to the mainstream of the TA's work. Furthermore, most of the content of this part of discussion was expressed more in terms of "what else is needed" rather than "what fell short."

The discussions around the most critical issues for future technical assistance to address were in-depth, varied and complex. While a sense of "more of the same" and "continuing on the same path" were prevalent some key identified needs are consolidated and summarised below:

- Data analysis skills to enable such things as assessing government policies, determining the feasibility of projects, disaggregating and analysing financial and statistical data.
- Addressing the poor financial capacity in SHIs. This would include developing business acumen to launch operations, the ability to generate and read management accounts, invoicing and collecting rental. Such efforts should aim to obviate the need to outsource Quickscan-C requirements.
- Advocacy skills aimed at growing the sector and bringing more policy makers and implementing agents on-board.
- Working with communities at the precinct level around development, resolving conflicts and managing multi-stakeholder fora.
- Building understanding of inclusionary housing so as to capacitate the sector to work closely with municipalities on this issue.
- Expanding skills and knowledge around land and building acquisition to the extent necessary to obviate the need to engage consultants for this purpose.
- A strategic professional development plan for middle and senior managers tailor-made for the sector.
- Developing capacity to leverage funds and dealing effectively with financial institutions.
- Interacting with the private sector and private sector bodies (e.g. SAPOA).
- Developing support packages to assist new SHIs to deliver their first project.
- Lifecycle costings regarding long-term maintenance.

It should be noted that many of these needs are not necessarily ones that Equal Spaces could address directly themselves but may be able to partner with others in order to help develop packages.

Many respondents reflected on the still unmet need of sustained capacitation of new SHIs. While some felt that this is an area that the TA programme could have focused on more strongly, others expressed the sense of this as a critical ongoing priority which must inform future TA efforts by other players in the sector as well. One participant reflected that: "Despite the best efforts of Equal Spaces and partners like NASHO the support for newcomers to get them to understand the business and getting first projects off the ground is still severely lacking."

A SHRA representative also strongly emphasised the need for much greater capacitation and knowledge building around public finance to enable the regulator to respond more effectively to greater demands for justification. The respondent asserted:

"We are getting challenged by finance figures in government and have to learn how to justify our programmes and proposals in that environment. We are asked such things as 'how do

you justify this level of cross subsidisation in a formula'? We need to speak the language of finance not just of equality and socioeconomic change."

The respondent also noted the need for key sector figures to better-understand legal issues and complex overarching legislation. Using the Municipal Finance Management Act (MFMA) as a prime example the respondent exclaimed: "We must be able to argue from the perspective of the MFMA or we are dead in the water. "

4.1.7 Cost efficiency

Respondents expressed a strong sense that, as a programme intervention, the technical assistance component represented a highly efficient use of resources. Some were wary of weighing in on the question of cost efficiency from an accounting perspective with one asserting that "we don't have insight as to how programmes and finance interrelate." But participants were unequivocal on such aspects as the well-managed use of time, availability, quick response times, the transfer of skills, knock-on effects and appropriate targeting of assistance. One respondent concluded: "The approach is cost effective. The programme not only targets people in high office but all key people at the right levels where implementation has to happen."

There was also no sense whatsoever that the resources could have been used differently to produce similar results. One participant asked: "How could there be another way in our context that this money could have been spent?"

4.2 Locally-engaged consultants

The evaluation assessed the impact that local consultants, engaged by Equal Spaces for specific projects, had made on the sector around developing capacity. Megan Sager undertook a project on SHI mixed portfolio development with mixed income and equity creation. In doing so she built on a previous NASHO / Rooftops Canada Long-Term Financing project to run a workshop for SHIs looking at the challenges of expanding their portfolios into the gap rental market. Megan also worked with Equal Spaces and SHI representatives in developing a business plan for the setting up of a *back-office* model.

In his direct work for Equal Spaces Jacus Pienaar (along with Lizette Zuniga) developed an assessment tool to help to financially assess mixed market development proposals. He also created two financial templates, one (a simplified version) for SHIs and one for municipalities to receive RFP financial proposals on common templates. Through a multifaceted and inclusive process Dr Marinda Weideman produced the *Gender Equality Strategy for the Social Housing Sector* through Equal Spaces.

4.2.1 Reflections on the consultant's work

Megan's work was lauded by those participants who had engaged with her around these projects. Reflecting this view an SHI CEO described this consultant's work on diverse portfolios as: "Very positive, very, informed, pragmatic and based on a very knowledgeable approach."

Underlining the value of this work in terms of relevance and implementability another CEO emphasised that: “The discussions on diverse portfolios are no longer theoretical. The engagements are highly technical and focused on decision making. It’s all about the application of basic economics.” Yet another CEO described how Megan’s work had informed the SHI’s development planning.

The work around the back office demonstrated a central theme arising from the evaluation, that being the practical applicability of Equal Space’s support and products. In describing the utility of the tools developed to proactively assess the feasibility of projects, one respondent identified another sub-theme (expressed particularly by municipal officials): For the first time, key players better understand the perspective of private developers.

Only a few participants felt sufficiently informed to comment meaningfully on the modelling tool for development costs developed by Jacus Pienaar through Equal Spaces. Those who did, however, (particularly respondents in local government) reflected positively on this product. One respondent asserted that: “The product has been great and has helped municipalities address what had been a significant void. The tool sets out processes around RFPs and has given municipalities a framework for moving forward and to improve procurement.”

The utility of the financial templates developed by Jacus resounded with those participants in any position to comment. At least four expressed the sense that the templates were highly practical and “hands-on.” While acknowledging the value of the financial template, however, one participant asserted that the process to develop them was somewhat rushed and added that: “Financial templates need time to develop. They have to evolve and you have to test them.”

There was also a sense among some respondents that the work of the consultants had some significant limitations. Reflecting the view of others one participant acknowledged the great value of Megan’s work around back office arrangements, mixed market portfolios and also her enhancement of the capabilities of some SHIs. But the respondent also underlined the limitation of the longer-term impact of this work if it is not held through an ongoing programme of support. The concern is that the value of the outcomes may simply not be sustainable without longer-term structured support.

While not specifically questioned on the issue, a number of respondents either directly asserted or strongly implied that the work of the TAs through NASHO, and in partnership with NASHO, had greatly enhanced the capabilities of that organisation in different ways. The enhancement of NASHO’s skills and capabilities in this context have been enhanced through their collaborative work with the TAs and through other Equal Spaces interactions.

It must be emphasised, however, that Equal Spaces did not arrive to find a blank slate and nor were their interventions built on sand. For many years NASHO and many of its member organisations had worked to develop the capacity of the sector and to build an institutional support context to facilitate this process and to hold the gains. This was done with support from the Dutch social housing movement, Rooftops Canada and other support organisations. It was precisely this context which coalesced with Equal Spaces.

4.2.2 Gender Equality Strategy

The strategy developed by consultant Marinda Weideman and, more broadly, the range of Equal Space's interventions around the issue of gender equality, were widely cited by respondents who expressed a range of differing perspectives.

Municipalities reflected very positively on the strategy and, in particular, the efforts to facilitate implementation of key parts of it. A municipal official explained:

“Research was commissioned by Equal Spaces on gender equality and we workshopped on this with Jo. The report outlined about 10 different strategies and we zoomed down to three that we felt were really pressing issues for the municipalities.”

Respondents from SHIs cited many examples of the practical aspects of the strategy as presented in workshops which inform design, upgrading, tenant relations and management practice. In addition to addressing safety-related issues such as lighting, security processes and privacy there were also some indications that Equal Space's work around gender has stimulated important internal discussions. The management team of one SHI, for example, identified the need to develop a protocol for their security guards for situations in which they deal with domestic violence.

Underlining the relevance of the strategy one SHI stakeholder affirmed that Equal Space's efforts around gender equality spoke to the entire value chain and also to a broader imperative in South African public policy:

“This deals with all levels in the sector but also speaks to national policy imperatives across all of government: Plans for staff development to have more women in management, more women owned companies and plans for more women in construction.”

Asserting that there was never a sense of the consultant “owning” the strategy one respondent maintained that Equal Spaces has worked on the issues in partnership with the sector and noted that the process ended with a tangible plan which included the identification of responsibilities and a budget. A SHRA respondent maintained that: “Some SHIs might not see it as a priority but from the view of a national entity the question of addressing women and social housing is critical. We need a national plan with specific tangibles.”

Another SHRA figure underlined the relevance of the strategy to that institution by explaining: “We are drawing on the gender document because we are not meeting our targets. This project helped with our transformation strategy and with our Growth & Development Strategy.”

Reflecting a sense expressed by others, however, one SHI respondent maintained that there were some aspects of the gender strategy which were not particularly useful as the organisation was already well into the process of addressing the issues of equality. Questioning the extent to which further change needs to be a top priority for the sector one participant argued that: “The social housing programme is very gender sensitive. The policies are already there in terms of allocation criteria, BEE, and even in the culture of housing in South Africa. Woman take leadership.”

There was also a sense among a small number of respondents that while gender equality is a vital issue there are other considerations pertaining to equality and inclusion which are equally important and which need to be addressed. One respondent asserted: “It’s all very well to say we are pro-woman – but there are other excluded groups that we can’t fit in under a policy for women.”

One SHI CEO asserted that: “The consultants highlighted gender-based violence (GBV). But it’s not just women who are affected by violence, it’s entire communities.” This respondent also maintained that the sector must address the exclusion of male youths and LGBT people. Another CEO explained that:

“We had an open secret bias of renting to single mothers. But when we started to put it into policy – we realised that we excluded single dads, gender fluid people, gay couples who had been kicked out of townships and child headed households.”

4.3 National Workshops

In the first two years, Equal Spaces supported 24 national workshops on different themes including: land release, the gender equality strategy, back office approaches to service delivery, transitional and special needs housing, and numerous practical topics of interest to SHIs such as human resources, greening buildings, credit control, client services and diversifying SHI portfolios. Most of these workshops were carried out in partnership with NASHO and many were facilitated using the learning hubs.

Reflecting a central theme running through the evaluation participants expressed the sense that the prime value in the workshop sessions provided through Equal Spaces was the strong focus on the practicalities of skill and knowledge application. Typifying this view one respondent asserted that: “The workshops were critical in terms of showing the ‘how to’ and not just the theoretical side. There was a lot of emphasis on practicality in terms of exchanging ideas around implementation.”

Participants cited different ways in which the sessions have made a positive impact. An important finding was the way in which the workshops function as a highly interactive and productive forum. Underlining the need for a focused, structured and well-facilitated space, one respondent argued that:

“It is not enough for social housing practitioners to simply sit down and exchange information around their particular approaches. The workshops have been very valuable in terms of information exchange, good practice and in addressing why things have not worked out.”

Building on this theme another respondent reflected that: “We’d had discussions with others in the sector but we weren’t aligning. The workshops help align organisations, help you think differently, allow you to see different perspectives.”

Some respondents expressed the sense that the workshops facilitated learning around alternative approaches and understanding issues from the perspectives of other types of institutions with one asserting that: “The workshops have helped people reflect on ways in which they’re working in their own environments while also learning how to engage with people in different environments.”

The high level of relevance of the workshop content for the sector and to organisational challenges was widely emphasised. One respondent noted that such relevance is ensured by the fact that the materials are based on the ground experience, i.e. what people are actually doing in the field. This promoted a high level of engagement during the sessions. Workshop topics were cited as being highly relevant to contemporary issues in the sector. Particularly highlighted in this regard were community development, accessing land and financial modelling.

4.3.1 Priorities not yet addressed

Similar to the situation with the TA programme, participants cited a wide array of topics they felt still need to be addressed through workshops, whether provided by Equal Spaces or not. These included:

- Day to day operational efficiencies pursuant to running a business;
- Dealing with bad debt;
- Managing vacancies;
- Precinct planning methodology & approach and link mechanisms; and
- Building SHI business capacity whilst linking this to the transformation agenda.

Some municipal representatives advocated for workshops aimed specifically at higher levels of management in local (and provincial) government. This could include heads of committees and MECs and, in particular, elected officials. One municipal participant explained that: “Things can get lost in translation when we try to educate them (i.e. top management and politicians). It would better if they got this information directly from Equal Spaces to facilitate their understanding.”

One municipal official also suggested a broader agenda for workshops around building greater understanding of social housing in civil society:

“This could function as an advocacy tool. It could be a space for Equal Spaces to engage other civil organisations such as legal entities, local NGOs who do advocacy work and others around the value of social housing, precinct planning and constitutional mandates. This could, in turn, help develop vehicles to hold municipalities accountable.

The official added that “Cape Town is stronger because there has been more effective advocacy.” Undertaking education and advocacy targeted to civil society, public institutions and other sectors could be a key ingredient to promote the sector’s sustainability and expansion. Equal Space’s 2018-19 Work Plan includes bringing some high-level people from the cities of Toronto and Vancouver precisely to help influence key officials in the metros. This will help local stakeholders to continue this type of intervention and advocacy.

4.3.2 Learning Hub

Three audio-visual conferencing facilities called *learning hubs* have been installed, one at NASHO in Johannesburg and one each at SHIs in Cape Town and Durban. SHIs in East London and Port Elizabeth have installed their own sub-hubs which connect with the three that Equal Spaces support. The strong consensus among participants was that the learning hub innovation has been a very useful and cost-effective intervention.

The hub facility was seen as creating not only a collegial learning environment but making this space accessible, something that logistics and budget limitations would otherwise impede. A CEO asserted that:

“Technology has broadened access. In most cases I could not send most staff members to Johannesburg for a two-hour meeting. But through the hub we can send non-core staff to the learnings, even to just have exposure. It’s highly cost-effective.”

There was a strong sense that the hub is cost-efficient with one respondent affirming that: “There’s real economy-of-scale and organisations save travelling and other costs. You get to meet people you would not usually have met because of logistics.”

It is clear that the hub has been well-utilised particularly after it became accessible from three centres. Overall, there was a sense that the topics addressed through the hub sessions were very relevant and even vital for SHIs and other stakeholder organisations. Lease issues, mitigation of risk, debtor analysis, client services and credit control were cited as examples.

While technical difficulties were cited as a problematic factor one of the TAs noted that these have been addressed. A limitation may be that the hub is not suited to events of a duration much longer than two-hours. One participant also reflected that since the hub’s launch it has been difficult to maintain the momentum with so many other priorities. NASHO has taken ownership of the hub (and will be responsible for follow-up) as part of an expanded capacity co-ordination role.

4.3.3 Reach and targeting

Of those who weighed on the issue there was a general sense that the workshops were well targeted and that the appropriate people, from junior through senior managers and decision makers, are participating. However, there was also a view expressed by at least three participants that the workshops had not been far-reaching enough to make a significant impact where capacity building is critically needed: “There is very little participation from less-capacitated SHIs. Workshops are limited to those who are highly motivated. But the real problem is with lower-tiered SHIs.”

This view was supported by a CEO who emphasised that the under-capacitated and most at-risk SHIs are generally not participating and that this may have negative consequences for them and indeed for the sector. While, as noted by one of the TAs, there may be many reasons for this it needs to be remembered that SHIs are ultimately responsible themselves for securing the support they need to become functional as businesses and sustainable.

At least three respondents felt that the sessions could be better targeted as their experience was that not all the sessions were necessarily relevant to them. This, however, is more of an internal matter for the participating organisation as the general practice for targeting is to ask the CEO to send the most appropriate people.

A limitation cited by two respondents is that the content of some national workshops seems to assume that all SHIs face the same issues. On the issue of transitional housing, for example, two participants felt that there was limited interest on this topic outside Gauteng and cautioned that any tendency to focus on issues relevant to only a few could become problematic. Conversely however,

others cited the need for transitional and emergency housing training targeted at municipalities even as the limited participation of municipalities in mainstream workshops was also noted.

There was a strong sense overall that the workshops were including the right people and that the content was highly relevant. One CEO, for example, affirmed that the workshops are very well targeted to people's functions and that they also align well with organisational KPIs.

4.4 Canada Study Visits

Equal Spaces supported three study visits in the first two years. Two were on the theme of *Exploring Best Practice, Management Systems and Back Office Tools for Growth and Management of Social Housing* (Toronto, March 2017 and Vancouver, November 2017). The main theme of the third study visit (Toronto, October 2017) was *Exploring Urban Regeneration Strategies Involving Public, Private and Social Housing Partnerships*. The total of 22 participants were from the SHRA (7), SHIs/NASHO (7), Metros (6) and others (2).

From this piece of the research a clear picture emerged of not only the positive outcomes for Canada study visit participants in terms of their own professional development but also of notable secondary effects for the sector as a whole. Interviewees gave clear indications as to how their experiences in Canada had resulted in a fundamental mind-shift for them and of a consequential broadening of productive discussion across the sector.

The theme of effective collaboration between a broad range of stakeholders was widely cited by respondents, particularly those in metropolitan municipalities. One municipal official explained:

“In South Africa we suffer from not being integrated. Even as we operate in a similar space but are not the same. The realisation struck me that we don't leverage from each other. We need to collaborate much more with other cities.”

The realisation of the role that social housing could play as a key catalyst in urban regeneration and of its fundamental links to other infrastructure development was a solid outcome for municipal officials who had completed the study visit. One such participant asserted:

“When we were there, we were able to look at different areas and see how social housing responds to the influences in each area such as transport nodes, how the critical needs are considered in that space and what the practical mechanisms are that bring them together and make the development work.”

Another municipal participant reflected that:

“What we experienced helped us understand our own challenges much better. We made so many connections in terms of addressing these challenges in areas such as capital and operation subsidy, use of prime land parcels, regeneration, ways to influence policy making, the function of SHIs as land-holding companies and participation of the private sector.”

This statement reflects a theme that emerged from the interviews that far from being a theoretical exercise the study visits presented the participants with models and ideas relevant to addressing pertinent issues in concrete ways. Respondents provided numerous examples of this which included the development of long-term maintenance plans; the costing of major renovation in older buildings versus demolition; and models and processes for relocation.

One respondent reflected that his group grasped how higher density development can really work in terms of economy-of-scale, management, socioeconomic integration and other factors. Two closely related aspects of the study visits noted by several participants were the passionate dedication of their Canadian counterparts and the focus on fundamentally changing people's lives.

Some participants described what they felt was a strong commitment to socioeconomic change with one asserting:

“One thing that came out prominently was not just theory but a better understanding of the importance of making a difference in people's lives. We don't celebrate social consciousness in this kind of way in South Africa. It would be good for us to reflect back on how social housing can help transform our society.”

In instances where the study visit included staff from both SHIs and municipalities there seemed to be what one participant termed a “bonding experience” between members of the two groups. Noting this, one respondent reflected that: “We built relationships which was very helpful and generated a lot of good will in the sector. We got to know each other in a different context.”

Other aspects of the visit cited as particularly useful included:

- Coming to understand the underlying mechanics that really make things work well but *also* coming to understand why some interventions were not successful;
- Interaction with the Toronto Community Housing Company;
- Seeing how a solid business-like approach was entrenched in organisations;
- Ways of engaging with and working with communities; and
- How good governance practice is undertaken to support long-term sustainability.

4.4.1 Relevance to South Africa

Participants were asked to weigh in on the question of the applicability of what they saw and learned about in Canada to the very different South African social housing environment. An unexpected response came from one stakeholder who asserted:

“We always looked at the Dutch model – but the Canadian model is contextually much closer to what we need. It's done more on a scale that is not too far-fetched for us. Holland is so complex and so first-world. From Canada we can use material as it is now. The Canadian context is so much more relevant from an implementation point of view.”

In this sense, Canadian models are seen not only relevant to South Africa in terms of policy and programmes but also in the practical details of implementation. One respondent felt that the precinct-based, long-term urban regeneration model he witnessed would be a highly appropriate one for some South African cities and asserted that the model could work even better in this country

While noting that there is not a “a completely relevant translation” of the learnings a municipal participant affirmed that the basic principles are highly relevant for the South African environment and added: “We will make it work for our circumstances and our legislative framework.” At least two respondents in the Vancouver study visit, however, stated that the strong focus on housing cooperatives was not relevant for their organisations or to the current challenges for the sector.

Participants had different experiences around the issue of gender equality on the study visits. For some it appears that the issue was not discussed in any depth. Others, however, reflected that they had interacted with strong, highly knowledgeable woman in senior management positions, including CEOs, who were clearly running highly efficient companies (and had men answering to them).

Three themes that were widely cited as being particularly relevant were the back-office model, innovations in urban regeneration and community development practice. On the latter issue one SHI participant provided an example of how learnings have been utilised in terms of organisational policy programming and structure. Along similar lines an SHI CEO concluded: “The effect of the study visit was profound. It occurred at time of strategic review and our board of directors made a complete about-turn from a bricks and mortar mentality to a strong human development focus.”

In 2018 Equal Spaces and NASHO began collecting data on community, social and local economic development initiatives by SHIs. The aim is to learn more about what is happening in this field in order to set up a database and encourage mentoring and sharing between SHIs on these issues.

While conceding that not all Issues were fully relevant to the South African environment one social housing practitioner asserted that the urban development aspects clearly were:

“SHIs there are having to think of innovative ways to redevelop stock in a changing urban landscape which has highly lessons for us. The issue of land designation being not just for social housing but for mixed use development of state-owned land can definitely be contextualised for the South African space.”

At least four respondents cited the great value of the visit to Regent Park particularly around the issue of urban design. One concluded: “We had not understood until then the relevance of urban design in addition to physical building. We appreciated how - in a very big way – challenges have been addressed through urban design.”

4.4.2 What could be done differently?

Some respondents reflected the sense that that they had spent a greater amount time listening to presentations (which could have been done remotely) than in visiting institutions, the latter having being widely experienced as the most beneficial aspect of the study visit. One respondent asserted:

“I would have liked to see more and have gone to more places to see the CEOs on their own turf rather than have them flying in. Going to the few organisations we did was of incredible value – more valuable than having 15 people coming to speak to us.”

While several participants appreciated learning about transitional housing models in Canada, (including rollout, institutional arrangements and partnerships) some expressed the sense that it is not currently possible in South Africa to replicate such a model and ensure its sustainability. This illustrates a sub-theme emerging from the evaluation that it is hard to create any form of rental programme for people with unstable incomes or to formulate a model which needs substantial subsidy or operational subsidy. While respondents felt that many of the learnings were implementable in South Africa at least five noted the reality of budget, human resource and administrative / legal constraints.

At least four participants felt that it may be beneficial to have a form of exchange programme in which South Africa practitioners would go to Canada for several months at a time while their Canadian counterparts would come to South Africa. Through such a model the participants would be able to build and consolidate skills through undertaking hands-on day-to-day projects working alongside their Canadian colleagues. Making the case for an expanded version of the study visit programme to include longer-term exchanges one respondent argued that: “Jo’s in-depth understanding of our sector came through her full immersion over time. It’s great to observe but at some point you must be immersed in the organisation to learn.”

Two SHI CEOs felt that there could be more material on community development and urban renewal, a sentiment shared by some others. A few respondents either asserted or implied that targeting has been somewhat problematic in that a small number of study visit participants had no reason to be there. At least seven participants, four of them CEOs or senior municipal officials, emphasised the importance of targeting people who have the capability of making impact.

4.4.3 Cost Efficiency

Noting that the Canada study visit programme is quite a costly capacity-building intervention respondent were asked whether they thought that it provided good value for money (i.e. if it is cost efficient) or if less costly interventions could produce a similar result. While some participants were hesitant to weigh in on any aspect of this question that might be seen as superseding a formal financial “audit” as it were, the overwhelming sense was one that the study visit programme is an extremely valuable capacity building intervention on many levels, the core aspects of which could not be replicated in any different approach or method.

Articulating what many interviewees had indicated, an SHI middle manager affirmed that “We are not going to get same results if we do an entire study visit through remote means.” Another affirmed: “This is money well-spent. We can only gather so much perspective from presentations, documents and pictures. Experience is a different thing. “

Some respondents expressed the sense that the visits create an onus on the participant to take responsibility for their learnings and to bring the lessons home in a way that other interventions could not facilitate. Another factor indicating efficient use of resources was the fact, relayed by several participants, that the visits were very tightly organised with full schedules leaving no time to waste.

In the context of addressing cost efficiency respondents from both municipalities and SHIs asserted that value of the study visits was so great that rather than limiting them institutions could, in future, take some responsibility for partial payment. A municipal representative said that his department

could motivate the value to the City for half the costs while an SHI respondent suggested: “A study visit does not have to be a total free for all. We would raise funds with municipalities if they also attend. This would not be an insurmountable challenge.”

Illustrating the value of this intervention, and incorporating much of the sentiment expressed, one participant concluded:

“Without the visits there would be a missing piece. There’s nothing like walking the streets, witnessing and meeting the people. Expensive as it may be, the visits have increased not only our capacity level but our activism – what we should be doing – the instruments we have seen working and how we can capture this for relevance to our own objectives.”

5 Analysis and conclusions

5.1 Long- and short-term Technical Advisors

The evaluation revealed that the work of the long-term TAs has had positive effects which have begun to effect practice and policy making.

The TAs have helped instil a vision of social housing playing a core and central role in the socio-economic transformation of cities and that of the sector providing not only affordable housing to beneficiaries but developmental initiatives to transform their lives. However, the strength of Equal Spaces, and of the technical assistance component in particular, has proved to be not only in the creation of a vision but in building the capabilities to bring it about.

The work of the TAs has directly spoken to the most critical elements around the sustainability of the sector and of SHIs as viable business entities. This is not to say that the reach of the TAs has encompassed all in the sector. Most smaller, emerging SHIs have not yet participated meaningfully in the capacity building interventions. However, as evidenced in their reporting, Equal Spaces has been working with NASHO and the SHRA to develop and implement a strategy aimed at assisting weaker and especially new SHIs.

While the impact of the short-term consultants was somewhat difficult to assess, there is enough evidence to conclude that the support provided by Jim Duke and Josie Adler was well utilised where it was provided, particularly in relation to community engagement and development. However, it proved particularly challenging to isolate the contribution of short-term TAs from Canada undertaking once-off assignments in a way that differentiated this aspect of Equal Spaces assistance from other interventions. The “repeat assignment” model, through which Jim and Josie operate, is clearly preferable to the once-off model.

While the modes and formats used by the TAs to deliver support were found to be highly suitable for facilitating learning a more striking finding of the evaluation was that, regardless of set-up, it was the empowering, peer-to-peer manner of engagement of the TAs that was key to the successful outcomes. The TAs were able to build relationships and inspire meaningful interaction in such a way so as to yield

more powerful effects than could be expected from a standard technical service provider model. The extremely high-level of cost effectiveness of the TA piece of the programme was made very clear. From a qualitative perspective is almost impossible to conceive as to how a capacity building strategy which has made such positive and broad impacts from such a relatively small investment could possibly be made more cost-efficient.

5.2 Locally-engaged consultants

Megan Sager's work around the diversification of social housing portfolios and the back office were found to be extremely useful and were seen as intrinsic to sector sustainability. Yet again, in keeping with a core and cross-intervention finding of the evaluation, it is evident that a strength of Megan's work is the way it lends itself to practical application. It was made clear that her work is helping to enhance local government practices and that she has also helped build capacity in some SHIs. Among those who had interacted with Jacus Pienaar and seen his products there was a clear sense of their quality, relevance and utility.

A concern, however, is that consultancy work is necessarily limited and time-bound. The absence of a programmatic structure to maintain and further develop the work to ensure ongoing impact might mean that its full value is not be sustained over time.

Marinda Weideman's work around the Gender Equality Strategy was seen by a majority of respondents as highly relevant, even critical, for the sector. Of particular value were the range of measures that SHIs could take in management, design and tenant services to develop safe spaces for women. The work provided material for highly productive workshops and has promoted a discourse in the sector on various aspects of gender equality. It was also evident that the material was greatly appreciated and well-utilised by municipalities.

Others, however, maintained that the sector already has the necessary policies and that significant progress had already been made in gender equality, while some felt that the process is happening organically. Others expressed the opinion that socioeconomic integration was a greater priority for the sector. There was also a sense among a few participants that a focus on gender equality alone leaves out other marginalised and excluded groups.

From a pragmatic perspective it needs to be recognised that Equal Spaces was not well-positioned to address broader issues of exclusion beyond gender even if that had been the intention. There was a considered discussion among those organising the work that incorporating other marginalised groups would make the study too complicated for most stakeholders to engage at this stage of the developed consciousness in the sector. Over the longer-term, however, it should be possible to bring a focus to issues around equality and inclusion for other marginalised groups even if in an incremental way.

5.3 National Workshops

The evaluation found that the series of national workshops provided by Equal Spaces was highly relevant, met a range of priority needs and dovetailed very well with the other interventions. While a small number of limitations were identified the evaluation concluded that very little needs to be corrected around the Equal Spaces workshop strategy. It is clear that that workshops do more than

simply impart knowledge and develop skills. The model served to create highly productive learning environments which maximised peer-to-peer engagement and built a forum for innovation, ideas and problem solving.

With few exceptions, the targeting for the workshops has been well undertaken and the right staff members are participating in the most relevant workshops for them. They have, however, attracted those who are already well-motivated and have not reached smaller, emerging SHIs who require capacity building the most. This model works well for people and organisations keen to develop their own capacity and who are invested in the development of the sector as a whole.

The evaluation revealed that there are significant remaining skills and knowledge gaps that could be addressed through further workshops. However, it is clear that the workshops to date, at least in the vast majority of cases, identified high priority needs. The remaining skill and knowledge gaps identified in this report are generally very well-known to Equal Spaces which has been addressing these challenges with the SHRA throughout 2018.

The learning hub has facilitated a level of access to learning and peer exchange not previously experienced in the sector. The removal of logistic and financial barriers to support, knowledge building and peer engagement have been key to the success of this initiative. The hub net has expanded with two SHIs having created their own mini-hubs. NASHO has “ownership” of the hub and a professional, whose duties include overseeing the hub as part of a broader capacity building strategy, has commenced work at NASHO.

5.4 Canada Study Visits

In keeping with the central thematic finding of the evaluation it was found that a key strength of the study visit programme was that it exposed the participants to models and ideas on relevant issues in highly practical ways. But on a deeper level the inspiration that most participants experienced was an even more salient factor. The sense of this was encapsulated by one participant who reflected that: “Even from intrinsic motivation perspective – when you’re exposed to that level of opportunity you come back refreshed, energized and wanting making a difference.”

Innovations observed in management, design, transversal partnerships and community development served as workable models and the participants were able to inculcate technical understanding around their development and implementation. There was a sense that most of the learnings had great applicability in South Africa and respondents cited some examples of how such earnings have helped inform practice.

Not all elements were seen to be transferable. For example, in South Africa there are not the same funding streams available to assist groups such as people with disabilities, those with mental health challenges and seniors. While the same might be concluded for broader community development initiatives the study visit experience has led to one large SHI fundamentally changing its approach to community development and substantially expanding the unit responsible for it. Other SHIs were making moves in this direction around community development as well as in client services.

The evaluation captured ideas for opportunities to further develop the scope and thus increase the impact of the study visit model. One such idea is to bring in Canadian sector figures and have them interact in our environment. Another is to develop a programme of longer-term work exchange. A core finding was that the greatest value of the study visit programme lay in the visits to institutions, the observation of their operations and the interactions with staff. The vital lesson here is that no learning intervention can substitute for the experience of being present in and interacting with peers in their own environment.

6 Recommendations

It needs to be noted that not all of the following recommendations could be realistically addressed by Equal Spaces alone. Most will require partnerships with key sector actors, particularly the SHRA and NASHO. Given the evolving roles of these two organisations some of the recommendations might be suitably addressed by the SHRA or NASHO as the lead proponent.

1. Make no fundamental changes to the Equal Spaces programme direction, content or modes of engagement.
2. In collaboration with the SHRA and others comprehensively address the issue of poor financial literacy and management capacity in SHIs and consider how support may be provided and integrated for this purpose through all modes of interventions. The current initiative to develop and implement a strategy aimed at assisting new SHIs is a major step forward to addressing this most pressing need in the sector.
3. Continue to prioritise the issues of land access and acquisition (including in the context of precinct-based planning) in the development of capacity building interventions.
4. Provide support to SHIs planning to develop or expand community development services and local economic development. A database being created by Equal Spaces and NASHO to encourage mentoring and sharing on these issues may provide a good platform for such support.
5. Continue to build understanding of, and commitment to, urban regeneration, and the role of social housing therein, within the sector, among key decision-making institutions and persons, whilst developing technical skills on this theme.
6. Continue and even increase the momentum towards developing the *back office*.
7. Ensure that hub initiative does not lose momentum and strategise around ways to broaden support for it. The investiture of the hub with NASHO provides a strong platform for this.
8. Continue to drive consultant Megan Sager's work around portfolio diversification and equity creation. Also consider how her services could be utilised in the delivery of high-level capacity building.

9. Provide technical support, analysis and information to assist key stakeholders in developing their own paths for influencing directions of policy and implementation. Visits planned for high-level municipal officials from Canada could be utilised for this purpose.

10. Provide follow-up support in municipalities to ensure that the awareness of the link between social housing and urban regeneration is not lost. Such follow-up should focus on technical assistance, education, support for key staff and those at the political representative level.

11. Gender Equality

- Continue to the roll-out of key pieces of the Gender Equality Strategy, particularly those informing management, staff development, design, planning, tenant relations and community development practices at SHIs.
- Over the longer term, even if in an incremental fashion, stimulate and facilitate discussion in the sector on issues related to equality and inclusion for a range of marginalised groups in the context of the social housing space.

12. Canada Study Visits

- Continue the visits and expand access to them, even if this means that the participating institutions who are able to do so, commit to covering a portion of the costs. However, careful targeting must be undertaken to ensure that the most relevant people are recruited for the visits. Where possible, ensure a mix of SHI and municipal participants in any one visit.
- In the study visit itinerary allocate more time and emphasis to institutional visits and less to a presentation-style format.
- Consider bringing more Canadian sector players to South Africa ensuring that their itinerary provides maximum opportunities for broad engagement and hands-on participation.
- Expand the focus on community development initiatives.
- Investigate the feasibility of developing a longer-term exchange programme between the Canadian and South African sectors.

7 Conclusionary comments

This evaluation has found that, through its multifaceted interventions, the efforts of Equal Spaces have resulted in extremely positive outcomes in terms of expanding capacity in the social housing sector, both in SHIs and public bodies, and in helping develop the public policy agenda on social housing and urban regeneration. All four strategies of support analysed in this evaluation were found to have been highly relevant, well-delivered, cost effective and, while impactful in their right, mutually supportive and aligned in such a way that strengthened the efficacy and impact of the overall project.

The great value Equal Spaces has brought occurred within an existing institutional support context in South Africa which has its own capacity and which coalesced with the project. A cornerstone of the strength of the project is that it built on this capacity in a way to help ensure that the gains are consolidated and mainstreamed so that the South African social housing sector will continue to strengthen and develop well beyond the term of Equal Spaces.

Appendix 1: Interview Participants

NASHO Staff

Malcom McCarthy, Executive Director

Themba Mbangata, Social Housing Assistant

Bathandwa Gumede, Urban Regeneration Assistant

Jacus Pienaar, Consultant

Social Housing Institutions (SHIs)

Anthea Houston, CEO: Communicare

Tony Lloyd, CEO: IMIZI, NASHO NEC

Andrew Wiseman, MD: Own Haven, NASHO NEC

Rose Chetty, GM: Business & Community Development, EHC

Caroline Kuppusamy, Client Services Administrator: MHA

Heather Maxwell, CEO: SOHCO, NASHO NEC

Anthony Ngcezula, ex-CEO, JOSHCO, NASHO NEC

Karabelo Pooe, JHC Development & Finance

Prakshna Somai, CEO, Yeast

Chris Lund, CFO: MHA

Social Housing Regulatory Authority (SHRA)

Dewalt Koekemoer, Sector Development & Transformation Executive

John Mofokeng, Capacity Development

Gafee Vengadajellum, Consultant, ex-SHRA Regulation Manager

Rheena Hansarajih, Compliance Analyst

Gillian Mackay, Strategy Research & Policy Manager

Rory Gallagher, CEO, PSC Member

Metropolitan Municipalities

CAPE TOWN

Lance Boyd, Senior Professional Officer

Pogiso Molapo, Manager: Social Housing and Land Restitution

Nomzamo Mlungu, Head: Social Housing and Land Restitution

Mark Rountree, Executive Support officer to Councillor Brett Herron Mayoral Committee Member:
Transport & Urban Development (TDA)

eTHEWKINI

Beryl Mphakathi, Deputy City Manager: Human Settlements

Smangele Moloji, Portfolio Head: Social Housing

Soobs Moonsamy, Programme Manager: Urban Renewal

JOHANNESBURG

Nikki Pingo, Development Facilitation, Acting Executive Manager, Johannesburg Development
Authority (JDA)

Manny Sotomi, Director: Housing Programme Support

Equal Spaces

Lizette Zuniga, Technical Advisor

Jo Ferris-Davies, Technical Advisor

Others

Helen Rourke, Programme Manager: Development Action Group (DAG)

Naeemah Sadien, Project Officer: Development Action Group (DAG)

Ahmedi Vawda, Deputy Director General: National Department of Human Settlements (NDHS) (also
PSC member)

Appendix 2: Standard Interview Schedule

Interview subject:

Organisation:

Date:

Evaluation Question	Sub-Questions (Effectiveness, Outcomes and Efficiency)
<p>To what extent have the interventions of the long- and short-term technical advisors, and products developed by them jointly with stakeholders, helped to increase capacity?</p>	<p>Have the participants who have engaged with the TAs felt that their and their organization’s capacity was enhanced in the most important areas of need as a result of the engagement?</p> <p>To what extent, and in which ways, has the support from / collaboration with the TAs been valuable? (e.g. improving processes, institutional arrangements promoting greater collaboration between diverse stakeholders, promoting/working with working groups, steering committees, transversal teams, etc.).</p> <p>Have the participants been able to utilize any acquired skills in the workplace and, if so, to what effect?</p> <p>Was the format, foci and the means used by the TAs optimal for facilitating learning and capacity building? Which methods and means work the best for people (e.g. face to face meetings, workshops, e-mail or telephone communication, etc.)? What, if anything, could be improved in these regards?</p> <p>Where there any parts of the products or aspects of the support which were not as relevant as they could have been?</p> <p>Are there any remaining skill or knowledge focus areas for which support from the TAs would be useful?</p> <p>Were issues pertaining to gender equality addressed by the TAs? How did this manifest in the workplace (e.g. RFPs, access to employment opportunities, balance in participation engagement in urban regeneration and community management, etc.)?</p> <p>Was the support and services provided by the TAs efficient from the perspective of optimal allocation of resources? Was, for example, the right combination of capacitation strategies provided and was the targeting of resources viz needs optimal in terms of relative cost effectiveness? If not, what could have been /could be done to more efficiently use such resources to meet need?</p>

<p>To what extent have the products developed by local consultants (and any support provided by them) strengthened the capacity of stakeholders who have utilized them?</p>	<p>To what extent have stakeholders who have utilized the products developed by the consultants or received their support feel that their capacity and that of their organizations has been developed? In what areas?</p> <p>Have the products / tools created (and the support provided) been relevant in addressing the challenges for SHIs and the challenges for the Metros?</p> <p>Have the products and the support provided by the consultants been useful in addressing key objectives and priorities? What are some examples?</p> <p>Where there any parts of the products or aspects of the support which were not as relevant as they could have been?</p> <p>Has any support or materials around the issue of gender equality (including the strategy) been utilized in organizational, planning, operations, services or engagements? If so, how and to what effect?</p> <p>Are there any priority areas in which consultants should be further retained to develop new products or provide support?</p> <p>Was the support, services and / or products provided by the consultants efficient from the perspective of optimal allocation of resources? Was the targeting of consultant resources viz needs optimal in terms of relative cost effectiveness? If not, what could have been /could be done to more efficiently use such resources to meet need?</p>
<p>To what extent have the national workshops and exchanges contributed to capacity building?</p>	<p>In what ways have the workshops and exchanges-built capacity?</p> <p>Was the material highly relevant in terms of meeting capacity building priorities?</p> <p>Are there any important areas that have not yet been addressed?</p> <p>Could these interventions be more relevant or better focused to meet such priorities? If so how?</p> <p>Have the workshops and exchanges been far reaching enough? Are they engaging enough stakeholders and the most appropriate ones?</p> <p>Have workshop participation and materials been of assistance in helping participants and their organizations build networks and in undertaking effective networking? If so, in what ways?</p> <p>Are the teleconference “learning hubs” effective mediums? Please explain either way.</p> <p>Were the style, mode and format in which the workshops were presented optimal to maximize learning? (e.g. balance of presentations vs working together sessions, quality, length, etc.)? If not, what could be changed?</p>

	<p>Did the workshops represent an efficient use of resources? Were the foci and quality of the training viz needs efficient in terms of relative cost effectiveness? If not, what could have been / could be done to more efficiently use such resources to meet need?</p>
<p>Are the study visits to Canada effective as a capacity building intervention?</p>	<p>Do study visit participants feel that their knowledge and capacity have been significantly enhanced through the experience?</p> <p>If so, what were the key elements that brought these about? If not, how could the format and or content of the visits be improved?</p> <p>In which ways have the study visits broadened the participant’s understanding of urban regeneration and social housing practices?</p> <p>To what extent have such learnings been relevant to the South African environment?</p> <p>Have participants been able to apply skills and knowledge gained though the visits? If so, how?</p> <p>Have the study visits resulted in the development of networks and / or ongoing professional relationships both in Canada and within SA? If so, in what ways have these been helpful?</p> <p>Have the content and experience of the study visits been useful in any way in terms of informing efforts back home to improve gender equality practices in the sector such as better engagement and participation opportunities for women (and other policies or practices)?</p> <p>Given the significant costs involved are the study visits an efficient means to promote information sharing and capacity building? If not, how might the resources be better-utilized to achieve these objectives?</p>