



PUBLIC SERVICE COMMISSION

**REPORT ON THE EVALUATION OF GOVERNMENT'S
POVERTY RELIEF PROGRAMME**

2005

HSRC RESEARCH OUTPUTS
3671

FOREWORD



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GLOSSARY

AGIS	Agricultural Geographic Information Systems
CASP	Comprehensive Agricultural Support Programme
CMIP	Consolidated Municipal Infrastructure Programme
DBSA	Development Bank of South Africa
DPLG	Department of Provincial and Local Government
EPWP	Expanded Public Works Programme
FSDP	Free State Development Programme
FSGDS	Free State Growth and Development Strategy
GCIS	Government Communications and Information Systems
GIS	Geographic Information Systems
GPS	Global Positioning Systems
HSRC	Human Sciences Research Council
IDP	Integrated Development Plans
IDT	Independent Development Trust
IFSNP	Integrated Food Security and Nutrition Programme
ILO	International Labour Organization
ISRDP	Integrated Sustainable Rural Development Programme
LED	Local Economic Development and Social Plan Grant
LEDF	Local Economic Development Framework
LRAD	Land Redistribution for Agricultural Development
M&E	Monitoring and evaluation
MIG	Municipal Infrastructure Grant
MOS	Measure of Size
NDA	National Development Agency
NSDP	National Spatial Development Perspective
NSS	National Statistical System
OPSC	Office of the Public Service Commission
PDF	Portable Document Format
PGS	Provincial Growth Strategies
PoA	Programme of Action
PPS	Probability Proportional to Size
SLAG	Settlement and Land Acquisition Grant
URP	Urban Renewal Programme

EXECUTIVE SUMMARY

1. Background

South Africa has a legacy of inequalities that the democratic government of the country has been dealing with since 1994. To address these inequalities the government dramatically increased the proportion of funds being allocated for social related initiatives. This was in line with the thinking laid out in the White Paper on Reconstruction and Development in 1994 that looked at addressing poverty, access to land and improving the imbalances in access to services and infrastructure so that the quality of life of all people could be improved. Now eleven years after the ushering in of the democratic state in South Africa the government is still challenged by poverty and the need to reduce it by half by 2014 in line with its commitments to the Millennium Development Goals (MDG).

The interventions implemented by government have largely been allocating funds to the neediest areas in the country. However, the impact of these programmes, especially amongst the ultra poor, has been limited, which has contributed to the Gini Coefficient becoming worse over recent years. Factors that have been identified as contributing to a lack of performance of these programmes includes poor coordination, poor integration of service delivery, lack of processes, exclusionary practices and a lack of monitoring and evaluation. President Mbeki in his State of the Nation address in 2005 described a new framework within which the government is to address the poverty and service imbalances in South Africa.

To achieve the goals within this new framework requires an improvement in the way the State operates. There will also be the need for acceleration in social development. Poverty relief programmes will have to be implemented more effectively to ensure that targeted communities, especially the poorest members, benefit. To enable the Office of the Public Service Commission (OPSC) to assess the extent to which government is having success in implementing its poverty relief programmes, a project was implemented to gain a more thorough understanding of the criteria and definitions used to describe poverty. The project also collected information on projects of as many programmes within national and provincial departments as possible. This information is required to enable the OPSC to draw a sample of the programmes and projects so that an evaluation of government's poverty relief programme can be done.

2. Methodology

A review of international and South African literature was done to get an understanding of the definitions used to describe the different types of poverty relief programmes and the criteria used to categorize them. Key informant interviews were also conducted with selected national government departments. The intention of the interviews was to get a perspective on how

government officials defined poverty and what criteria they used to categorize the different programmes and projects into the different poverty types.

Before any information on the programmes and projects were collected, a database was designed to house any data collected and to create a potential framework for future reporting on programmes and their projects. A relational database was designed that should be used in the future to collect information on programmes and projects. This was done through consultation with national government departments and by reviewing programme databases already in existence. Two main approaches were then used to collect information on programmes and projects. Firstly, the annual reports of every national and provincial department was collected and examined to identify all programmes that were developmental, poverty relief or conditional grants.

Searches of the literature and the web were also done to identify programmes and to access any information on them or the projects undertaken within them. Government officials responsible for these programmes were contacted and information on the programmes and their projects solicited. Unfortunately, through this approach little information was obtained on the programmes and the projects. Secondly, workshops were held with national and provincial departments to get further information on definitions, criteria and data on their programme projects. Information received on projects belonging to programmes was then captured into databases before being integrated into one overall project database.

3. Findings

President Mbeki's "three pillar formulation" is the government's most recent portrayal of how it is to address the multi-dimensional nature of poverty and under development in South Africa. This involves encouraging growth and development in the First Economy, increasing the potential to create jobs, implementing programmes to address the challenges in the Second Economy and building a social security net to bring about poverty alleviation. It is within this framework that the OPSC recommends that "poverty reduction" be used as the term to describe all of government's programmes that focus on poverty and underdevelopment. Poverty reduction can be defined as 'an initiative, project or programme that seeks to improve the livelihood or quality of life of poor individuals or households'.

The advantages of this term are that it is sufficiently broad and generic to be able to incorporate all programmes presently being implemented by government from the 'welfarist' to the "developmental' and 'structural' programmes. This is the wish expressed by government officials when consulted during the workshops conducted in the study. Furthermore, 'poverty reduction' implies a long term and large scale effort by the government in addressing the different forms of poverty in South Africa.

In selecting criteria or a categorization of programmes, two issues were considered. In the first instance, the categorization should lend itself to any future monitoring and evaluation and in the second instance; it should resonate with the way that decision makers see their various endeavours. Considering the above two categorization issues, the one approach focuses on poverty types and the second on programme/activity types. The first approach defines programmes by the type of poverty that they are addressing (e.g. income, capability, asset, special needs and social insurance) and the interventions that are implemented. The second approach simply defines programmes based on the existing programme interventions (e.g. social security, free basic services, subsidized services, housing, land reform, income generating and public works) and the advantage of this approach is that it already aligns with governments thinking. It is the second approach that is the more favoured by the OPSC.

An integrated database of more than 36 programmes was produced that contains more than 11 500 projects. These projects have been captured into a database design developed during the study that may well form the basis of a database structure used by government to standardize the reporting on programmes and projects in the future. With the incorporation of some of the largest programmes such as that of the Expanded Public Works Programme (EPWP), Integrated Sustainable Rural Development Programme (ISRDP), Free State Growth and Development Strategy (FSGDS), Land Redistribution for Agricultural Development (LRAD), Settlement and Land Acquisition Grant (SLAG) and the Comprehensive Agricultural Support Programme (CASP) a solid foundation has been developed. However, many more important national and provincial programmes could have been incorporated if the support was forthcoming from the different departments. More specifically, the Department of Housing's Housing Subsidy Programme and the Department of Provincial and Local Government's Municipal Infrastructure Grant (MIG) and the Consolidated Municipal Infrastructure Programme (CMIP) as well as the registers that have been set up by some of the Premier's offices, could have been provided.

A further finding of the project was that there was no central national database of poverty relief programmes and projects. This meant that the information had to be sourced from the national and provincial departments themselves. Furthermore, both programmes and projects did not normally have sets of unique numbers to distinguish themselves from one another, which means that it was difficult to pick up duplicate projects in the data sets and to be able to do comparative analyses of programmes and projects from one year to another. A future requirement of any central database is to identify both a core set of variables for which information on programmes and projects needs to be collected and a set of indicators for measuring the impact of programmes. Norms and Standards should also be developed around how information on programmes and their projects are collected and stored in a database.

A system that allows the capture of information on programmes and their projects is required that takes into consideration the points that have been presented in the previous paragraph. The Office

of the President has already commissioned such research and the findings of the study are presently awaited. Another outcome of the project is that a list of programmes that are known to occur in the different national and provincial departments with their contact details has been compiled, which provides a ready source of information for future studies that may want to add to what has been collected in this project.

4. Conclusions and recommendations

The project has successfully accomplished the three main objectives that it set out to achieve. In the first instance, a definition was provided for government to use when describing programmes that have a focus on poverty. Secondly, a mechanism of categorizing poverty programmes was described and the criteria for the inclusion of programmes into the different categories provided. Finally, an integrated database of programmes and their projects was developed that can be used for the selection of a sample to conduct an evaluation of government's poverty relief programme. However, much more could have been done in the development of an integrated database of programmes and projects if government processes and systems were in place and the necessary capacity was available in national and provincial departments to make the necessary information available. It is with this context in mind that the following recommendations can be made.

Recommendations

Definitions and categories

The definitions and categorizations suggested in this report should be communicated to relevant stakeholders for their consideration and input. Mechanisms should be examined as to how these definitions and categories can start to be incorporated into the business processes of national and provincial departments.

Development of a database

A national strategy and Norms and Standards for the implementation of poverty relief programmes should be developed. A standardized set of variables and indicators for each programme and project should be collected. The Office of the President has been identified in the Programme of Action to take forward the development of government's monitoring and evaluation system. It is further recommended that the Office of the President take responsibility in consultation with the National Treasury, Statistics South Africa and the OPSC, for the development and maintenance of the database of government poverty relief programmes and their projects on an annual basis.

Part of the requirements of a system is the development of appropriate business process to ensure the proper recording of information on programmes and projects. In this regard, there is a need for government to develop a system that allows programmes and projects to be provided with unique

identifier codes or numbers. It is also critical that geographic information on the projects to be provided and that the sub-place names database of Stats SA become the official source of names to use for geo-locating projects.

Sample design for the evaluation phase

It is recommended that data from the integrated database and the additional electronic and hardcopy information that is to be received on national and provincial programmes and their projects after the completion of this study be considered as two separate target populations. The two populations will be stratified by province and programme and a sample of 300 projects will be drawn from each with probability proportional to size (pps). The Measure of Size (MOS) will be the total number of projects in each strata.

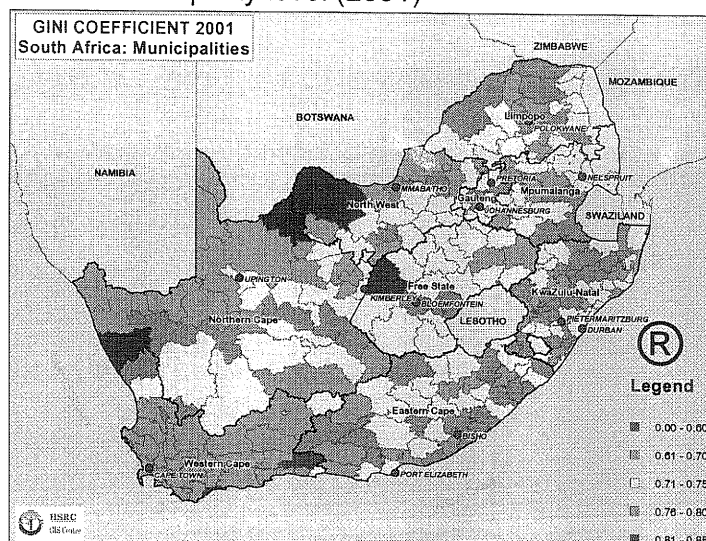
1. INTRODUCTION.

1.1 Background

Since the new government came into power in 1994, it has shown great commitment in addressing the many inequalities that came from the previous apartheid government. Over the last eleven years the government has dramatically increased the proportion of public resources being allocated to social-related spending. This they have done through many different initiatives and have shown their willingness to invest heavily in meeting the basic needs of the people of South Africa. They have done this by delivering infrastructure and services through initiatives such as the Expanded Public Works Programme (EPWP) to the many poor communities distributed across the country. Research conducted by the Human Sciences Research Council (HSRC) as part of the Ten Year Review showed that largely the government was targeting the poorest areas in the country (Aliber and O'Donovan, 2004).

Other impressive programmes of the government have been the provision of social grants to the elderly, children, disabled and other beneficiaries. They have also provided free or subsidized services such as free basic water and electricity, free primary health care and subsidized education. Through other initiatives they have shown their commitment to improving the human capital base of the country. However, these programmes have not had the impact that was anticipated, especially amongst the ultra poor, and this will have contributed to an increase in the Gini Coefficient or income inequality of the South Africa. Figure 1 shows that the municipalities with the highest levels of income inequality are located in the North West, Northern Cape and Free State provinces.

Figure 1: Gini Coefficient at a municipality level (2001)



The persistence of under development, poverty and inequality in the country has resulted in President Mbeki outlining a new approach to addressing these problems (Mbeki, 2005). The approach will be based on three pillars, namely: encouraging growth and development in the First Economy; increasing the opportunity for jobs and addressing the challenges of the Second Economy and building a social security net to bring about poverty alleviation. Analysts have pointed out the elements of this approach are largely the same as those laid out in the White Paper on Reconstruction and Development of 1994 (Aliber and Nhlapo-Hlope, 2005). The main principles of the RDP was to improved the standards of living and quality of life for all South Africans and to create a sustainable democracy by prioritizing poverty eradication, access to land and providing basic services to people within a peaceful and stable society characterized by equitable economic growth.

Several factors have been identified that have inhibited the government achieving these objectives. One of these factors is the inappropriate processes and exclusionary practices that have infiltrated into the governance and implementation of government programmes. Research conducted by the Office of the Public Service Commission (OPSC) into the national housing subsidy scheme showed that it was being constrained by factors such as poor coordination and the poor integration of service delivery systems and processes (PSC, 2003). Other problems that have been identified by the OPSC is that project management systems are often not introduced, criteria for support are not clearly defined and results are not monitored. This has resulted in the government concluding as part of the Ten Year Review that more direct interventions is possibly needed and in fact, this has been called for by some departments attending workshops as part of this study.

To achieve the objective of halving poverty by 2014 as stipulated in the Ten Year Review, released in October 2003, it is essential to improve the performance of government. The OPSC's State of the Public Service Report of 2004 highlights the importance for government to accelerate social development and address poverty more effectively to ensure that the above objective is achieved. Research undertaken by the HSRC has pointed out that it is not only about a reduction of poverty through improved performance but it is also about identifying the prevailing conditions in areas and using the natural, human and economic resources to bring about economic growth where the poor share equally in the proceeds (Aliber and Nhlapo-Hlope, 2005). Improving road access to economic centres where people can find employment, raising the standard of education and improving access to health facilities are all factors that need to be considered when implementing programmes aimed at improving the standards of living of people in South Africa.

It is against this background that the OPSC has identified the need to evaluate government's poverty relief programme to see to what extend it is having an impact on under development, poverty and inequality in the country, especially in relation to the three pillars highlighted by President Mbeki. Of great importance to any evaluation of this nature is to determine the extent to which an integrated approach to development is being achieved and whether this is happening

within a "comprehensive, coherent and co-ordinated framework" (PCAS, 2003). To undertake such an evaluation requires as thorough an understanding as possible of all government programmes at a national and provincial level so that the universe for sampling purposes can be defined. From this sampling frame a realistic and representative sample of projects will be identified to conduct the evaluation as part of a second phase of this project.

1.2 Purpose and objectives

The purpose of the project is to provide all the necessary definitions, criteria and data on government programmes aimed at poverty relief. The idea is that once a universe of projects within the programmes being implemented by the national and provincial departments has been developed that a realistic and representative sample can be drawn. This will enable the OPSC to implement Phase 2 of the project that will involve evaluating the impact of selected programmes and projects.

To achieve the purpose of evaluating government's poverty relief programmes and projects, the following three objectives were set for the project:

- To define what is meant by poverty relief (and related terms) programmes and projects.
- To develop criteria for the classification of poverty relief programmes and projects
- To develop and populate a database on poverty relief programmes and projects in all government departments at national and provincial level.

1.3 Mandate of the Public Service Commission

The Office of the Public Service Commission is an independent and impartial institution established in terms of Section 196 of the Constitution of South Africa (1996). On its creation it was tasked and empowered to investigate, monitor and evaluate the organisation and administration of the Public Service. This mandate also entails the evaluation of achievements, or the lack thereof, of government programmes at all levels.

Linked to the aforementioned powers, the OPSC is also tasked with the promotion, throughout the public service, of measures that ensure effective and efficient performance, as well as promoting the values and principles of public administration as set out in the Constitution.

Having established that this project falls within the mandate of the OPSC, as determined by the South African constitution, the project employed the methodology detailed below, to achieve the set objectives.

1.4 Scope

The scope of this project was to include all programmes and projects aimed at poverty relief that are implemented at the national and provincial spheres of government. To carry out the scope, it was necessary to identify all programmes that in some way have a poverty or developmental focus. The setting of these objectives and scope are in line with the mandate of the Public Service Commission, which was outlined in the previous section.

1.5 Methodology

The methodological approach adopted by the investigating team to fulfil the objectives of the projects, were the following:

1.5.1 Definition of poverty relief projects/programmes and criteria for the classification of poverty relief projects

The definition and categorization of 'poverty relief' and associated concepts was examined through a review of the South African and international literature. South African literature included recent academic treatments, government documents, white papers, the State of the Nation address and budget reviews by the National Treasury. International literature included that of the International Labour Organisation (ILO), the World Bank and the Overseas Development Institute, amongst others. A summary of the relevant points extracted from the literature is provided in Addendum 1.

It is important to note that the approach had to be somewhat reflexive, in the sense that one can establish working definitions at the beginning of the project that might change on completion of the project or even after the project has ended. There remains a likelihood that these definitions will and should be amended as the project progresses and a more comprehensive idea of 'what is out there' and what constitutes a useful definition is obtained.

In addition, interviews were conducted with government officials in key departments as to their understanding of 'poverty relief' and their respective considerations as to what constitutes a 'project' and a 'programme'. The interviews were targeted at the Departments of Social Development, Health, Agriculture, Provincial and Local Government, Public Works, Land Affairs and Science and Technology. The Policy Co-ordination and Advisory Services Unit in the Office of the President and the National Treasury was also approached for interviews on the definition. Government officials interviewed in the selected departments are listed in Table 1.

Table 1: List of officials interviewed in selected national departments

DEPARTMENT	NAME(S) AND DESIGNATION(S)
Social Development	Sadi Luka – Chief Director, Integrated Development
Health	GH de Klerk – Deputy Director, Nutrition

DEPARTMENT	NAME(S) AND DESIGNATION(S)
	A Behr – Assistant Director, Nutrition
Agriculture	Salome Modiselle – Deputy Director, Farmer Settlement
Provincial and Local Government	Chris Malehase – Director, M&E Free Basic Services
	Amanda van Schoor – Deputy Director, Municipal Infrastructure Grant
	Neliswa Nolabankulu – Deputy Director, Free Basic Electricity
	Monthe Moatshe – Deputy Director, Free Basic Water and Sanitation
National Treasury	Julia de Bruyn – Senior Manager, Intersectoral Programmes
	(formerly Programme Manager, Special Allocation for Poverty Relief Infrastructure Investment and Job Summit projects)
Policy Co-ordination and Advisory Services, Office of the President	Vusi Gumede – Chief Director, Social Sector
	Mastoera Sadan – Director, Social Sector
	Lawrence Matemba – Deputy Director, Social Sector
Science and Technology	Isaac Lusunzi – General Manager, Poverty Reduction
Public Works	Stanley W. Henderson – Chief Director: Monitoring and Evaluation Specialist, Expanded Public Works Programme
Land Affairs	Carmen van der Merwe – Director, Redistribution Policy and Systems

Interviews were also centered around questions on the respective department's contribution to resolving South Africa's poverty problem, whether their efforts are working and the reasons for their success or failure with respect to poverty relief. Questions were also asked as to the department's reliance on a formal monitoring and evaluation (M&E) system.

1.5.2 Developing a database on poverty relief projects

1.5.2.1 Design of the database

Since there was no centralized national database on all poverty relief programmes and projects in South Africa, and it was assumed that no such database existed at a provincial level, it had to be designed from the beginning. The structure of the database had to allow all the required information of programmes and projects to be collected and, thereby, enable the scope of the project to be achieved. Furthermore, the database design was implemented to meet the future requirements of the Public Service Commission and ultimately, the government. In developing the database design, the project team examined databases from various national government departments.

The database design drew from available project databases of the Department of Agriculture (Land Care Programme), Department of Housing (Housing Subsidy Scheme), the Department of Public Works (Community Based Public Works Programme) and the Department of Science and Technology (Database on technologically-oriented poverty reduction projects). The database was

designed to contain fields relating to the main pieces of information needed to populate an extensive database of projects. These fields included the programme and project name, principal activities, contact details, budget information, location of projects (by municipality), outputs, beneficiaries, etc. An initial meeting between members of the project team, focused on discussing database design issues and the establishing of the database.

In order to test the utility of such a database design, that is one that will aim to capture relevant and useful data elements, a workshop with selected national government stakeholders was held. Representatives of the Department of Public Works, Department of Provincial and Local Government, Department of Social Development, the Public Service Commission and the Human Sciences Research Council (HSRC) attended. The workshop initially provided participants with the relevant context of the project and the database design. A preliminary database design was also presented to provide some framework to the discussions. This included a description of the tables to be incorporated in the database design, their attributes/fields and the relational links between them. Examples of code tables and values that need to be categorized were also presented.

The main discussion points that were touched on were:

- Programmes and projects to be captured in the database;
- Description of fields and the type of data to be stored in each (e.g. numeric or text);
- Defining values of programme and project types, categories or classifications;
- Fields that should be added (e.g. what data is required to aid classification later);
- Hierarchical relationships between programmes and projects and what data should be stored at each level;
- Identification of critical versus nice-to-have fields;
- A discussion on what data is readily available for all fields.

This workshop also offered the project team a rare insight into the functioning of government departments and highlighted the phenomenon of 'reporting fatigue', especially during the period leading up to the end of the financial year. During this time senior government officials are inundated with requests from directors-general, MECs, premiers and national ministers for relevant data in various formats to be included in budget and State of the Nation speeches. Following the workshop, amendments were made to the database design before a final report was produced.

1.5.2.2 Developing a database on government's programmes and projects

This phase of the project involved several different activities including conducting searches of the web and relevant literature in identifying national and provincial programmes and getting contact details of individuals that were responsible for such programmes. It also involved accessing and

capturing data on programmes and projects so that the database could be populated. The geographic coordinates or place names associated with projects were also used to map them.

The main approach followed by the project team in identifying national and provincial programmes was to obtain the annual reports from all national and provincial government departments (Addendum 2). A team of researchers obtained the contact details of national and provincial government departments from the web and through telephonic contact. The team then made contact with the departments and organized for couriers to collect the annual reports. However, most of the reports were obtained from the Government Printers in Pretoria and from the National Treasury that had already sourced and received the annual reports from most provincial departments. In the initial project plan, it was indicated that this would be undertaken over a period of a month but because of the difficulty in contacting the relevant government officials, this process eventually took much longer.

Having received the annual reports, researchers then scanned through them to identify any poverty or developmental related programmes and projects. The list of programmes identified from the annual reports in the different departments is provided in Addendum 3. The criteria used to identify relevant programmes and projects in the annual reports are listed below:

- All poverty relief programmes;
- All conditional grant allocations;
- Programmes that provided some form of services and/or infrastructure to communities or the people

The annual reports were also used to obtain information on programme objectives and projects. The list of programmes and their associated information that were identified in the annual reports are presented in Addendum 3. The national and provincial government departments were then contacted telephonically to obtain the names of government officials responsible for the identified programmes. Direct contact with government officials was made through telephone, fax, e-mail and personal visits. An example of the letter faxed to each of the departments requesting information on programmes and projects is provided as Addendum 4. The reasons for the direct contact were threefold: i) to verify information that were already available via existing databases; ii) to collect more information about programmes and projects for which only partial information was available; and iii) to identify 'new' poverty relief initiatives and to collect the necessary information about them in the format set out in the database design.

Written material describing these government programmes was also accessed by undertaking internet-based searches for literature and accessing departmental web sites to assist in getting the contact details of government officials. Information obtained from the web and from the government departments themselves was used to populate the database with information on

programmes and projects. The official website of the South African government (www.gov.za) was also used to access contact information of departments at national and provincial levels. The website carried a file in portable document format (PDF) compiled by the Government Communications and Information Systems (GCIS).

At the national level, the directors-general offices, the chief director, the chief financial officer or the person responsible for the programme was contacted. The approach of the project team at the provincial level was to contact the head of the department. The contact details of the person heading up the poverty relief programme and its activities in that department were then requested. These responsible persons were contacted to get access to information on the programme and to request access to the database of all projects undertaken in 2004/05 in the programme.

The project team worked closely with the national and regional OPSC offices to get access to contact details of government officials. These officials were then able to assist by suggesting contacts within government departments that were more directly linked to the different programmes. Officials of the OPSC's national and regional offices accessed these contact details personally and forwarded them to the project team. Although this avenue of enquiry yielded positive results, it was not significantly more successful than the approach described in the previous paragraph.

The approach of identifying the programmes and contacting relevant departments at a national and provincial level to get in touch with the government official responsible for the programmes so that the project databases could be accessed did not prove very successful. The main reasons for this was that few government official responsible for the programmes could be identified, those responsible for programmes could not be contacted after numerous attempts were made, the project team was informed that no project database existed and managers of programmes took a long time to provide any data on projects or provided no information at all. Consequently, after much time had been allocated to the gathering of information on programmes and project databases with limited successes, it was decided by the project team that workshops with government departments would be held in each of the nine provinces and at a national level.

Table 2 below shows the dates on which the different workshops were held. The regional offices of the OPSC assisted by making all the necessary arrangements for the workshops, including organizing a venue and contacting all the relevant provincial government departments. This was after a letter had been sent by the OPSC to all national and provincial departments (Addendum 5). Regional directors also welcomed delegates to the workshop and it was envisaged that they would continue to assist on the project by following up with the provincial departments. Members of the investigating team provided a brief overview of the project rationale and an understanding of what the objectives of the project were and how they would be undertaken.

Table 2: Dates of workshops with national and provincial departments.

DATE	WORKSHOP
30-May-2005	Western Cape
31-May-2005	Northern Cape
1-Jun-2005	Free State
1-Jun-2005	Kwazulu-Natal
3-Jun-2005	Mpumalanga
3-Jun-2005	Limpopo
6-Jun-2005	North West
7-Jun-2005	Gauteng
7-Jun-2005	Eastern Cape
9-Jun-2005	National Departments

Having introduced the project to the workshop delegates, discussions were held on what types (e.g. income, capability, asset, special needs or social insurance) and categories of poverty relief programmes (e.g. social security, free/subsidised basic household services, subsidised individual services, housing, land reform, income generating projects and SMMEs, public works) were being implemented in the provinces. The definitions that were being used to describe poverty relief, alleviation, reduction or eradication in the provinces were also discussed. The monitoring and evaluation (M&E) systems and/or activities taking place in the departments to assess the impact of these programmes and projects was also talk about. However, the main purpose of the workshops was to get an understanding of what databases were available on projects within the poverty-relief programmes at a national and provincial level. The discussion document used in the workshops is included as Addendum 6.

The contact details of provincial and national representatives at the workshops were used to follow up with government departments to get access to as many project databases as possible. The list of delegates that attended the workshops from the different national and provincial departments is provided in Addendum 7. This information in combination with the list of government officials responsible for the different programmes that were obtained from the internet searches is of great value as it will allow researchers to make contact with these programmes in the future so that current data on projects can be sourced.

During the project, electronic databases and hardcopy lists of projects in the different programmes was obtained from a number of departments. The databases received were integrated into the database structure developed at the onset of the project. The project data was stored in Microsoft Excel because it is the easiest to use in manipulating and analysing the data. It also provides much functionality including the ability to transpose data. Data capturers are also able to enter the project data quickly into the database. Hardcopy lists of projects were captured into the database structure by data capturers. Finally, the databases of all the programmes were integrated into a single database.

To enable projects to be geolocated to the smallest geographic place possible, the spelling of place names where projects were implemented had to be corrected and stored in a separate variable. Unfortunately, the geographic level that was provided for projects in the database varied from village to district municipality level. Consequently, a variable was included in the database that indicated to what geographic level each project in the database was geolocated. The projects were geolocated using Atlas GIS and the place names databases of Statistics South Africa, generated from the 1996 and 2001 censuses, were used to geolocate the projects.

1.6 Resources available to the project team

A team of more than fourteen researchers participated in the project. The team members were skilled in the collection of information on programmes and their projects as well as capturing this information into designed databases. Researchers with a background in poverty, monitoring and evaluation, database design and implementation and Geographic Information Systems (GIS) formed part of the team. Personnel based at the national and regional offices of the OPSC assisted on the project by making the necessary contact with national and provincial government departments. These officials also assisted in organizing workshops with national and provincial government departments.

The project team had access to all necessary modern information and communication technologies and facilities required to implement the project. This included access to telephones, faxes and the Internet to make regular contact with officials responsible for the national and provincial government programmes and to access any electronic or hardcopy documents forwarded to the project team. Researchers used Microsoft Excel and Access to design and capture the information on programmes and projects into an electronic database. The project team also had access to GIS software, namely Atlas GIS and ArcMap, to produce the necessary maps.

1.7 Limitations

The project was limited by the fact that it was initialised towards the end of the 2004/5 financial year. This meant restricted and delayed access to senior officials within government. At this time, a major task was supplying information that had to be fed into the annual budget speech by the Minister of Finance, as well as the completion of departmental activities for the financial year end.

The project was severely limited by the lack of a central database on programmes and projects. Furthermore, the seemingly limited capacity and lack of resources at national and provincial departments to deal with requests for information on programmes and projects also prevented the project from fully completing its objectives.

2. DEFINITION OF POVERTY RELIEF PROJECTS/PROGRAMMES AND THE CRITERIA FOR THE CLASSIFICATION OF POVERTY RELIEF PROJECTS

2.1 A definition of poverty

Over the course of the past two decades, there has been increasing attention to the fact that poor people's experience of poverty involves a great deal more than inadequate income or consumption (Chambers, 1994; Kanbur and Squire, 1999). This has been forcefully illustrated in South Africa by means of a number of qualitative research initiatives, of which perhaps the most ambitious is the excellent South African Participatory Poverty Assessment, or "SA-PPA" (1998). All of this leads to ways of describing poverty which seek to reflect poverty's multi-dimensional nature. A good example is South Africa's draft Comprehensive Social Security Framework, which seeks to ensure a social safety net that addresses "income poverty," "service poverty," and "asset poverty," among others.

In addition to these increasingly comprehensive and elaborate ways of describing poverty, there also exist many theoretical and methodological perspectives on poverty that purport to explain what poverty is, what is at its root, and/or how best to really understand it. These would include for example the 'capabilities approach,' the 'multiple livelihoods framework,' the 'entitlements approach,' etc.

Because government policy does in fact recognize the multi-dimensional nature of poverty, as evidenced by its attempts to address poverty in a number of different ways, the OPSC is adopting a working definition of poverty that is as broad and encompassing as possible. That is, an individual or household is said to be in a state of poverty when they are unable to meet her/his/its basic human needs.

2.2 Definitions of activities aimed at addressing poverty

There is no firm, internationally accepted typology of anti-poverty activities. However, there is a tendency to distinguish interventions according to the extent to which they are designed to meet immediate needs of those who otherwise cannot fend for themselves (i.e. 'welfarist'), or empower poor people to better their own circumstance (i.e. 'developmental'), or reconfigure the economy so that the structural aspects of poverty are minimised or removed.

The following definitions from Henriot (2002, p.6) are a typical example:

- *"Poverty Alleviation: this is the work of lessening the suffering of the poor, meeting their immediate pressing needs with welfare handouts and social security, providing safety nets, dealing with widows, orphans, the elderly and the handicapped. This is basically charitable assistance."*

- *“Poverty Reduction: this is the task of lowering the numbers of those living below the poverty line and eliminating them from the rolls of the deprived. This involves providing people with jobs which pay wages above the poverty line, providing health and education services, providing credit for small business enterprises and other opportunities to rise above the poverty line. This is, basically, commitment to development.”*
- *“Poverty Eradication: this is the challenge of restructuring society so that there is no longer growing poverty and absolute numbers of the impoverished decrease to minimal exceptional cases. This calls for planning – for setting priorities, for shifts in power, for restructuring society, for radical social and economic changes. This is basically the transformation of society through policies based on justice, compassion and inclusiveness. However, this article will use the term ‘addressing poverty’ to cover all of the above. Specific distinctions will emerge in the discussion of each approach. One can identify five approaches currently used for addressing poverty. They are not mutually exclusive but rather are interlinked.”*

Mafeje (2002) attempts to provide some historical explanation for the use of different terminology. He contends that “poverty alleviation” as a distinct concept arose among international development institutions (especially FAO, IFAD, and UNDP) in the late 1970s as they became increasingly disillusioned with the failure of conventional development policies to ‘trickle down’ to the poor. In other words, the emergence of the use of the term “poverty alleviation” was an acknowledgement of the need for more active measures to combat poverty in developing countries. Mafeje further contends that “poverty eradication” was a later coinage, this time as a reaction to the failure or limitations of structural adjustment policies; the distinction was more or less the same as that reflected in Henriot’s definitions above, i.e. in contrast to “poverty alleviation,” “poverty eradication” implied more attention to (developing) the self-reliance of the poor, and/or to addressing the social and economic conditions that perpetuate poverty.

However, it is fair to say that there is only modest consistency in the use of these and related terms in the international literature, notwithstanding the near-universal acknowledgement that it is important, inter alia, to distinguish safety-net type measures from those that are more developmental.

Turning now to the case of South Africa, it is evident that the situation is much the same. There is little or no consistency in the manner in which different terms are used (i.e. “poverty alleviation,” “poverty relief,” “poverty eradication,” etc.), but there is, broadly speaking, an understanding that there are in fact different types of interventions aimed at addressing poverty. This is confirmed by both the scan of the literature and the interviews with government officials. The central distinction, as with the case of “poverty alleviation” versus “poverty eradication” cited above, is that between

'welfare' and 'development,' as most visibly illustrated by the shift in thinking that was reflected in the name change from Department of Welfare to Department of Social Development. However, it is also important to point out that in South Africa the meaning of "poverty eradication" is somewhat different than described above vis-à-vis some of the international literature: it is not a function of the type of intervention, but rather is taken to mean the ultimate, longer-term goal of eliminating poverty, regardless of how it is achieved.

At one level, the distinction between welfare interventions and developmental interventions is very real: clearly the activity of disbursing grants is entirely different from supporting an income generating project or financing the transfer of land to poor people. However, at another level – that of impact – it is important to be cautious: it appears that it is not correct to assume that grants only assist poor people in terms of short-term relief from income poverty, while developmental interventions, by contrast, 'teach them to fish' (or whatever they do). There is credible research to the effect that South Africa's social grants are in fact quite developmental, while a lot of would-be developmental initiatives are not. One implication of this is that when the OPSC evaluates some of these programmes in the future, it must not restrict itself to an examination of impacts related to their stated objectives only.

2.3 Brief overview of South Africa's anti-poverty 'strategy'

Before proceeding to the proposed categorizations, a very brief summary of the prevalent view in government as to what their anti-poverty strategy consists of is provided. This is needed to address the possibility that an official typology of government's anti-poverty measures exists that may already suit the needs of the OPSC.

In fact, there is really only one recent, official statement as to government's anti-poverty policy that can be considered a candidate. In particular, we suggest that it is important to take note of the 'three pillar formulation' offered by President Mbeki in a speech to Parliament in May 2004:

"At the core of our response to all these challenges is the struggle against poverty and underdevelopment, which rests on three pillars. These are: encouraging the growth and development of the First Economy, increasing its possibility to create jobs; implementing our programme to address the challenges of the Second Economy; and, building a social security net to meet the objective of poverty alleviation" (Mbeki 2004).

This formulation is important in at least three respects. First, it accurately reflects the view of many in government and elsewhere that a central key to resolving poverty does not relate to targeted poverty alleviation initiatives at all, but rather to fostering a stronger and, hopefully, more inclusive, economy. Second, it confirms the distinction drawn above between the welfare-type interventions associated with the third pillar, and the developmental interventions covered in the second-

economy third pillar. And third, the two-economy language is now firmly ensconced in government's lexicon, for example serving as an organizing principle for the economic cluster in the government's Programme of Action (POA).

Arguably, however, it has three shortcomings. The first shortcoming is that the second and third pillars each are extremely broad and, in fact, heterogeneous. This is not to fault the three-pillar formulation as a short-hand for communicating with the public, but as a way of understanding the organization of government's anti-poverty strategy it is limited. The second, related shortcoming is that it is difficult to determine where poverty reduction through improved access to services is situated. It is noted that, if only for organizational purposes, the roll out of the Municipal Infrastructure Grant is listed as a second-economy intervention in the POA.

At the same time, provision for free basic services and subsidized healthcare and education are typically associated with the Social Cluster. The third concern with the three-pillar formulation is that it lends the impression of greater coherence to government's anti-poverty activities than can fairly be claimed. As 'pillars' go, interventions in the second economy are diffuse, uncoordinated, and generally are not established at a scale that is commensurate with the problems they seek to address.

2.4 Proposed definition of 'poverty reduction' for OPSC's purposes

The OPSC requires a broad definition of activities aimed at addressing poverty, which can be unambiguously linked to a single term. OPSC has determined that a useful general term to be used is 'poverty reduction,' which can be defined as 'an initiative, project, or programme which seeks to improve the livelihood or quality of life of poor individuals or households.' The reason for using 'poverty reduction' rather than 'poverty alleviation' or 'poverty relief' is that the latter are frequently understood to mean short-term palliatives. The advantage of 'poverty reduction' over 'poverty eradication' is that the latter is often interpreted to imply a long-term, large-scale effort with near-complete results.

The downside of 'poverty reduction' is that it is sometimes also construed with a specific meaning, as illustrated with the example above. However, the general observation is that, of all of the terms generally in use in South Africa, 'poverty reduction' is the broadest and most generic, which is suitable for the OPSC's purposes. The proposed definition itself aims to be quite inclusive, and indeed very clearly includes welfare, improved services, and developmental interventions. However, it does stress deliberate interventions, that is, it would not include indirect or passive lessening of poverty to due to job growth in the formal sector.

2.5 Proposed systems of categorization

An important component of the present exercise is to propose one or more ways of categorizing anti-poverty initiatives to serve the purposes of the OPSC. This means first and foremost that whatever way of categorizing that is proposed lends itself conveniently to any future monitoring and evaluation the OPSC way wish to do. An additional consideration is that, if possible, it would be desirable if whatever is proposed were to resonate with the way in which South African policy makers tend to see their various endeavours.

Two main approaches to categorizing are explored, the first by poverty type, and the second by activity type.

By poverty type

This way of classifying anti-poverty measures is based on what is probably the most specific and developed South African attempt to categorise different initiatives. The following table appears on page 42 of the Taylor Committee (2002) report:

Table 3a: Comprehensive social protection package and components

POVERTY TYPE	APPLICATION	KEY COMPONENTS
Income poverty	Universal	<ul style="list-style-type: none"> ▪ Basic Income Grant ▪ Child support grant ▪ Maintained state Old Age grant
Capability poverty	Universal/ Eligibility criteria	<ul style="list-style-type: none"> ▪ Free and adequate publicly-provided healthcare ▪ Free primary and secondary education ▪ Free water and sanitation (lifeline) ▪ Free electricity (lifeline) ▪ Accessible and affordable public transport ▪ Access to affordable and adequate housing ▪ Access to jobs and skills training
Asset poverty	Universal/ Eligibility criteria	<ul style="list-style-type: none"> ▪ Access to productive and income-generating assets such as land and credit ▪ Access to social assets such as community infrastructure
Special needs	Eligibility criteria	<ul style="list-style-type: none"> ▪ Reformed disability grant, foster care grant, child dependence grant
Social insurance	Eligibility	<ul style="list-style-type: none"> ▪ Cover for old age, survivors, disability, unemployment, and health needs

Source: Taylor Committee, 2002.

Even though the focus of the Taylor Committee was on social security, its analysis went far beyond that to include poverty reduction in various aspects. The table above is not meant entirely to be descriptive of what exists (note for example the reference to the Basic Income Grant), nor necessarily to what should be (it is not in the recommendations section of the Committee's report),

but rather seeks to illustrate how different types of poverty can be addressed by different types of interventions. The work of the Taylor Committee has been further elaborated by the Social Cluster Task Team in various ways, of which one notable development was in distinguishing “service poverty” as a distinct category of “capability poverty” (DSD 2003), a distinction which we would endorse. Either way, it is clear that the “key components” identified in the third column encompass pretty much all anti-poverty measures in South Africa that one can think of, with the obvious exception of ‘first economy’ interventions.

The main drawback of this system from our point of view is that the mapping between types of poverty and key components is overly restrictive, as illustrated by the example given above about the under-recognized developmental impact of social grants. A second example is public works programmes, which in some countries are considered a type of welfare, and in others a form of capacity building (see e.g. Appendix 1 in the evaluation of the ‘RAP-85’ programme). However, recognizing this limitation and bearing in mind a few adjustments, the OPSC feels that this be considered as one way of categorizing anti-poverty activities. As reflected in Table 3b, the proposed adjustments are: 1) that, as had been done by the Social Cluster Task Team, ‘Service Poverty’ be distinguished from ‘Capability Poverty’, mainly for the reason that otherwise the suggested activities are too diverse; and 2) the non-inclusion of social insurance, or at least that part of it that depends on job-related contributions.

Table 3b: Revised comprehensive social protection package and components

POVERTY TYPE	KEY COMPONENTS
Income poverty	Social security grants
Capability poverty	Subsidised education, training and healthcare
Service poverty	Free / subsidised basic services
Asset poverty	Access to productive, income-generating and social assets
Special needs	Special grants
Social insurance	Employment-related social insurance schemes

By activity type

The second proposed way of categorising anti-poverty initiatives is by the type of activity, where this is defined more or less intuitively in line with major types of existing programme interventions. The table below illustrates:

Table 4: Categories based on types of activities

PROGRAMME TYPE	PROGRAMMES
Social security	• Child support grant

PROGRAMME TYPE	PROGRAMMES
	<ul style="list-style-type: none"> • Old age pension • Disability grant • Food parcels
Free/subsidised basic household services	<ul style="list-style-type: none"> • Water and sanitation • Electricity • Transport • Refuse removal
Subsidised individual services	<ul style="list-style-type: none"> • Education and training • Healthcare
Housing	<ul style="list-style-type: none"> • RDP housing
Land reform	<ul style="list-style-type: none"> • Land redistribution • Land restitution • Land tenure reform
Income generating projects and SMMEs	<ul style="list-style-type: none"> • Ntsika, Khula, etc. • Various departmental programmes (DSD, DEAT, DTI, etc.)
Public works	<ul style="list-style-type: none"> • CBPWP • Working for Water • LandCare • CoastCare • other 'components' of the EPWP, etc.

The advantage of this rather simple approach – apart from the fact that it is simple – is that it does not rely on a preconception of what a programme does or seeks to do, and it is aligned with government activities as they are presently defined.

Although in principle both approaches are serviceable ways of categorizing poverty reduction initiatives, in the sense that both could figure as fields in the database of initiatives, and thus serve as a means of disaggregating or drawing a stratified sample, it is felt that the second, simpler approach by types is preferred.

The reader may wish to know why, having delved into the semantics of “poverty alleviation” etc. that some sort of typology based on these terms is not proposed. The reason is twofold. First, it is felt that these terms are over-used and at the same time interpreted too variously to be useful, especially if and when the OPSC may wish to communicate with the outside world in respect of its poverty-related work. Second, the terms as described above are likely too coarse to be of much use.

2.6 Thinking ahead to monitoring and evaluation

The recent trend in Monitoring and Evaluation (M&E) is to focus on outcomes rather than primarily on inputs. 'Results-Based M&E' has been developed to support governments in designing and adjusting their projects, programmes and policies. Essentially, Results-Based M&E comprises the following activities (Kusek and Rist, 2004):

- Formulate outcomes and goals
- Select outcome indicators to monitor
- Gather baseline information on the current condition
- Set specific targets to reach and dates for reaching them
- Regularly collect data to assess whether the targets are being met
- Analyze and report the results.

A key question behind selecting and designing an M&E approach or system for South Africa's 'Poverty Reduction Programme' is what are the strategic goals and what outcomes are or could be attached to these goals? In the absence of a national poverty reduction strategy, goals could be deduced from current types of programmes and/or projects aimed at poverty reduction as these are listed in Table 3. However, an alternative approach is to use poverty reduction categories based on a typology of poverty (see Table 4) and to base the goals of poverty reduction on these poverty types.

The advantages of M&E based on the poverty type categorization include the following:

- The types cover various aspects or dimensions of poverty, whereas programmes and programme goals might be too specific and fail to impact on important poverty components.
- They provide a theoretical base against which dimensional assessments can be made and are thus less vulnerable to ad hoc and short evaluations. Programme goals are being defined once a programme comes into existence. Evaluation of the impact of a programme is therefore often limited to programme activities and duration per se and fails to incorporate developments, which are not necessarily directly related or synchronous to the programme.
- They allow for intergovernmental (integrated) assessments, whereas with regard to programmes intergovernmental activities are defined by programme design. This might result in one or few government departments involved and assessed. The poverty typology on the other hand allows for evaluation of department on the poverty dimensions irrespective of government programmes per se.

Disadvantages include:

- Interventions might relate to more than one typology; the typologies are not exclusive. Overall assessments of interventions/programmes might therefore become complicated. See also next point.
- There is no certain level of importance and relevance or weight attached to each type and the interdependency among types of poverty might be contextual. This undermines the possibility to evaluate a programme, which touches on various types of poverty.

Having said this, one should also consider current efforts to develop an integrated anti-poverty strategy, which is not necessarily based on either a poverty typology or existing programmes. According to Kusek and Rist (2004), the creation of a results-based M&E system often works best when linked with other public sector reform programs and initiatives, such as creating a medium-term public expenditure framework, restructuring public administration, or constructing a National Poverty Reduction Strategy. Linking the creation of M&E systems to such initiatives creates interdependencies and reinforcements that are crucial to the overall sustainability of the systems. Developing an anti-poverty strategy and an M&E system thus goes hand in hand.

3. DEVELOPING THE DATABASE ON POVERTY RELIEF PROJECTS

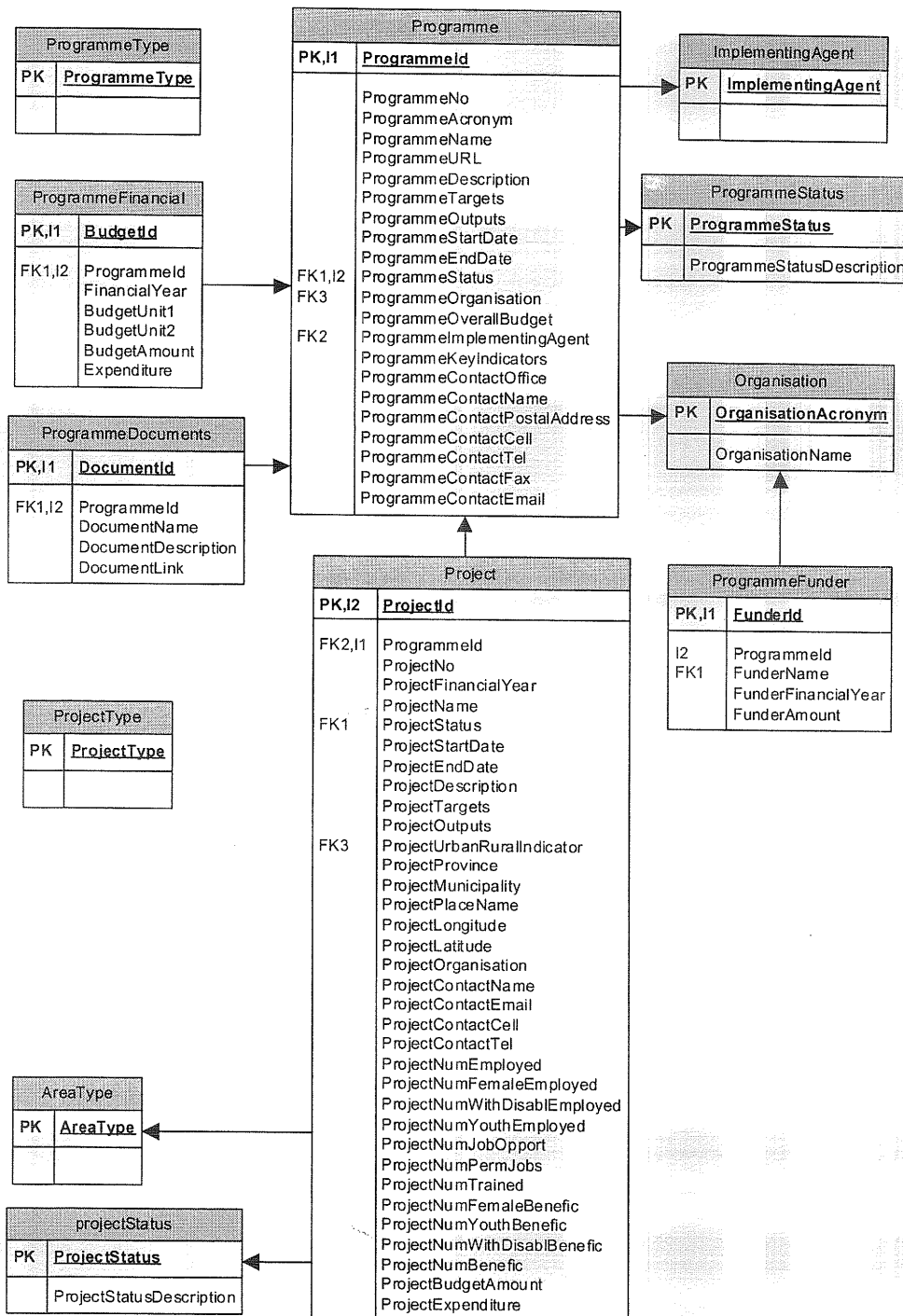
3.1 Design of the programme and project database

The database designed during the initial stages of the project uses a relational database configuration. A relational database design allows information on distinct entities to be stored separately but can be joined together using a key column or primary key (e.g. Programmeld) and, therefore, provides access to only the relevant data at any particular time. In the relational database design of this project, individual databases provide information on six main entities (Figure 2), namely: the programmes, projects, implementing agent, responsible department/organization and the funder. Another reason for developing this design is that it provides government with a format that potentially can be used in the future at a national and provincial level for recording information on programmes and their projects.

In terms of the relational database design, each programme may have several projects within it but a project belongs to one specific programme only. The individual databases and the information that they contain on the different entities and how they link to one another are schematically represented in Figure 2. What Figure 2 also shows is that each programme may have one or more funders, documents, financial data or projects. The primary key (eg Programmeld) is used to link the programme to its corresponding funders, documents, financial data or projects. The database design has been integrated in Microsoft Access and is available on CD.

Project information is provided by financial year because the budgets and expenditure are allocated according to a financial year as required by the National Treasury. The database design caters for this by providing data on projects by department and for data to be captured on an annual basis (per financial year). In developing the database design it was assumed that programmes and projects would not necessarily have a unique project number. Therefore, the matching of projects from year to year would be a tedious and time-consuming process with a high potential for error. However, by sorting on various project fields, trends associated with projects can be examined from year to year.

Figure 2: Data flow diagram



A description of the fields contained in the more important component databases are described below. For the description of the fields in all the component databases, Addendum 8 is provided. The description of the fields contained in the programme database and their type are provided in Table 5. The purpose of this database is to provide descriptive information about each of the national and provincial programmes. Ideally, each programme should be registered at a central government facility and have a unique identifier number or acronym (e.g. Expanded Public Works Programme EPWP). Where this does not exist it should be generated programmatically. Critical

fields of information that should be maintained are the contact details of the government official who are responsible for each programme in the country. This information will allow government officials and researchers to get ready access to information on the programmes, but more especially, data on the projects that are being conducted under each programme.

Table 5: Description of fields in programme database

	Programme	Description	Type
Describe	Id	Numeric primary key to uniquely identify a programme programmatically because there is not an alternative in the form of consistent unique identifiers. These values will however be hidden to any user.	Number
	No	Unique descriptor for a programme. It is left for future use but will not currently have values as programmes do not have an identifying number at this stage.	Text
	Acronym	Acronym for the programme. Programmes are currently uniquely identified by their acronyms even though every programme may not have an acronym	Text
	Name	Name of the programme	Text
	URL	Web Address of the programme if it is available on a website	
	Description	Provide an overall description of the programme including the mission, aims and objectives of the programme	Text
	Targets	Describes the list of tangible outputs intended to be produced by the programme e.g. 10 km of road built or 20 mobile clinics. These will differ between programmes.	Text
	Outputs	Describes the list of tangible outputs actually achieved by the programme. These will differ between programmes.	Text
	StartDate	The date or year that the programme started.	Text
	EndDate	The date or year that the programme was completed or discontinued.	Text
	Status	Status of the project: Planned: Programme has been approved and is in the planning phase. Implemented: Programme is currently in process and actively achieving objectives. Reviewed: Programme has been running for a while and is now in process of being Reviewed. Programme activities still continue taking place during this phase. Completed: The Programme has successfully completed its activities.	Text
	Organisation	The name of the organisation or department that owns and is responsible for the programme.	Text
	OverallBudget	OverallBudget contains the total budget assigned to the programme and could span several years. Percentage of budget allocated and spent per year may then be calculated.	Number
	ImplementingAgent	The agent that will be implementing the programme. Valid values are: national, provincial and municipality.	Text
	KeyIndicators	This will list the key indicators for the programme such as 40% of workforce must be female and all projects in the programme would be expected to comply with these indicators.	Text
Contact	ContactOffice	Office, department, directorate or section to contact regarding the programme.	Text
	ContactName	Name of the person to contact for information regarding the programme.	Text
	ContactEmail	Email address of the person to contact for information regarding the programme.	Text
	ContactCell	Cell number of the person to contact for information regarding the programme.	
	ContactTel	Telephone number of the person to contact for information regarding the programme.	Text
	ContactFax	Fax number of the person to contact for information regarding the programme.	Text
	ContactPostalAddress	Postal address of the contact person for the programme.	Text

The project database links to the programme database by the ProgrammeID, which should be unique to ensure the correct linkage of projects to the programme that they belong to. Each project should also have a unique number assigned to it by the programme coordinator or programmatically and should include the unique programme ID or acronym as a prefix (e.g. EPWP0001). Like the programme database, the project database contains descriptive and contact

detail fields. This database also contains critical fields on where the project is geographically located (e.g. local municipality, latitude/longitude coordinates) and information on key performance indicators (e.g. number of people employed). Summary information on the budget allocated and the amount that has been spent on the project each financial year is included.

Table 6: Description of fields in project database

	Project	Description	Type	
Describe	ProjectId	Meaningless numeric primary key to uniquely identify a project programmatically because there is not an alternative in the form of consistent unique identifiers. These values will however be hidden to any user.	Number	
	Programmeld	Link to the programme which supports this project. Using this value any of the programme fields may be displayed for the project.	Text	
	ProjectFinancialYear	Financial Year of the project. A project may span budget years. Format: yyyy/yy	Text	
	ProjectNo	Unique Reference Number assigned to a project to identify it.	Text	
	ProjectName	The name of the project or in it's absence the name of the community where the project is taking place.	Text	
	ProjectStatus	Status of the project: <ul style="list-style-type: none"> Planned: Project has been approved and is in the planning phase Implemented: Project is currently in process and actively achieving objectives Reviewed: Project has been running for a while and is now in process of being Reviewed. Project activities still continue taking place during this phase. Delayed: The Project did not start on its planned start date and is delayed for various reasons. Discontinued: The Project will no longer continue its activities or receive funding for various reasons. Completed: The Project has successfully completed its activities 	Text	
	ProjectStartDate	The planned start date of the project. If the project does not start at its planned start date for various reasons then the project status 'delayed' may be used to indicate that the project has been delayed.	Date	
	ProjectEndDate	Actual date of completion of the project. It was decided not to store PlannedEndDate at this stage.	Date	
	ProjectDescription	Provide an overall description of what the project is about. Include the description, aims and objectives of the project.	Memo	
	ProjectTargets	Describes a list of tangible outputs intended to be produced by the project e.g. 300 people trained	Memo	
	ProjectOutputs	Describes the tangible outputs actually achieved by the project e.g. 250 people trained.	Memo	
	UrbanRuralIndicator	Indicates whether a project is taking place in an urban or rural area. Valid values are Urban or Rural.	Text	
	Geolocation	The lowest spatial (geographic) level to which the project could be geocoded (e.g. GPS, placename, local or district municipality, province or Unknown)	Text	
	Source	The department or agency (where it could be determined) from whom the project data was received. This is not necessarily the same as the department which implements the project.	Text	
	Type	The format in which project data was received (e.g. hard copy or digital/electronic format)	Text	
	Location	ProjectProvince	Province within which the project is located and operating	Text
		ProjectMunicipality	The local municipality where the project is taking place and not the district municipality. The district municipality can be identified from the local municipality.	Text
ProjectPlaceName		Name of place where project is located or operating	Text	
ProjectLongitude		Latitude of the project location	Text	
ProjectLatitude		Longitude of the project location	Text	
Contact	ProjectOrganisation	Organisation undertaking to do the project.	Text	
	ProjectContactName	Name of the contact person for the project.	Text	
	ProjectContactEmail	Email of the contact person for the project.	Text	
	ProjectContactCell	Cell number of the contact person for the project.	Text	
	ProjectContactTel	Telephone number of the contact person for the project.	Text	
Key Perf ormance Indic ators	ProjectNumEmployed	No. of workers employed. From CBPWP Key Performance Indicators	Number	

	Project	Description	Type
	ProjectNumFemaleEmployed	No. of women workers employed. From CBPWP Key Performance Indic	Number
	ProjectNumWorkWithDisablEmployed	No. of workers with disabilities employed. From CBPWP Key Performance Indicators	Number
	ProjectNumYouthEmployed	No. of youth (people between the ages of 18 and 35) employed. From CBPWP Key Performance Indicators.	Number
	ProjectNumJobsOpport	No. of of job opportunities created.	Number
	ProjectNumPermJobs	No. of permanent jobs created. From CBPWP Key Performance Indicators	Number
	ProjectNumTrained	No. of local labour being trained. From CBPWP Key Performance Indicators	Number
	ProjectNumFemaleBenefic	Number of females benefitting from the project.	Number
	ProjectNumWithDisablBenefic	Number of people with disabilities benefitting from the project.	Number
	ProjectNumYouthBenefic	Number of youth (people between the ages of 18 and 35) benefitting from the project.	Number
	ProjectNumBenefic	No. of individuals benefitting from the project. From Dept Agric. Landcare Programme Projects	Number
Finance	BudgetAmount	Amount in rands of budget allocated	Number
	Expenditure	Amount in rands that were spent	Number

It is strongly recommended that the place (i.e. suburb in metropolitan areas; village, town or local municipality in rural areas) be defined for each and every project and that Statistics South Africa's 2001 sub-place geographical name database be used as the standard. Examination of the various databases that have been received so far show that the extent to which projects having a unique number vary from programme to programme. Furthermore, in comparison to the list of database fields presented above, most programmes provided limited data. It is the contention of the project team that government should standardize on a core set of fields to be used in reporting on all programme projects. It is also recommended that a unique number be provided for each and every programme and project being implemented at a national and provincial level. This will facilitate much faster access to programme data and will enable much easier comparisons of programmes from one year to another.

It is also recommended that summary information on what agency is funding a programme, in what financial year and the amount of funding is provided (Table 7). This is for several reasons, including getting an understanding of where the funds are coming from so a complete picture of who is funding what and where can be obtained. For example, a project might be implemented under the EPWP but its funding is coming from a provincial department. Tracking this information will also allow more effective reporting to the funding agent and assist in monitoring whether there is duplication of expenditure on programmes.

Table 7: Description of fields in programme funder database

	Programme	Description	Type
Funder	Name	Name of the funder e.g. World Bank.	Text
	FinancialYear	Financial Year for which funding was received.	Text
	Amount	The amount received from the funder.	Number

The purpose of the programme financial database is to provide summary data on various aspects of the programme (Table 8). This includes providing budget and expenditure data at various

administrative levels (i.e. province and local municipality) and for different components (e.g. training, salaries, etc). Financial information is also provided over the financial years for which the programme is operational.

Table 8: Description of fields in programme financial database

	Programme	Description	Type	
Financial	Financial	Budgets and Expenditure are done by varying units e.g. province and are allocated per financial year. Allows budget and expenditure to be stored for several years per unit allocated.	Table	
		FieldName	FieldDescription	
		BudgetYear	Year for which budget was allocated	Text
		BudgetUnit1	Unit e.g. province to whom allocation was made. This allows for some breakdown of the budget instead of just storing one global amount.	Text
		BudgetUnit2	Unit for breakdown of budget if needed to breakdown budget further eg by training or salaries within province.	Text
		BudgetAmount	Amount in rands of budget allocated	Number
		Expenditure	Amount in rands that were spent	Number

A final database component that will be described in the text here, is that of the programme document database (Table 9). In this database information is provided on secondary documents that relate to the programme and in which format they are stored. Provision is made in the database to hyperlink to the actual document or to gain access to documentation on a relevant web page. This information is of great value for evaluation purposes as it provides secondary information that may not be stored in a database (e.g. vision, objectives, etc).

Table 9: Description of fields in programme document database

	Programme	Description	Type	
Documents	Documents	Name and link to any document (.doc,.pdf,.xls), database or report related to this programme. Allows several documents to be listed.	Table	
		FieldName	FieldDescription	
		DocumentName	A short name to identify the document.	Text
		DocumentDescription	A more detailed description of what the document contains.	Text
		DocumentLink	The fully qualified filepath and filename to the physical file so that it may be opened and viewed. Note: Affects portability as there is a hardcoded reference to the filepath.	Hyperlink

For specific fields in the database, the design has catered for the selection of a value from a predefined list. Code tables have been created to provide an understanding of what the predefined list of values mean (Addendum 9). For example, these include ProgrammeStatus, ProjectStatus, ImplementingAgent and AreaType. When accessing these specific databases the code value is used as the primary key, which makes the export and extraction of programme and project data much simpler. An organisation table has also been created to ensure the consistent use of organisation (or department) names in the database. This table supplies values for

a coordinating role. This is beginning to happen but there is still a long way to go before all the necessary information is available for monitoring and evaluation purposes in South Africa.

Similar difficulties experienced during a national survey undertaken by the HSRC in collaboration with the CSIR and University of Fort Hare on 'Technology transfer for poverty reduction', were also encountered during this project (HSRC, 2004). The main difficulty was that to assemble a list of programmes and/or projects required an enormous number of person-hours just to make contacts and follow-up contacts with government staff. This research project further showed that sending official requests for information, in this case a letter of introduction signed on behalf of the Director-General of the OPSC (Addendum 3), can not on its own succeed in getting access to lists or databases of poverty relief projects or programmes. Experience in conducting similar research as part of the Ten Year Review confirms that departments do not feel compelled to provide such data when being requested to do so by even the Office of the President. During this research it was concluded that this was mainly because of a lack of systems and standards but a lack of capacity must also be included.

The second element of the stipulated methodology employed by the investigating team was to contact departments directly for access to databases. One such department was the Department of Public Works, for access to its database of Expanded Public Works Programme (EPWP) projects. Quarterly updates were available from the programme's website, but a more comprehensive database of all projects for the last financial year, could only be made available to the project team during July 2005. The EPWP is a prominent and well-publicised anti-poverty programme of government and it was important to include this programme in the project. The project team had specifically identified this programme at the start of the project and followed-up regularly with the department but only received the required information several months later.

Many other national and provincial departments were approached, but the responses were not always forthcoming or helpful. One notable exception was the Premiers Office in the Free State, which could extract individual project data from their Free State Development Programme (FSDP) website to supply to the project team with all the poverty relief projects for the province. Although the EXCO Programme of the Mpumalanga province was not as comprehensive and was provided in hardcopy format rather than in an electronic database, it is another example of how quickly departments and provinces can respond to a request for information on their poverty relief programmes. The number of programmes and projects received from departments in either an electronic or hardcopy format are presented in Tables 5 and 6 below.

The approach that the project team followed from the onset of the project was to identify self-standing programmes that exist in each and every national and provincial department. Early on in the project, databases were received from provinces, especially the Premiers Office's, that contained information on projects for a number of different departments and programmes (e.g.

Mpumalanga). It was only after the workshops that it became clear that many of the national and provincial departments were implementing their poverty relief programmes through other programmes, such as EPWP. As has been stated earlier, some of the provinces have begun to collate their poverty relief programmes/projects through their Premier's office (e.g. Mpumalanga, North West, Free State) or in the case of Gauteng province, the Gauteng Interdepartmental Sectoral Development Unit.

What is apparent is that there are certain programmes, such as the EPWP of the national Department of Public Works and the Integrated Sustainable Rural Development (ISRSD), Urban Renewal Programme (URP), Local Economic Development and Social Plan Grant, Consolidated Municipal Infrastructure Programme (CMIP) and Municipal Infrastructure Grant (MIG) of the Department of Provincial and Local Government (DPLG) that contain a majority of the poverty relief projects being implemented for national and provincial departments. However, there are still national and provincial departments that are implementing smaller programmes such as the Department of Social Development's Food and Emergency Relief Programme and the HIV and AIDS programme. Furthermore, provinces are implementing poverty relief projects using their own funds that are not being registered in the databases of the larger programmes and, therefore, the necessity for the Premier's Offices to collate information of their poverty relief programmes at a provincial level.

A complexity of these project databases is that they may be incorporated into both national and provincial databases resulting in records possibly being duplicated. Without a unique programme or project identification code, the ability to identify these duplicate records is limited and can only be done through a comparison of project names, which is extremely difficult to do and very time consuming. This suggests that only the programme project databases of national departments should be used to conduct evaluations of the poverty relief programmes because they contain a majority of the poverty relief projects being implemented across the country. It also confirms the necessity for a system to report on a standardized set of poverty relief programme indicators.

Another aspect of the database development was to access as much information as possible on the programmes and projects so that the designed database could be populated. Requests for this information were made to departments at the same time as approaching them for project databases. Information on programmes was also sourced from annual reports, internet-based literature, other material accessed from various sources and from departmental web sites. What became immediately apparent is that there is little to no standards in the fields of information provided on poverty relief programmes and their projects.

Clearly, this points to the necessity for the departments to adopt business approaches (e.g. Norms and Standards, indicators) as suggested by the National Treasury. There is also the need for a system that will allow the information from national and provincial departments to be centrally

stored so that this information can be easily accessed for especially monitoring and evaluation purposes. Thus, the project team had to accept what it received and had to integrate the data from the different programmes into a single database as best as possible. This in itself meant spending many person-days on the integration.

As has been explained in Section 1.5.2.2, the project team used criteria to sift through annual reports, such as identifying poverty relief programmes, conditional grants or by identifying developmental activities that indicated a direct benefit to people or communities. Using these criteria, programmes were not always easily identifiable in the annual reports. Even though a broad list of programmes was identified (Addendum 3), no reference to individual projects related to these programmes was available to the project team. Consequently, direct contact with government officials through telephone, fax and e-mail had to be made. The aim of this approach was to verify information contained in existing databases, to collect more information about programmes and projects for which only partial information was available, and to identify 'new' poverty relief initiatives.

This proved a most frustrating endeavour for the project team members working on the project. Having contacted government departments it became clear that frontline staff within departments did not have an understanding of what poverty relief programmes were being undertaken in their department and as a consequence, project members either made no headway or were given the run around. Inputs received from the provincial workshops confirmed that there is not much knowledge amongst departmental staff on the different programmes and it was suggested that structures need to be put in place for more effective communication on these matters to occur. To progress, team members used information from the annual reports to make contact with chief directors responsible for certain programmes and when this did not work requests were made to be transferred to the Chief Financial Officer, the M&E units if they existed and even the IT divisions of departments.

Access to databases, where these existed, was also highly dependent on the availability of senior management who seemed to be not available for a myriad of reasons. Even more frustrating was that requests left for these managers to return calls or to provide information did not happen. Letters signed by the Director-General of the OPSC were sent to many departments to formalize the investigating team's requests, but these did not yield many positive results.

Many departments stated that their project databases were not up to date and used this as an excuse to delay or not provide any data. Even though incomplete data is not ideal, it did provide the project team with a starting point to populate the database. These and other projects were included in the final database of 11 556 projects and are presented in the integrated database. In the future considerations must be given to how information on poverty relief programmes become

“official” statistics that can be incorporated into the National Statistical System (NSS) and contain the necessary endorsements from departments that the data provided is accurate and complete.

In the sections above, issues arising from the approach implemented by the project team and problems encountered, are described. However, much progress was made and has hopefully provided a foundation from which information on all poverty relief programmes in South Africa can start to be collected on an annual basis. In this regard several departments must play a role. The Office of the President in consultation with the National Treasury needs to develop guidelines and Norms and Standards for the implementation of businesses processes to record a standard set of fields on all poverty relief programmes. The database design developed by the project team in this project would be a good starting point.

Statistics South Africa as custodians of the National Statistics System should provide advice on indicators to use in their reporting on poverty relief programmes. The Office of the President would have to play a facilitation role to get the necessary systems in place that would allow the data on poverty relief programmes and projects to be recorded into a central database as is suggested in the PoA. At this stage it is recommended that the Office of the President be the custodian of the central database. Ultimately, the data should be archived in the NSS at Stats SA. Having such a system and central database will allow the OPSC and departments to get ready access to the information they require to undertake monitoring and evaluation of government programmes. The OPSC with their regional offices could also play a facilitation role in ensuring that national and provincial departments have the necessary resources and capacity to capture this information into a central system.

3.2.2 Findings of the workshops held with national and provincial departments

After several months had passed and a small number of programme project databases had been received, workshops with representatives from the different national and provincial departments were organized. Researchers working on the project then travelled to each of these workshops. In hindsight, it would probably have been a better approach to organize the workshops at the onset of the project. Findings of the workshops largely confirm what has been stated in the previous section but a clearer understanding of the complexity within which departments operate and are able to monitor their programme projects was gained. This understanding will be expanded upon in this section.

One of the main findings is that many of the line department programmes being implemented have an outreach to communities and, therefore, can be considered poverty relief programmes. According to the government officials most of these programmes either have a direct (e.g. job creation) or indirect (e.g. skill development) impact on poverty. This is because national and provincial policies and strategies guide departments to ensure that the needs of the people are

being addressed in their programmes. What was also highlighted was that the focus of government is moving away from poverty relief programmes and towards what they term "investment" programmes.

It was acknowledged that outside of the line departments there are distinct poverty relief programmes such as those that receive conditional grant funds. Furthermore, there are large poverty relief programmes being implemented by national and provincial departments that are often independent of line department functions. The programmes that were consistently identified were the Expanded Public Works programme (EPWP), Integrated Sustainable Rural Development Programme (ISRDP), Urban Renewal Programme (URP), Local Economic Development Programme (LED), Municipal Infrastructure Grant (MIG) and the Consolidated Municipal Infrastructure Programme (CMIP). The importance of these different programmes changes from province to province as the emphasis shifts from the building of schools to the building of clinics as an example.

Other programmes that were identified to form part of the poverty relief programmes of the country are those that provide free basic services or subsidies. An important programme that has over the years had a dramatic impact on poverty in South Africa and should be incorporated into any evaluation by the OPSC is the social grants provided by the national Department of Social Development. A database of over 8 000 pay points exists in the department and can be used to evaluate the impact of this programme on the beneficiaries. Presently, the M&E division of the Department of Social Development is conducting an evaluation of the social grant programme in South Africa.

Outside the line departments and large poverty relief programmes of the national and provincial departments are agencies that are implementing poverty relief programmes. One of these is the National Development Agency (NDA) that receives its funding mainly from the Department of Social Development and another is the National Lottery Board of the Department of Trade and Industry. Within some of the provinces development agencies have been established and if they are allocating funds independently of provincial governments for poverty relief programmes then they should be monitored. Agencies like the Independent Development Trust (IDT) and the Development Bank of South Africa (DBSA) who assist departments in the implementation of the projects and also provide their own funding for the implementation of programmes should also incorporate their information in the central database. This is to ensure that the evaluation of poverty relief programmes in South Africa provides a holistic understanding of the impact.

What became clearer in the workshops is the extent to which the national Department of Public Works and the EPWP plays a role in poverty relief initiatives in the country. This department and programme have provided guidelines and definitions of poverty that are being extensively used at a national and provincial level. They are not only keeping detailed information on all the EPWP

projects being implemented across the country but are also undertaking the monitoring and evaluation of projects. Many provincial departments indicated that their projects, which receive funds from outside the EPWP, are being implemented through this programme.

In fact many provincial departments indicated that they did not keep a database of their poverty relief projects or developed M&E units because this was being undertaken by the EPWP. Within the national departments M&E is much more established than most of the provincial departments. Some of the provinces, especially the better off ones like Gauteng and the Western Cape, are beginning to establish their M&E units. It was also mentioned that because national departments, the National Treasury, provincial Treasury's and the Office of the President (Programme of Action) are doing reporting and M&E, the need for individual departments to do it as well was not really necessary. In fact departments raised a concern about the amount of reporting they are doing and that it affects their ability to implement their programmes.

The workshops clearly pointed out that no integrated central database of poverty relief programmes and projects exist at either a national or provincial level. Databases are mainly available within the larger programmes and Premiers Offices in some of the provinces are starting to develop their registers. There has also been some indication that individual departments have poverty relief programme databases. It is accepted that this is probably the situation but the problem remains that to access many of these databases is largely impossible without a team working on the project full time throughout the year. Another area of concern is that without a central database there is a strong chance that projects are either being duplicated or they are being left out when integrating the databases from the myriad of sources.

For M&E to be effectively implemented in South Africa and to address the above problem makes the development of an integrated central database in South Africa a necessity. National and provincial departments have stressed that such a central database should be developed within the framework of a national strategy, which the Office of the President is presently busy with. Furthermore, a department will have to be identified that will drive the entire process of implementing and maintained such a system. There are several potential role players that have been identified in a previous section but are worth mentioning again here.

These main role players are the Office of the President, the National Treasury, Office of the Public Service Commission and Statistics South Africa. Other parastatals like the CSIR and HSRC could well play a role considering their research capacity. The Office of the Premier has been identified as having an important responsibility in coordinating the collection of information on poverty relief programmes from the different departments and ensuring that the information is captured into the central database. These departments would also have to facilitate the development of Norms and Standards and a standard set of indicators to be incorporated into the central database and to measure the impact of the poverty relief programmes.

3.2.3 Integration of programme project databases

Throughout the project, programme managers were requested to provide the data in a digital format. Digital formats ranged from documents supplied in Microsoft Word format and as Microsoft Excel workbooks with either one or multiple sheets. They were also requested to provide specific data that could be used to populate the database design. It was realized early on in the project that the project team would have to be satisfied with whatever format they received the data in and with whatever variables the programme managers could provide. This was because the initial databases received in hardcopy/electronically were very different from one another.

Many of the programmes provided a list of poverty relief projects in hardcopy format. Documents that appeared on websites were usually in a PDF format and these were printed and treated as hard copies, since extracting text from PDF documents was regarded as too time-consuming. Project team members were responsible for compiling the integrated database from the digital and hard copies, respectively. In developing the integrated database, the process of 'cutting-and-pasting' was employed for data from digital sources, whilst standard data typing was employed to capture data from the hard copy sources. Regular quality checks were performed during these onerous tasks, to ensure that data capturing errors were kept to a minimum.

Although care was taken during the integration of both hard copy and digital sources of data, no guarantee can be given on quality of the data. The reasons for this are twofold. In the first instance, the significant variation in the variables incorporated into the programme databases and documentation made it extremely difficult to integrate. In the second instance, the erratic spelling of programme and project names and especially variables containing geographic information (e.g. place name, local and district municipality) has made it largely impossible to map the projects within the time frame of this project. Having integrated the data into the database considerable editing had to be done. However, this too was an enormous task that will require more person hours than are available in this project to complete.

The population of core data fields was also highly dependent on the entries supplied in digital and hardcopy format by the various government departments. Significant errors were discovered with data in fields not matching the variable names. One example is that the project owner may be a local municipality or a provincial government department. However, in the project owner field the record provided does not refer to who is the source/custodian of the data. Thus the field, ProjectMunicipality, had records that mainly contained municipality names, while another contained 'Agriculture'. These obviously inaccurate entries were edited in the database and the record of the project was retained.

In many cases, the spelling of geographical place names was not the same. Furthermore, there were mismatches between the data provided and the names of the variables. For example, a village name would be entered into the ProjectMunicipality field and in other instances; there was a mixture of district and local municipalities in the same field. Variations in spelling, the truncation of names and the complete omission of data from fields, but especially geographical place name, has made it largely impossible to develop an integrated database of sufficient quality. All of the above talks to the necessity of standards in capturing programme information and the core set of variables that all programmes should collect for M&E purposes.

It must also be noted that some programme databases could not be captured and integrated into the database because they were received too late in the project. Furthermore, it is anticipated that reports on programmes will continue to be received even after the completion of this phase of the project. Therefore, consideration must be given as to how the electronic, hardcopy and late submissions of programme projects can be used for sampling in the evaluation phase of the project. One such example is the 'Project Analysis Reports' that was made available by the DPLG on the Integrated Sustainable Rural Development Programme (ISRDP). The report lists project linkages, stakeholders, objectives and several projects specific details are provided in a Microsoft Word document. Even if this report were received in a digital format, it would have taken several days to integrate the data into the standardised format of the database designed by the investigating team.

What has been received and been integrated into the database is summarized in the tables below. A total of 11 556 projects spread across the nine provinces and from several different programmes that are implemented at a national and provincial level have been integrated into the database. The provinces with the highest number of projects are Free State (3 416), Eastern Cape (1 497), Mpumalanga (1 348) and Gauteng (1 304). The main reason for the Free State having such a high number of projects is because of the excellent work that the Office of the Premier has done in establishing their project register. In the Eastern Cape there is quite an even spread of projects amongst several programmes with the highest number coming from the national Department of Land Affairs' Land Reform Programme. In Mpumalanga province, 40% of the projects (534) come from the national Department of Public Works' Expanded Public Works Programme (EPWP) with quite a high number of projects also coming from the Office of the Premier's project register. The majority (70%) of the projects that have been integrated into the database for Gauteng come from the EPWP.

Table 10: Analysis of projects integrated into database by province and source.

PROVINCE	SOURCE OF PROGRAMME	NUMBER OF PROJECTS
EASTERN CAPE	Agriculture (AGIS)	213
	DPLG	173

PROVINCE	SOURCE OF PROGRAMME	NUMBER OF PROJECTS
	Eastern Cape Dept of Housing, Local Government and Traditional Affairs	95
	Eastern Cape Economic Affairs, Environment & Tourism	189
	Eastern Cape Social Development	10
	Land Affairs	467
	Public Works	344
	(blank)	6
	Total	1497
FREE STATE	Agiculture (AGIS)	36
	DPLG	12
	Free State Local Economic Development	30
	Free State Office of the Premier	2712
	Land Affairs	477
	Public Works	107
	Social Development	38
	(blank)	4
	Total	3416
GAUTENG	Agiculture (AGIS)	16
	DPLG	9
	Gauteng Social Development	190
	Land Affairs	142
	Public Works	912
	Social Development	21
	(blank)	14
	Total	1304
KWAZULU-NATAL	Agiculture (AGIS)	282
	DPLG	42
	KwaZulu-Natal Arts, Culture and Tourism	15
	Land Affairs	320
	Public Works	362
	Social Development	70
	(blank)	13
	Total	1104
LIMPOPO	Agiculture (AGIS)	99
	DPLG	18
	Land Affairs	218
	Public Works	193
	Social Development	63
	(blank)	41
	Total	632
MPUMALANGA	Agiculture (AGIS)	66
	DPLG	16
	Land Affairs	252
	Mpumalanga Office of the Premier	412
	Public Works	534
	Social Development	51
	(blank)	17
	Total	1348
NORTH WEST	Agiculture (AGIS)	188
	DPLG	11
	Land Affairs	147
	Public Works	113
	Social Development	38
	(blank)	3
	Total	500
NORTHERN CAPE	Agiculture (AGIS)	38

PROVINCE	SOURCE OF PROGRAMME	NUMBER OF PROJECTS
	DPLG	25
	Land Affairs	157
	Northern Cape	1
	Northern Cape Agriculture and Land Reform	23
	Public Works	98
	(blank)	2
	Total	344
WESTERN CAPE	Agriculture (AGIS)	97
	DPLG	18
	Land Affairs	362
	Public Works	382
	Social Development	11
	Western Cape Social Services and Poverty Alleviation	39
	(blank)	16
	Total	925
	Grand Total	11556

To look more closely at the distribution of projects that have been received and integrated into the database, an analysis of the programmes has been done and is presented in Table 11. The largest programme database that was received was that from the Office of the Premier in the Free State. This was followed by the projects contained in the different components of the EPWP, which if combined, makes up the biggest database (3 484) to have been received in this project. The national Department of Agriculture provided the next largest source of data from their Land Redistribution for Agricultural Development (LRAD), Settlement and Land Acquisition Grant (SLAG) and Comprehensive Agricultural Support Programme (CASP).

The Integrated Sustainable Rural Development Programme of the DPLG is also a large programme that will contribute significantly to the project. Other programmes that are expected in the near future, such as the Department of Housing's Housing Subsidy programme and the DPLG's Municipal Infrastructure Grant (MIG) and Consolidated Municipal Infrastructure Programme (CMIP), will provide the investigating team with a more comprehensive base from which projects can be selected to undertake the evaluation of the poverty relief projects. Although not all programme databases were received, some of the more important ones, like the EPWP and the ISRDP, have been obtained.

Table 11: Analysis of projects by programme.

PROGRAMME NAME	NUMBER OF PROJECTS
Free State Growth and Development Strategy (FSGDS)	2712
EPWP_Infrastructure	1915
EPWP_Environmental & Culture	1281
Land Redistribution for Agricultural Development (LRAD)	971
Settlement and Land Acquisition Grant (SLAG)	884
Comprehensive Agricultural Support Programme (CASP)	737
Restitution Discretionary Grant	528
Executive Outreach	412

PROGRAMME NAME	NUMBER OF PROJECTS
Land Care	296
Unspecified	252
EPWP_Social	218
Poverty Alleviation by Local Authorities	190
LED Poverty Relief Projects	180
Local Economic Development Framework (LEDF)	131
Commonage_Grant	124
LED/REDZ/SRDP	82
EPWP_Economic	70
Women	68
Aged	56
HIV/AIDS	55
NLP	54
Poverty Relief	48
UNKNOWN	36
Local Economic Development (LED)	30
Poverty Alleviation Allocations	30
Food Security	29
Food security	25
Food production	23
Food Gardens	22
Gauteng	21
Poverty Alleviation	21
Nigel	14
PGDP Service Delivery Programme	13
Youth	7
Food cluster	4
Elderly	2
Cradock Care Centre	1
Cradock Environmental Project	1
Elukhanyisweni Organisation	1
Glen Grey Cultural Assosiation	1
Ikamva Elihle	1
Integrated Food Security and Nutrition Programme (IFSNP)	1
Izanda Pottery Mthatha	1
Khanyisa Bulhoek Progr	1
Kuyasa Community	1
Laphumikkwezi Food Security	1
Urban Renewal Projects	1
Youth Development Programme	1
Youth Re-skilling Programme	1
Youth Skill Development	1
Zanoncedo programme	1
Grand Total	11556

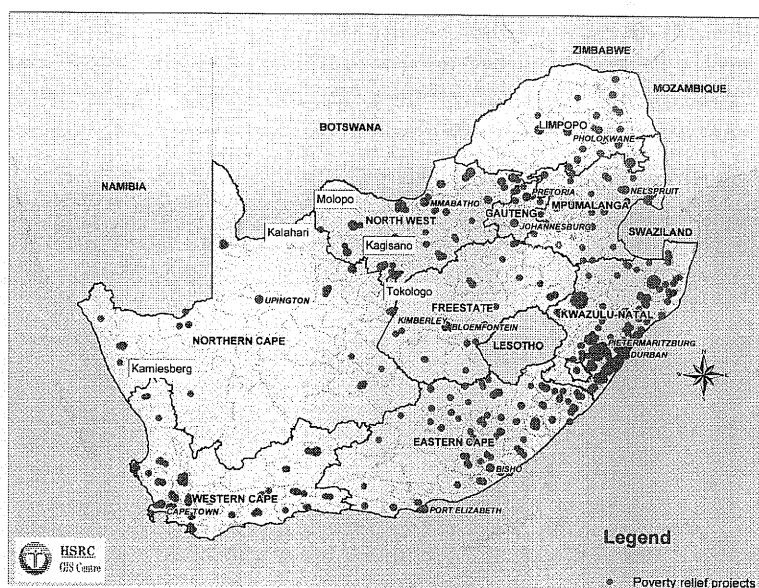
A copy of the integrated database and the individual programme databases has been compiled on CD. A file containing all the hardcopy documents og programme projects has also been put together. This information will be used by the OPSC in drawing a sample for Phase 2 of the project. It also gives an understanding to government of which national and provincial departments provided information on their programmes. An examination of the different programme databases also shows their differences in terms of variables included and the way the data has been

captured. Very importantly it provides programme managers with information in an electronic format that can now be checked for its content and accuracy.

3.2.4 Mapping the programme project databases

The exact geographic coordinates of projects in the field would have been the ideal but the data received did not contain this level of spatial detail. The project team would have preferred that programme databases included the geographic coordinates created through the use of Global Positioning Systems (GPS) but only the national Department of Environment Affairs and Tourism was able to supply such data (Figure 3).

Figure 3: Poverty relief projects of the Department of Environment Affairs and Tourism.

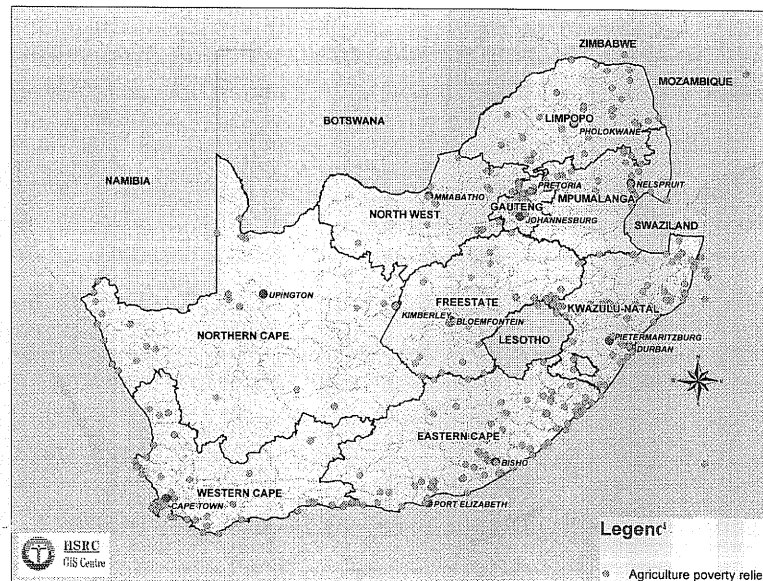


The Department of Agriculture provided geographic information for their Comprehensive Agricultural Support Programme (CASP) that had been geolocated to the local municipality level (Figure 4). It would have been preferred if the data could have been geolocated to at least the sub-place level as this will allow people doing fieldwork to navigate more accurately to within a short distance of where the project is located. The intention was to geolocate as many projects as possible in the integrated database of all programmes to the sub-place level. However, this was not possible because of the poor quality of the geographical names provided in the database.

Furthermore, many of the programme project databases provided information on the geographic location of projects to only the local or district municipality level. Thus, what the integrated database provides is, firstly, a comprehensive list of projects that gives a universe from which a sample of projects can be drawn. Secondly, the projects geolocated to the municipality level can be aggregated to provide statistics at the local or district municipality level. For the purposes of

identifying the geographic location of projects to enable them to be properly evaluated it would have been better to have the locations of the projects at their exact or sub-place name levels. This is something that the government will have to look at in the future to facilitate better M&E in South Africa.

Figure 4: Comprehensive Agricultural Support Programme (CASP) of the Department of Agriculture.



4. CONCLUSIONS AND RECOMMENDATIONS

Through the extensive literature reviews and key informant interviews that were done by the project team, a set of definitions for the various terms used to describe poverty, both internationally and locally, could be provided. Considering the multi-dimensional nature of the poverty, government policy and the recent trend to move towards “investment” type programmes, it was recommended that a broad and encompassing definition be used. Inputs from national and provincial departments consistently emphasized this point and they requested that all programmes that have an outreach to communities, whether they have a direct or indirect impact, be incorporated. It was also emphasized that programmes within line departments, poverty relief programmes, conditional grant programmes, free access to services and subsidies, large developmental programmes and work being done by agencies outside of government (e.g. NDA, IDT, DBSA) be considered.

To facilitate having such a broad definition, the project team recommends that the term ‘poverty reduction’ be used to describe programmes and projects that have a focus on ‘improving the livelihoods or quality of life of low-income individuals and households’ or those people living in poverty. Furthermore, the use of this terminology implies a long term and large-scale effort in addressing the different forms of poverty in South Africa. It also ensures that all forms of intervention, whether they be welfarist, service orientated or developmental can be included.

Linked to this thinking in defining poverty programmes in South Africa, is the need for a set of criteria to categorize programmes and projects and this was provided in the project.

Two criteria listed for categorizing programmes and projects was that they should lend themselves to undertaking monitoring and evaluation and they should echo the thinking of policy makers in terms of their approaches to addressing poverty in South Africa. In this regard, it is suggested that poverty programmes and projects can be categorized by type and activity (see Tables 3a, 3b and 4). Government officials attending the workshops were generally happy with this approach but suggested that there were additional components that could be added to the categories and that ideally, the type and activity categorizations should be hybridised into one single system. The message received from government officials was - the simpler the better, and therefore the definitions and categories that have presented by the project team provides a solid start.

Another component of the project was to develop a database of all poverty relief programmes and projects at a national and provincial level. To accomplish this, the project team had to identify what programmes were being implemented by the different national and provincial departments. Information on these programmes was access from annual reports, undertaking Internet searches and accessing information from departmental web pages. Contact was also made with these departments by telephone, fax and E-mail to access information on programmes, get project databases and to solicit information on what other poverty relief programmes were being implemented. Workshops with national and provincial departments were also conducted to communicate to government officials about the project, to solicit input on definitions, categories and to gain a first hand understanding of what programme project databases existed.

An integrated database of over 11 500-programme projects has been developed that covers the entire country and encompasses many of the key poverty relief programmes in the country. It is believed that this database for purposes of doing an evaluation of government's efforts in addressing poverty will suffice. By no means is the integrated database and supporting documents totally encompassing of all governments poverty relief programmes. The ideal would have been for this to be accomplished in the project. Unfortunately, both at a national and a provincial level there is no readily available central source of this information and the lack of capacity, systems and standards has inhibited this objective of the project being fully accomplished.

The integrated database that has been developed, even with its limitations, has gone some way towards the establishment of a centralized database of poverty relief projects in South Africa. Hardcopy and electronic databases of programmes continue to be received, which will form part of the overall universe of programme and project information. The project has also developed a large source of information on national and provincial government departments and has developed a contact list of government officials responsible for programmes that in many ways is worth its weight in gold. The project has also developed a database design that could well form the

foundation of government's future efforts in establishing a central standardized database and system for monitoring and evaluation in South Africa.

4.1 Recommendations

4.1.1 Definitions and categories

In terms of the definitions and categorizations suggested in this report it is recommended that they be communicated to relevant stakeholders for their consideration and input. Further to this, mechanisms should be examined as to how these definitions and categories can start to be incorporated into the business processes of national and provincial departments. Clearly, the Office of the President, National Treasury, Statistics South Africa and the departments themselves has an important role to play.

4.1.2 Development of a database

The integrated database that has been developed needs to be improved and as many poverty relief programmes as possible added. This is not necessarily for the evaluation phase but it is to provide the country with a more comprehensive list of poverty relief projects for reporting and monitoring and evaluation purposes. Clearly there is the need for a national strategy and Norms and Standards for the implementation of poverty relief programmes. There is also the need for a standardized set of variables to be collected for each programme and for systems to be put in place, whether manual or electronic, that ensure consistent and accurate access to information on poverty relief programmes and projects. A "champion" that can take this forward needs to be identified within government.

There are several different agencies that might fit the mould of a "champion" and these include the National Treasury, OPSC, Statistics South Africa and the Office of the President. However, with the Office of the President being identified within the Programme of Action to mobilize the public service and align planning and implementation of government programmes, including the National Spatial Development Perspective (NSDP), Provincial Growth Strategies (PGS) and the Integrated Development Plans (IDP) it makes sense for the project team to recommend that they champion the development and maintenance of the database on programmes and projects. Furthermore, the Office of the President has been identified to take overall responsibility for the design, improvement and roll out of government's monitoring and evaluation frameworks and systems.

A web-enabled system should possibly be considered for the capture, transfer and dissemination of information on programmes and their projects. The use of such web based systems is cost effective as people in remote centres can access the system and will ensure that standardized variables and formats are used by national and provincial programmes alike. As has been pointed out by the National Treasury, business process will still have to be developed to ensure that proper

recording of information on programmes and projects happens so that the data can eventually be captured into the web based monitoring and evaluation system. The web-enabled data capture system will need to be developed with all the appropriate security checks built in. It is strongly recommended that the present integrated database be updated on an annual basis up until such time as the government has been able to implement an appropriate system.

To be able to effectively assess the impact of projects on communities it is a necessity for geographic information on the projects to be provided. In this regard, it is strongly recommended that the sub-place names database of Stats SA become the official source of names to use for indicating where projects are being implemented. If this is not possible, then the name of the local municipality in which the project is located should be a minimum. The need for projects and place names to have unique numbers associated with them cannot be over emphasized. It is also important that government investigate the mechanisms by which this information at its project or aggregated levels can be made available to government officials and the broader public of South Africa.

4.1.3 Sample design for the evaluation phase

Consultation with sampling statisticians has enabled the project team to recommend the following sample design for Phase 2 or the evaluation phase of this project. Information on the unique set of national and provincial programmes with their individual projects that have already been received and integrated into the database can be considered as one population. Any additional information on national and provincial programmes and their projects received in electronic databases or in hardcopy after the completion of Phase 1 of the project can be considered another population. The OPSC plans to draw a sample of individual projects within each of the national and provincial programmes forming part of the two populations to be able to undertake the evaluation.

It is the intention of the OPSC to draw at least 300 projects from the different national and provincial programmes to be able to report with sufficient precision on the overall impact of government's poverty relief programme in the country. Thus, the reporting domain of Phase 2 of the project will be at the national level. Data from the two populations will be stratified by province and programme. Within the defined strata a random sample of poverty relief projects will be selected from the two populations. The sample of projects will be drawn with probability proportional to size (pps) with the total number of projects in each programme and in each province being the Measure of Size (MOS). Thus, the larger national and provincial programmes will have more projects selected for the evaluation than the smaller ones.

Once the projects have been drawn that are going to be evaluated, their geographic coordinates or the names of the places where they are situated will be used to map their locations. This will enable effective route planning to be done and for the evaluation teams to accurately find the

location of the projects in the field. Having completed the evaluations and captured data on each sampled project, weighting of the data will be done by a sampling statistician. This will enable the OPSC to conclude on the impact of government's poverty relief programme in South Africa.

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ADDENDUM 1

SUMMARY OF LITERATURE REVIEW

ADDENDUM 2

LIST OF ANNUAL REPORTS RECEIVED

ADDENDUM 3

**LIST OF PROGRAMMES IDENTIFIED FROM THE ANNUAL REPORTS AND THEIR
ASSOCIATED INFORMATION**

ADDENDUM 4

LETTER SENT TO GOVERNMENT DEPARTMENTS REQUESTING INFORMATION

ADDENDUM 5

WORKSHOP INVITATION LETTER

ADDENDUM 6

WORKSHOP DISCUSSION DOCUMENT

ADDENDUM 7

LIST OF DEPARTMENTS ATTENDED WORKSHOP

ADDENDUM 8

DESCRIPTION OF FIELDS IN DATABASE DESIGN

ADDENDUM 9

CODING TABLE FOR VALUES IN DATABASE

ADDENDUM 10

NATIONAL AND PROVINCIAL CONTACT LIST FROM GCIS