Comprehensive outcomes evaluation report:

South Deep Education and Community Trusts

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TSHIKULULU
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ACKNOWLEDGEMENTS

LIST OF ACRONYMS AND ABBREVIATIONS

B-BBEE	**Broad-based black economic empowerment**
Brics	Brazil, China, Egypt, Ethiopia, India, Indonesia, Iran, Russia, South Africa and United Arab Emirates group of countries
CIPC	Companies and Intellectual Property Commission
DAC	Development assistance committee
DBE	Department of Basic Education
ECD	Early childhood development
GBV	Gender-based violence
InterSen	Intermediate and Senior Phase of schooling
GDP	Gross domestic product
M&E	Monitoring and evaluation
NGO	Non-governmental organisation
NSFAS	National Student Financial Aid Scheme
OECD	Organisation for Economic Cooperation and Development
PSET	Post-school education and training
Safa	South African Football Association
SDCET	South Deep Community and Education Trusts
SDCT	South Deep Community Trust
SDET	South Deep Education Trust
SDG	Sustainable development goal
SMMEs	Small, medium and micro enterprises
STEM	Science, technology, engineering and mathematics
UN	United Nations
Unesco	United Nations Educational, Scientific and Cultural Organisation
Unicef	United Nations International Children's Emergency Fund
USA	United States of America

EXECUTIVE SUMMARY

Introduction and background

This report outlines an evaluation conducted by Tshikululu Social Investments with oversight from an evaluation steering committee to assesses the programmatic interventions implemented by the South Deep Community Trust (SDCT) and South Deep Education Trust (SDET) between 2013 and 2023. It provides a comprehensive measurement of the outcomes – intended and unintended, positive and negative – and lessons learnt from the Trusts' investments across the key focus areas of education, community welfare and enterprise development within the South Deep host communities. The report goes on to provide actionable recommendations to inform future investments and strategic decisions.

The South Deep Education Trust and South Deep Community Trust are part of South Deep's Black Economic Empowerment ownership structure and receive annual dividend income as follows: South Deep Education Trust – Invictus (Pty) Ltd and South Deep Community Trust – Newshelf (Pty) Ltd. They are aimed at promoting inclusive development in Westonaria and Bekkersdal in Gauteng's Rand West City. The Trusts have consistently advocated, facilitated and stimulated systemic change by supporting initiatives that build local capacity, improve access to knowledge, and enhance the resilience and employability of community members. The SDET supports education through bursaries, infrastructure and early childhood development (ECD), whereas the SDCT focuses on community welfare, enterprise development and public infrastructure improvements.

Context of the evaluation

Persistent poverty, inequality, youth unemployment, crime and gender-based violence and femicide (GBVF) characterise South Africa. Actors in the mining sector, such as the Trusts, are increasingly expected to contribute to sustainable development. the Trusts' strategic focus is in line with the growing national emphasis on inclusive economic growth, community development and the quality of education and public health services.

Key contextual challenges include increasing inequality in ECD, poor literacy and numeracy performance at the basic education level, and a deepening higher education funding crisis, all of which limit young people's ability to access quality learning and secure employment. In parallel, the country's social welfare and enterprise development systems remain under strain, with small businesses facing systemic barriers to survival and scale, and GBVF continuing to impose massive social and economic costs. The Trusts' targeted investments in ECD centres, shelters for GBVF survivors, bursary support and small business initiatives are highly relevant within an underfunded environment constrained by policy gaps. This context underscores the importance of adaptive, holistic approaches and strong partnerships to drive meaningful and lasting impact in South Deep's communities.

Aims and objectives of the evaluation

The Trusts commissioned Tshikululu to undertake an independent evaluation to assess achievements and successes, and draw lessons to inform future strategic planning and programme improvements. The evaluation aimed to comprehensively assess the outcomes, partnerships and sustainability of initiatives supported in the past decade. Specifically, it sought to determine the reach of the programme, measure its effectiveness against set objectives, assess sustained results, evaluate the relevance and quality of partnerships and the use of resources, and extract lessons and recommendations for future programming, scaling and sustainability.

Scope and key limitations of the evaluation

This evaluation focuses on the Trusts' funded interventions in education (support such as scholarships, bursaries and school infrastructure), community welfare (projects aimed at improving health and social well-being), enterprise development (support for small businesses and job creation) and infrastructure development (which intersects with the other focus areas), between 2013 and 2023. However, it was constrained by gaps in programme documentation and comprehensive data on reach (including beneficiary databases) guided by defined key performance indicators in the absence of theories of change with clear impact pathways. This limited the Trusts' ability to comprehensively assess uptake and impact, and meant that only aggregated estimates could be included. The evaluators could not perform a financial analysis as expenditure had not been tracked against budgets or disbursed grants.

Evaluation design and methodology

The evaluation used a retrospective cross-sectional design through outcome harvesting to assess the outcomes of the Trusts' interventions. This enabled the evaluation team to identify both intended and unintended outcomes, including those not predefined, through a detailed process involving document review, stakeholder engagement (through surveys, interviews and focus group discussions) and the triangulation of data to verify findings and map the links between interventions and outcomes. The evaluation opted for a mix of methods design grounded in critical realism that allowed for the integration of quantitative and qualitative data. The evaluation was framed and its findings are presented using the development assistance committee (DAC) criteria of the Organisation for Economic Cooperation and Development (OECD). Sampling included both convenience and purposive approaches, targeting a range of stakeholders such as implementing partners, trustees, beneficiaries and community members. Primary evaluation data was collected using appropriate tools through interviews (31 participants), focus group discussions (49 participants), surveys (44 respondents), and four case studies covering thematic areas in education, community welfare and enterprise development.

Quantitative data was analysed using Microsoft Excel and Stata/MP, applying descriptive and inferential statistics, while qualitative data was analysed thematically using ATLAS.ti. Quality assurance was maintained through rigorous data validation and ethical standards were strictly adhered to, with informed consent obtained from all participants and anonymity preserved throughout. Despite several limitations, including difficulties in tracing beneficiaries, non-responsiveness from some stakeholders and gaps in programme documentation and financial expenditure tracking, the evaluation used triangulation and adaptive methods to ensure robustness. Limitations such as recall and response bias, especially given the retrospective nature of the evaluation, were acknowledged and mitigated through methodological cross-checks and stakeholder collaboration.

Key evaluation findings

The six OECD DAC evaluation criteria – relevance, coherence, effectiveness, efficiency, impact and sustainability – are used to present the results of the evaluation, synthesise the qualitative and quantitative findings, and draw insights and actionable recommendations.

Relevance

The evaluation confirmed that the Trusts' interventions in education, community welfare and enterprise development are relevant, directly addressing pressing challenges and needs, and aligning with the priorities of target communities in Westonaria. In **education**, the Trusts' investments in ECD infrastructure and private school scholarships responded to historic underfunding and barriers to access in early and basic education, while its bursary programme tackled the financial exclusion crisis in higher education, complementing national priorities and alleviating the burden of debt for many students. In **community welfare**, the Trusts' psychosocial support services, GBVF interventions and emergency relief during the Covid-19 pandemic were timely and aligned with urgent socioeconomic needs, including the national response to GBVF. **Enterprise development** interventions addressed the high rate of unemployment and inequality among young people through the provision of targeted support to small, medium and micro enterprises (SMMEs), including vocational and entrepreneurial training, mentorship and infrastructure investment, consistent with national strategies such as B-BBEE and

SMME promotion frameworks. **Across all three areas**, partnerships with government, the private sector and implementing partners further enhanced the responsiveness and quality of interventions. The results reflected high satisfaction and confirmed that the Trusts' programmes are not only contextually appropriate, but also catalytic in nature, with a deliberate shift from legacy projects to scalable, systems-oriented solutions that support long-term development.

Coherence

The evaluation found the Trusts' interventions demonstrate strong coherence, with clear strategic alignment and internal synergy across its focus areas of education, community welfare and enterprise development. The Trusts' programming is logically interconnected, with investments structured to reinforce one another across the developmental lifecycle. For instance, foundational investments in ECD (such as the Kagisano ECD centre) lay the groundwork for improved educational outcomes, which are later supported through bursaries and enterprise development, including the provision of training and mentorship for SMMEs, ensuring continuity all the way from early learning to economic participation.

Community welfare interventions such as psychosocial support, GBVF services and basic infrastructure play a stabilising role by creating secure, dignified environments that enable educational and economic initiatives to succeed. This mutually reinforcing design strengthens household resilience and community well-being, amplifying the overall success of initiatives funded by the Trusts.

Additionally, the Trusts' coherence is enhanced through strategic partnerships with stakeholders such as the Government Technical Advisory Centre's Jobs Fund, other public entities and Gold Fields. These collaborations integrate external expertise and resources, extending the reach and effectiveness of the Trusts' work while maintaining internal consistency in approach. The Trusts' coherent strategy and implementation model reflect a systems-thinking approach in which education, welfare and economic empowerment are not treated as siloed interventions but as interdependent levers for community transformation.

Effectiveness

The evaluation assessed the effectiveness of the Trusts' interventions by examining the extent to which the initiatives achieved intended outcomes in the areas of education, community welfare and enterprise development. Synthesis of secondary data reviewed, revealed that about 25 230 community members benefitted from interventions supported through an estimated R100 million invested by the Trusts between 2013 and 2023 – see table below for a summary of inputs, outputs and outcomes achieved.

Table 1: SDCET investments: Summary of inputs, outputs outcomes (2013 to 2023)

Focus area	Project overview and reach	Outputs	Total spend	Key outcomes
Education	Foundation, intermediate and senior phases (InterSen), tertiary: Infrastructure development, learning material/equipment, vegetable gardens, scholarships and bursaries, afterschool programme, matric exam rewriting	**997** children and learners, 8 schools, 1 ECD centre, 10 staff members		Access: safe early learning facilities and quality primary, secondary and tertiary education Social cohesion Access to reliable water supply for community Job creation
			R77 967 900	Youth employment

Community welfare	Shelter, infrastructure development, equipment, relief (food parcels, water, sanitisers), home-based care	**15 622** people, including 3 000 households each with an estimated 5 family members totalling 15 000 people	R4 219 030	Victim empowerment and emotional and psychosocial support Improved infrastructure for service delivery
Enterprise development	Skills development and cooperative establishment, business capital, infrastructure development	**8 611** community members, including 110 jobs created and 33 cooperatives started	R17 893 222	Technical/vocational skills Access to essential agricultural infrastructure Operational efficiency Income generation
Total		**25 230 people reached, 8 schools, 1 ECD centre, 120 jobs created/supported, 33 cooperatives started**	**R100 080 152 invested**	

Although the Trusts did not initially operate with formalised theories of change or clearly defined key performance indicators, effectiveness was evaluated through an outcome harvesting approach grounded in three strategic impact pathways: strengthening equity and communities, building social capital through partnerships, and driving economic growth and improved quality of life. The Trusts recorded notable achievements across these pathways.

- For **strengthening equity and communities**, initiatives such as bursaries, scholarships and victim empowerment programmes enabled access to education, reduced dropout rates and supported psychosocial recovery. Beneficiaries reported improved academic success (93% of bursary recipients completed their degrees), personal confidence and life skills, while cooperatives and agricultural interventions equipped communities with tools for self-sufficiency.
- Within **building social capital through partnerships**, high partner ratings (4.6/5) and successful co-funding arrangements, such as with Gold Fields and the Jobs Fund, demonstrated the Trusts' catalytic role in leveraging strategic relationships to deepen impact and scale services. Partners highlighted the Trusts' responsiveness and consistent support as key to programme delivery.
- In relation to **economic growth and improved quality of life**, enterprise development support – including training in trades such as plumbing and agriculture – enabled the establishment of small businesses and supported income generation. Infrastructure investments in early learning centres, shelters and schools enhanced service delivery and created employment opportunities. However, the evaluation also highlighted employment challenges after graduation, with only 56% of bursary recipients securing jobs, underscoring the need for strengthened job placement and support for labour market integration.

Moreover, while formal monitoring systems remain under development, stakeholders agreed that the Trusts' initiatives have yielded meaningful outcomes. Improvements in community trust and reduced protest activity also suggest enhanced stakeholder relations and programme credibility. Effectiveness has been most prominent in the education sector, backed by the largest budget allocation. Ongoing

refinement is needed in community welfare and enterprise development to match these gains. Collectively, the Trusts' multifaceted approach allows for progress towards long-term community transformation.

Efficiency

The evaluation assessed efficiency by examining how well the Trusts and their implementing partners used financial and human resources in the areas of education, community welfare and enterprise development to achieve outputs and outcomes in a cost-effective manner. Although a detailed value-for-money analysis was constrained by a lack of programme-level data on expenditure, stakeholder perceptions and programme evidence offered valuable insights.

Across all focus areas, there was consistent feedback indicating that the Trusts have adopted a more strategic and catalytic approach to allocating resources. Stakeholders, including trustees, emphasised a philosophy of "maximum impact with less input", reflecting a conscious effort to ensure that spending translates into meaningful and scalable benefits. This mindset was embedded in key decisions such as prioritising interventions with the potential to unlock co-funding or amplify systemic change. For example, infrastructure investments in schools, such as water tanks and sanitation facilities, were widely seen as high-return interventions that provided value to both learners and the broader community while requiring limited ongoing maintenance.

The Trusts also introduced more rigorous due diligence processes to guide partner selection and funding decisions. By ensuring that funded partners had a strong track record, solid financial management and were strategically aligned with the Trusts' goals, the Trusts were better able to target their investments and increase their impact. This marked a departure from earlier "tick-box" projects as resources were focused on initiatives with demonstrable potential for broad social and economic influence. However, this improved accountability also created tensions around inclusion as some organisations with high potential for impact were reportedly excluded because of weak governance systems. This raises questions about the extent to which additional capacity-building or support mechanisms might help emerging or grassroots partners meet the Trusts' compliance standards over time.

Despite limitations in the tracking of expenditure data, the evaluation found strong qualitative evidence that the Trusts are using resources efficiently. Through catalytic investments, strengthened governance and a focus on system-level impact, especially in education, the Trusts are increasingly delivering strong value for money across its programmes.

Impact

The impact analysis focused on intended and unintended long-term changes resulting from the Trusts' interventions in the areas of education, community welfare and enterprise development. The outcome harvesting approach that was used captured both positive and negative effects of interventions that extend beyond initial programme design. The findings suggest that although the Trusts' interventions have contributed to meaningful transformation, some emerging risks may compromise sustainability if they are not addressed.

A key unintended negative impact was increased dependency on the Trust, especially in community welfare and enterprise development. Stakeholders reported that some beneficiaries expect continued support, undermining the goal of promoting self-reliance. In some cases, loans for entrepreneurs were mistakenly viewed as grants, resulting in a low repayment rate of just 16% and the eventual collapse of the initiative. Similarly, starter kits distributed to agricultural participants generated expectations for ongoing material support, indicating gaps in exit strategies and communication. This dependency has the potential to weaken beneficiary motivation and limit the scalability of interventions unless addressed through stronger partnerships and referral systems.

In contrast, multiple positive ripple effects were observed in education programming. There was a notable shift in communities' educational aspirations, with young people particularly showing increased interest in higher education. The Trusts' support for bursaries and scholarships contributed to making university education more accessible and desirable, particularly in science, technology, engineering

and mathematics (STEM) fields. This is critical to breaking generational cycles of educational exclusion and improving long-term prospects for employment.

The evaluation also identified a strong culture of "paying it forward" among beneficiaries. Roughly 85% of graduates who completed their studies reported giving back to their communities through mentorship, tutoring or application support. This finding was significant, with a P value of 0.006. This was also echoed through qualitative data, where a beneficiary from the Philani programme, in enterprise development, trained others with disabilities in sewing, multiplying the impact of initial investments. These patterns of reciprocity foster organic peer-led development and enhance community resilience.

Targeted infrastructure investments such as the school water tanker were found to foster social cohesion and strengthen communal networks. These interventions met basic needs while creating shared assets that brought different community groups together. These contributions have laid a foundation for collective problem-solving and community-led development, suggesting that the Trusts' work catalyses deeper, systemic change when programmes are aligned and sustained.

The Trusts' work has contributed to meaningful, long-term improvements in living standards and community structures. However, it is critical to manage expectations, strengthen exit pathways and reinforce ecosystem partnerships to ensure these impacts endure beyond the Trusts' direct involvement.

Sustainability

The sustainability analysis explored the extent to which the Trusts' interventions in the areas of education, community welfare and enterprise development are likely to endure beyond the period of direct funding and support. Evidence suggests that the outcomes achieved in all three areas demonstrate strong potential for long-term sustainability, with seven out of eight implementing partners expressing confidence in the enduring impact of their work. This was primarily attributed to the upskilling of beneficiaries and promoting self-reliance, and to infrastructure investments that, if maintained, can yield continued benefits.

The Trusts' holistic and integrated programme design further strengthens sustainability. Education interventions were commended for adopting a "cradle to career" approach, while enterprise development provided practical alternatives for individuals who were not bound for university. This complementary structure was seen as inclusive and sustainable, covering diverse needs across community demographics. Implementing partners noted satisfaction with the Trusts' design logic and alignment with community realities.

The study found that sustainability is also reinforced by the Trusts' catalytic funding model, which aims to unlock additional investments and prepare grantees for follow-on support from institutions such as the Jobs Fund and the National Lottery. Trustees articulated this strategic intent, noting the goal was to empower local systems and communities to thrive independently in the long term. Grants were typically structured over multiple years and encouraged income-generating models, including social enterprise, to support organisational resilience.

Survey data corroborated these findings. Implementing partners gave high scores on the effect of grants in meeting beneficiary needs (average 80%) and on broader organisational impacts such as governance, visibility and financial viability (average 72.5%). Many partners noted that the Trusts' support not only improved service delivery, but also enhanced credibility and opened doors to new partnerships, which are critical enablers of sustainability. However, some sustainability risks were also identified. Stakeholders noted that the long-term success of infrastructure projects depends on local ownership and ongoing maintenance. Similarly, although bursary investments are valuable, their full potential – success after graduation – is realised only with layered support such as mentorship, work readiness and job placement. These insights underscore the need to strengthen exit pathways and deepen partnerships. The Trusts' **Horizon 2030 strategy**, with its focus on empowerment, systems strengthening and robust monitoring and evaluation (M&E), places its programming on a trajectory that is expected to ensure sustainability. Continued attention to local capacity building, long-term planning and the leveraging of resources will be essential to ensure lasting impact beyond individual project cycles.

Key recommendations

Key cross-cutting recommendations emerging from the three focus areas are summarised in the table below. These are informed by stakeholders' reflections on what has worked well and where improvements are needed. They offer practical opportunities to enhance the effectiveness, sustainability and strategic direction of the Trusts' programmes by strengthening implementation, deepening partnerships and aligning future efforts with community needs and long-term development goals.

Recommendation	Description
Strengthen project planning, management and communication	There is a need to enhance how projects are conceptualised, coordinated and communicated to ensure alignment with community realities and expectations. In some instances, programme design lacked key sustainability elements, such as post-shelter economic empowerment for GBV survivors. Additionally, unclear information sharing, inconsistent feedback loops and weak communication, particularly around initiatives such as the SMME Hub and the suite of services offered, limited the effectiveness and reach of interventions. This is especially important in mining communities, where expectations from companies are high and perceived under-delivery can lead to mistrust.
Strategic partnerships and collaborations	Partnerships have helped leverage resources and improve programme delivery. Sustaining gains beyond Trust funding requires greater collaboration between government and the private sector.
Community cohesion and connectedness	Promote social cohesion and connectedness across programme areas to reinforce inclusion, community ownership and long-term sustainability. While some interventions such as access to water and safe spaces contribute to cohesion, this impact is often incidental and not intentionally designed or tracked.
Impact through evidence-based practices and rigorous M&E	The lack of formal, data-driven M&E systems hinders the tracking of long-term outcomes and limits learning. Stakeholders highlighted the need for rigorous evaluation, clear key performance indicators at programme inception, and stronger reporting systems to ensure accountability and to drive improvement. Considerations for continued investments and scaling the agriculture initiatives under the enterprise development focus area through the Hub, to maximise the outcome achieved.
Governance and oversight	Governance and oversight emerged as a significant theme, with risks of conflicts of interest and perceived bias where trustees are also community representatives. An implementing partner highlighted that some trustees had informed beneficiaries that loan funds did not need to be repaid, contributing to a low repayment rate of just 16%, suggesting possible miscommunication linked to the trustees' close relationships with community members. Some trustees also noted being approached directly by community members for support, and expressed reservations with individuals who previously lobbied against the Trust now serving as trustees. While community representation enhances local relevance and legitimacy, these dynamics highlight the need for clearer governance boundaries. The current Trust Deed is largely silent on this governance dynamic, and should be updated to explicitly outline expectations regarding trustee conduct, conflict of interest management, and appropriate channels for community engagement.

Conclusion

The findings of this evaluation show that the Trusts have evolved in both strategic focus and implementation, positioning themselves as catalytic actors in driving inclusive and meaningful change. Programmes were consistently found to be highly relevant to communities' needs, implemented through

aligned and responsive partnerships, and in line with national priorities and private sector contributions. Participants reflected on the qualitative experiences of how their lives have been positively affected, and shed light on strengthened trust in institutions, shifts in perceptions of education and opportunity, and increased community resilience. Importantly, the Trusts have managed to balance urgent community needs with longer-term investments in interconnected systems of support and infrastructure, such as the cradle to career education pipeline and enterprise development pathways, with programmes that are mutually reinforcing and designed to promote sustainable development. Challenges such as the need to establish mechanisms to support sustainability, ensure bursary graduates are absorbed into the workforce, and manage community expectations remain, but the groundwork that has been laid provides a solid platform. With continued strategic refinement, stronger M&E and deeper community engagement, the Trusts are well positioned to expand their impact and remain a key development partner in mining-affected communities.

1. INTRODUCTION

This evaluation report documents an independent and comprehensive assessment of the SDCET programmatic activities between 2013 and 2023. Conducted by Tshikululu Social Investments, with oversight from an evaluation steering committee, the evaluation measures the outcomes and perceived impact of the Trusts' investments in education and community development in the communities surrounding the South Deep mine, operated by Gold Fields Limited in Westonaria, Gauteng.

The Trusts have been supporting development work in West Rand City to contribute towards improving the quality of life of the members in these communities. The trustees commissioned an evaluation to understand the achievements, successes, barriers, challenges and lessons learnt to inform actionable recommendations for the Trusts' consideration towards future investments and strategic decisions.

The evaluation focuses on both positive and negative, intended and unintended, direct and indirect outcomes stemming from the initiatives supported by the Trusts in the areas of education, community welfare and enterprise development.

1.1 Background

The South Deep Education Trust and South Deep Community Trust are part of South Deep's Black Economic Empowerment ownership structure and receive annual dividend income as follows: South Deep Education Trust – Invictus (Pty) Ltd and South Deep Community Trust – Newshelf (Pty) Ltd. Although they are independent, both Trusts are interconnected with the aim of driving inclusive development in the mine's host communities, particularly Westonaria and Bekkersdal.

The Trusts play an advocacy and facilitative role in aligning initiatives and funding for South Deep communities to stimulate systemic change and improve capacity and resilience, connection to knowledge, levels of education and the employability of community members. Through active consultation with community members, the Trusts were established to drive sustainable social development within the communities surrounding the South Deep mine. The Trusts aim to become trusted partners in the social development journey of South Deep communities, so they can thrive through stability and connection "connectedness".

The SDET was mandated to promote access to quality education, particularly through:

- Scholarship and bursary education support;
- Infrastructure support for local schools;
- Teacher development and learner support;
- ECD for the Kagisano ECD centre; and
- School safety and security.

The SDET also has an arm that provides a range of legal services to the community; a section that works with self-help and poverty alleviation; an arm that provides funding to labour-sending areas; and a component that manages donations to charitable institutions with similar objectives.

The SDCT supports community development and training projects that contribute to job creation, adult education and infrastructure development, and provides capacity-building assistance for emerging micro enterprises and community-based initiatives. It also provides funding to charitable institutions with similar objectives. Between 2013 and 2023, the SDCT focused on broader community upliftment projects, including:

- Agriculture and food security;
- Health and social welfare interventions;
- Inclusive local economic development and entrepreneurship by providing support to local entrepreneurs and small businesses through funding and capacity building; and
- Community infrastructure projects aimed at improving quality of life and community sustainability.

Initially, a significant portion of the Trusts' investments went towards supporting scholarship and bursary programmes by providing learners with access to quality education at private schools. Over the years, the Trusts have refined their approach to maximise impact and long-term sustainability. Through consultation with key stakeholders, the trustees revised their social investment strategy and launched the Horizon 2030 strategic framework informed by the Trusts' commitment to tackle inequality and drive social transformation through building social capital and partnerships.

1.1.1 SDET and SDCT management

Until 2022, both Trusts were managed by an external law firm. Tshikululu took over the management and administration in 2023 and provided strategic guidance, operational support and fiduciary oversight. The Trusts maintain a transparent project selection process that ensures projects selected to benefit from the Trusts have potential or demonstrate long-term impact, community relevance and alignment with either SDET or SDCT objectives, as well as overall alignment with national development priorities.

1.2 SDCET strategic evolution and impact pathways

Over the years, the Trusts have evolved their strategy to maximise impact and sustainability and better align with their vision of becoming a trusted partner in the social development of South Deep communities. Their investments have consistently aimed to foster community stability, connectivity and prosperity, with a strong focus on Westonaria and, to a lesser extent, South Deep mine's labour-sending areas.

Tshikululu's review of their projects since 2013 highlighted three key impact pathways that have guided their investments:

- **Strengthen equity and communities** – address poverty and inequality and empower marginalised groups.

- **Build social capital through partnerships** – foster collaboration among stakeholders to enhance development outcomes.

- **Drive economic growth and improved quality of life** – support job creation, skills development and infrastructure improvements to uplift communities.

Although the Trusts have made significant strides in these areas, there remained a need for deeper reflection on the overall efficacy of their investments. As part of their commitment to continue to drive innovative and meaningful impact in Rand West City, the SDCT trustees commissioned Tshikululu to review their 2015 to 2019 strategy in 2023. Between August and November 2023, the trustees approved Tshikululu's proposed Horizon 2030 strategic framework and subsequent theories of change. The framework is informed by five strategic pillars or initiatives:

ECD	Quality public schools	Bursaries	SMME Hub
Early childhood development	Primary school / Secondary school	Post-education and training	Sustainability and livelihoods
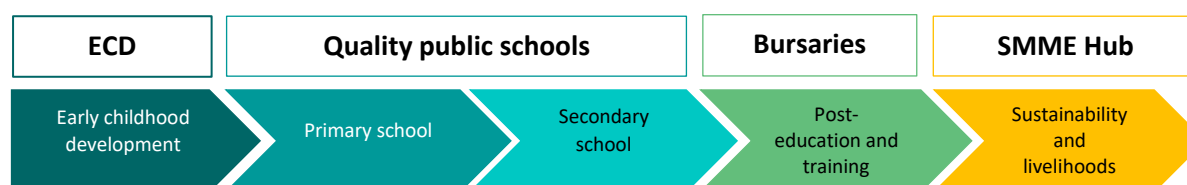
Figure 1: 2024-2029 strategic pillars

1.2.1 2024-2029 strategic pillars

The pillars are informed by advocacy and collaboration with stakeholder engagement and a robust monitoring and results reporting framework informing the implementation process managed by Tshikululu.

The evolving strategic move reflects a commitment to ensuring that investments lead to meaningful, sustainable change in the communities they serve. The Trusts' mission is to continue to be a trusted partner in the social development of South Deep communities to foster a stable, connected and thriving society. Through strategic partnerships and funding, they contribute to education, employability and economic development, ensuring long-term impact that is meaningful.

2. RATIONALE AND PURPOSE OF THE EVALUATION

The SDCET commissioned Tshikululu to conduct an independent evaluation to measure its achievements and derive lessons to inform their future strategic plans and enhancements to their programmes or interventions. The main purpose of the evaluation was to conduct a comprehensive assessment of the outcomes, partnerships and sustainability of the outcomes and projects supported by the Trusts between 2013 and 2023 . The specific objectives of the evaluation are to:

- Determine the reach and breadth of the programmes based on existing reports or data;

- Measure the effectiveness of the programmes in terms of the achievement of outcomes against set objectives;

- Assess the long-term and sustained changes or results of the programmes;

- Assess the relevance, quality and sustainability of partnerships and their implementation, as well as their resource efficiency; and

- Draw critical insights on lessons learnt and make recommendations for future programming and implementation regarding adaptations, scaling, replication, strategic partnerships and sustainability.

2.1 Evaluation approach and key questions

The evaluation was guided by the DAC criteria of the OECD. Established in the DAC principles for the evaluation of development assistance, these criteria serve as a global benchmark for conducting thorough and standardised evaluations. Particular focus for this evaluation was on relevance, effectiveness, efficiency[1] and sustainability. Key evaluation questions were designed in alignment with these criteria and insights were drawn to provide actionable recommendations to enhance the future implementation of the Trusts' initiatives.

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[1] Programme reports and data had limited financial data, which hindered a comprehensive assessment of the Trusts' efficiency and value for money in accordance with the DAC criteria. However, qualitative data was used to draw insights from various stakeholders' experiences on their use of resources.

Table 2: OECD DAC criteria and key evaluation questions

	DAC criteria	Key evaluation questions
Relevance	Assesses the extent to which the activities and outputs of the SDCET align with the needs and priorities of target communities and stakeholders. Relevance involves ensuring that the Trusts' programmes are appropriately designed to address the specific challenges and opportunities within the mining communities they serve. This criterion evaluates whether the Trusts' strategic focus matches the actual aspirations and requirements of the community and how the partnerships they foster support these goals.	How relevant are the programmes? How valuable are the partnerships? What is the quality of the programmes?
Effectiveness	Measures the success of the SDCET in achieving defined objectives. This involves assessing whether the Trusts' initiatives meet their outcomes goals within the short and medium term. Under this criterion, the evaluation considers the degree to which positive change and benefits have been derived not only for the beneficiaries, but also for the community's well-being.	To what extent are the programmes achieving intended outcomes in the short and medium term?
Efficiency	Examines how economically the SDT partners use their resources to achieve their intended outputs and outcomes. It assesses the cost-effectiveness of the Trusts' initiatives, questioning whether the financial and human resources invested in the programmes are proportional to the benefits produced. Efficiency in this context also involves looking at how well the Trusts manage their partnerships and resources to maximise the impact per unit of cost.	How well are resources being used? To what extent is the relationship between inputs and outputs cost-effective and to expected standards?
		Do the outcomes or achievements of the programmes supported represent value for money through comparing costs or inputs and outcomes achieved?
Impact	Assesses the broader long-term results and benefits of SDCET's programmes, focusing not only on the positive and intended outcomes, but also on any unintended or undesirable consequences. This criterion explores how the Trusts' interventions could have led to outcomes that were not originally anticipated, which could be either beneficial or detrimental. It also examines the long-term sustainability of the observed changes, questioning the extent to which these results can endure beyond the life of the projects. This involves evaluating whether the improvements initiated by the Trusts' programmes are robust enough to continue providing benefits to the community in the long run without ongoing external support.	To what extent are the programmes achieving intended outcomes in the long term? What, if any, are the unintended or undesirable outcomes?
		Are the observed changes and outcomes sustainable? To what extent will the positive changes and results of the intervention continue in the long term?
Sustainability	Assesses whether the benefits of the Trusts' programmes are likely to continue after the initial funding and direct interventions end. This includes evaluating the long-term viability of the projects initiated by the Trusts, the enduring nature of partnerships, and the capacity of the community to maintain and build upon the gains achieved. It also explores conditions under which the positive impacts of the interventions can be sustained or replicated in other contexts or regions.	Are the observed changes and outcomes and supported programmes sustainable? To what extent will the positive changes and results of the intervention, as well as the intervention itself, continue in the long term?
		Under which conditions would the intervention produce similar results if it were replicated or scaled?

2.2 Evaluation scope

The scope of this evaluation assessed the outcomes of the Trusts' funded interventions across three primary programmatic areas (education, community welfare and enterprise development) between 2013 and 2023. The evaluation was conducted between October 2024 and March 2025. The methods employed are detailed in section 3 (methodology).

Additionally, the infrastructure development component, which intersects with these three focus areas, was also assessed under each focus area. The evaluation focused on **education initiatives** that were funded, including scholarships, bursary support programmes and school infrastructure development; **community welfare** projects designed to improve health and social well-being; and **enterprise development** efforts that support small businesses and facilitate job creation.

Programmatic documents and reports shared with Tshikululu to inform the evaluation had key gaps that affected some of the evaluation objectives and limited the ability of the analysis to determine the breadth and uptake of initiatives across focus areas and to fully understand the reach of the programmes funded. The programmes did not have clear impact pathways (theories of change) or key outcome indicators (metrics), and some reports tracked or documented very limited outcomes. As such, aggregated estimates are detailed in the report. Moreover, a financial analysis could also not be performed to determine value for money and cost-effectiveness because programme expenditure was not adequately tracked and reported against budgets or grants disbursed.
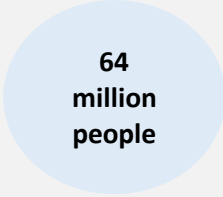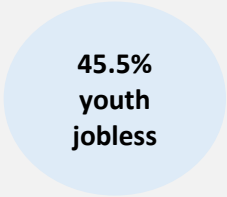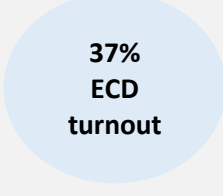
3. CONTEXT OF THE EVALUATION

The SDCET operates within the Westonaria and South Deep host communities' multifaceted socioeconomic landscape. This literature review synthesises national statistics and contextual data to inform the Trusts' strategic focus areas: education, community welfare, enterprise development and community infrastructure development.

3.1 Macro socioeconomic landscape

The South African government is committed to driving inclusive economic growth and job creation, reducing poverty and strengthening a capable, ethical and developmental state. The social investment and impact sector is inextricably tied to these commitments as the political and socioeconomic context affects how social investors create effective change in communities. South Africa's socioeconomic outlook is characterised by cautious optimism, tempered by the need for effective policy implementation and structural reforms to address persistent challenges such as poverty, inequality, high unemployment and violence.

3.1.1 Key findings from the literature review

64 million people	According to Statistics South Africa (2024), the South African population totalled more than **64 million people**, comprising 27.5% children (aged 0 to 14), 33% youth (aged 15 to 34); 29.8% adults (aged 35 to 59); and 9.7% older people (older than 60).
31.9% jobless	As at the fourth quarter of 2024, South Africa's unemployment rate was 31.9%, meaning that 8 million people are unemployed, mainly women and youth.
45.5% youth jobless	More than 45% of youth were unemployed in 2024 and more than 50% of them were inactive in the economy (not seeking opportunities employment, education or training).
37% ECD turnout	According to the United Nations' (UN) 2023 Sustainable Development Goals (SDG) Report, the average ECD attendance rate for children aged 36 to 59 months in 61 low- and middle-income countries was **37%, with a 16% gap between urban and rural areas** and a 34% gap between the richest and poorest quintiles.
80% jobs by SMMEs	SMMEs account for 90% of businesses and provide 80% of jobs in African (World Bank, 2022). In South Africa, **SMMEs are estimated to employ between 50% and 60% of the workforce and account for 34% of gross domestic product (GDP).**

The mining sector is an important partner in addressing South Africa's development challenges and has a critical role to play in contributing towards a more inclusive society and alleviating poverty. Whereas social investment efforts may have been voluntary in the past, there has been a shift over the years in which mining corporations are subject to provisions prescribing sustainable development and investment in affected communities.

In 2023, the Minerals Council South Africa found that, **the South African mining industry had spent more than R4.9 billion in 2023 alone, in social investment and development initiatives aimed at enhancing quality of life within mining host communities**. This social investment complemented the R135 billion that the mining sector contributed to the National Treasury, primarily through taxes and royalties as part of its broader economic contribution during the same period.". According to the study, these investments were in infrastructure and enterprise development, GBVF prevention, and education.

In the infrastructure development sector, mining companies supported programmes aimed at providing education and health infrastructure. Some community construction projects were also aimed at improving access to water and sanitation.

Over the reporting period, enterprise development initiatives gained momentum, supporting new businesses through enterprise and supplier development programmes aimed at stimulating job creation. Funding prevention, response and aftercare services for survivors of GBVF in host communities were also priority investments for mining companies. Most initiatives in the education sector included support for educators and learners, often with a focus on improving performance in Stem subjects by providing bursaries to students for tertiary education.

3.2 Education

3.2.1 Global landscape

Education is recognised as a catalyst for economic growth, poverty alleviation and sustainable development. The UN's SDG 4 aims to ensure inclusive, equitable quality education and promote lifelong learning opportunities for all by 2030.

Some of the key global trends include:

- A strong emphasis on ECD, especially for cognitive, emotional and physical growth for children aged 0 to 7. The importance of ECD is highlighted in the SDGs, specifically SDG 4.2, which aims to ensure all children have access to quality ECD care and preprimary education by 2030.

- Persistent education inequality, particularly affecting girls, rural communities and conflict-affected areas. Whereas 89% of children in high-income countries benefit from early education, only 35% of children in low-income countries have the same opportunities. Furthermore, roughly 30% of children worldwide are not on track developmentally, with those from poorer households and rural areas facing significant challenges.

- Despite gains in access, progress has stalled in reaching the remaining out-of-school children. The United Nations Educational, Scientific and Cultural Organisation (Unesco) reports that **251 million** children and youth are still out of school globally – a mere 1% reduction in the past decade (Dawn.com, accessed [April] 2025).

- Digital transformation in education, accelerated by Covid-19, which exposed divides in internet access, device availability and digital skills.

- Lifelong learning and the integration of 21st-century skills such as critical thinking, collaboration and digital literacy into the curriculum. Increased interest in lifelong learning is driven by the need to prepare students for a rapidly changing world.

- About 222 million students are enrolled in tertiary education globally, up from about 100 million in 2000. In sub-Saharan Africa, enrolments have doubled every 20 years since the late 1970s. This massive growth remains critical as a student with a tertiary education degree in the region is likely to earn more than twice as much as a learner with just a high school diploma over a lifetime, though, of course, a variety of factors such as social capital and networks, institution quality and academic programme selection are among the factors that lead to a notable heterogeneity of outcomes.

- The global push for free or affordable tertiary education, driven by rising student debt and economic inequality. Evidence shows that inequalities in higher education participation exist in about 90% of countries (Atherton, Dumangane and Whitty, 2016).

3.2.2 Regional landscape

Despite commitments under the Continental Education Strategy for Africa and the African Union's Agenda 2063, education in Africa faces systemic challenges.

Key regional dynamics:

- **Low foundational learning outcomes** – according to Unesco (2022), up to 90% of African children do not meet minimum reading proficiency by age 10.

- **Underinvestment** – while South Africa spends above the global average (**6.15%**), public education expenditure across **sub-Saharan Africa averages 3.7% of GDP**, compared to the **global average of 4.2%**, reflecting persistent underinvestment in infrastructure, teacher training, and learning resources in the region. (UNESCO, 2023; World Bank, 2021)

- **Education quality and equity are major concerns** – learning poverty remains high, with about 70% of children worldwide unable to read and understand a simple text by age 10, a figure that rises to roughly 90% in sub-Saharan Africa (Mouyeme, 2022).

- **International donors** – in many African countries organisations such as the World Bank and the United Nations International Children's Emergency Fund (Unicef) support curriculum reforms and learning assessments to monitor progress.

- **Youth bulge** – Africa has the youngest population in the world, creating urgency for access to quality secondary and tertiary education and employable skills.

- **Private and NGO involvement** – non-state actors increasingly contribute to bridging funding, access and quality gaps, often through scholarship models and community-based education.

- **Refugee and vulnerable populations** – initiatives such as the Albert Einstein German Academic Refugee Initiative aim to serve refugee students through dedicated scholarships and psychosocial support.

3.2.3 Education in South Africa

3.2.3.1 Increasing inequality in ECD
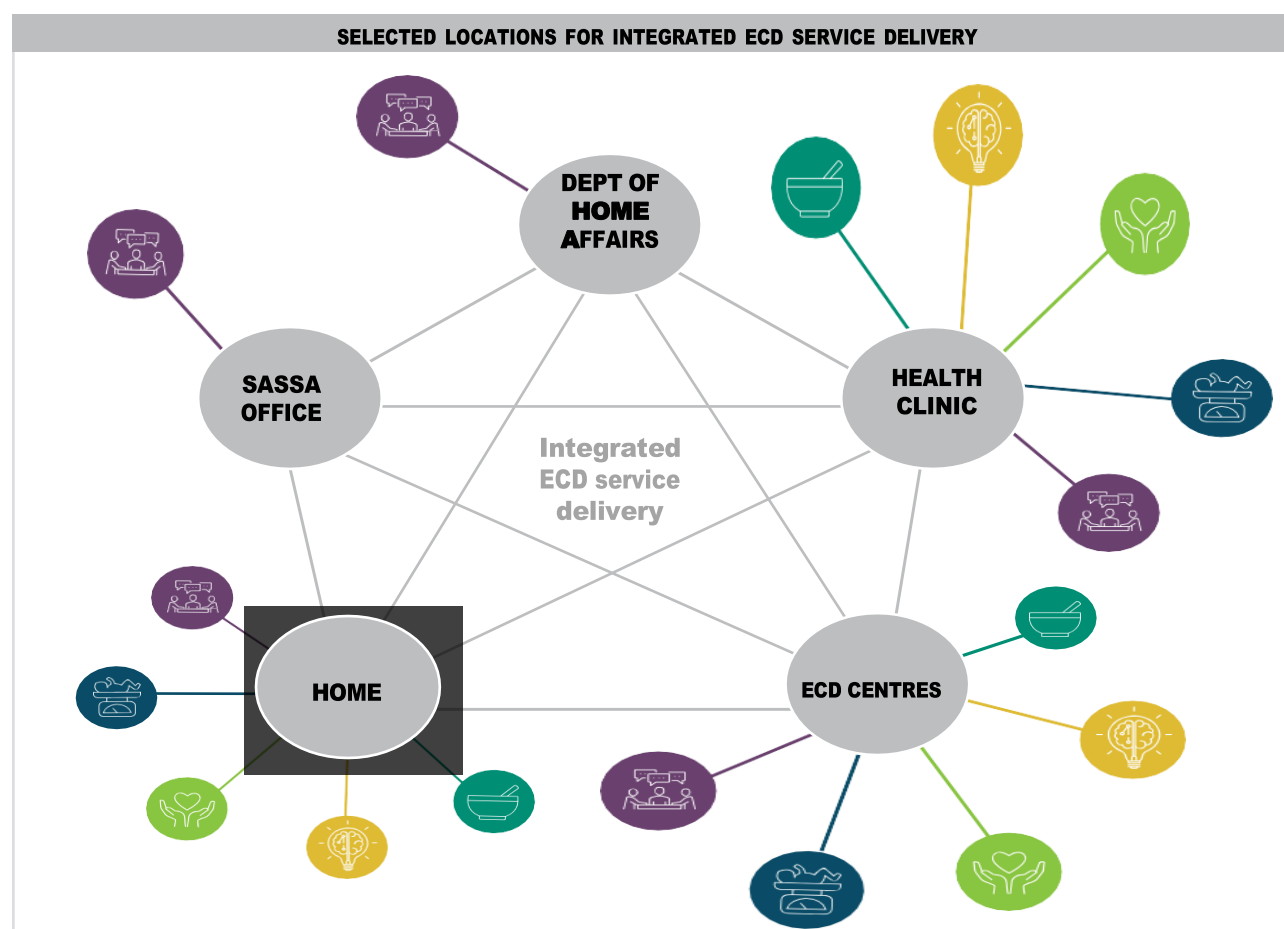
Figure 2: Selected locations for integrated ECD service delivery

ECD is pivotal for long-term educational outcomes. In 2022, about 36% of children aged 0 to 4 attended ECD programmes, with significant provincial disparities. In April 2022, the Department of Basic Education (DBE) took over the responsibility for ECD from the Department of Social Development and made two years of ECD compulsory before grade 1. This was aimed at addressing these gaps. However, challenges persist, including underfunding, inadequate infrastructure and a shortage of qualified practitioners.

ECD is critical in reducing socioeconomic inequality. Although this is broadly accepted in South Africa, most children are born into environments that reduce their chances to realise their potential – typified by insufficient access to high-quality health services and nutrition, inadequate living environments, a lack of security and social protection, and limited opportunities for quality early learning and stimulation. As a result, children experience malnutrition and great stress. From the very start, they are chronically underpowered to participate fully in the economy and society. They are unable to fully realise the benefits of formal schooling, with obvious repercussions during adolescence and later in life. Despite what the country has achieved after apartheid, progress in ECD is unacceptably slow.

The DBE has identified the historic underfunding of the sector as its greatest challenge – pointing to the lack of infrastructure support for ECD centres and underqualified practitioners as some of the effects of this systemic challenge. The SDET has been proactive in addressing these challenges. The Trust's investments in the Kagisano ECD centre's operations and infrastructure is central to driving access to quality and comprehensive education and services to children in the South Deep host communities.

3.2.3.2 Primary and secondary education

Despite substantial government investment – 17.3% of total public expenditure on education in 2021 – educational outcomes remain suboptimal, with more than 80% of 10-year-olds unable to read for meaning. This underscores the need for targeted interventions to improve literacy and numeracy skills at the foundational level.

Between 2021 and 2024, South Africa consistently allocated a significant share of public resources to basic education, maintaining spending levels at 17–19% of total government expenditure (National Treasury, 2021–2024). The national Department of Basic Education saw its budget rise from R28.4 billion in 2021/22 to R32.3 billion in 2024/25 (National Treasury, 2024), though most basic education spending is delivered through provincial departments, with a combined total of R308 billion allocated in 2023/24. Despite this, real (inflation-adjusted) per-learner spending has stagnated or declined as fiscal constraints, debt-service costs, and competing priorities, such as expanding tertiary education, have eroded the share available for primary and secondary schooling. The shift in emphasis toward higher education is evident, with basic education's share of total public education spending falling from 76% in 2015 to about 69% in 2023 (Spaull, 2023; UNESCO, 2024). While modest gains have been made in Early Childhood Development and infrastructure, constrained funding continues to limit the scale and quality of foundational learning interventions.

Despite these investments, outcomes remain poor. South Africa performs among the lowest in global literacy assessments, with only 19% of Grade 4 learners able to read for meaning, a decline from 22% in 2016, according to Progress in International Reading Literacy Study (PIRLS) 2021. Dropout rates are also concerning: nearly 9% of 17-year-olds and 3% of 15-year-olds had already exited the schooling system by 2021, with the sharpest attrition occurring between Grades 10–12, (Department of Basic Education, 2022). This suggests that high spending alone has not translated into improved outcomes, due in part to systemic inefficiencies and pandemic-related learning losses. While policy efforts have increasingly focused on early literacy (e.g., through the national reading strategy and curriculum support), implementation has been uneven, and most provinces lack dedicated large-scale catch-up programmes. South Africa continues to prioritise education in fiscal terms, but the system remains under pressure and in urgent need of more effective, evidence-based interventions to reverse learning deficits and improve retention.

3.2.3.3 Higher education funding crisis

Higher education in South Africa faces persistent financial challenges, including a shortage of spots at public universities, rising tuition fees and historic tuition debt, inadequate government support, and an overwhelmed National Student Financial Aid Scheme (NSFAS). Students struggle to access public universities and affording tuition, and NSFAS is struggling to cope with demand, leaving many students without funding or facing delays in receiving the funding. Many students graduate with significant debt – a major impediment to finding employment.

Many students drop out of their studies because of financial constraints, academic struggles or inadequate support, leaving them without qualifications yet still burdened with debt. South Africa's outstanding student debt is in the region of R20 billion (Moneyweb, accessed [insert month] 2025). The funding crisis has become even more prominent in the past eight years, as evidenced by recurring protests such as the FeesMustFall movement in 2015 and the Asinamali protests in early 2021.

NSFAS's latest funding status report shows that, as at 2 April 2025, 660 000 students (243 000 of whom are fully funded) have provisionally been funded for the current academic year at a projected cost of R48.4 billion.

The gap between statutory funding from NSFAS and the Department of Higher Education and Training and actual funding requirements should be planned for strategically, where contributors bring what they can and align strategies from that point on. It is estimated that it would cost R121 billion per year (Gqubule, 2021) to provide free tertiary education. The concern over free education and student debt

in South Africa occurs within the context of higher education institutions the world over struggling with questions about funding models, debt and sustainability.

An estimated 70% of students who enter university are first-generation participants (Bawa & Strydom, 2019). These students are more vulnerable to financial pressure and less sure about where their next meal might come from. Access and success remain racially skewed. Although, in comparison to other racial groups, more black students are able to access university, their proportional participation in their age cohort is still low (18% vs 56% white student participation per age cohort) (Council on Higher Education, 2019). Most students, even with NSFAS support, face financial pressure, especially first-generation participants and black students, leading to high dropout rates.

The few published studies based on the South African tertiary education sector helped shape the design and analysis of some of the findings. Emerging research indicates that higher education's impact on South Africa's economic well-being is dwindling. The country's poor economic performance has had negative effects on employment, which has hindered economic growth. To understand how these development challenges intersect, the research considers the impact of education. Poor education is seen as being the root of many of South Africa's problems, influencing continued inequality and the socioeconomic well-being of future generations. Although the research notes that substantial progress in raising the minimum level of education of the South African population since 1994 has increased the employment prospects for individuals with matric certificates or tertiary qualifications, better-educated people have not contributed significantly to increasing economic output.

A 2003 study by Groenewald and Schurink pioneered the notion that properly implemented holistic funding with relevant support interventions would lead to greater access to education, improved completion rates, the development of work ethics, ambition to succeed, access to employment and a desire to contribute to society. First-time entry into the labour market and securing a first full-time, formal-sector job is considered the most important life-course transition for a young graduate. Failure to access their first job has the power to condemn young people to permanent unemployment. Early success in securing a first job shapes a future trajectory up the occupational ladder. Interventions to support young people make this transition successfully are crucial, including career guidance offered by universities and other higher education stakeholders.

The challenge of providing comprehensive student support is far greater than any partner can overcome alone. Many barriers to success relate to multiple socioeconomic factors. The national plan for post-school education and training (PSET) is government's response to address youth unemployment and socioeconomic growth: "By 2030, we aim to have developed a more socially just, responsive and well-coordinated PSET system, providing access to a diversity of quality education and training opportunities where students have a reasonable opportunity for achieving success, and with vastly improved links between education and the world of work." (Parker, 2019).

3.2.3.4 The SDET's role in advancing education in South Africa

The education landscape – from global trends to local realities – shows that although access has improved, quality and equity remain persistent challenges. The South Deep communities reflect the broader South African struggle with educational inequality, but also present opportunities for transformative, place-based interventions. The SDET is strategically positioned to respond to these challenges through integrated, long-term investments in ECD, secondary school performance, higher education access and youth employability, thereby contributing to inclusive development in alignment with national and global education goals.

3.3 Community welfare

Globally, community welfare has become a cornerstone of inclusive development efforts, with a strong emphasis on eradicating poverty, reducing inequality and promoting social protection systems for the most vulnerable. This aligns with key international commitments such as SDG 1 (no poverty) and SDG 10 (reduced inequality). Recent years have seen the expansion of multidimensional approaches that integrate income support with health, education, climate resilience and gender justice to build more resilient, inclusive communities.

Despite this progress, critical challenges remain:

- Extreme poverty persists, with nearly 700 million people (8.5% of the global population) still living on less than $2.15 a day. Covid-19 and economic stagnation have reversed poverty reduction gains in many regions, particularly in low-income countries (World Bank, 2024).

- Sub-Saharan Africa remains the epicentre of global poverty, home to two-thirds of the world's extreme poor. This is the only region where absolute poverty numbers have continued to rise in recent decades (World Bank, 2024).

- High income inequality undermines social cohesion, especially in middle-income countries such as South Africa, Brazil and Mexico, where Gini coefficients remain stubbornly high (in the 40 to 60+ range).

- GBVF has reached crisis levels in South Africa and many other contexts, imposing immense human and economic costs. GBVF is now widely recognised as both a development and public health emergency.

- Basic service access remains inadequate in many low-income communities, with limited access to water, sanitation, electricity and primary health care continuing to fuel vulnerability and poor living conditions.

- Social protection systems remain underfunded and underdeveloped in much of Africa. Only 17% of people on the continent have access to any form of social protection and spending averages just 3% to 5% of GDP in many African countries, well below global targets (Global Alliance against Hunger and Poverty, 2024).

3.3.1 A comprehensive approach to fostering community cohesion and development

South Africa's social welfare system supports approximately 28 million people monthly, with about 9 million unemployed people receiving the social relief of distress grant (Daily Investor, 2024; SAnews, 2024). However, the system is under strain, with only 7.1 million taxpayers supporting it (National Treasury, 2024). According to Stats SA (2024), unemployment remains high at 31.9% as at the fourth quarter of 2024, with youth unemployment at a staggering 45%.

Data from Statistics South Africa reveals that crime rates increased in 2022/23 and that housebreaking is the most common crime experienced by households. Murder, extortion, assault and kidnapping have also increased, and women have been reported to be the primary victims of these crimes.

GBVF is another critical concern. Although the underreporting of GBVF cases is a known challenge, the hidden financial costs of GBVF mostly continue to be ignored. It is estimated that GBVF cost South Africa R36 billion in 2024 (UN Women & KPMG, 2024). The private sector, including the mining sector and its associated community development trusts, has a key role in influencing systemic GBVF-related change and policymaking efforts geared towards enabling equal opportunities and empowering women. The UN Women and KPMG (2024) report highlights that private sector participation in addressing GBVF must be integrated into corporate governance and reporting frameworks, calling for systemic accountability and leadership in the response to GBVF. According to the UN Women Gender Snapshot 2024, the global economy loses about $10 trillion each year due to persistent gender inequalities. It follows that increased private sector participation to address GBVF in South Africa would likely yield positive change, both for the social fabric and GDP of the country.

3.4 Enterprise development

Enterprise development has emerged as a critical strategy for promoting inclusive economic growth and transformation in South Africa. In the context of persistent unemployment, inequality and poverty, SMMEs are widely recognised as key drivers of job creation, innovation and local economic development (OECD, 2022; SEED, 2021). However, the entrepreneurial environment has declined, with South Africa's score dropping to 3.6 in 2023 on the Global Entrepreneurship Monitor (GEM) National

Entrepreneurship Context Index (NECI), ranking third-lowest among 49 economies. Although SMMEs employ an estimated 13.4 million people in South Africa, 72% of them operate informally (FinMark Trust, 2024). Despite its potential, the sector continues to face significant challenges such as limited access to finance, low survival rates for start-ups, fragmented support ecosystems and skills mismatches (FinMark Trust, 2020). There is also a need for more holistic, place-based strategies that address both enterprise-level constraints and structural barriers in local economies (Bhorat *et al*., 2021).

Effective enterprise development models typically include a combination of financial support, capacity building, infrastructure provision, market access and mentorship (Timm, 2012; Abor and Quartey, 2010). In recent years, there has been a shift towards more impact-driven, rather than purely compliance-driven, approaches, with growing emphasis on measuring long-term sustainability and systemic change (Tshikululu, 2021).

Emerging opportunities in the space include the development of blended finance mechanisms, local enterprise hubs and the integration of green and digital economy models into enterprise development initiatives. Strategic partnerships between corporates, development finance institutions and civil society are also increasingly being explored to scale and deepen impact (Bertha Centre, 2020). The following points summarise key insights that position South Africa's enterprise development landscape within the broader global and regional context, highlighting areas of progress, gaps and opportunities relative to other middle-income and economies in the Brazil, China, Egypt, Ethiopia, India, Indonesia, Iran, Russia, South Africa and United Arab Emirates group of countries (Brics).

- South Africa's SMMEs employ an estimated 50% to 60% of the workforce and contribute about 34% to GDP, a lower share than in peer countries such as Mexico (52%) and China (60%) despite employing similar proportions of the labour force (Mexico Secretariat of Economy, 2024).

- The country had about 2.6 million SMMEs (including informal businesses) in 2018, yet this number has shown limited growth, reflecting structural and ecosystem challenges (International Finance Corporation, 2018).

- China's SMMEs account for 80% of urban employment and 60% of GDP, while Brazil's informal micro-enterprises play a major role in employment generation, despite formal SMMEs contributing a similar share of GDP as in South Africa.

- Middle-income country peers such as Turkey and Indonesia have more dynamic enterprise sectors. Turkey's SMMEs contribute more than 70% of employment and are embedded in global supply chains, and Indonesia's are the backbone of its economy and have led recent growth in digital entrepreneurship.

- South Africa continues to lag in international entrepreneurship indicators, with slower SMME growth and less structural integration into key economic sectors, contributing to persistent unemployment and underperformance in inclusive economic development.

3.5 Community development

Infrastructure development is essential for community well-being. South Africa announced R445 billion in new infrastructure projects in 2023, with 78% funded by government and state-owned enterprises. Access to basic services remains a concern: 94.8% of the population had access to drinking water, 89.4% to electricity and 78.1% to basic sanitation in 2024.

3.6 Summary of key trends and comparative indicators

The following table provides a comparative snapshot of key global, regional (Africa and Southern Africa) and national (South Africa) trends across the three focus areas of education, community welfare and enterprise development. It draws on international benchmarks and emerging evidence from Brics and other middle-income countries to contextualise South Africa's progress, gaps and opportunities. It synthesises patterns in access, quality, coverage and policy alignment, highlighting where South Africa aligns with or diverges from global and regional peers. This comparative lens is essential for guiding

future programming and strategy, ensuring that interventions are not only locally grounded, but also globally informed.

Table 3: Summary of key trends and comparative indicators

Focus area	Global trends and challenges	Africa and Southern Africa	South Africa vs peers
Education	– **251 million** children out of school worldwide (stagnant progress) – Emphasis on ECD and quality (SDG 4); digital learning on the rise – **70%** learning poverty globally (age 10); underinvestment in education in many regions	– Lowest education outcomes globally: **90%** of 10-year-olds in sub-Saharan Africa cannot read proficiently – Chronic underfunding; many schools lack basic resources – Southern Africa: high enrolment but mixed quality (effects of apartheid-era inequalities linger)	– Near-universal access in South Africa (primary net attendance **95%**) – **Quality gap: 78%** of South African grade 4 learners not reaching reading benchmarks (vs **50%** in Brazil) – South Africa trails Brics in test scores; Russia and China achieve nearly **100%** literacy and better Stem results
Community welfare	– Global extreme poverty **8.5%** (**700 million** people); progress slowed by Covid-19 – **52%** of world's population covered by social protection benefits (rapid expansion of cash transfers, etc.) – Rising focus on inequality, GBVF and social inclusion in policies	– Sub-Saharan Africa has **67%** of global extreme poor; poverty rate of **35%** (highest of any region) – Only **17%** of Africans have any social protection coverage (most rely on informal safety nets) – Southern Africa: relatively higher social grant coverage (e.g. pensions in Botswana, grants in South Africa), but very high unemployment and inequality	– South Africa has **one of the world's highest inequality** levels (Gini - **63**), vs Brazil (**52**) and Mexico (**43**) – **Unemployment:** South Africa **31.9%**, dramatically higher than peers (Brazil **9%**, Turkey **9%**, India **8%**) – **40%** of South Africans receive social grants, comparable to Brazil's Bolsa Família reach, but poverty and youth joblessness remain more severe in South Africa
Enterprise development	– SMMEs = 90% of firms worldwide, 50% to 60% of jobs; formal SMMEs account for 40% of GDP in emerging economies – Global push to support SMMEs (credit access, business climate reforms, start-up incubators)	– SMMEs are the backbone of African economies (90% of businesses, 80% of jobs), but often informal and small-scale – African SMMEs face financing gaps and infrastructure hurdles; youth entrepreneurship rising but needs support	– **SMME GDP contribution:** South Africa 34% vs 50%+ in peers (e.g. Mexico 52%) – South Africa's early-stage entrepreneurship rate is far lower than other Brics countries (reflecting barriers to business entry and growth) – Doing Business (2020) rank: South Africa is mid-table (84th) behind Russia (28th) and China (31st),

	– Growing trends of digital entrepreneurship and integration of SMMEs into value chains	– Southern Africa: strong policy focus (such as the Southern African Development Community industrialisation strategy) on SMME development, yet informality is widespread and entrepreneurial activity is relatively low	indicating a less competitive SMME environment. Recent reforms aim to close this gap

Sources: World Bank, Unesco, United Nations Development Programme, International Labour Organisation, OECD

4. EVALUATION DESIGN AND METHODOLOGY

The comprehensive outcomes evaluation used a retrospective cross-sectional design and collected observational data from a representative subset population of programme beneficiaries.

The evaluation used the outcome harvesting method. This approach was selected for its efficacy in capturing both documented activities and the deeper, often unrecorded impacts of programmes between 2013 and 2023 . This approach is particularly suited to the Trusts' complex environment, where outcomes are not clearly defined from the onset. Outcome harvesting allows evaluators to identify and understand both expected and unexpected outcomes without prior assumptions about the nature of these changes, allowing for results to emerge and inform recommendations. This approach ensures a deep, nuanced understanding of the programmes' effects, capturing both direct and indirect impacts and ripple effects that extend beyond initial projections. The process is summarised in Figure 3:

- It begins with a comprehensive review of existing documentation to establish a baseline of recorded activities and preliminary outcomes, including available financial data[2].
- This is followed by extensive stakeholder engagement through interviews, surveys and focus groups to gather a broad spectrum of data on perceived and unforeseen impacts.
- Each outcome is then meticulously articulated and verified using multiple sources, ensuring that the findings are precise and substantiated.
- The final step involves a detailed analysis of the connections between interventions and their outcomes, highlighting the mechanisms of change and integrating these insights into a comprehensive evaluation report.

1	**2**	**3**	**4**
Documentation review	**Stakeholder engagement**	**Outcome formulation and verification**	**Analysis and reporting**
Review existing documentation and reports to identify preliminary outcomes related to the Trusts' activities.	Engage with a broad spectrum of stakeholders through interviews, surveys and focus group discussions to gather data on perceived and unanticipated outcomes.	Articulate and verify all identified outcomes using multiple sources to ensure they are substantiated by robust evidence.	Analyse the linkages between interventions and outcomes, focusing on the mechanisms through which changes have occurred.

Figure 3: Outcome harvesting process for evaluating SDCET programmes

A mix of methods approach was used to inform the evaluation given the complex multisectoral and multidimensional nature of SDCET interventions. This approach, aligned with the critical realism framework, allows for a comprehensive examination of both expected and unexpected outcomes of the Trusts' interventions. By integrating qualitative and quantitative research methods, the approach allowed for the triangulation of data by documenting a broad spectrum of data from various stakeholders and sources.

The evaluation used both convenience and purposive sampling methods to gather data. Convenience sampling allowed broad participation from beneficiaries in surveys, ensuring extensive data collection. Purposive sampling was crucial for in-depth qualitative engagements, key informant interviews and focus group discussions, targeting stakeholders who could provide specific insights into the

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[2] Programme reports and data had very limited financial data, which hindered a comprehensive assessment of the Trusts' efficiency and value for money.

programmes' operational dynamics and impacts. Stakeholders were chosen for key informant interviews, focus group discussions and case studies based on their direct involvement in or the impact of the initiatives, facilitating the collection of rich, targeted insights.

Implementing partners shared databases of staff members and beneficiaries, which helped to determine the sample size with a 95% confidence level and a 5% margin of error. Tshikululu then traced beneficiaries who had been part of the programmes since 2013, inviting them to participate in the evaluation. Table 3 summarises the number of participants engaged through various data collection methods.

4.1 Data collection and quality assurance

The evaluation used a variety of data collection methods and tools to ensure a comprehensive understanding of the intervention impacts. The primary data collection was underpinned by a thorough review of strategic documents, programme reports and relevant literature, providing a solid contextual backdrop of the Trusts' past activities and objectives.

- **Key informant interviews** were conducted with a wide range of stakeholders, including trustees, implementing partners, past and present beneficiaries, sector experts and community members through platforms such as MS Teams and telephonic interviews. These interviews were crucial for capturing diverse perspectives on the impacts and effectiveness of the interventions.
- **Surveys** targeted at past programme participants and implementing partners provided quantitative data that complemented qualitative insights.
- This was supplemented by **participatory evaluation techniques** such as **focus group discussions**, case studies and onsite observations, which played a key role in ensuring comprehensive stakeholder engagement and capturing both the direct and indirect outcomes of interventions.

Table 4: Summary of overall study participants

Type of data collection	Number of participants engaged
Interviews	31
Focus group discussions	49
Surveys	44
Case studies	4
Total respondents	**128**

Table 4 provides a detailed breakdown of study participants engaged through qualitative data collection methods used during the evaluation process:

Table 5: Qualitative research sampling

Thematic area/ programme		Focus group discussions	In-depth interviews for case studies
Education			
ECD partner representatives	1	1 discussion with 9 beneficiaries	

Intermediate and senior phase of schooling and tertiary partner/school representatives	6	1 discussion with 5 beneficiaries	1
Sector experts	2		
Community welfare			
Community welfare partner representatives	3	3 discussions with 27 beneficiaries, community members, house mothers and auxiliary social workers	1
Sector experts	2		
Enterprise development			
Enterprise development partner representatives	13	1 discussion with 8 beneficiaries	2
Sector experts	1		
Trustees	3		
Total	**31**	**49**	

All qualitative data was recorded and collected by two researchers – a lead facilitator and co-lead who took detailed notes. The co-facilitator typed out the notes following the data collection, listened to the recording and shared with the lead facilitator for review and finalisation. The notes were used to perform thematic data analysis.

4.2 Data analysis

- **Programme beneficiary data**: All secondary data extracted through document review were captured and analysed on MS Excel to understand the breadth and reach of the programmes. This informed the background and context of the evaluation, as well as the estimation of the final survey sample size for both the quantitative and qualitative components.
- **Survey data** was cleaned for inconsistencies and capturing errors, including the coding of open-ended responses, using MS Excel. Descriptive statistical analysis (including central measures of tendencies), cross-tabulations and bivariate analyses using the chi-squared test of association were used for significant testing between beneficiaries and controls for the study outcomes. All analyses were performed on Stata/MP 18 with a 5% alpha level of significance.
- **All qualitative data** from interviews, focus group discussions and open-ended survey questions were analysed using thematic analysis methods. This was done using a data analysis framework that entailed coding the data and identifying emerging themes and sub-themes using ATLAS.ti, and synthesising insights to identify cross-cutting and prominent themes from the various qualitative data collection sources according to the evaluation questions. This allowed for the identification of common patterns that reflected the respondents' perceptions, experiences and opinions regarding the initiatives evaluated. As part of synthesising the data, the evaluation team discussed the emerging themes across interviews and focus group discussions to ensure accuracy in the identified themes and insights.

4.4 Ethical considerations

Ethical considerations were observed in this evaluation to adhere to standard research practice. Participants were fully informed about the purpose of the study, the nature of their involvement and their right to withdraw at any point without any repercussions. Participation information sheets were developed to explain the purpose of the study and invite participation in surveys, interviews and focus group discussions. The sheets explained that their identity would be protected and respected through confidentiality and anonymity, and that no harm would come to them as a result of participating. Consent was obtained from all participants. Before the start of any interviews, both verbal and written consent was sought and secured.

All data gathered during the evaluation process were treated with the utmost confidentiality and handled only by the evaluation team. Pseudonyms were created for illustrative quotations included in the report to support the findings that emerged from data analysis.

4.5 Study limitations

The following challenges are summarised as study limitations applicable to both primary data collection and the document and secondary data review:

- Sampling and tracing efforts were made to recruit as many programme beneficiaries as possible by extracting beneficiary details from existing reports and datasets. As these were limited and had gaps such as no or invalid contact details, only 52 of 76 bursary and 10 of 15 scholarship awardees were successfully traced. Only 27 bursary awardees and 9, respectively completed the online survey despite numerous efforts to increase the response rate through sending reminders and follow-up emails, WhatsApp messages and telephone calls. No baseline studies were conducted on the South Deep interventions, and no baseline data was available for the evaluation. As such outcomes measured are self-reports of the experiences of the programme beneficiaries. Comparisons are made against national benchmarks that could be sourced through desktop research i.e.., graduation rates etc.
- A handful of programme beneficiaries for various community welfare and enterprise development projects were successfully traced in consultation with implementing partners. As such, given the small sample sizes, focus group discussions and interviews rather than surveys were conducted with available and consenting programme beneficiaries.
- Some stakeholders were not responsive and did not answer calls, respond to emails or show up for scheduled interviews, which led to delays. To address this, Tshikululu liaised with the trustees to obtain detailed contact information and used a snowballing approach for stakeholders to identify other stakeholders and beneficiaries, and sent reminders for scheduled interviews to ensure availability.
- Data gaps in the existing programme documentation negatively affected the depth of secondary data analysis. As such, data from the Trusts' report, "A decade of contribution to empower communities (2012 to 2022)", was used to contextualise the evaluation in the absence of programmatic reports to verify data and performance through secondary data analysis.
- There was a lack of programmatic financial expenditure data to allow for the assessment of the social return on investment and adequately assess the cost efficiency and value for money. Available reports provided overall funds disbursed or spent across projects without detailed expenditure.
- There was recall and response bias associated with self-reported data. Some respondents indicated that they had forgotten about the interventions as some projects/investments go back more than 10 years. Other respondents also had an explicit expectation to get something from SDCET as a result of participating in the evaluation studies. The risk with these is the potential of "social desirability bias" –giving socially acceptable responses or options and not being completely honest about unintended or negative experiences. Although no objective data was collected (academic records/qualifications to confirm that participants had completed their tertiary studies), the survey was administered online with open-ended questions and data was triangulated with focus group discussions and interviews to mitigate this limitation.

5. RESULTS AND REFLECTIONS

This section presents the findings of the evaluation for each of the three focus areas beginning with a synthesis of findings across focus areas as a summary of key outcomes achieved through the Trusts' interventions.

Secondary data analysis revealed that an estimated **25 230** people were reached through the Trusts' investment of **R100 080 152** in the West Rand. These are detailed in the respective thematic results sections. Table 5 summarises the inputs and outputs associated with the Trusts' investments between 2013 and 2023.

Table 6: SDCET investments: Summary of inputs, outputs outcomes (2013 to 2023)

Focus area	Project overview and reach	Outputs	Total spend	Key outcomes
Education	Foundation, intermediate and senior phases (InterSen), tertiary: Infrastructure development, learning material/equipment, vegetable gardens, scholarships and bursaries, afterschool programme, matric exam rewriting	**997** children and learners, 8 schools, 1 ECD centre, 10 staff members	R77 967 900	Access: safe early learning facilities and quality primary, secondary and tertiary education Social cohesion Access to reliable water supply for community Job creation Youth employment
Community welfare	Shelter, infrastructure development, equipment, relief (food parcels, water, sanitisers), home-based care	**15 622** people, including 3 000 households each with an estimated 5 family members totalling 15 000 people	R4 219 030	Victim empowerment and emotional and psychosocial support Improved infrastructure for service delivery
Enterprise development	Skills development and cooperative establishment, business capital, infrastructure development	**8 611** community members, including 110 jobs created and 33 cooperatives started	R17 893 222	Technical/vocational skills Access to essential agricultural infrastructure Operational efficiency Income generation
Total		**25 230 people reached, 8 schools, 1 ECD centre, 120 jobs created/supported,**	**R100 080 152 invested**	

		33 cooperatives started		

5.1 Synthesis: Cross-cutting evaluation findings

The synthesis of evaluation findings across the three focus areas is structured using the OECD DAC criteria of **relevance**, offering reflections on coherence, efficiency, effectiveness, impact and sustainability. This framework enabled a comprehensive assessment of how well the Trusts' interventions aligned with community needs, complemented one another, delivered measurable outcomes, made effective use of resources and contributed to lasting change and resilience.

The findings show that the Trusts' programmes were relevant and met the needs of communities, and their effectiveness was demonstrated through both intended outcomes and significant ripple effects. Partnerships played a catalytic role in extending value, while efforts to embed sustainability through local capacity building, infrastructure investment and organisational strengthening emerged strongly. The Trusts' strategic repositioning in education, for example, coupled with learning-oriented adaptations, positioned its work as impactful and responsive to the evolving needs of the communities it serves.

5.1.1 Relevance

The evaluation examined relevance, assessing the degree to which the activities and outputs of the Trusts align with the needs, priorities and aspirations of target communities and stakeholders. Specifically, relevance involves determining whether the Trusts' interventions are effectively designed and strategically positioned to address the specific challenges and opportunities within the communities they serve. It also explores how the Trusts' partnerships and collaborations meaningfully support and reinforce these community-focused goals to ensure interventions are responsive, targeted and beneficial to communities' actual needs.

The Trusts partnered with **more than 20 implementing partners** to provide community welfare interventions over the 10-year reporting period. Only **eight of these partners participated in the survey**. The interventions funded by the Trusts are relevant and closely aligned with the real and pressing needs of the communities. All surveyed implementing partners confirmed that the Trusts' initiatives directly responded to critical community challenges.

Educational programmes demonstrated strong relevance by addressing immediate barriers such as infrastructure gaps and limited access to educational support while also establishing clear pathways for sustainable community development, an improved educational environment and better employment prospects.

The DBE identified the historic underfunding of the ECD sector as a major challenge, highlighting inadequate infrastructure, overly burdensome regulatory frameworks, the absence of a management information system, weak quality-assurance mechanisms and a shortage of qualified practitioners. Recognising that ECD is fundamental to reducing socioeconomic inequality, the Trusts contributed meaningfully by investing in ECD infrastructure, addressing a critical gap and laying a stronger foundation for long-term educational outcomes. Scholarships were also provided to learners from vulnerable households to access high-quality education in private schools to improve their prospects for a better quality of life.

At the tertiary level, the Trusts' relevance is further underscored in the context of South Africa's broader higher education crisis, marked by persistent financial challenges. These include a shortage of public university placements, rising tuition fees and mounting historic tuition debt. NSFAS has struggled to keep up with demand, leading to delays in disbursements and leaving many students either unfunded or partially supported. As a result, many students drop out because of financial strain, academic pressures or the lack of adequate institutional support, often exiting the system without qualifications but burdened with debt. It is estimated that South Africa's student debt now exceeds R20 billion (Moneyweb, 2025). This crisis has fuelled widespread dissatisfaction, exemplified by national protests

such as #FeesMustFall (2015) and #Asinamali (2021), which called attention to the systemic exclusion faced by underprivileged students. Within this context, the Trusts' bursary programme is not only relevant, but vital. By alleviating the financial burden on beneficiaries and enabling access to higher education, the Trusts play a critical role in responding to one of the country's most urgent educational challenges.

Community welfare programmes similarly showed relevance through their capacity to swiftly respond to urgent needs, positioning the Trusts as essential actors during crises such as natural disasters and the Covid-19 pandemic. The relevance of the Trusts' GBVF-focused programmes is further underscored by national data showing that GBV has significant hidden socioeconomic costs. In 2024 alone, GBV was estimated to cost South Africa R36 billion, reflecting both direct healthcare and legal costs, as well as long-term productivity losses and social strain. Despite its scale, GBV remains widely underreported, and the hidden financial and social costs that are often overlooked because these incidents are often not reported. As such, GBV represents not only a public health emergency, but also a major obstacle to national development. The Trusts' support for GBVF interventions also aligns with the growing body of evidence that highlights the critical role of the private sector in responding to the scourge, in line with broader policy and business imperatives.

Additionally, enterprise development programmes proved very relevant, tackling local economic empowerment by providing beneficiaries with essential vocational and entrepreneurial skills for sustainable livelihoods. This aligns with national and international literature that positions enterprise development as a pivotal vehicle for addressing South Africa's structural challenges of unemployment, poverty and inequality. In this context, SMMEs are widely recognised as key enablers of job creation, innovation and localised economic growth (OECD, 2022; Supporting Entrepreneurs for Environment and Development, 2021). The Trusts' focus on enterprise development is consistent with national priorities, particularly the B-BBEE framework, which mandates and incentivises private sector investment in enterprise and supplier development. As per the B-BBEE scorecard, entities are expected to allocate at least 3% of net profit after tax to qualifying initiatives aimed at supporting black-owned SMMEs (Department of Trade, Industry and Competition, 2019).

Moreover, the Trusts' support model mirrors established good practice in the field of enterprise development, which combines financial assistance with non-financial support such as skills training, infrastructure provision, mentorship and access to markets (Abor and Quartey, 2010; Timm, 2012). This multidimensional approach enhances the viability and scalability of small enterprises, especially in contexts where formal employment opportunities are limited. The Trusts' targeted investments, in partnership with credible implementing partners in vocational training (such as plumbing, sewing and agriculture) and business development have not only been contextually relevant, but also aligned with proven models for fostering inclusive, sustainable economic participation.

The following table provides an overview of the programme focus areas reflected in the survey responses.

Table 7: Focus areas and community needs (survey respondents)

Funded intervention area	Number of implementing partners	Community need being addressed
Education	4	- Water shortages that disrupt teaching time - Limited ablution facilities - Lack of access to computers - Lack of access to educational and psychosocial support programmes
Community welfare	2	- Timely access to medication
Enterprise development	2	- Unemployment and limited access to skills development opportunities
Total	8	

The effectiveness and relevance of these interventions have been significantly enhanced by valuable partnerships and collaborations. Implementing partners rated partnership effectiveness highly (**4.6 out of 5**), emphasising how strategic networks have strengthened programme delivery. The Trusts' engagement with partners also received positive ratings (**4.1 out of 5**), with respondents highlighting responsiveness, regular communication and consistent support. One partner notably highlighted: *"We have established a good relationship with them. In times of crisis, they come to our rescue."*

The Trusts strategically positioned themselves as catalysts, using their resources to attract broader investment and collaborative engagement, reinforcing relevance and impact. A trustee succinctly articulated this strategy: *"We see ourselves as an organisation that comes into the community with help, but we also understand that the help is not unlimited, so we need to trigger change … so that whoever we are helping is now enabled to qualify for more help."* Supporting examples include collaborations in GBVF initiatives with Gold Fields and the World Gold Council, the joint establishment of the SMME Hub, and co-investment in agricultural projects through the Jobs Fund. These partnerships extended beyond financial contributions, encompassing shared expertise and capacity enhancement, amplifying both programme relevance and impact.

Quality across all the Trusts' programmes has been consistently reinforced by strategic alignment, informed decision-making and a deliberate shift towards impactful catalytic interventions. Initiatives in the education sector are closely aligned with the DBE, ensuring that programmes complement rather than duplicate existing systems. The partnership with Tshikululu has further enhanced programme quality by embedding social investment best practice into funding decisions and implementation oversight. Trustees have proactively transitioned away from legacy projects with limited broader community benefit towards interventions capable of achieving significant developmental outcomes and attracting future investment. Establishing model institutions such as Kagisano, with robust infrastructure and governance standards, has also improved programme quality, creating sustainable environments to attract further funding.

The Trusts' strategic focus, partnerships and commitment to quality programme implementation reinforce the relevance of its interventions. By closely aligning initiatives with community priorities, leveraging meaningful collaborations and continually enhancing programme effectiveness, the Trusts ensure supported interventions remain responsive and impactful to the evolving needs and aspirations of the communities they serve.

5.1.2 Coherence

Coherence in the context of evaluation refers to the extent to which interventions are a strategic fit and are logically aligned and mutually reinforcing within an organisation, and with other initiatives and stakeholders addressing similar challenges. In the case of the Trusts, coherence assesses how effectively their interventions across education, community welfare and enterprise development interconnect and complement one another to maximise overall community impact. The evaluation findings demonstrate strong internal coherence within the Trusts' approach to education. The education interventions supported by the Trusts span the full educational life cycle, from foundational phase to tertiary education, creating a seamless, supportive educational pipeline. Investments such as the Kagisano ECD centre continue to establish foundational learning environments that directly feed into improved primary education outcomes, strengthening the transition to higher education and vocational training programmes. This comprehensive approach ensures sustainable educational and economic empowerment, addressing barriers at each educational stage to promote long-term community upliftment.

Coherence is also observed through the Trusts' role as catalytic agents, strategically partnering with organisations such as the Jobs Fund, Gold Fields and government departments. Moreover, the Trusts' commitment to building robust community welfare initiatives is coherent with their broader educational and economic empowerment strategies. Interventions such as emergency response during crises and infrastructure improvements such as water tanks and ablution facilities directly support and stabilise communities, creating conducive environments in which education and enterprise development initiatives can thrive and facilitate community connectedness. The Trusts' strategic direction, underpinned by coherent internal strategic planning, programming and sound external partnerships,

effectively fosters systemic change and resilience within target communities, significantly amplifying the collective impact of interventions.

5.1.3 Effectiveness

Effectiveness assesses the extent to which the Trusts' interventions have successfully achieved their objectives. As the Trusts' work over the past decade was not underpinned by a theory of change, clear outcomes or key performance indicators, effectiveness was analysed through the outcome harvesting approach, informed by three defined impact pathways, which Tshikululu established following a comprehensive review of the Trusts' projects since 2013:

- **Strengthening equity and communities** – addressing poverty and inequality, and empowering marginalised groups.
- **Building social capital through partnerships** – fostering collaboration among stakeholders to enhance development outcomes.
- **Driving economic growth and improved quality of life** – supporting job creation, skills development and infrastructure improvements to uplift communities.

Using these objectives, this assessment provides a structured view of the Trusts' performance in achieving meaningful and sustained impacts in the short, medium and long term. An evaluation of outcomes across the three focus areas through insights from various stakeholders indicates that significant results have been realised.

Implementing partners rated their programmes' success in achieving planned outputs and outcomes an average of **3.75 out of 5**, with five organisations providing above-average scores and three below average. These ratings reflect improvements across key indicators, including an increased number of beneficiaries, enhanced service capabilities, expanded outreach and improved responsiveness to community needs. A summary view of the Trusts' performance aligned with its three impact pathways is presented in Figure 4.

The SDET has effectively advanced the pathway of **strengthening equity and communities** by directly addressing poverty and inequality, and empowering marginalised groups through its interventions. Central to this pathway was the facilitation of **access to quality education**, mainly through scholarships and bursary programmes, which enabled learners from disadvantaged backgrounds to complete grade 12 and access tertiary education. By alleviating financial burdens associated with tuition, accommodation and transportation, these initiatives significantly reduced dropout rates and fostered an environment conducive to academic success. As one beneficiary noted, the support provided *"peace of mind"*, allowing them to fully concentrate on their studies without external pressures.

Additionally, the Trusts enhanced economic equity through the **increased formation of enterprises**, particularly cooperatives, empowering beneficiaries with vocational skills, business acumen and resources needed to sustain their enterprises. The **improvement in agricultural production and farming practices** similarly equipped communities with practical skills and critical resources, strengthening economic independence and local food security. Moreover, the Trusts' interventions in victim empowerment provided survivors of GBV with targeted counselling and psychosocial support, significantly enhancing their self-reliance and problem-solving abilities. Beneficiaries acquired skills necessary for independent living, further demonstrating the Trusts' commitment to holistic empowerment.

Furthermore, comprehensive academic support and bridging programmes and life skills training resulted in an impressive 93% university success rate for participants. This success contributed to **broader community transformation**, notably shifting community perceptions and making university education both accessible and aspirational within historically marginalised groups. Overall, the Trusts' multifaceted strategic approach to equity has cultivated sustainable outcomes, directly addressing inequality and empowering individuals to uplift their communities.

The Trusts successfully advanced the impact pathway of **building social capital through partnerships**, strategically leveraging collaborative relationships to enhance the relevance, reach and

effectiveness of interventions. Central to this approach was the Trusts' deliberate positioning as catalysts, using initial investments and support to stimulate broader engagement and attract additional resources into communities.

Implementing partners rated the effectiveness of these partnerships very high **(4.6 out of 5)**, underscoring their role in strengthening programme delivery. The Trusts' engagement and responsiveness were similarly perceived as commendable, receiving positive feedback **(4.1 out of 5**) for regular communication, support and timely intervention. Partners noted: *"In times of crisis, they come to our rescue."*

Illustrative examples of this catalytic strategy include partnerships with Gold Fields and the World Gold Council to scale interventions to combat GBV, the joint development of the SMME Hub and agricultural projects funded collaboratively through the Jobs Fund. These strategic alliances went beyond mere financial collaboration, encompassing mutual knowledge sharing, capacity building and complementary expertise. Collectively, these collaborative approaches significantly strengthened community networks, enhanced social cohesion and amplified development outcomes across all programme areas.

The Trusts effectively advanced the pathway of **driving economic growth and improved quality of life** by strategically supporting job creation, skills development and infrastructure improvements. Diverse technical and vocational training initiatives in areas such as sewing, plumbing and agriculture empowered community members to establish and sustain enterprises, thereby enhancing livelihoods and stimulating local economic activity. Complementing this, programmes dedicated to business and entrepreneurial skills development significantly contributed to both professional growth and personal empowerment, enabling participants to navigate market opportunities more effectively.

The Trusts' investments in community infrastructure, notably through the Kagisano ECD centre, created a model for an early-learning facility and a community asset, generating employment and volunteering opportunities for local practitioners. Infrastructure improvements also extended to community welfare, enhancing shelter facilities and the dignity of service delivery, especially for vulnerable groups such as GBVF survivors. Additionally, infrastructure projects such as the school water tanker not only improved access to essential resources, but also fostered greater social cohesion by benefitting both learners and the broader community.

Despite notable academic success among bursary recipients (there was a 93% graduation rate), the Trusts encountered structural employment challenges, with just more than half (56%) of graduates securing employment after graduation. This highlighted the need for integrated job-readiness support and placement services to bridge the gap between academic qualifications and labour market demands. Nonetheless, the Trusts' strategic initiatives collectively supported economic growth, enhanced community infrastructure and substantially improved quality of life within the communities they serve.

Although monitoring and evaluation practices are still evolving within the Trusts and among its implementing partners, there is a positive sentiment that the intended outcomes are being realised, supported by increased community buy-in and trust. As one trustee emphasised: *"Many of our successes are more qualitative than quantitative. We have improved trust between the community, the mine and the Trust, which has reduced protests and enhanced collaboration."* This reflects a meaningful shift in community perceptions of the relevance and impact of the Trusts' interventions.

Particularly within the education sector, there was consensus that substantial outcomes have been achieved, reflecting the significant funding allocation of about R80 million. One trustee expressed clear satisfaction with educational achievements: *"[I'm quite happy with] the projects we've delivered on the education side…. On the community side, we're still experience teething [problems], but I think we'll get it right."* This recognition underscores the necessity for continued interventions for maximum impact across all programme areas.

The following figure depicts key outcomes that emerged from the qualitative data gathered from multiple stakeholders across the three focus areas.

Community empowerment through job creation
Creation of employment and volunteering opportunities for ECD practitioners, contributing to local income generation.

Economic participation
Improved economic participation as children are better prepared for formal schooling and parents can participate more in the workforce.

Access to reliable water supply for the community
The community also benefitted from the water tanker investment at the school as both learners and community had access to water.

Increased dependence on community welfare support
High unemployment rates and limited local economic opportunities have led to growing dependence on community welfare programmes for basic needs, emotional support and survival.

Community resilience and empowerment
The initiatives have strengthened community bonds by fostering a network of support among participants, which enhances community resilience and collective economic empowerment.

Model ECD centre
The Kagisano ECD Centre acts as a community asset and model for early learning.

Holistic programme support in bridging programmes
The programme provides academic bridging, life skills and essential needs support, resulting in a 99% university success rate for participants.

Victim empowerment: Self-reliance and problem solving skills
The holistic support provided saw survivors of GBVF able to exercise their independence while working with social auxiliary workers to problem solve.

Improved revenue/income generation through agricultural enterprise support
These improvements have led to substantial financial/economic gains, with a notable increase in turnover to R9.5 million across three sites (Nongoma, Vryheid, and Lephalale) and an increase in average farmer incomes from R32000 to R71000 per year.

Strengthened educational foundations and future school readiness
Enrolment and holistic child development – social, emotional and cognitive growth through structured ECD programmes.

Paying it forward
85% of graduates actively giving back to their community, i.e. tutoring, university application assistance, etc.

Access to basic needs for crisis relief and dignity restoration
The community welfare programmes assisted restore the dignity, created safety and supported beneficiaries on their journey to recovery and stability.

Improved agricultural production and Farming practices
Beneficiaries have successfully leveraged the skills and resources provided to establish and sustain various forms of enterprises, particularly cooperatives

Fostering community and belonging
Reduction of parental stress as local children are cared for closer to home, reducing transport costs and safety risks.

Youth employment
As a result of the bursary, graduates had the opportunity to secure employment.

Improved infrastructure for service delivery
Investments in infrastructure updates, including shelter facilities, improved accessibility and dignity of service delivery for vulnerable groups - survivors of GBV.

Access to essential business services and infrastructure
Beneficiaries have successfully leveraged the skills and resources provided to establish and sustain various forms of enterprises, particularly cooperatives.

Increased formation of enterprises
Beneficiaries have successfully leveraged the skills and resources provided to establish and sustain various forms of enterprises, particularly cooperatives

Access to safe early learning spaces
Improved access to safe learning spaces through infrastructure development.

Access to quality education
The beneficiaries had the opportunity to complete Grade 12 and pursue tertiary studies. The bursary alleviated financial stress allowing students to focus on their studies

Immediate emotional and psychosocial support
The programmes supported by SDCT effectively delivered critical emotional and psychosocial support to vulnerable community members, particularly those facing crisis situations such as abuse and displacement.

Technical/vocational skills
Diverse training programmes in areas such as sewing, plumbing and agriculture have empowered individuals to create and sustain businesses.

Business and entrepreneurial skills development
Enhanced the capabilities of participants, effectively contributing to their professional and personal growth.

Education	**Community welfare**	**Enterprise development**

Figure 4: Emerging outcomes

5.1.4 Efficiency

This criterion assessed how economically the Trusts and partners have used resources across focus areas to achieve intended outputs and outcomes. It assessed whether financial investments, human resources and partnership arrangements have been managed cost-effectively, resulting in proportional benefits. Within this synthesis, efficiency specifically considers the strategic allocation and use of resources, exploring how effectively inputs translate into outcomes. Although this analysis centres on the concept of value for money, there was reliance on the perceptions of interviewees as there was no financial expenditure data.

There is strong evidence across the three focus areas that the Trusts have taken deliberate steps to ensure resources are used strategically and cost-effectively. Stakeholders repeatedly referenced the idea of achieving "maximum impact with less input", suggesting that value for money has become a key consideration in decision-making processes. One trustee explained: *"'Catalyst' [comes up] in a lot of our discussions. Whenever we make decisions, we always think … how do we spend, how do we get more – maximum impact, less input."* The notion of the Trusts acting as catalysts – investing in ways that unlock additional resources, strengthen institutional capacity and attract further funding – was central to this thinking.

In terms of infrastructure, school investments such as water tanks and sanitation facilities were perceived to have had a high return on investment, benefitting both learners and the wider community with minimal ongoing maintenance costs. This dual-purpose infrastructure highlights how carefully designed interventions can meet multiple needs cost-effectively and efficiently.

On the governance side, rigorous due diligence processes and tighter alignment with strategic objectives have improved the targeting of funds, as one trustee noted, *"We conduct rigorous due diligence before selecting partners, assessing their track record, financial management and alignment with our goals."* Trustees noted the challenge of balancing financial accountability with impact, especially when previous legacy projects were perceived to have merely "ticked boxes" without delivering value to the broader community. As part of the Trusts' realignment, efforts were made to phase out older commitments and concentrate funding on interventions with demonstrable benefits and wider systemic influence, particularly in the education space.

That said, the issue of governance and risk remains a delicate balance. Although strong financial controls are in place, some potentially impactful entities were excluded because of governance shortcomings, raising questions about whether greater support structures might enable these organisations to meet the required standards over time.

Although challenges remain, the Trusts have made clear progress in refining their strategy and improving how resources are used, with a clear focus on catalytic investments, accountability and sustainability contributing to stronger value for money across its programmes.

5.1.5 Impact

This criterion considers the long-term results of the Trusts' work. It is not a formal counterfactual impact evaluation, but rather an outcome harvesting review that identifies both intended and unintended changes that have emerged over time. It looks at which results, positive or negative, materialised outside of the original programme design and assesses how long these shifts might last once funding and support are phased out. Drawing on evidence from across the three focus areas, the analysis highlights ripple effects that either strengthen the Trusts' objectives or pose risks to long-term gains. The following figure presents a synthesis of these unintended or undesirable outcomes across the three focus areas.
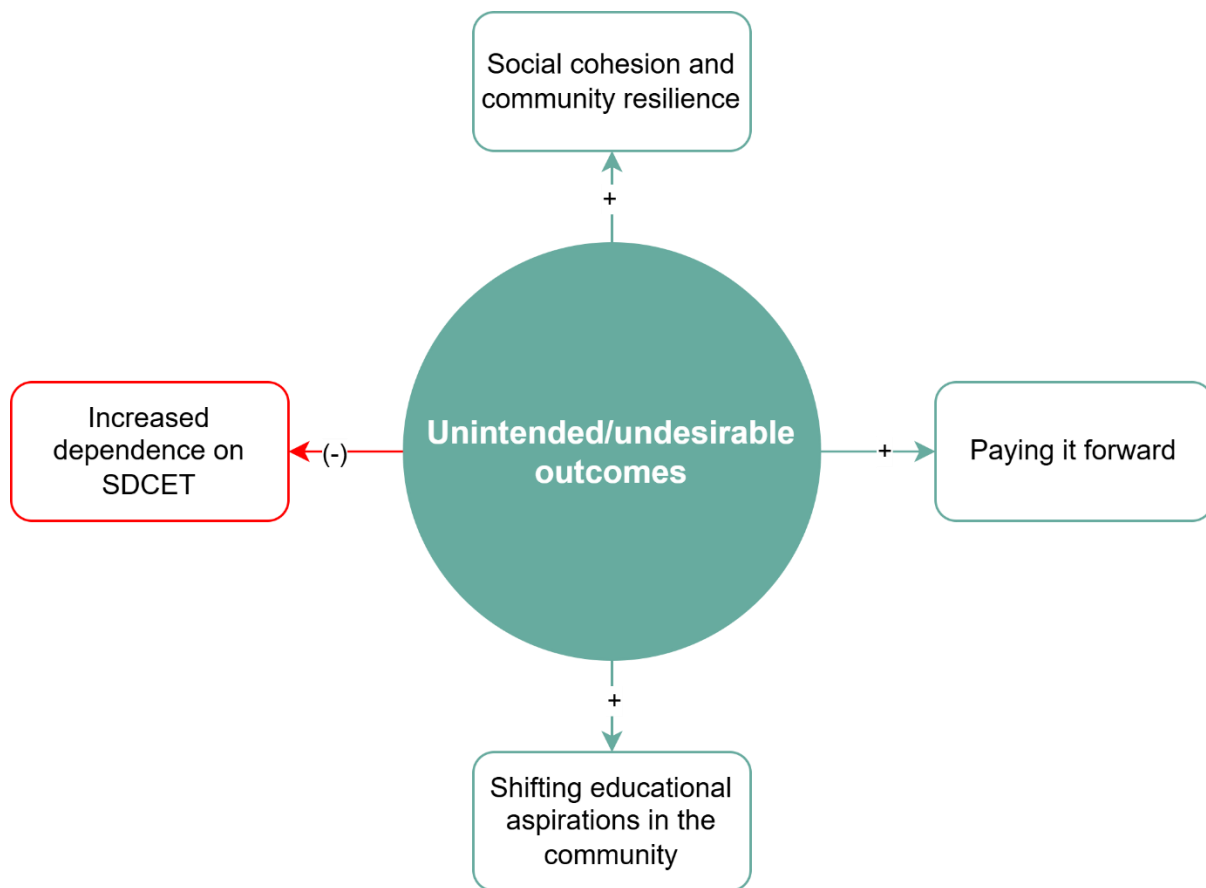
Figure 5: Summary of unintended or undesirable outcomes

i.   Increased dependence on the Trusts

One notable issue was increased dependence on the Trusts. This growing reliance highlights a critical challenge: initial support, while beneficial, often sets expectations for ongoing support beyond the original scope, fostering a dependency that could detract from the initiative's goals of empowerment. High unemployment rates and limited economic opportunities have heightened reliance on community welfare programmes, not just for temporary relief but for sustained emotional support and survival. This dependency, although reflective of the acute needs within the community, has inadvertently set a precedent in which beneficiaries come to expect that the Trusts should provide all forms of support, which might stifle the drive towards self-sufficiency. This pattern was particularly evident in the misunderstanding around the services provided at the entrepreneurship hubs. Some community members mistakenly believed these hubs offered free services, which skewed their usage and detracted from their intended purpose of fostering genuine entrepreneurial growth.

An implementing partner encountered another example of this issue, where loans intended to spur local entrepreneurship were perceived as non-repayable grants. This resulted in a loan recovery rate of just 16%, undermining the financial sustainability of the initiative and leading to its eventual closure. This might not only signify a misunderstanding of the programme's terms, but also reflect a broader expectation of perpetual support. The expectation of continual support was also prevalent among participants in agricultural projects, despite receiving initial starter kits intended to kickstart independent operations. Enterprise Development programme beneficiaries Study indicated the need for further assistance.

These scenarios underscore a significant unintended consequence of the Trusts' interventions – while initially beneficial, they could foster a dependency that might hinder the overarching goal of empowering communities to become self-reliant and economically independent. It also speaks to the importance of leveraging partnerships to refer beneficiaries to existing support agencies or organisations for relevant support to ensure sustainability.

ii. Shifting educational aspirations in the community

University education was not initially a common aspiration within the community. However, the Trusts' involvement catalysed a significant shift, making higher education both accessible and desirable. This transformative impact is especially pronounced in Stem fields, which are crucial for breaking the cycle of educational disadvantage and broadening career possibilities for young people in the community. The increased accessibility and appeal of university education represent a pivotal change, driven by the Trusts' educational programmes. These initiatives have not only altered perceptions, but have also fostered a growing ambition among young people to pursue further education.

iii. Paying it forward

A significant and positive unintended outcome of the Trusts' initiatives is the trend of beneficiaries actively giving back to their communities. This trend demonstrates a strong culture of reciprocity that extends the impact of the Trusts' investments. About 85% (21 of 25) of university graduates are returning to their communities to provide valuable services such as tutoring, mentorship and help with university applications. Their involvement underscores a commitment to paying forward the support they received and uplifting the next generation.

Table 8: Contribution back to communities

Have you contributed back to your community?	Study status		Total
	Completed	Not completed	
Yes I have	21 (100%)	0 (0%)	21 (100%)
No I have not	4 (67%)	2 (33%)	6 (100%)
Total	**25 (93%)**	**2 (7%)**	**27 (100%)**
	Pearson chi^2(1) = 7.5600 Pr = 0.006		

Additionally, participants from SMME training programmes are also contributing meaningfully. For example, a beneficiary living with disabilities from the Philani programme used the sewing skills he acquired to empower others with disabilities by teaching them vocational skills. This initiative not only provides practical skills, but also enhances communal inclusivity and supports individual livelihoods through skill-sharing. This kind of giving back enriches the community and ensures the sustainability of the Trusts' efforts.

iv. Social cohesion and community resilience

Investments such as the water tanker for the local school have fostered social cohesion. By providing access to water for both learners and the broader community, this initiative has not only met a basic need, but also fostered a sense of unity and mutual reliance among community members. Moreover, the Trusts' programmes have bolstered community resilience by creating networks of support among participants. These networks facilitate economic empowerment and collective action, enabling communities to better withstand and adapt to social and economic challenges. As these bonds strengthen, they lay a foundation for sustainable community-led development, illustrating a powerful ripple effect from targeted interventions to broader community transformation.

5.1.6 Sustainability

Sustainability assessed the extent to which the benefits and outcomes of the Trusts' interventions across the three focus areas were likely to persist beyond the conclusion of direct funding and support. It examined whether the Trusts' projects and partnerships had been structured in a way that ensured their longevity and self-sufficiency, and whether the community had the capacity to maintain and build on the gains achieved. This analysis also explored the conditions under which the positive outcomes could be sustained or replicated in other contexts.

The evidence suggests that the changes and outcomes observed are broadly sustainable, with the potential for long-term impact. Seven of the eight implementing partners surveyed indicated strong confidence in the sustainability of their interventions. They attributed this to the upskilling of beneficiaries, which promotes self-reliance, and to infrastructure investments that, if properly maintained, can benefit communities for years to come.

From a design perspective, the Trusts' interventions were described by stakeholders as mutually reinforcing, addressing community challenges holistically. For instance, the education interventions were praised for their "**cradle to career**" design, while enterprise development programmes provided vocational pathways for those not pursuing university, demonstrating inclusive and complementary programming. One implementing partner remarked: *"The way the Trusts have designed their programmes is very sustainable … everyone is covered."*

Sustainability is also bolstered by the Trusts' catalytic approach, which seeks to leverage investments to attract additional resources and partnerships. As one trustee explained, the aim is not just to fund programmes directly, but to empower others and trigger broader systems of support: *"Our overarching goal became empowering local communities to be sustainable beyond the life of the mine. We also recognised our role as catalysts for change."*

This approach was evident in the Trusts' longer-term funding model (often spanning three years), encouragement of revenue-generating activities such as social entrepreneurship, and efforts to prepare organisations for follow-on funding from institutions such as the Jobs Fund and the National Lottery.

Survey data further reinforces this notion sustainability. Implementing partners rated the effect of the grants on their ability to respond to beneficiary needs with an average score of **16 out of 20** (with total scores ranging from 10 to 20)[3].

Table 9: Impact of grants on implementing partners' ability to respond to beneficiary needs

Impact score	Number of implementing partners	Percentage
Above average (17-20)	5	63%
Average (16)	0	0%
Below average (10-15)	3	36%

In addition, implementing partners assessed the impact of the grant on broader organisational areas such as **governance structures and financial sustainability**. The average score across these dimensions was **29 out of 40**, with scores ranging from **16 to 36**[4].

Table 10: Impact of the grant on broader organisational areas

Impact score	Number of implementing partners	Percentage
Above average (35-36)	3	38%
Average (29)	1	12%
Below average (16-28)	4	50%

Further insights on organisational impact revealed that, beyond enhancing service delivery, the grants are seen to have improved their visibility, supported staff capacity, strengthened governance and

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[3] *The reliability analysis of the four statements used to calculate this score produced a Cronbach's alpha of 0.92, indicating strong internal consistency and confirming that the items reliably measure the same underlying construct.*

[4] *A Cronbach's alpha of 0.91 again indicates high reliability and internal consistency across the eight organisational indicators.*

enabled partners to establish new partnerships – all critical elements that contribute to long-term sustainability.

However, sustainability also depends on sustained support systems. One partner noted that although infrastructure projects such as water tanks and ablution facilities had long-term value, their impact ultimately depended on local ownership and maintenance. Similarly, the full value of bursary investments could be realised only with added layers of support such as mentorship and job placement to ensure the success of graduates in the world of work. The Trusts' focus on empowerment, local capacity building and its Horizon 2030 vision, backed by strategic partnerships and the appetite for strengthening M&E, sets its programmes on a strong trajectory for sustainability. Still, ongoing refinement and reinforcement will be key to ensuring these gains endure beyond the life of individual projects or funding cycles.

Figure 6 illustrates the key enablers and barriers influencing the sustainability of the Trusts' interventions. It maps the interconnected dimensions, ranging from programme design and organisational capacity to partnerships and community ownership, that collectively determine the long-term viability and impact of supported initiatives, as well as the conditions that need to be in place for continued success and sustainable long-term impact.
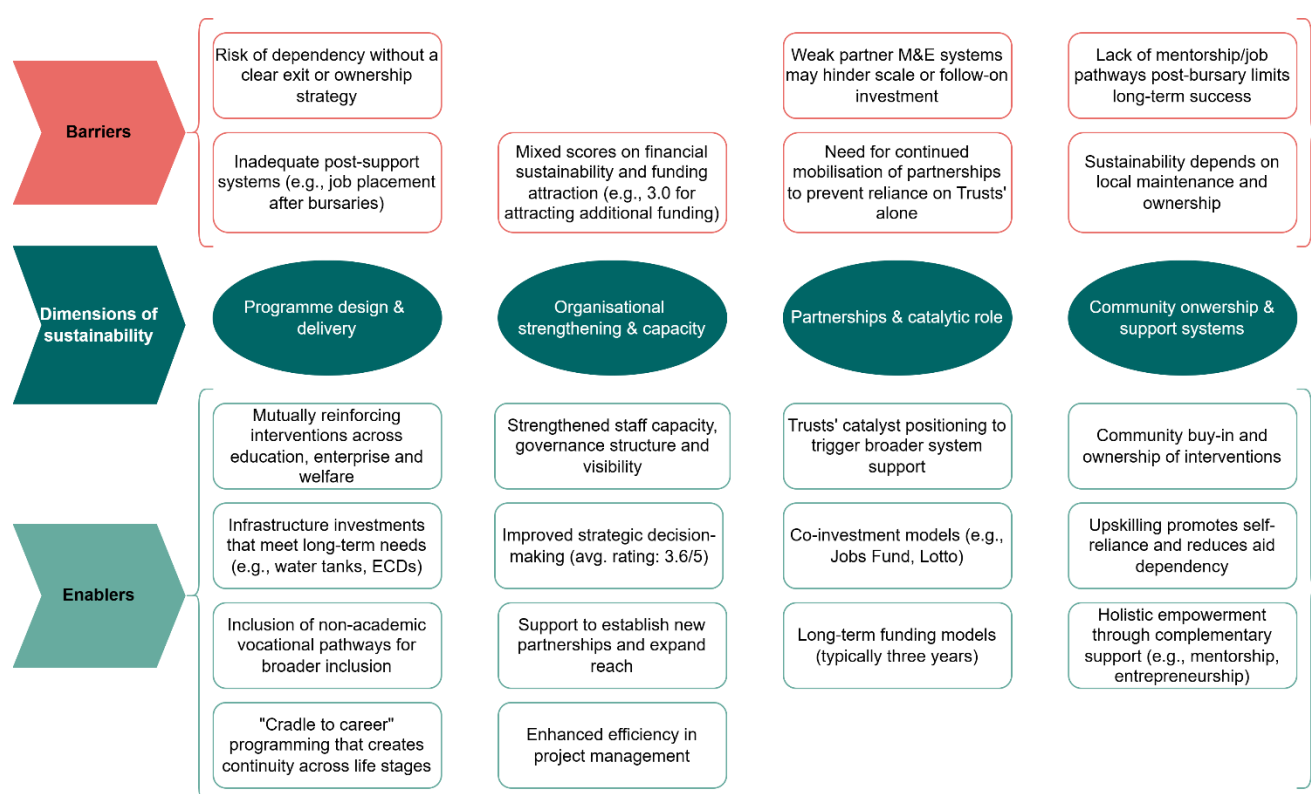

Figure 6: Dimensions of sustainability

5.2 Education results and reflections

5.2.1 Survey study participants

A total of 36 education programme beneficiaries participated in the evaluation survey, which had a response rate of **53%.**

Table 11: Survey distribution and response rates by stakeholder group

Stakeholder	Survey distributed	Surveys completed	Response rate
Bursary recipients	52	27	52%
Scholarship recipients	16	9	56%
Implementing partners	15	8	53%
Total	**83**	**44**	**53%**

5.2.1.1 Sociodemographic characteristics of bursary programme beneficiaries

Of the 27 bursary beneficiaries that responded to the survey, 14 (52%) were men and 13 (48%) were women. All beneficiaries were Black African and were on average 19 years old at the time of receiving the bursary. Most beneficiaries (89%) were from the Rand West City with the highest proportion from Bekkersdal (33%), followed by Westonaria (26%) and Simunye (22%). Three beneficiaries were from labour-sending communities in Eastern Cape. At the time of receiving the bursary, 78% of beneficiaries were studying and 19% were unemployed.

Table 12: Sociodemographic information of bursary recipients

Sociodemographic information of bursary recipients

	Female (N = 13)	Male (N = 14)	Total (N = 27)	p-value
Age when bursary was received				0.325
Mean (standard deviation)	18.5 (3.2)	19.8 (3.3)	19.2 (3.2)	
Ethnicity				.
Black African	13 (100%)	14 (100%)	27 (100%)	
location				0.134
Bekkersdal	7 (53.8%)	2 (14.3%)	9 (33.3%)	
Glenhavier	0 (0%)	2 (14.3%)	2 (7.4%)	
Simunye	2 (15.4%)	4 (28.6%)	6 (22.2%)	
Westonaria	2 (15.4%)	5 (35.7%)	7 (25.9%)	
Eastern Cape	2 (15.4%)	1 (7.1%)	3 (11.1%)	
Economic status when bursary was received				0.245
Employed	1 (7.7%)	0 (0%)	1 (3.7%)	
Studying	11 (84.6%)	10 (71.4%)	21 (77.8%)	
Unemployed	1 (7.7%)	4 (28.6%)	5 (18.5%)	

5.2.1.2 Sociodemographic characteristics of scholarship programme beneficiaries

Of the nine scholarship awardees that responded to the online survey, five (56%) were girls and four (44%) were boys. The majority of beneficiaries were Black African (78%) and were on average 12 years old at the time of receiving the bursary. Most beneficiaries (78%) were from the West Rand City and two were from KwaZulu-Natal.

Table 13: Sociodemographic information of scholarship recipients

Sociodemographic information of scholarship recipients	Female	Male	Total	
	(N = 5)	(N = 4)	(N = 9)	p-value
Age when scholarship was received				0.426
Mean (standard deviation)	13 (0)	11 (4.7)	12 (3.3)	
Ethnicity				0.200
African	5 (100%)	2 (50%)	7 (77.8%)	
Coloured	0 (0%)	1 (25%)	1 (11.1%)	
White	0 (0%)	1 (25%)	1 (11.1%)	
Location				0.202
Bekkersdal	0 (0%)	1 (25%)	1 (11.1%)	
Randfontein	1 (20%)	0 (0%)	1 (11.1%)	
Simunye	1 (20%)	0 (0%)	1 (11.1%)	
Westonaria	3 (60%)	1 (25%)	4 (44.4%)	
KwaZulu-Natal	0 (0%)	2 (50%)	2 (22.2%)	

5.2.1.3 Sociodemographic characteristics of implementing partner survey respondents

Among the eight implementing partners surveyed, four focus on education, two on community welfare and two on enterprise development. Seven of these partners have been operational for more than 15 years and one has been active for between five and 10 years. Three partners depended solely on the Trusts for financial support for their interventions, whereas the other five also had other funding sources. Five partners had been funded for one to two years and three had received funding for three years or more. These projects were carried out across five different areas in Rand West City.

Table 14: Sociodemographic information of implementing partners

Overview of implementing partner survey respondents	Total
	(N = 8)
Sectors of operation	
Education	4 (50%)
Community welfare	2 (25%)
Enterprise development	2 (25%)
Organisation length of operation	
Five to 10 years	1 (12.5%)
More than 15 years	7 (87.5%)
SDET financial contribution to intervention	
Full	3 (37.5%)
Partial	5 (62.5%)
Number of years funded by the Trusts	
One year	2 (25%)
Two years	3 (37.5%)
Three years	2 (25.0%)
Six years	1 (12.5%)
Project implementation area	
Simunye	5 (63.5%)
Bekkersdal	3 (37.5%)
Westonaria	3 (37.5%)
Zuurbekom	2 (25%)
Hillshaven	1 (12.5%)
Labour-sending area	1 (12.5%)

5.2.1.4 Key evaluation question 1: To what extent are the programmes achieving their intended outcomes (short, medium and long term)?

The SDET has implemented a multi-tiered education strategy since 2012, investing more than R77.9 million in ECD, primary and high school, and tertiary support in the form of capital and operating expenditure. These investments were in assets such as a donation towards a container aimed at serving as a HIV/Aids treatment centre, water tanks at a school that had limited access to water, an ECD centre for convenient and affordable access for children, and day-to-day spending for implementing partners. Qualitative and quantitative data indicates that although the education programmes broadly achieved their intended outcomes, several structural gaps remain.

Table 15: SDET's education reach and investment spend

Project		Project reach and outputs	Total spend
ECD		**± 600**	**R3 357 935**
Kagisano ECD centre		An ECD centre was built to support an average of **100** beneficiaries a year	R3 357 935
Scholarships and bursaries		**107 beneficiaries**	**R 57 898 734**
Grade 7 awards		**13** beneficiaries were awarded five-year high school scholarships to attend Kingswood College and St Martins	R20 411 254
Clifton College and Kingswood School legacy scholarships		Scholarships awarded to **22** beneficiaries to attend Clifton School and Kingswood College from grade 1 to grade 12	R15 240 468
Bursary programme		**72** beneficiaries were awarded tertiary education bursaries	R22 247 012
Educational support programmes		**290 beneficiaries**	**R 15 754 525**
Bokamoso Education Trust		**130** beneficiaries from grades 10 to 12 attended after-school and holiday tutoring programmes that focused on mathematics, physics and accounting	R1 560 800
Edumap		**160** beneficiaries were helped to rewrite their matric examinations	R14 193 725
Infrastructure and resources		**8 schools**	**R956 706**
Primary school support		Four primary schools benefitted from resources, including two computer laboratories, water pumps and water storage tanks, laptops for teachers, and kitchen equipment	R300 000
School garden project		Four high schools were supported to create tunnel vegetable gardens	R656 706
Total spend		**997 beneficiaries and 8 schools**	**R77 967 900**

Early childhood development

Access to safe early learning spaces

One of the most impactful transformations through the SDET's investments in education has been the establishment of the Kagisano ECD centre. Prior to its development, early learning in the area was conducted in makeshift facilities, including a garage. The construction of a purpose-built centre with classrooms, a kitchen space and learning resources provided not only a safer learning environment, but also increased access for young children aged 0 to 5. This structural upgrade significantly enhanced ECD outcomes by offering a clean, well-equipped and age-appropriate facility.

"From starting in a garage in 2008, we now have proper classrooms and [more than] 100 children. The community no longer has to travel far." – ECD principal

Reduction of parental stress

With the ECD centre located within the community, parents noted that they longer need to travel long distances to access these services. This has not only reduced transport-related costs and safety concerns, but also alleviated emotional stress. Knowing their children are safe and receiving quality care near home has improved parents' peace of mind and daily routines. It has also freed up time to engage in economic activities, thus improving family income and well-being.

"The parents are fully supportive. It's the only centre in the area, so now they don't have to send their children far away." – ECD principal

"I can go look for work without having to worry about my child's safety and well-being. The centre keeps our children safe." – Parent

Community empowerment through job creation

The ECD initiative has created direct and indirect employment within the community. Teachers, support staff and interns have gained opportunities to generate income, while the centre's development has fostered a sense of ownership and pride among local residents. However, gaps in funding after 2018 have led to insufficient salaries and operational budgets, undermining the stability of these gains.

"We sometimes have to pay [interns] from our own savings ... It's not sustainable without consistent support." – ECD principal

Strengthened educational foundations

Structured programming at the Kagisano ECD centre supports children's holistic development. Cognitive, emotional and social skills are cultivated from a young age, better preparing children for primary school and beyond. This foundational support is critical in addressing educational inequality and promoting long-term academic success.

Model ECD centre

Kagisano was widely viewed as a model ECD centre by parents within the community, providing a blueprint for other potential centres. Its presence has elevated the perceived value of early learning in the region and introduced a culture that prioritises structured ECD.

"*Kagisano is the only ECD centre of such good quality in the community. Our children are the only ones who can speak English and are very confident compared to the majority of their peers."* – Parent

Economic empowerment

The centre has allowed caregivers, particularly mothers, to enter the workforce or engage more fully in economic activities. This dual impact – on children's education and parental productivity – has helped foster stronger local economic participation.

Although the development of infrastructure created a safe learning space, a lack of security features such as fencing, cameras and alarm systems has left it vulnerable to theft and vandalism. This was reported to undermines the long-term sustainability and safety of the centre.

"We've had break-ins … [We have] no cameras, no proper fence. We've requested [them], but we're still waiting." – ECD principal

Scholarships and bursaries

Access to quality education

The SDET's scholarship and bursary programmes have been instrumental in opening doors to quality education for learners from disadvantaged backgrounds. Financial support enabled recipients to complete grade 12 and pursue tertiary education without the additional burden of tuition, accommodation and transport costs. This has allowed them to focus on their academic success, reducing dropout rates and improving overall academic performance and well-being.

"The bursary provided me with peace of mind … Knowing I had a roof over my head and support gave me the freedom to focus on my studies." – Beneficiary

Youth employment

Although academic performance and graduation rates were high (93% of bursary recipients completed their degrees), only 56% of graduates found employment. The remaining 44% were either unemployed or still studying. This points to a structural disconnect between academic success and labour market absorption, compounded by South Africa's broader youth unemployment crisis. These findings underscore the need for integrated job-readiness training, networking and placement services.

"*Graduating is great, but getting a job feels like a second mountain to climb."* – Graduate beneficiary

Table 16: Beneficiary completion of studies

Did you complete your studies?	Number of beneficiaries	Percentage
Yes	25	93%
No	2	7%
Total	27	100%

Table 17: Proportion and economic status of students who graduated

Economic status	Study status		
	Completed	Not completed	Total
Employed	14 (100%)	0 (0%)	14 (100%)
Studying	3 (100%)	0 (0%)	3 (100%)
Unemployed	8 (80%)	2 (20%)	10 (100%)
Total	25 (93%)	2 (7%)	27 (100%)

Social cohesion

An overlooked but important outcome was how the infrastructure investments – such as the water tanker at local schools – benefitted both learners and broader community members. These shared resources fostered trust and strengthened the relationship between schools and surrounding communities.

Paying it forward

A standout impact of the bursary programme has been the ripple effect it created. About 85% of surveyed graduates are actively contributing back to their communities through tutoring, mentorship and helping with university applications. This kind of social return illustrates the value of education not only in individual upliftment, but also in community development.

"I tutor kids from my old school because someone once helped me, and now I want to pass that on." – Graduate

Holistic programme support through bridging programmes

Bridging programmes such as Edumap provided wrap-around support to students who otherwise wouldn't have qualified for tertiary admission. These students received academic enrichment in key subjects along with life skills, transport stipends and meals. The 99% success rate of Edumap students at university demonstrates the effectiveness of this approach.

"[Almost] every student they sponsored went to university, graduated and found employment … The programme changed lives and entire communities." – Implementing partner

Community transformation

Prior to these interventions, higher education was not a realistic goal for many students in the host communities. The Trust's commitment has catalysed a cultural shift through which higher education has become both accessible and aspirational. This has had broader effects, encouraging even non-beneficiaries to aim higher in their academic and career goals.

"Initially, most resources were allocated to private schools ... Now we ensure students can access quality education without leaving the area." – Trustee

Psychosocial and career readiness

The analysis revealed that funding alone is insufficient for long-term outcomes. Despite high academic completion rates, many graduates struggled to find employment. This signals a need for integrated psychosocial and career development services to better prepare students for life after graduation.

"Graduating is not enough … We need guidance for what comes after." – Beneficiary

5.2.1.5 Key evaluation question 2: What are the unintended or undesirable outcomes?

Although SDET education interventions have yielded significant positive outcomes, several unintended or undesirable outcomes were highlighted as challenges that warrant attention for future strategic improvements.

Early childhood development

Contractor engagement and oversight

An unexpected issue arose from the contract signed with the infrastructure contractor responsible for the ECD centre. Community members expressed confusion about the terms of this agreement, which was for a period of 99 years and limited their ability to oversee maintenance and operational decisions effectively. This has created governance and accountability challenges.

"I don't understand what the 99-year contract means … We had no say, and now we can't even monitor properly."

Operational funding

Initial operational support was provided for staffing and running costs between 2016 and 2018, but subsequent funding gaps have forced the centre to rely heavily on volunteers, which is unsustainable and affects staff morale and retention.

Scholarships and bursaries

Misalignment between programmes

One critical unintended outcome was the lack of integration between the various education programmes (Edumap, Bokamoso, scholarships and bursaries). Without an overarching strategy to connect these initiatives, their potential for synergistic impact was limited. For example, some scholarship recipients could not transition into the bursary programme because of eligibility gaps or policy misalignment.

"The funding stopped when I matriculated because of 'financial reasons'. Two other scholarship recipients were offered assistance, but I was not." – Scholarship recipient

Cultural adjustment and social integration

Students placed in private schools through the scholarship programme faced difficulties adjusting to new environments, including cultural and socioeconomic differences. This sometimes led to bullying, isolation or emotional distress.

"Basic homesickness. At first it was difficult to settle in ... In my first year, I experienced physical abuse and bullying." – Scholarship recipient

Communication and support

Beneficiaries reported feeling disconnected from the SDET because of insufficient communication, especially during critical incidents, citing a lack of mentorship and proactive engagement from the Trust.

"The school stopped supplying us with lunch and tried to charge us for damaged iPads." – Scholarship recipient

Governance and trustee engagement

Former project managers and implementing partners noted limited physical presence from trustees, which affected stakeholder relationships and programme monitoring.

"Despite funding the project, trustees never visited to interact with learners or see the impact first-hand." – Implementing partner

External events and policy constraints

Funding disruptions as a result of the Covid-19 pandemic

The pandemic caused funding cuts, notably affecting the Edumap programme, despite its high success rate. This raised concerns about the sustainability of even well-performing interventions.

"The Trust funded about 30 students per year to attend the college ... but it stopped funding around Covid-19." – Implementing partner

Policy-driven exclusions

There were isolated disciplinary incidents reflecting the need for strengthened behavioural support structures and clearer expectations for students.

"We had an incident in which a scholarship student was found in possession of cannabis, which led to his dismissal." – Former principal

5.2.1.6 Key evaluation question 3: How relevant are the programmes? How valuable are the partnerships? What is the quality of the programmes?

In evaluating the effectiveness of the SDET's educational initiatives, this key question probed three pivotal areas: the relevance of programmes, the value of partnerships and the quality of educational offerings. This assessed whether the programmes were suitably aligned with the community's needs and how they enhanced educational opportunities for underprivileged students. It also examined the

strategic role of partnerships in extending the Trust's reach and enriching educational resources, alongside a critical evaluation of programme quality, focusing on adaptability, oversight and alignment with broader educational standards. Through surveys and interviews with various stakeholders, including trustees, educators, implementing partners and beneficiaries, this analysis sought to uncover the depth of the programmes' relevance to the community, the efficacy of collaborations with corporate and educational partners, and the robustness of the educational frameworks established by the Trust.

i.   How relevant are the programmes?

Local primary schools benefitted from infrastructure investment that not only serviced the schools, but in many cases also benefitted the communities around the schools. When one of the communities experiences water shortages, the school that has water tanks installed is able to provide it with water, expanding the reach of the project's impact.

"The SDET has assisted us with two major projects. The first was the installation of JoJo tanks. Given our area's frequent electrical and water supply problems, these tanks have been essential. The Trust also helped build new bathrooms on our sports field for boys and girls." – Acting school principal

The kitchen equipment project was also relevant as food was prepared for learners in a more sterile environment, reducing contamination and ensuring all learners had a lunchbox.

"They provided 20 computers, four large pots, 1 000 lunchboxes, one four-burner stove, a storage shelf, a fridge and a geyser. Learners previously had to bring their own lunchboxes, which was often unhygienic. Now every learner has a lunchbox and meals are prepared with proper kitchen facilities. The storage shelf has also reduced the risk of contamination." – School principal

According to the responses gathered through the survey, the bursary initiative granted beneficiaries the opportunity to pursue university degrees and secure academic qualifications. When asked about alternative methods for funding their education in the absence of the SDET bursary, 17 respondents indicated they would have sought other bursaries, NSFAS funding or loans. Notably, nine respondents disclosed they had no alternative plans to finance their studies and three mentioned their families would have struggled to find funding, potentially preventing them from pursuing higher education. This underscores the uncertainty and difficulty of obtaining alternative financial support, highlighting the bursary programme's vital role in providing accessible tertiary education to the community.

The subsequent tables detail the educational institutions attended and the fields of study chosen by the beneficiaries as per the survey results. The University of Johannesburg was the most frequented institution, followed by the University of Witwatersrand. Beneficiaries mostly pursued studies in STEM subjects, indicating the programme's effectiveness in aligning with high-demand educational fields that are crucial for personal and community development.

Table 18: Educational institutions attended by Trust-funded students

Type of institution	Number of beneficiaries	Percentage
University	27	96%
College	1	4%
Total	28*	

*There is a total of 28 because one beneficiary studied at two universities. It is assumed that the beneficiary transferred to another university to complete his or her studies.

Table 19: Beneficiaries by field of study

Field of study	Number of beneficiaries	Percentage
STEM	13	48%
Commerce, finance and business studies	7	26%
Education	2	7%
Law and legal studies	2	7%

Humanities and social sciences		1	4%
Agriculture and environmental sciences		1	4%
Health sciences and medicine		1	4%
Total		**27**	**100%**

The scholarship programme offered learners the chance to attend elite high schools, allowing them to access high-quality education without the burden of financial constraints. The following table indicates the distribution of scholarship recipients across prestigious institutions, demonstrating the programme's success in integrating students into top educational environments.

Table 20: Distribution of scholarship recipients across high schools

Name of high school	School quintile	Number of beneficiaries	Percentage
Kingswood College	Independent	5	56%
Clifton High School	Independent	2	22%
Hoërskool Westonaria High	5	1	11%
Saint Martin's School	Independent	1	11%
Total		**9**	**100%**

The survey results underscore the relevance of education programmes, which have significantly improved the lives of scholarship and bursary recipients by addressing socioeconomic disparities, a longstanding issue within the community. The average rating for the relevance of education programmes was 23 out of 25 (with total scores ranging from 16 to 25). This suggests that, overall, the bursary had a positive impact on the beneficiaries' educational journey.

Impact score	Number of beneficiaries	Percentage
Above average (24-25)	18	66%
Average (23)	1	4%
Below average (16-22)	8	30%

The provision of funding for schooling and tertiary education allows learners and students to concentrate on their academics, enhancing their prospects for success. Not only does the bursary support academic endeavours, it also facilitates access to economic opportunities.

The relevance of the educational interventions provided by the Trust is also highlighted through interviews conducted with various stakeholders. These programmes have been essential in providing vital educational opportunities to underprivileged students, substantially influencing their lives and educational paths. An implementing partner commented on the Trust's targeted recruitment and thorough assessments, ensuring the selection of students who, despite their disadvantaged backgrounds, demonstrate potential for academic success. He noted, *"We also conducted our own assessments ... Many students came from extremely disadvantaged backgrounds with poor schooling conditions."* This approach addresses not only immediate educational needs, but also fosters long-term academic and professional growth.

Further insights from another implementing partner revealed the transformative impact of these educational programmes within the community. University education was initially not a common goal among community members. The Trust's involvement has shifted this perspective, making higher education both accessible and desirable, especially in STEM fields. This change is crucial as it helps break the cycle of educational disadvantage and opens wider career possibilities for young people in the community. *"Our programme made education more accessible and desirable,"* a representative from Bokamoso explained, highlighting the shift in community aspirations.

The relevance of these educational initiatives is further reinforced by the strategic focus on ECD and enhancing foundational skills. Trustee insights into investments in school infrastructure and ECD highlight a proactive approach to improving educational environments and outcomes from an early age. These efforts are crucial for ensuring that children have access to conducive learning environments, which is foundational for their future academic success. One of the trustees commented: *"We said, let us champion ECD ... If we could create a state-of-the-art ECD centre, then that could model the infrastructure needed for ECD."*

The alignment of the Trust's educational programmes with the community's needs is evident in the sustained engagement and outcomes observed. These programmes not only address immediate educational barriers, but also establish a framework for continual community development and individual advancement, as evidenced by the significant improvements in educational infrastructure, access to higher education and subsequent employment opportunities for beneficiaries. This strategic alignment is critical for the ongoing relevance and success of the Trust's educational initiatives within the community. Moreover, a key finding highlights that the SDET's interventions align closely with SDG 4 (quality education), SDG 10 (reduced inequality) and SDG 17 (partnerships for the goals). This alignment underscores the strategic effectiveness of the Trust's programmes in addressing critical global challenges through localised interventions, enhancing educational access and quality, and actively working towards more equitable social outcomes within the communities they serve, facilitated through robust partnerships.

ii.   How valuable are the partnerships?

The value of partnerships in the Trust's education initiatives is highlighted through the views of trustees, implementing partners and sector experts. These collaborative efforts are essential to enhancing educational environments and extending the Trust's reach within communities. Notably, partnerships with corporations such as Gold Fields and Sibanye have equipped schools with crucial resources, including JoJo tanks, computers and science laboratory equipment, vital for creating conducive learning environments. A trustee underscored the strategic significance of these partnerships, stating: *"There are a couple of projects that we did towards that strategic direction of actually improving school infrastructure ... through partnerships, of course, with Gold Fields and Sibanye."*

Additionally, donations of land for ECD centres illustrate the profound impact and strategic nature of partnerships, providing essential space needed for the development of foundational educational facilities. Another trustee explained: *"When it comes to ECD, land has always been an issue in the Westonaria area ... The land was donated by Gold Fields and Crimson King Developments."* This highlights how these contributions alleviate financial burdens and enable crucial educational projects.

However, the complexity of partnerships, particularly when involving multiple stakeholders with different priorities, introduces challenges. Challenges including delays and coordination issues were particularly evident in projects such as Sibanye's technical and vocational education and training college, reflecting the difficulties of aligning various operational approaches. A trustee reflected on these, noting: *"In terms of our primary objective ... that particular partnership has not worked because there's more than one partner ... The relations with us and Sibanye are at arm's length."*

Despite these hurdles, the consensus among trustees and educational experts is overwhelmingly positive, affirming that partnerships significantly bolster the SDET's capacity to meet its educational goals. Notably, the strategic integration of resources and community engagement is exemplified by initiatives such as the use of sports fields for community events, which extends the impact of these collaborations beyond the classroom. This was highlighted by a primary school principal, who noted: *"We use our sports field for community events and markets, fostering stronger relationships."* This approach fosters broader social outcomes, demonstrating the potential of educational partnerships to also support community development and cohesion.

One expert emphasised the importance of forming partnerships with organisations that are already active within the community on complementary aspects that enable collaboration without duplication. The expert said: *"If there are organisations that are already active in that community that focus on other*

aspects such as nutrition that feed into ECD, start [having] conversations and developing partnerships so that you can work collaboratively without duplicating your approaches and resources."

This insight reinforces the necessity of robust partnerships, particularly with educational authorities and other community stakeholders, to ensure systemic educational enhancements. One expert suggested: *"If you want to create long-term systemic change ... invest in a relationship with the DBE."* This emphasises the importance of aligning with and actively contributing to national educational strategies and policies. These partnerships not only cater to immediate educational needs, but also lay the groundwork for sustainable, long-term educational improvements, which is crucial for the strategic enhancement of educational infrastructure and support systems within communities.

iii.   What is the quality of the programmes?

The quality of the programmes implemented by the SDET is characterised by a robust and adaptive approach, addressing immediate educational challenges while ensuring sustainability and alignment with broader educational frameworks. This adaptability is crucial because educational needs evolve. One trustee noted: *"Our approach evolved as circumstances changed. For example, we introduced literacy and numeracy programmes after identifying a need for stronger foundational skills."* This emphasises the shift towards long-term educational improvements over short-term fixes.

However, there were challenges in ensuring consistent support and oversight to beneficiaries, as one former principal pointed out: *"There were some attempts. If I remember correctly, they had someone assigned to check in on them periodically. However, the effectiveness of this support varied."* This reflects the complexities involved in managing diverse programmes spread across multiple locations.

Moreover, there were also issues with the selection process for students, suggesting a need for a more meticulous approach akin to other high-standard institutions. A former head of school pointed out: *"The process should be more rigorous. For example, Oprah Winfrey's school conducts home visits and selects students not just based on academics, but also on family stability."* This points to the need for standardised assessments to ensure students can cope with the demands of a private school environment.

Aligning with national standards, the Trust ensures its educational initiatives complement and enhance existing frameworks. Another trustee affirmed the importance of integration into the national educational strategy: *"Our education initiatives align with the DBE, ensuring they complement existing programmes."*

To strengthen administrative capabilities and improve decision-making, the Trust engaged Tshikululu. This strategic partnership is aimed at enhancing the quality of programme management and ensuring adherence to social investment best practices. *"We recognised that our administrative structure needed improvement. Initially, our trust administration was legally sound but lacked programmatic expertise. We engaged Tshikululu Social Investments to bridge this gap."*

While the SDET's efforts to enhance the quality of education are evident, the ongoing need for comprehensive support systems for bursary students underscores the necessity for providing more than just financial assistance to ensure successful academic and career outcomes.

Key evaluation question 3 findings:

i. The **bursary programme is essential** in providing opportunities for tertiary education, especially for students without other financial means.

ii. The **focus on STEM fields by the majority of beneficiaries reflects the programme's alignment with market demands** and crucial sectors for community development. This strategic focus enhances personal and professional opportunities for students and supports community advancement through educated individuals in key sectors.

iii. Experts emphasised the **importance of establishing robust partnerships with educational authorities** to ensure systemic educational enhancements. Aligning with national educational strategies and policies is advised to create long-term, systemic changes and systematically improve the quality of education.

iv. One of the experts highlighted the value of starting conversations and **developing partnerships with existing organisations in the community** that focus on complementary aspects such as nutrition, which are integral to ECD. This approach helps to maximise resources and ensure that efforts are not duplicated, leading to more efficient and comprehensive educational support systems.

v. The SDET's **interventions align closely with specific SDG 4 (quality education), SDG 10 (reduced inequality) and SDG 17 (partnerships for the goals).** This alignment underscores the strategic effectiveness of the Trust's programmes in addressing critical global challenges through localised interventions, enhancing educational access and quality, and actively working towards more equitable social outcomes within targeted communities, facilitated through robust partnerships.

5.2.1.7 Key evaluation question 4: How well are resources being used? To what extent is the relationship between inputs and outputs cost-effective and to expected standards? Do the outcomes or achievements of education programmes represent value for money?

In assessing the use of resources and cost-effectiveness of educational programmes funded by the SDET, several key insights emerged from stakeholder comments, revealing a nuanced understanding of financial management, strategic prioritisation and the tangible impacts of educational investments. These insights highlight both the challenges and strategic shifts necessary to maximise the impact of educational funding.

An implementing partner raised concerns about past financial issues, stating: *"Essentially, there was mismanagement of funds within the Trust. The other gentleman, who had been chairman, was able to secure funding for Edumap, but after he stepped down, new trustees came in and priorities shifted. Some trustees resigned due to concerns about how funds were managed. Ultimately, they claimed they had run out of money."* This problem underscores the need for transparency and robust governance structures to ensure the sustainable management of funds.

The cost-effectiveness of funding individual students at high-cost institutions was questioned by multiple stakeholders. For instance, one partner highlighted the substantial costs involved per student: *"The cost per student is about R160 000, including board, food and transportation. This is a high cost considering the targeted beneficiaries."* Additionally, a former principal criticised the high fees of private schooling and suggested a more community-focused approach: *"Instead of funding a few students at elite schools, companies could invest in entire communities by placing skilled teachers in underprivileged schools. The same budget could provide quality education to a much larger group of students."* This perspective

supports the argument that funds used for one student at a high-fee school such as Saint Martin's, which costs about R300 000 per year, could support several students at high-performing public schools, enhancing overall impact and reach.

Trustees indicated that they had recalibrated their strategy from funding a few students at elite schools to enhancing local educational opportunities. This strategic pivot is aimed at broadening the impact of the Trust's initiatives and ensuring a more equitable distribution of resources. A trustee explained: *"Initially, most resources were allocated to the Education Trust, funding students at private schools such as Kingswood College in Grahamstown and Saint Martin's in KwaZulu-Natal. Instead, we shifted focus to strengthening education within our host communities, ensuring that local students could access quality education without leaving the area."*

This reallocation is supported by the insight that investing in local schools might yield comparable educational outcomes at a lower cost and support more beneficiaries. This approach is not only more cost-effective, but also aligns with broader educational equity goals. An education sector expert suggested a strategic approach to improving education: *"It's more cost-effective to take learners from disadvantaged backgrounds and place them in a good school that's already high performing than try to improve a poorly performing school where so many things need to be fixed, right? But I think if you can find some schools that are doing some things right and you have good results and focus on supporting them more, that could be helpful."*

The challenges and strategic shifts highlighted by these stakeholders underscore the complex dynamics of educational funding and the critical need for careful resource management to ensure that educational programmes are both sustainable and impactful. These reflections and adjustments reveal the Trust's continual effort to optimise its resource allocation, enhance the quality of education and ensure its investments yield the highest possible returns in terms of educational and community development.

On the other hand, beneficiary respondents indicated that the bursary sufficiently covered costs for books, tuition, laptops and accommodation, with 95% noting that, without this support, they would have had to resort to part-time studies, deregister or take out loans. Figure 7 shows that 25 of the 27 respondents successfully completed their studies with the support of the bursary.
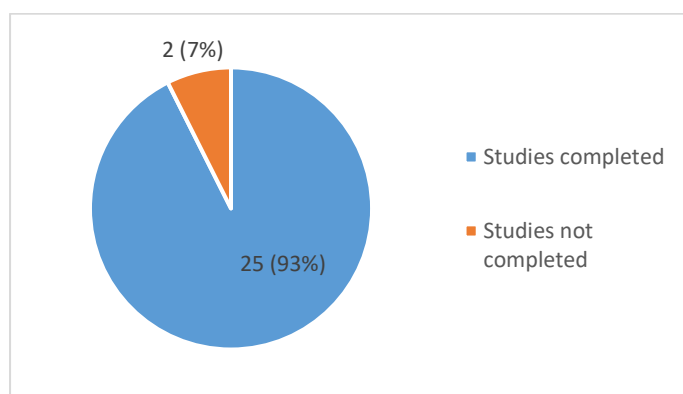

Figure 7: Educational attainment outcomes of bursary recipients

Qualitative insights suggests that the return on investment from these programmes has been significant, contributing positively towards four SDGs. These include providing access to quality education through the scholarship and bursary programmes, supporting grade 12 matriculants from the scholarship programme, supporting the bursary programme beneficiaries graduate with tertiary qualifications and contributing to these graduates securing employment after they graduate. A recurrent theme among beneficiaries was the critical role the bursary played in enabling their educational pursuits, emphasising that many would not have been able to continue their studies without this financial assistance. These are supported by the quotations below:

"They funded my second- and third-year university studies, allowing me to continue to pursue my degree in information systems."

"They funded my second and third year of university."

"The SDET helped with paying for tuition, accommodation, a stipend and learning materials."

Figure 8: SDGs associated with the SDET

The evaluation depended heavily on feedback from various stakeholders because of the lack of comprehensive programme reports necessary for detailed data analysis, such as throughput rates, academic progress, graduation rates, dropout rates and employment metrics. As essential financial and non-financial data was missing, it was not possible to fully quantify return on investment. Consequently, the analysis primarily drew on self-reported qualitative data from beneficiaries and other stakeholders. This type of data provides valuable insights and shows positive impacts. The feedback was favourable in general, indicating that the Trust's strategic adjustments effectively optimise the use of resources and create meaningful impact for beneficiaries.

Key evaluation question 4 findings

i. Stakeholders **questioned the cost-effectiveness of funding individual students** at high-cost private institutions, noting that the substantial investment per student could be more strategically used by enhancing education within broader community settings.

ii. A formerprincipal and other educational experts advocated for **using funds to improve education across entire communities**, such as by enhancing public schools or investing in skilled teachers, rather than focusing on a few students at expensive private schools.

iii. An education sector expert highlighted the cost-effectiveness of placing learners from disadvantaged backgrounds in already high-performing schools rather than trying to overhaul poorly performing ones. This approach **leverages existing successful educational environments**, which can provide more immediate and impactful benefits.

iv. The evaluation was constrained by insufficient financial and non-financial data, leading to a reliance on qualitative feedback from stakeholders. Despite this limitation, the feedback indicates that **the Trust's strategic adjustments are enhancing educational impact and the use of resources**.

5.2.1.8 Key evaluation question 5: What are the lessons and recommendations for future programmes and implementation?

Stakeholders provided invaluable insights that highlight several key areas for improvement and strategic realignment:
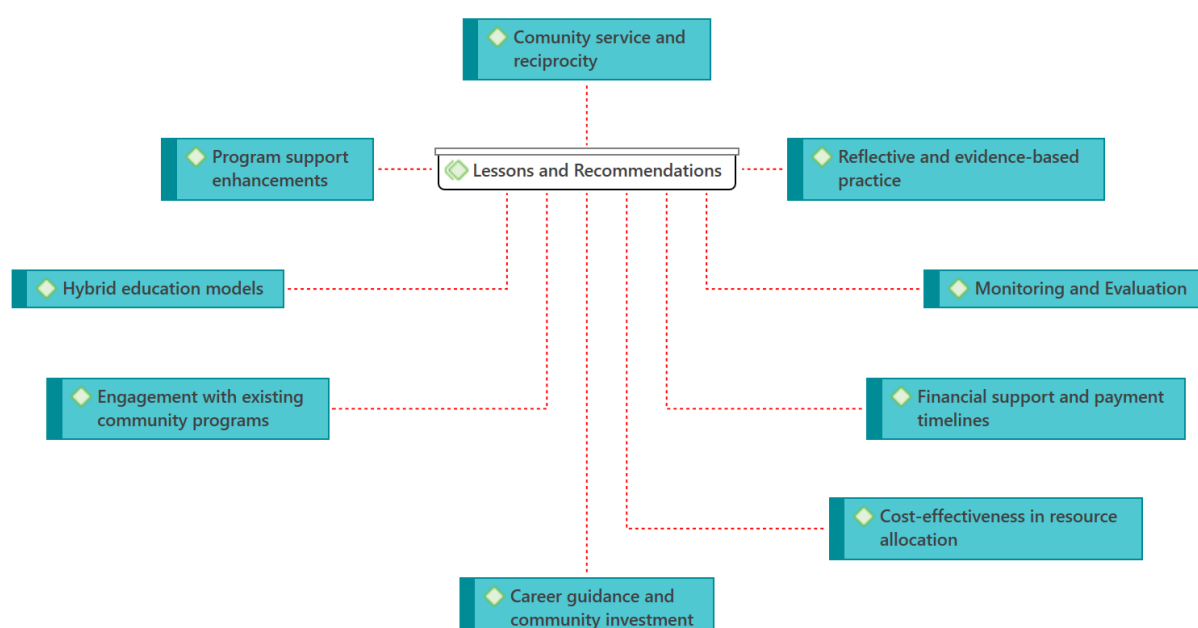
Figure 9: Strategic overview of lessons learnt and recommendations for enhancing educational programmes

i.   **Programme support enhancements**

Stakeholders recognise the challenges of first-generation students, who often struggle with academic preparedness and social and cultural integration. An emphasis on holistic support is vital, as one stakeholder pointed out: *"The programmes' beneficiaries are first-generation students and need more than financial support as they encounter unique challenges."* To support these students effectively, psychosocial support, mentorship and career-readiness programmes are crucial. These initiatives can help bridge the gap between the students' capabilities and the demands of higher education.

Additionally, integrating students into environments where they may feel out of place because of their background can significantly affect their performance and well-being. A former principal noted the difficulties of students from poorer backgrounds: *"Many of these students came from disadvantaged backgrounds and found it difficult to integrate into a wealthy school environment, which made them feel like outsiders."* This highlights the need for continual and comprehensive support systems that include regular engagement, access to resources and personal encouragement to ensure they not only adapt to, but also excel in their new settings. Moreover, the effectiveness of these programmes relies heavily on the engagement and ongoing communication between bursary provider, tertiary institution and student. Regular check-ins and progress tracking are essential to ensure students remain accountable and supported throughout their educational journey.

A bursary recipient noted: *"I suggest forming an alumni network to mentor new bursary recipients. Many of us went through similar struggles, and having a support network could provide career advice and guidance for future students."* An implementing partner highlighted the need for trustee involvement: *"Trustees should visit and interact with beneficiaries to show their commitment beyond funding."* Another bursary recipient suggested: *"The provision of mentors, networking sessions with other beneficiaries and psychosocial support (at least quarterly) would be great for helping beneficiaries outline their career goals and the steps needed to get there."* This underscores the importance of structured support mechanisms to enhance the impact of financial aid.

ii.   **Hybrid educational models**

The adoption of a two-tier educational approach was suggested by an implementing partner who emphasised the importance of leveraging technology to expand educational access: *"We need a two-*

tier approach – continuing the in-person programme for sponsored students while expanding through technology and remote learning to reach more students at a lower cost." This model not only increases reach, but also enhances the cost-effectiveness of educational programmes.

iii. Financial support and payment timelines

Timely financial support remains a critical issue, with stakeholders expressing concerns over the management of funds. A partner revealed: *"The main issue was delayed payments. Some sponsors, such as Exxaro, pay upfront, but South Deep preferred monthly payments, which were often late."* This inconsistency puts strain on the operational capacity of educational institutions and can negatively affect students' educational experiences. Adding to this, a bursary beneficiary noted: *"The only challenges were with the delays in payment from January to April every year,"* highlighting the specific period of financial disruption. An implementing partner elaborated: *"Delayed payments create operational difficulties and should be addressed."* This underscores the need for improved payment processes to support the smooth functioning of educational programmes.

iv. Career guidance and community investment

There is a significant emphasis on enhancing career guidance and creating job opportunities, especially given the alarming unemployment rates among young people. An education sector expert underscored the importance of such initiatives, stating: *"I think career guidance programmes at school could help a lot … Our unemployment rates for young people are absolutely terrifying."* The expert further explained the role of networks in securing employment, noting that people from more privileged backgrounds often have better access to these networks and family role models who demonstrate daily work routines and the preparation required. This access significantly influences their success in seeking and securing jobs. *"Work seeking is important and helpful, too, because you don't want to do all this investment in education and then find that the people you've invested in, despite their great potential, find it really hard to get jobs."* This highlights the crucial need for supportive structures that extend beyond educational attainment to include practical job-acquisition skills.

v. Cost-effectiveness in resource allocation

A shift towards more community-centric educational investments was discussed. A former principal argued for the redistribution of resources to achieve broader educational impact: *"Instead of funding a few students at elite schools, companies could invest in entire communities by placing skilled teachers in underprivileged schools."* This approach is seen as more sustainable and equitable, providing quality education to a larger group of students at a fraction of the cost. However, an education sector expert suggested more strategic scholarship allocation: *"I think it's more cost-effective to take learners from disadvantaged backgrounds and place them in a good school that's already high performing than to try to improve a poorly performing school where so many things need to be fixed."* This perspective underscores the advantages of strategically investing in schools within the community that demonstrate potential for excellence. By focusing resources on these "quick wins", high-performing schools can be further developed, amplifying their success and potentially cascading benefits throughout the community. This targeted approach ensures that investments are not only efficient, but also capable of generating substantial educational improvements across broader areas.

vi. Engagement with existing community programmes

The need to engage with and enhance existing community programmes was emphasised, reflecting the importance of educational initiatives not operating in isolation. An education sector expert highlighted this approach, advising on the benefits of leveraging local strengths: *"… understanding the*

context and building on what is good that's there and using local resources where you can, so it's not like parachuting everything in from the outside." This advice underlines the Trust's catalytic approach to development, facilitating essential changes that enable organisations and individuals to form partnerships to access further support from the private sector and government rather than trying to be the only player. As the African proverb goes, it takes a village to raise a child. The expert suggested forming partnerships with organisations already in the community: *"If there are organisations that are already active in that community that focus on other aspects such as nutrition that feed into ECD, start having conversations and developing partnerships so that you can work collaboratively without duplicating your approaches and resources."* This strategy ensures that efforts are integrated and synergistic, avoiding redundancy and maximising the efficacy of resources.

vii.   Monitoring and evaluation

The importance of establishing rigorous systems for monitoring and evaluating the impact of educational programmes was noted. An implementing partner emphasised: *"There should be a clear and rigorous system to track progress and impact."* Such systems ensure accountability and enable continual improvement in programme delivery.

viii.   Community service and reciprocity

Integrating community service into scholarship programmes was proposed to enhance the societal impact of educational funding. A trustee suggested: *"We need to integrate structured community service into our scholarship programme ... Funded students could commit to tutoring local learners."* This integration fosters a culture of reciprocity and community involvement among beneficiaries.

ix.   Reflective and evidence-based practice

Finally, the need for evidence-based planning and reflective practice was highlighted to continually improve programme design and implementation. An education sector expert recommended: *"[It's not] just thinking about what you're doing and whether it's grounded in evidence and always looking out for new evidence and thinking about that when you go into design, but building in reflection and learning into your programme implementation."*

> **Key evaluation question 5 findings**
>
> i. Enhanced support is crucial for first-generation students who often face challenges with academic preparedness and cultural integration. The implementation of psychosocial support, mentorship and career-readiness programmes is vital to bridge the capability gaps these students face.
>
> ii. An implementing partner suggested adopting a two-tier educational approach that combines in-person programmes for sponsored students with expanded technology and remote learning. This model aims to reach more students at a lower cost, increasing the cost-effectiveness of educational programmes.
>
> iii. A shift towards more community-centric educational investments is recommended to achieve broader educational impacts at a lower cost and provide quality education to more students.
>
> iv. It is important for educational initiatives to engage with and enhance existing community programmes. This helps to integrate efforts and leverage local resources effectively.
>
> v. Incorporating community service elements into scholarship programmes can enhance the societal impact of educational funding, fostering a culture of community involvement and reciprocity among beneficiaries.
>
> vi. Programmes should be grounded in evidence and reflective practice to continually improve design and implementation, ensuring that educational strategies are responsive to emerging needs and effective in meeting goals.
>
> vii. Providing comprehensive career guidance and creating robust job opportunities is essential. The insight emphasises the importance of equipping students with the necessary skills and opportunities to navigate the job market effectively. This ensures that the substantial investment in education translates into successful employment outcomes, enabling graduates to realise their potential in the workforce.

5.2.1.9 Key evaluation question 6: Are the observed changes and outcomes sustainable? To what extent will the positive changes and results of the intervention continue in the long term?

i. Community engagement and alumni reciprocity

Graduates often return to their communities, contributing positively by mentoring and teaching younger students. This cycle not only supports individual beneficiaries, but also extends benefits to families and communities, effectively breaking cycles of poverty. An implementing partner vividly captured this impact: *"The programme helps not just individuals, but entire families and communities, breaking cycles of poverty. I am a product of this system myself, and now I run the programme, helping others in turn."*

The survey results revealed that 85% (23) of the bursary beneficiaries who completed their studies and one-third (3) of the nine scholarship respondents contributed back to their community by tutoring students and helping them complete university applications, and volunteering at organisations. Furthermore, five of the 14 employed beneficiaries reported that they work in Rand West City, six work within Gauteng, two work in Eastern Cape and one works in Limpopo.

ii. Diversified funding sources

Some implementing partners suggested exploring sustainable funding models beyond traditional sponsorship, such as alumni contributions and corporate partnerships. An implementing partner explained: *"We rely entirely on sponsors. We are working on alternative funding models, including alumni contributions and corporate partnerships."* This approach aims to reduce dependency on single funding sources to ensure financial stability and continuity.

iii.   Inclusive community engagement

The involvement of community members in planning and executing educational initiatives is crucial for aligning programmes with the community's needs and aspirations. An education sector expert emphasised the importance of this engagement: *"It's also important to understand that the community … possibly has resources and access that they would use to … help and contribute to driving the change that you are investing in. But, more than anything, the involvement of community members in any initiative … is key and important [not only for] driving the community's resilience, but also [its] sustainability."* Another expert highlighted the structured inclusion of community voices within governance frameworks: *"I think if it's a community trust that's set up to benefit the community and presumably there's a governance structure that involves community members, I would think that that is kind of a given."* This validates the SDCET's commitment to community-driven initiatives, as evidenced by including trustees who come from and understand these communities, further allowing the Trust to adapt interventions to reflect local needs effectively.

iv.   Impact of external shocks

The sustainability of educational initiatives can be significantly influenced by external shocks, which may lead to shifts in funding priorities and availability. Recent events highlight the need for educational trusts to anticipate and adapt to such changes to maintain their support programmes effectively.

a.   Impact of international policy changes

The recent decision by the United States of America (USA) to withdraw funding from South Africa illustrates a potential vulnerability in relying heavily on international funding. An education sector expert criticised this withdrawal, noting its potential to leave programmes and beneficiaries in a precarious position: *"Thinking about the situation at the moment with the USA just withdrawing completely from South Africa and other countries, it's completely irresponsible [to] just completely cut off your funding at all without some kind of an exit strategy, which can leave people worse off than had you not been there in the first place."* This situation underscores the need for the Trusts to assess the potential impact of such withdrawals carefully and develop strategies to mitigate any adverse effects.

b.   Lessons from the Covid-19 pandemic

The Covid-19 pandemic serves as a stark example of how quickly resources can be redirected in response to global emergencies, affecting ongoing funding commitments. An implementing partner described the direct impact on its operations: *"The Trust funded about 30 students per year to attend college. However, they stopped funding around Covid-19 and they haven't funded since then."* This disruption highlights the necessity for the Trusts to have flexible and resilient funding mechanisms that can adjust to sudden economic shifts or crises to ensure the continuity of support despite external financial pressures.

i. Graduates often return to **mentor and teach in their communities**, helping to break cycles of poverty and build sustainable community benefits.

ii. Some implementing partners indicated that they are **exploring sustainable funding models** beyond traditional sponsorship, including alumni contributions and corporate partnerships, to ensure financial stability.

iii. **Educational initiatives that align with local labour market demands** enhance the relevance and sustainability of programmes, ensuring that skills development is directly linked to actual job opportunities.

iv. External shocks, such as the recent withdrawal of US funding from South Africa, should prompt the Trusts to **review their initiatives and stakeholders** to identify any potential impacts of sudden changes. This process is crucial to determine if there are implications that could affect objectives, ensuring that adjustments and strategies are in place to mitigate any adverse effects and maintain the sustainability of programmes.

5.2.1.10 Education: Case study 1

Sex: Male
Intervention/partner name: Bokamoso Educational Trust
Community of residence:

My story with the SDET began in 2017 when it funded the Bokamoso Educational Trust, a programme I was privileged to be part of as a learner. With the support of the SDET, Bokamoso provided us with quality education and, as a result, we performed well in our studies. I matriculated in 2017 and went on to study mechanical engineering at Wits in 2018, fully funded by the SDET. However, during my second year, I faced significant challenges, including the loss of my uncle, who was my caretaker, and personal health struggles. Unfortunately, this led to me failing my major subjects. As a result, I had to take a break from my studies and I stayed at home from 2020 until 2023. Determined to continue my education, I enrolled at Unisa in 2023 to study mechanical engineering again. During this time, I realised that my true passion lay in computing. I made the bold decision to switch my field of study and applied for a bursary from the SDET. Thankfully, my application was successful, and the SDET has been funding my computing degree ever since. In December

Zakes Matsimbe embarked on a journey of resilience and rediscovery, from mechanical engineering to computing
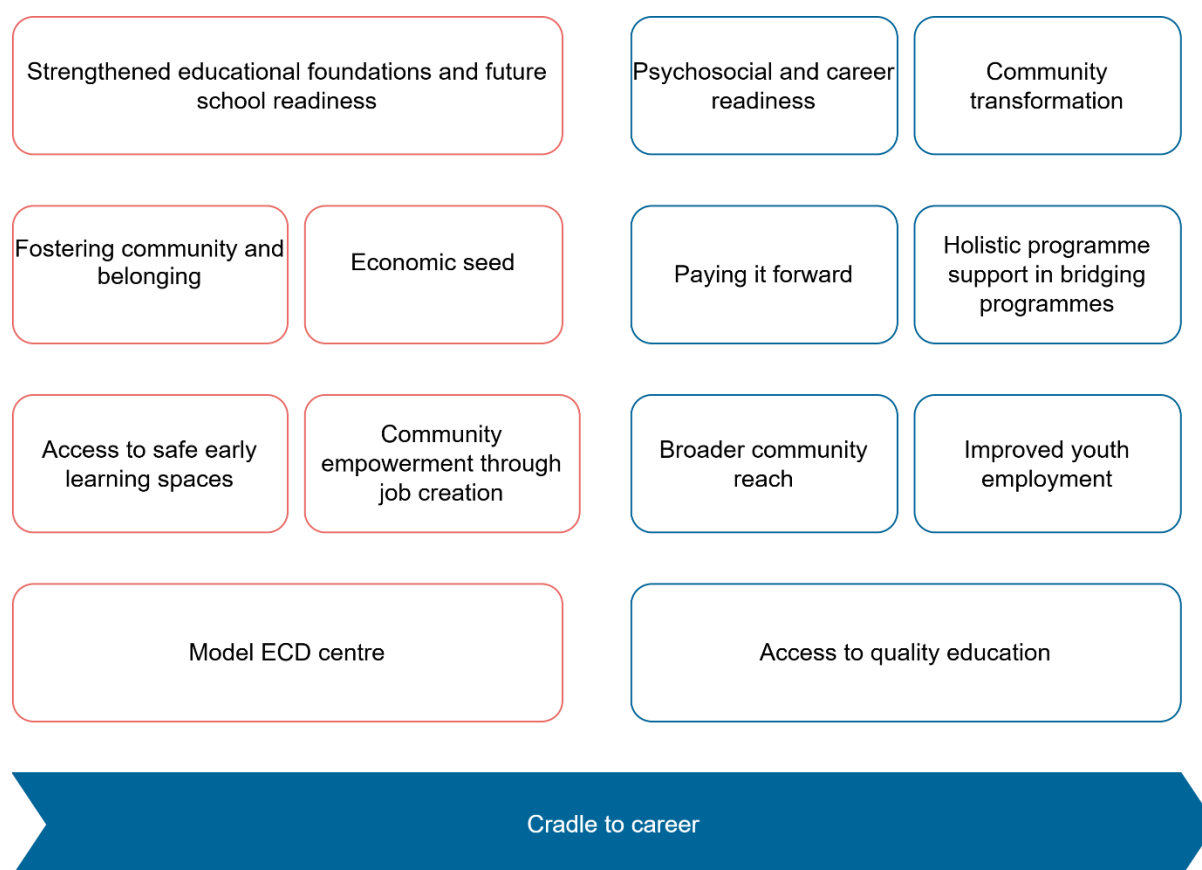
2024, I had the incredible opportunity to do vacation work at South Deep mine, made possible through the SDET. This experience further solidified my love for computing and IT, as I was exposed to the real-world applications of technology and learned invaluable skills. Studying with the support of the SDET has made all the difference. It has carried me through difficult times and allowed me to pursue my true passion. It takes care of everything, allowing me to focus entirely on my studies without financial stress. I am truly grateful for the opportunities it has provided and I look forward to using my skills to make a meaningful impact in the future.

5.2.2 Education emerging outcomes

| Strengthened educational foundations and future school readiness | | Psychosocial and career readiness | Community transformation |

| Fostering community and belonging | Economic seed | Paying it forward | Holistic programme support in bridging programmes |

| Access to safe early learning spaces | Community empowerment through job creation | Broader community reach | Improved youth employment |

| Model ECD centre | | Access to quality education | |

Cradle to career

Figure 10: Emerging educational outcomes

5.3 Community welfare: Results and reflections

Community welfare interventions are key to driving socioeconomic development, community cohesion and safety. The SDCET has provided financial support to a number of community and welfare projects since 2012. Some of the initiatives include infrastructural developments in the public health sector, particularly for GBV prevention and support, access to basic public health services and HIV/Aids treatment and management. The Trust also made one-off contributions aimed at driving community cohesion through sports development, arts and culture, and immediate relief support to community members during the Covid-19 pandemic.

Table 21: Community welfare programme reach and spend by project

Project	Project reach and outputs	Total spend
Infrastructure and resources		**R3 405 530**
A Re Ageng Social Services	The Trust built a women's shelter for survivors of GBV, benefitting **more than 100 beneficiaries**	R1 406 077
South African Football Association (SAFA) Safe Hub	Upgrading sporting facilities estimated to have **benefitted 510 people**	R1 500 000
Re A Ikoka	Funding towards infrastructure upgrades, medical equipment and medication, nurses' salaries, and food and other consumables for patients	R499 453

Emergency relief		R413 500
Covid-19 lockdown support	Donations during the lockdown of **3 000 food parcels** (catering for an estimated five people per household, amounting to **15 000 people**) and 5 000 litres of sanitiser to police stations and community health centres	R413 500
Programmatic support		R400 000
Sizabantu Homebase Care	Contribution towards the home-based care programme in partnership with the Department of Health	R190 000
Hope for Our Children	Contribution towards a children's centre, **benefitting 12 children**	R120 000
Soccer tournament	Financial support towards a local sports tournament	R90 000
Total	15 622	R4 219 030

The SDCT has contributed R4 219 030 in investment since its inception, with 81% of this funding going towards infrastructural development. Included in this is the sporting facilities as part of the Safa Safe Hub. This recognizes that sports is crucial in communities because it fosters holistic development, promotes social cohesion and can be a powerful tool for positive change among young people and adults (Sherlock, 2024). This was followed by infrastructural development towards fighting GBV, a shadow pandemic that challenges human rights and dignity. Emergency relief initiatives, particularly during the Covid-19 lockdown in 2020, as well as programmatic support, make up 19% of investments in community welfare.

5.3.1 Key evaluation question 1: To what extent are the programmes achieving intended outcomes in the short, medium and long term?

The evaluation found that SDCT-supported community welfare programmes are successfully achieving key **short-term outcomes**, with evidence of emerging **medium-term benefits** and early signs of **long-term transformation** in some areas. However, the depth and consistency of these outcomes vary across contexts and are often moderated by infrastructure, coordination and sustainability challenges.
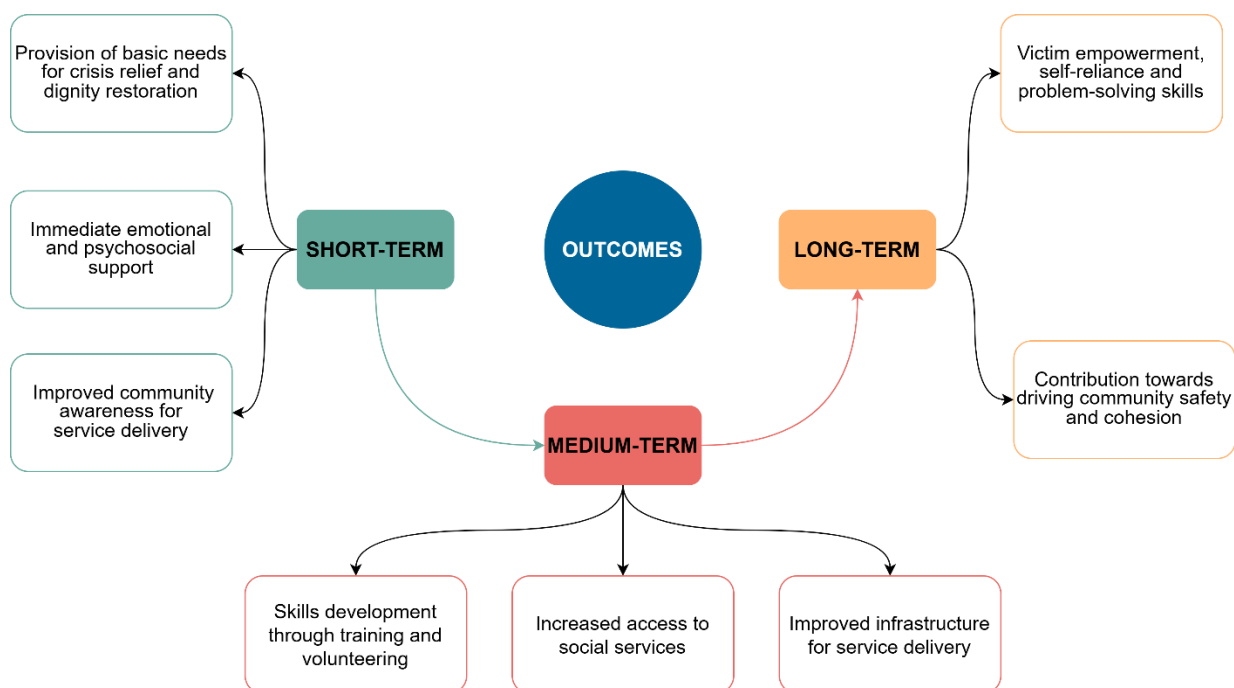
Figure 11: Community welfare outcomes

Short-term outcomes: Immediate relief and support

Implementing partners, trustees and beneficiaries confirmed that the SDCT's interventions delivered tangible short-term support, especially in times of crisis. These included the provision of basic needs, psychosocial counselling and emergency shelter services.

- **Provision of basic needs**: Food parcels, shelter, hygiene packs and documentation support were reported as critical lifelines. One implementing partner noted: *"South Deep has consistently shown that they have our welfare at heart … They provide emotional support that helps our beneficiaries feel cared for and valued."*

- **Psychosocial support**: Trauma-informed counselling provided by shelters was frequently cited as a key driver of emotional healing and stability for GBVF survivors. As one social worker described: *"They do an intake and check what each person needs, so everyone gets the right help."*

- **Improved awareness of services**: Outreach and awareness campaigns increased the visibility of available services, although this was dependent on effective local communication.

Medium-term outcomes: Stabilisation and empowerment

Programmes showed promising signs of enabling personal empowerment and improved access to community services in the medium term, though some barriers limited broader systemic gains.

- **Skills development through training and volunteering**: Beneficiaries, particularly young people, reported personal growth and increased confidence from participation in skills training and volunteer roles. However, many highlighted that volunteering was driven more by the lack of job opportunities than being a stepping stone to employment. A community member

commented: *"We volunteer because there are no jobs. But it's hard to keep going when you have to pay for your own taxi fare and food just to help out."*

- **Increased access to social services**: Wellness campaigns, documentation drives and psychosocial outreach enhanced access to critical services. Nonetheless, participation was sometimes constrained by logistical issues such as unclear schedules or transport limitations. One beneficiary noted: *"We don't always know when things are happening … If you miss one meeting, you might not hear about the next event."*

- **Improved infrastructure for service delivery**: Although investments in safe spaces, shelter upgrades and community facilities contributed to more dignified and efficient service environments, further low-cost improvements were frequently requested.

Long-term outcomes: Empowerment and community cohesion

Stakeholders reflected on the following early signs of transformative outcomes in relation to their programmes.

- **Empowerment of GBVF survivors**: The most notable long-term impact was observed among GBVF survivors who transitioned from clients to leaders. A former beneficiary shared: *"Without the support of South Deep, I wouldn't be here today. I escaped an abusive marriage and now, as the shelter manager, I help others rebuild their lives."* Her trajectory from crisis to leadership highlights the programme's potential when emotional, economic and social supports are sustained.

- **Contribution to community safety and cohesion**: The Trust's visible and responsive role particularly during the Covid-19 response solidified its reputation as a reliable development partner. As one trustee stated: *"That's a huge key achievement, how we have managed our partnerships and maintained relations with the community."*

Although these contributions have helped foster trust, safety and cohesion, the transition from individual recovery to systemic change remains an area for ongoing improvement.

Key evaluation question 1findings

i. **Basic needs were effectively met** through food parcels, shelter, hygiene supplies and documentation support, restoring dignity and addressing crisis needs.
ii. **Psychosocial support was timely and impactful**, especially for GBV survivors, providing emotional healing and a sense of care and safety.
iii. **Skills development and volunteering built confidence and experience**, but were often undermined by a lack of job opportunities and personal financial strain.
iv. **Access to social services improved** through wellness campaigns and outreach, but was constrained by logistics and inconsistent communication.
v. **The SDCT is increasingly seen as a trusted development partner**, particularly for its responsiveness during crises such as the Covid-19 pandemic and its support for public health and safety.

5.3.2 Key evaluation question 2: What, if any, are the unintended or undesirable outcomes?

The evaluation revealed several **unintended outcomes**, both positive and negative, that were not part of the SDCT's original programme design but emerged as by-products of its community welfare interventions. These offer critical insight into the broader ripple effects of the SDCT's programming for individuals, partners and communities.

1. Positive unintended outcomes

- **Emergence of survivor leadership and role-modelling**

  Although the primary aim of the GBV support programme was to provide safety and healing, some beneficiaries progressed beyond recovery into leadership roles. A powerful example is a former shelter client who became a shelter manager, illustrating how psychosocial support and training can foster long-term empowerment and transformation beyond the initial objectives. This kind of survivor-led leadership enhances peer support and strengthens the programme's credibility and impact.

- **Strengthened institutional credibility and trust**

  The SDCT's emergency responses during crises such as the Covid-19 pandemic led to unexpected gains in its reputation as a reliable and responsive actor. The Trust's agility in mobilising support during emergencies was widely praised and resulted in stronger relationships with municipalities and local stakeholders, reinforcing its role as a key development partner beyond its original scope of work.

2. Negative unintended outcomes

- **Perceived inequity during emergency relief distribution**

  During the Covid-19 food parcel campaign, some community members felt excluded or unfairly treated because of limited resources and unclear communication. Although the programme met its intended goal of providing short-term relief, it inadvertently created some dissatisfaction and tension. As one municipal official noted: *"Some were not happy because they didn't get food parcels and felt the distribution process was unfair."*

- **Volunteer fatigue and unintended financial strain**

  The use of community volunteers, especially young people, was intended as a pathway to skills development and empowerment. However, a lack of stipends or support meant that many volunteers experienced financial strain, having to cover their own transport and meals. In some cases, volunteering became a burden rather than a stepping stone to economic participation. One participant remarked: *"We volunteer because there are no jobs ... but it's hard to keep going when you have to pay for your own taxi fare and food just to help out."*

- **Dependency on the SDCT as a primary support provider**

  Although the Trust's consistent investment was appreciated, some stakeholders, particularly at municipal and implementing partner levels, began to perceive the SDCT as the default provider of solutions. This has the unintended effect of reinforcing dependency rather than encouraging self-sufficiency and the mobilisation of resources. Without clear exit strategies and co-funding models, the SDCT's presence could unintentionally delay the development of more sustainable community-owned systems.

5.3.3 Key evaluation question 3: How relevant are the programmes? How valuable are the partnerships? What is the quality of the programmes?

i. Relevance of programmes

The SDCT's community welfare interventions have shown strong relevance in responding to the acute and evolving needs of vulnerable groups, especially during periods of crisis. Over the 10-year reporting period, the Trust partnered with four implementing partners to deliver services within this focus area. The two partners that participated in the evaluation survey both affirmed that the interventions were well aligned with the realities facing their communities.

South Africa faces a deepening GBV crisis, often described as a second pandemic. With one of the highest femicide rates in the world, the 2020 national strategic plan on GBV recognises the urgent need for a multisectoral response. Within this context, the Trust's support to facilities such as the A Re Ageng shelter proved critical, enabling survivors of abuse to access psychosocial counselling, material aid, life skills and reintegration support through a dignified, needs-based approach.

"We do an intake and check what each person needs, so everyone gets the right help." – Social worker

"I rediscovered my identity after years of abuse." – Beneficiary

These testimonies demonstrate how tailored support helped beneficiaries regain their self-worth and agency. At a time when services for survivors were often fragmented or under-resourced, the Trust's role was widely seen as transformative. However, gaps were also noted. Stakeholders highlighted a lack of structured, long-term reintegration support and clear exit pathways, challenges that risk undermining the progress made during shelter stays.

"It feels like once you leave, your old challenges – like going back to an unsafe home – might return." – Beneficiary

"Even though we provide support when clients first arrive, many of them still leave the shelter feeling uncertain, like there isn't a clear plan for their next steps." – House mother

The Covid-19 pandemic tested the responsiveness of both civil society and public services. The SDCT responded with immediate relief interventions, including public health campaigns and the provision of direct support to vulnerable households. These efforts cemented the Trust's position as a responsive and trusted actor. The ability to mobilise quickly in times of uncertainty, including public health emergencies or natural disasters, was frequently cited as a strength.

Community welfare interventions have been highly relevant, responding quickly and empathetically to some of the country's most pressing social issues. Their effectiveness lies in their tailored, people-centred approach and responsiveness to crisis. However, their long-term impact will depend on deepening support systems beyond immediate care, strengthening exit planning and addressing overlooked operational needs.

ii. Value of partnerships

Partnerships have been central to the SDCT's ability to deliver effective and responsive community welfare programmes. Stakeholders consistently recognised the Trust's collaborative ethos, noting that its partnerships with government, non-governmental organisations (NGOs) and other institutional actors amplified both the scale and quality of its interventions, especially in areas such as GBV support and crisis response.

Strategic collaborations enabled the SDCT to unlock resources beyond its own funding base. A standout example is key partnerships. As one trustee noted: *"Through our relationship with Gold Fields, we secured R1.7 million from the World Gold Council to expand our GBV initiatives."* This reflects the Trust's ability to act as a catalyst, attracting co-investment to deliver greater value and reach.

Partnerships also played a vital role in strengthening the operational viability and sustainability of community-based organisations. One children's shelter, for instance, was supported to achieve compliance. A trustee explained: *"They were struggling to get compliance from the Department of Social Development, and through that compliance, they then qualified for the department's assistance."* This highlights how the SDCT not only funds, but also builds the institutional capacity of partners.

Emergency response efforts, particularly during the Covid-19 pandemic, further demonstrated the Trust's ability to coordinate with local municipalities to meet urgent needs. While food parcel distribution was broadly appreciated, it also revealed the challenges of managing community expectations in the context of scarcity. A municipality official noted: *"The goal of the food parcel distribution was met ... but some were not happy because they didn't get and felt the distribution process was unfair."*

At the municipal level, there was a strong call for deeper collaboration: One official said: *"We would appreciate similar and bigger partnerships with the Trust as we cannot meet service delivery needs on our own."* This points to the increasing importance of the Trust's role in augmenting overstretched public systems.

Long-standing relationships such as that with A Re Ageng further reinforced the value of consistent partnerships driven by values. A representative shared: *"Our relationship with South Deep has been our backbone. Despite some operational challenges, their ongoing support gives us the hope and capacity to continue doing meaningful work."* These enduring partnerships were credited with enabling programme continuity and supporting partner resilience.

The SDCT's ability to maintain partnerships even in volatile contexts was seen as a key achievement. As one trustee reflected: *"I think that's a huge key achievement, how we have managed our partnerships and maintained relations with them as well as maintained relations with the community."*

Although the value of partnerships is well recognised, there remains room for improvement. Some respondents raised concerns about limited joint planning, a lack of transparency during proposal revisions and inconsistent communication. Addressing these issues would allow the SDCT to deepen its partnership model, moving beyond transactional engagements to more strategic, co-owned relationships grounded in trust, clarity and shared goals.

iii. Programme quality

The evaluation revealed several interlinked dimensions that shape the overall quality of SDCT-supported community welfare programmes. While the programmes are widely regarded as impactful and client-centred, the findings highlight both enabling conditions and structural constraints that

influence long-term effectiveness. Figure 12 presents the key dimensions that influence programme quality, as reported by those involved in programme implementation and delivery.
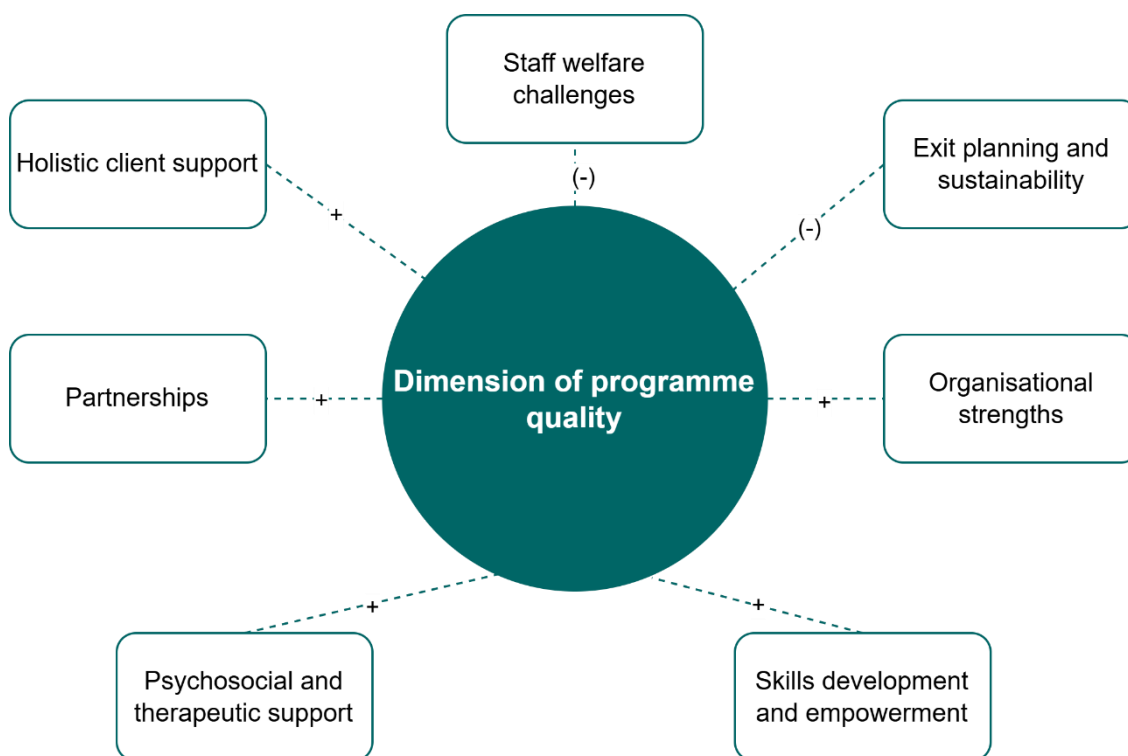

Figure 12: Dimensions of programme quality

Holistic client support was consistently highlighted as a key strength. Clients received individualised support based on detailed intake assessments and multidisciplinary teamwork. This personalised approach ensured that services were responsive to specific client needs and histories. As one social worker explained: *"They do an intake and check what each person needs, so everyone gets the right help."* This model of dignity-based care has helped build trust, improve outcomes and reinforce client empowerment throughout the recovery journey.

Psychosocial and therapeutic support also emerged as a critical dimension. Trauma-informed counselling and referrals to professional psychologists were seen as transformational by many beneficiaries. These services went beyond short-term crisis management, laying the foundation for longer-term emotional healing. One beneficiary reflected: *"I rediscovered my identity after years of abuse."* These deeply personal accounts underscore the emotional and psychological value of the therapeutic interventions supported by the Trust.

Skills development and empowerment was a key part of programming, with beneficiaries trained in basic business, craft and vocational skills. However, a recurring concern was the limited support offered beyond training. Beneficiaries reported a lack of equipment and an absence of structured pathways for applying their skills after programme completion. As one participant shared, *"We can do nails or baking, but we don't have enough tools or a halfway house."* This signals a missed opportunity to turn empowerment into tangible, sustainable livelihood outcomes.

The lack of robust **exit planning and sustainability** mechanisms was also noted as a constraint to long-term programme impact. Many beneficiaries expressed anxiety about reintegration, especially where home environments remained unsafe or unstable. One beneficiary asked: *"What happens when I go back to my perpetrator?"* This highlights the importance of structured transitional support – such as halfway houses, job placement services and ongoing psychosocial care – to ensure recovery continues after clients leave shelters.

Organisations demonstrated clear **organisational strengths**, particularly in team communication and culture. Some staff members were former clients, which fostered empathy and cohesion in service delivery. One social worker explained: *"We communicate daily on client progress, so we know who needs extra help."* This operational coordination was widely credited with improving responsiveness and deepening the quality of care.

However, **staff welfare challenges** emerged as a significant risk to programme sustainability. Burnout, low salaries and minimal benefits were commonly cited, raising concerns about morale and retention. A house mother said: *"We work so hard, but the funding is short, so we don't have job security."* A lack of investment in staff well-being and professional development could undermine the quality and continuity of services.

Improved partnerships were viewed as foundational to programme success. Stakeholders commended the SDCT's ability to build and maintain relationships with government departments, NGOs and community leaders, which helped anchor service delivery in local realities. One trustee noted: *"That has been the biggest achievement … The community was a little bit volatile, especially towards the Trust, but we managed to sort things out."* This reflects the evolution of trust-based collaboration and the catalytic role of partnerships in enabling long-term community impact.

Together, these dimensions provide a view of the conditions that underpin programme quality, highlighting what works well and where further investment is needed to ensure that interventions remain impactful, sustainable and grounded in client needs.

Key evaluation question 3 findings

i. **SDCT interventions were highly relevant** to the pressing needs of vulnerable groups, especially survivors of GBV and those affected by crises such as the Covid-19 pandemic.
ii. **Support to GBV survivors** through psychosocial counselling, shelter and life skills training was described as life-changing and restored dignity.
iii. **Gaps remain in structured exit and reintegration planning**, raising risks of relapse and limiting long-term impact.

5.3.4 Key evaluation question 4: How well are resources being used? To what extent is the relationship between inputs and outputs cost-effective and to expected standards? Do the outcomes or achievements of community welfare programmes represent value for money?

The evaluation of the SDCT's use of resources and value for money in its community welfare programming relied on qualitative insights from stakeholders to assess the efficiency and perceived returns on investment. The findings revealed a complex scenario in which targeted, high-impact interventions delivered meaningful short-term relief, yet structural and systems-related weaknesses constrained the ability to fully optimise resources for long-term value.

Stakeholders consistently praised the SDCT's role during the Covid-19 pandemic. The rapid mobilisation of food parcels, health supplies and psychosocial services was described as timely and lifesaving. As one local municipality official noted: *"The Trust worked with us to distribute the food parcels … The community was in serious need."* These emergency efforts, although temporary in nature, were seen as essential interventions that addressed urgent community needs.

Investments in infrastructure, such as water tanks, vegetable gardens and converted containers for shelter services, were also seen as highly effective and impactful. These modest capital inputs strengthened the dignity, safety and reach of community services. However, the implementation of such projects was not without challenges. For instance, one implementing partner lamented: *"We are not using the container donated because the municipality does not want to give us the land we agreed on."*

This highlights how inefficiencies in institutional coordination and follow-through can undermine the intended value of even well targeted inputs.

Despite the responsiveness of the SDCT's interventions, several systemic constraints were identified that undermined cost-effectiveness and long-term sustainability. Limited M&E systems reduced the Trust's ability to track outcomes, assess return on investment and adapt programming over time. Inadequate needs-based targeting also emerged as a challenge, with the absence of formalised assessments leading to perceived inequities in the distribution of resources. A local municipality official noted: *"The food parcels were not enough … some community members felt the distribution was unfair."* Additionally, gaps were reported in programme continuity, particularly in trauma recovery interventions where beneficiaries valued the initial support but struggled with reintegration because of a lack of transitional planning and follow-on services. One shelter client remarked: *"It's great for the moment … but we're left to fend for ourselves once it ends."*

Stakeholders highlighted several low-cost, high-impact adjustments that could improve operational efficiency and enhance overall client experience. The lack of dedicated transport for staff and beneficiaries was noted as a recurring challenge, often creating financial strain and affecting programme delivery timelines. A house mother shared: *"We often have to pay for our own taxis and lunch … It's difficult."* Similarly, beneficiaries who received vocational training expressed frustration at not being able to apply their newly acquired skills because of a lack of basic toolkits or micro-grants for small businesses. These practical enhancements, described by participants as "quick wins", were viewed as having strong potential to improve service quality and programme sustainability with minimal additional investment.

Feedback from stakeholders suggests community welfare programmes delivered highly relevant and impactful interventions, especially in times of crisis. However, structural inefficiencies such as weak M&E systems, limited needs-based targeting and under-resourced transition planning have constrained long-term value for money.

Key evaluation question 4 findings

  i. **Emergency interventions** during the Covid-19 pandemic were timely and life-saving, with the rapid mobilisation of food parcels, health supplies and psychosocial services.
  ii. **Modest infrastructure investments** (such as water tanks, vegetable gardens and converted containers) were seen as having high impact, and improving service dignity and access.
  iii. **Institutional coordination gaps** (such as land access issues) sometimes blocked the full use of resources.
  iv. **Poor programme continuity**, especially for trauma survivors, limited the sustainability of outcomes.
  v. **Lack of post-training enablers** such as toolkits or micro-grants limited beneficiaries' ability to apply vocational skills.
  vi. **Long-term value for money was undermined** by structural inefficiencies, including limited M&E systems, inconsistent targeting and weak follow-on support.

5.3.5 Key evaluation question 5: What are the lessons and recommendations for future programmes and implementation?

Several critical lessons emerged from the evaluation, each offering practical insight into how the SDCT can refine its strategic approach to enhance sustainability, impact and effectiveness.

i. Transitional support must be strengthened to be sustainable

Although SDCT-supported GBV interventions have provided essential psychosocial support and safe spaces for survivors, the evaluation revealed a critical gap in structured exit pathways. Many beneficiaries felt that once the immediate intervention ended, they were left vulnerable, often returning

to unsafe environments because of a lack of economic alternatives or transitional housing. As one beneficiary reflected: *"The programme offers good psychosocial support, but there seems to be a disconnect when it comes to follow-up … Once the intervention ends, we are not given a clear plan for continuing support."* To sustain impact and reduce the risk of revictimisation, future funding should prioritise implementing partners that integrate transitional mechanisms such as job placement, mentorship and halfway housing into GBV support models. This would ensure that survivors are equipped not only to heal, but also to rebuild their lives with safety and independence.

ii.   Emergency responses save lives but need structured follow-up

The SDCT's emergency relief efforts, such as the distribution of food parcels during the Covid-19 pandemic, were highly valued by communities and effectively addressed immediate needs. However, the evaluation also revealed the risks associated with unmet expectations and limited follow-through. As one municipal official noted: *"The goal of the food parcel distribution was met … but some were not happy because they didn't get food parcels and felt the distribution process was unfair."* Emergency interventions should be embedded within broader strategies that build community resilience. This includes pairing relief efforts with livelihood support, psychosocial services and clearer local communication and coordination mechanisms. These elements not only meet short-term needs, but also strengthen communities' capacity to withstand future shocks.

iii.   Skills training needs infrastructure support and market pathways

While SDCT-supported skills training programmes, particularly for GBV survivors, were recognised for building personal capacity and fostering empowerment, the absence of follow-through infrastructure and pathways limited their practical value. Most training was confined to a narrow set of activities such as nailcare and baking, with little diversification. Moreover, participants consistently cited a lack of tools, equipment and post-training platforms as major barriers to applying their new skills. As one beneficiary shared: *"We can do nails or baking, but we don't have enough tools or a halfway house."* To fully realise the potential of these interventions, the Trust should invest in expanding the scope of training and build strategic partnerships that facilitate access to workspaces, start-up kits and job placements. This would enable beneficiaries to transition from psychosocial support to sustainable economic participation.

iv.   Low-cost, high-impact improvements

Trustees and community members consistently pointed to small-scale operational enhancements as high-return opportunities for improving service delivery. Simple upgrades such as plastic chairs for clinic waiting areas, basic shade structures and modest transport support were seen as ways to restore dignity, improve access and reduce strain on vulnerable populations. As one trustee noted: *"Even low-cost plastic chairs and a shade would make a huge difference for the community, especially for the old people who wait in the sun or rain."* These "quick wins" require minimal investment but have substantial practical and symbolic value. Strategically branding such assets with the SDCT logo could also enhance visibility and the community's recognition of the Trust's role. Embedding these improvements into programme design demonstrates both responsiveness and long-term commitment.

v.   Extensive due diligence to align investments with partner capacity and context

The evaluation highlighted that operational challenges such as space constraints, unresolved land issues and weak transport logistics stemmed from gaps in due diligence during the early stages of project planning. These limitations affected programme efficiency and undermined the quality of service delivery, particularly in interventions supporting vulnerable groups. One implementing partner shared: *"We don't have proper transport to get to our wellness campaigns. Often, we have to pay our own money for taxis and lunch, which strains us and affects our commitment."* In another case, infrastructure intended to provide additional service space could not be used because of delays in securing access to land. These examples underscore the importance of assessing not only the relevance of a proposed intervention, but also the operational capacity and readiness of implementing partners. A more robust due diligence process covering site preparedness, infrastructure viability, logistical planning and organisational systems will enable the SDCT to make better and more aligned investments, reduce delays in implementation and ensure value for money.

The evaluation findings affirm the relevance and value of the SDCT's community welfare programming in addressing urgent needs and supporting vulnerable groups. However, to deepen and sustain this impact, the Trust must move beyond short-term relief towards more structured, long-term approaches. Strengthening transitional support, enhancing partner alignment, expanding infrastructure for skills development and embedding low-cost, high-impact improvements will ensure that investments yield enduring results. With these strategic adjustments, the SDCT is well positioned to evolve from a responsive grant-maker into a catalytic enabler of sustainable community development.

Key evaluation question 5 findings

iv. Although psychosocial support was valued, many **GBV survivors felt unprepared for reintegration** because of a lack of structured exit pathways such as job placement, mentorship or transitional housing.
v. The distribution of food parcels during the Covid-19 pandemic was impactful, but unmet expectations and limited follow-through highlighted the **need for clearer communication and resilience-building strategies alongside relief**.
vi. **Vocational training was empowering but narrowly focused** (such as on nails and baking), and without access to tools or workspaces, beneficiaries struggled to apply their skills or generate income.
vii. To **ensure sustainable development outcomes**, the SDCT must strengthen transitional support, improve partner alignment, diversify training programmes and institutionalise low-cost operational improvements.

5.3.6 Key evaluation question 6: Are the observed changes and outcomes sustainable? To what extent will the positive changes and results of the intervention continue in the long term?

The evaluation found that SDCT-supported interventions have generated meaningful short-term outcomes, particularly through psychosocial support, infrastructure investments and community partnerships. However, the long-term sustainability of these outcomes is uneven and hinges on several key factors.

Gaps in transitional support were repeatedly flagged as a barrier to sustaining impact. Although the SDCT has been effective in providing immediate care, especially in GBV and trauma recovery services, beneficiaries expressed concern about what happens when support ends. The lack of structured exit plans, such as job placement, mentorship and halfway housing, risks reversing any gains made during the intervention. As one beneficiary shared: *"The programme offers good psychosocial support, but there seems to be a disconnect when it comes to follow-up … Once the intervention ends, we are not given a clear plan for continuing support."*

The **economic sustainability of training efforts** was similarly constrained. Although vocational training was praised, its impact was limited by the lack of tools, infrastructure and market access to apply newly acquired skills. This gap left many beneficiaries unable to translate training into income-generating activity, as illustrated by a beneficiary's comment: *"We can do nails or baking, but we don't have enough tools or a halfway house."*

Organisational sustainability also came into question, particularly in relation to staff welfare. Burnout, limited job security and low pay were cited as threats to the continuity and quality of care. *"We work so hard, but the funding is short, so we don't have job security,"* noted a house mother. Addressing staff well-being is essential to retain experienced personnel and sustain programme integrity over time.

Although the interventions are valued and have made meaningful contributions to individual and community well-being, their long-term continuation and impact are uncertain. Without deliberate investment in transition planning, resource alignment and structural support, there are serious limitations to the sustainability of the SDCT's community welfare programming.

Key evaluation question 6 findings

   i.   Although the SDCT's interventions have delivered meaningful short-term outcomes, their **continuation beyond the life of the support is not assured**.

  ii.   An **absence of transitional mechanisms** such as job placement, mentorship and halfway housing risks reversing progress for vulnerable beneficiaries, especially GBV survivors.

  iii. **Burnout, job insecurity and low pay among frontline workers** were cited as major risks to maintaining service quality and continuity.

  iv. Without targeted investments in transitional planning, infrastructure and partner capacity, the long-term **sustainability of the SDCT's community welfare programmes remains limited**.

5.3.7 Community welfare: Case study 1

Jennifer's journey of triumph

Sex: Female
Intervention/partner name: A Re Ageng Social Services
Community of residence: Randfontein, Westonaria

A Re Ageng Social Services: A beacon of hope and support

Jennifer endured 25 years of physical, psychological and emotional abuse in her marriage. Her ordeal reached a critical point when she was shot and hospitalised, ultimately compelling her to leave her home in East London for Johannesburg.

After a period in a preliminary shelter, Jennifer was transferred to A Re Ageng shelter, where she and her children received comprehensive support. The intake process, coupled with structured psychosocial counselling and therapeutic interventions, played a pivotal role in her recovery. Initially struggling with profound self-esteem issues and a sense of worthlessness, she gradually reclaimed her identity through intensive counselling and skills training. Today, Jennifer is employed as a shelter manager. Her story is a testament to the transformative power of holistic support, demonstrating how targeted interventions can break cycles of abuse. She now serves as an inspiring role model, showing fellow survivors that recovery and self-reliance are achievable through the programme.

Despite her remarkable recovery, Jennifer lives with a constant reminder of her past, a bullet lodged in her head from that fateful ordeal, often causing severe headaches. She sheds tears whenever she reflects on her experiences, but she remains grateful for the support from A Re Ageng. Her story emphasises the harsh realities she overcame. Now, opening a new chapter, she focuses on the future, driven by gratitude and a commitment to help others in similar situations.

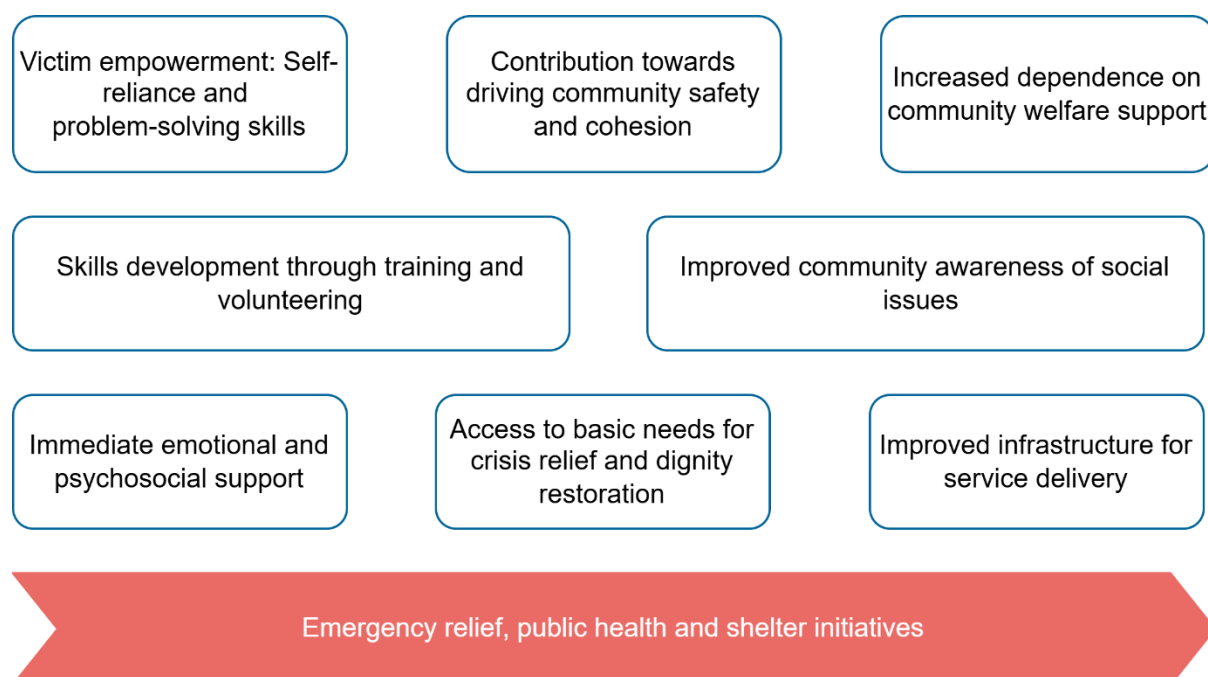## 5.3.8 Community welfare: Emerging outcomes

Figure 13: Community welfare: Emerging outcomes

5.4 Enterprise development: Results and reflections

Enterprise development is considered one of the strategic roadmaps to overcoming South Africa's triple burden of poverty, inequality and high unemployment. Enterprise development empowers entrepreneurs to develop, scale and improve their businesses by tackling key barriers to success through measures such as facilitating access to markets, sourcing technical assistance and building value chains. Resilient enterprises stimulate the local economy and bring about positive social change in both the businesses and communities in which they operate. The SDCT has been supporting key enterprise development projects in the Rand West City since 2012. The following table provides an overview of these projects, including their reach – approximately **8 611 people**. The Trust's total investment in this focus area was just more than **R17 million** over the period under evaluation.

Table 22: Enterprise development overview

Project	Project reach and outputs	Total spend
Training and job creation	**Approximately 1 611 beneficiaries reached**	**R 16 832 882**
Seriti Institute and AfriGrow	Contribution towards the development of **11** cooperatives and **201** short-term jobs	R4 185 038
Philani Cooperative Development	**300** people were trained and **22** people started/ established cooperatives	R3 858 000
Phakamani Capital	More than **200** people gained access to credit to start and sustain their businesses, creating **88** new jobs	R2 857 180

82

Lima Rural Development Foundation NPC Enterprise	A smallholder support programme that trained about **800** farmers	R5 932 664
Infrastructure development	**Approximately 7 000 beneficiaries reached**	**R1 060 340**
SMME Hub	A space for the community and existing small businesses to access a range of services, reaching an estimated 7 000 people since inception	R1 060 340
Total spend	**8 611 and 11 cooperatives**	**R17 893 222**

5.4.1 Key evaluation question 1: To what extent are the programmes achieving intended outcomes in the short, medium and long term?

A number of initiatives were implemented as part of the enterprise development focus area designed to enhance business skills, provide essential services and improve agricultural productivity. These efforts are reflected in the number of positive testimonials and outcomes reported by beneficiaries, implementing partners and trustees. Figure 14 illustrates emerging outcomes from the engagements with programme beneficiaries and implementing partner representatives.
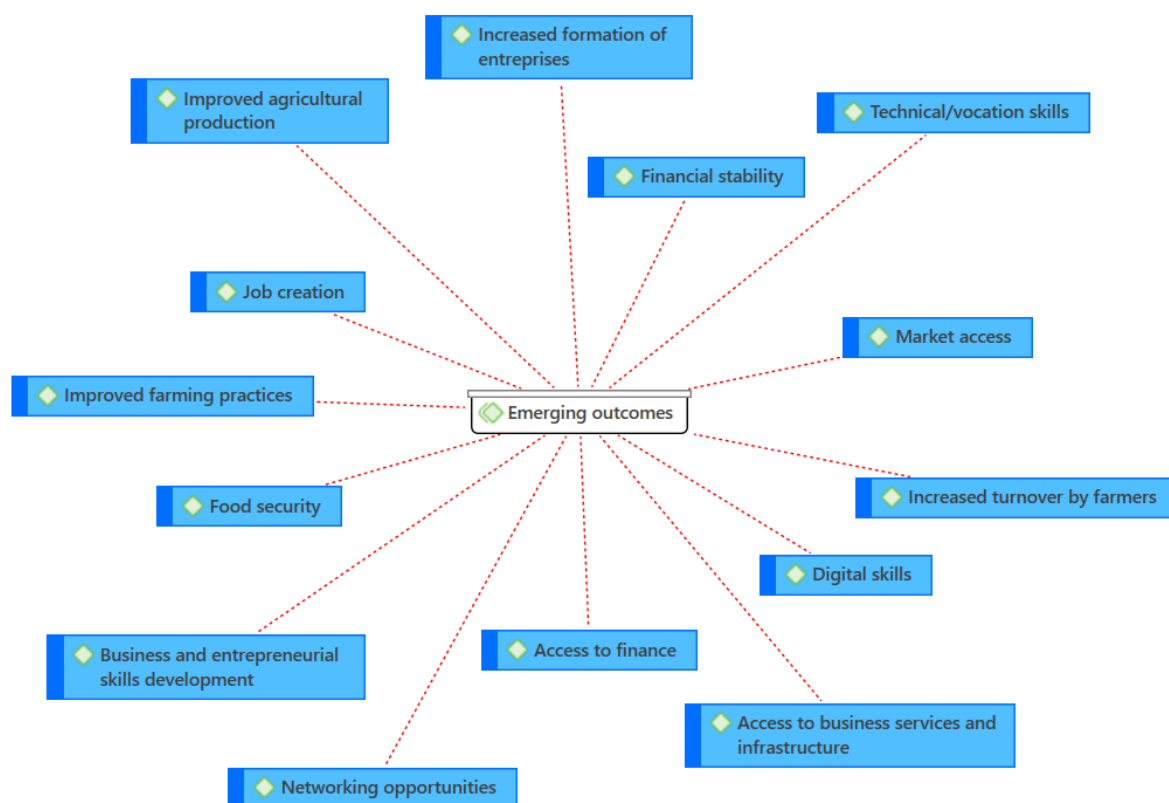

Figure 14: Enterprise development: Emerging outcomes

Business and entrepreneurial skills development

Business and entrepreneurial skills development initiatives have significantly enhanced the capabilities of participants, effectively contributing to their professional and personal growth.

Beneficiaries from the Philani programme articulated substantial gains from these programmes, with one saying: *"I got skills in business, computers [and] marketing, and I am really grateful."*

Further enriching this narrative, another beneficiary shared how Philani's comprehensive training approach, which includes aspects such as agriculture and business registration, not only improved their skills, but also empowered them to influence others positively in their community. The training provided at the SMME Hub, which equips local businesses with essential financial literacy and business development and management support, underscores the commitment to strengthening the economic fabric of the community. Additionally, participants gained market access through enhanced marketing skills and strategies, as evidenced by one beneficiary's experience: *"[The] SD[C]T taught us marketing and, as a result, we provided fruit to local retailers – Pick n Pay, Spar and others."*

Moreover, the integration of business management training with agricultural skills, as highlighted by Lima, enhances financial management, record-keeping and market access – key components for sustainable business growth. *"Farmers could train in multiple modules. Many took business management training alongside agricultural training. This helped them improve financial management, record-keeping and market access."* – Lima representative

These foundational skills are crucial for any entrepreneurial endeavour and are vital for the sustainable growth of local businesses.

i. Technical/Vocational skills

The provision of **technical or vocational skills** showed substantial impact in fostering economic self-sufficiency and empowering communities. Training in different areas such as sewing, bed-making, plumbing and agriculture has not only increased individual skill sets, but also significantly contributed to income generation and local economic development. For example, a Philani beneficiary shared her transformative experience: *"I came in to visit and saw how they make beds and I started attending classes to learn how to make beds from start to finish. I also got skills in sewing. I have sewing equipment and am using it for bed manufacturing."* This kind of training enables participants to create and sustain their own businesses. An example of this is Dorcus Legacy Enterprise, where skills in sewing have been extended to other community members, particularly those living with disabilities, fostering inclusivity and providing viable economic opportunities. Another beneficiary expressed how the skills training provided a lifeline: *"After I got retrenched as a truck driver at 50 years, someone referred me to Philani for skills training in plumbing. From there, I started my own plumbing business."*

These testimonials underscore the important role of technical or vocational training in building a resilient community in which individuals are equipped to innovate, contribute to the local economy and uplift others by sharing their newfound skills. Additionally, the provision of **computer and digital skills** have prepared participants for the demands of the modern digital economy.

Figure 15 illustrates a broad spectrum of skills development, from agricultural to digital literacy, empowering participants for diverse economic roles and fostering comprehensive community upliftment.
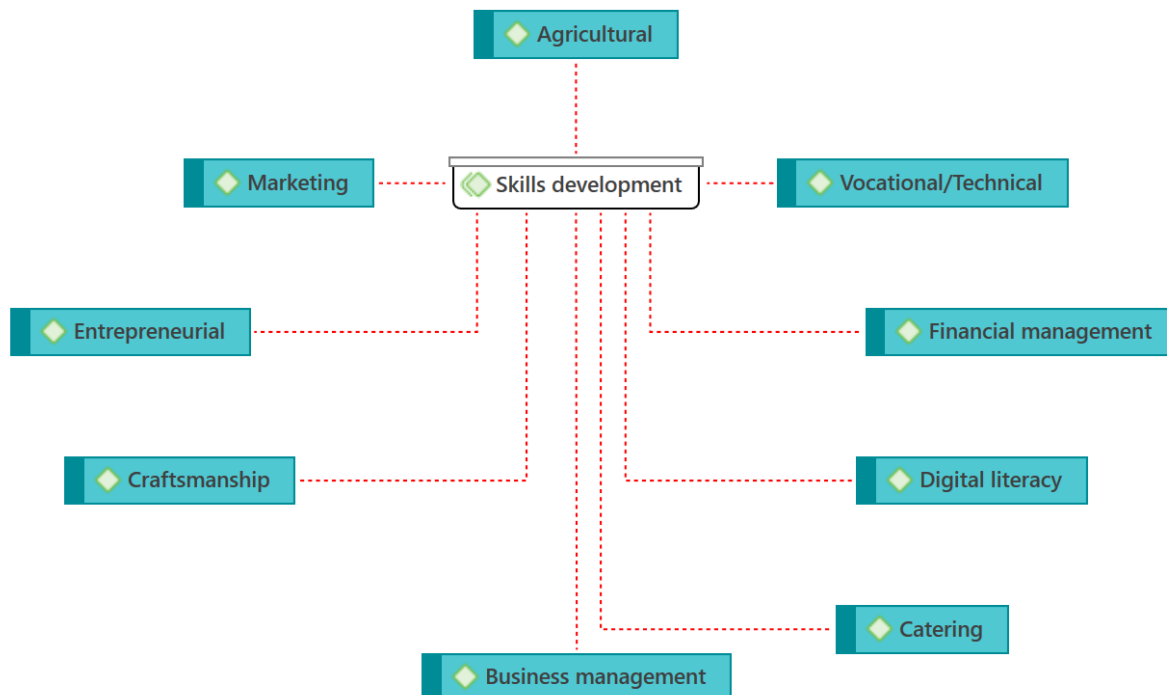
Figure 15: Diverse skills development areas

ii. Access to essential business services and infrastructure

Access to essential business services and infrastructure, such as co-working spaces and virtual offices provided by the SMME Hub, has been instrumental in enabling local businesses to professionalise and expand their operations. As detailed by the hub representative: *"Today, the hub provides digital services, co-working spaces and virtual office packages. It also offers rental offices for SMMEs, training sessions and community support services."*

This infrastructure is vital for SMMEs, which might otherwise struggle to afford such facilities. The support has been pivotal in fostering business growth, exemplified by the success of Waste Care Solutions, an enterprise that emerged from workshops offered at the hub and now runs successful waste management projects.

iii. Improved agricultural production and farming practices

There have been significant improvements in **agricultural efficiency and economic viability**, as evidenced during stakeholder interviews. As reported by Lima representatives, there have been notable improvements in farming practices, increases in yields and the expansion of cultivated land, coupled with enhanced capabilities in business planning and financial management. These improvements have led to substantial financial gains, with a notable increase in turnover to **R9.5 million** across three sites (Nongoma, Vryheid and Lephalale) and an increase in average farmer incomes from **R32 000** to **R71 000** per year. However, challenges such as the lack of land ownership continue to impede potential investment and support, as highlighted by a Philani beneficiary who mentioned difficulty in securing land in spite of the impressive results showcased to investors. Despite these obstacles, the SDCT's provision of equipment and starter packs has been crucial in mitigating some of these barriers.

iv. Increased formation of enterprises

Interviews with various stakeholders showed the **increased formation of enterprises**. Beneficiaries have successfully leveraged the skills and resources provided to establish and sustain various forms of

enterprises, particularly cooperatives. For example, participants highlighted the practical support they received:

"They gave us starter packs, which helped us start our co-ops [and] was very helpful." – Philani beneficiary

"I thought this was just another [form of] training, but Philani helped me register as a cooperative and I got my certificates and started doing work in the community such as installing toilets and pipes, and made money." – Philani beneficiary

"We attended training offered by Philani and they helped us to establish cooperatives. The trainings were also about how to start cooperatives, how to fill in forms and do the paperwork to apply for our cooperatives. This ensured that we receive certificates from CIPC [the Companies and Intellectual Properties Commission]." – Philani beneficiary

Starter packs enabled new entrepreneurs to overcome initial barriers to starting a business. Alongside these packs, targeted training imparted essential knowledge and practical support, enabling participants to establish their enterprises with the necessary registration documentation and legal recognition required to operate. Additionally, tailored training in business management, computer skills and marketing empowered participants to operate and grow their businesses effectively. This approach not only facilitated the direct establishment of new enterprises, but also ensured their sustainability through enhanced capabilities and access to markets.

v. Other outcomes

Though there have been some challenges, various development programme initiatives have significantly bolstered community resilience.

Networking opportunities have been immensely beneficial. Participants have enjoyed the chance to meet like-minded individuals, fostering a network that supports personal and professional growth.

Financial sustainability has been notably advanced through initiatives such as Africa Resilience Investment Accelerator which transitioned from grant dependence to generating its own revenue through social work services. This shift is crucial for long-term sustainability and decreases reliance on unpredictable funding sources. Similarly, **access to finance** through mechanisms such as revolving credit has supported agricultural and business endeavours, providing essential capital for production and expansion. However, this support system has faced setbacks such as in the case highlighted by a representative of the Phakamani Group, where a poor loan recovery rate as a result of the involvement of SDCT trustees marked a significant reputational and financial blow – an unintended outcome detailed under key evaluation question 2.

The creation of **job opportunities** has had positive impact, stimulating both direct and indirect employment across various sectors through the development of supply chains and support services. This has been vital in enhancing economic health. Parallel to this, the emphasis on **computer and other digital skills** has prepared participants for the demands of the modern economy.

Initiatives in **food security for vulnerable people** have effectively increased local food production, which has been critical in ensuring sustenance. The direct application of agricultural training in community gardens demonstrates a practical approach to skill application, which one beneficiary illustrated with her involvement in a soup kitchen that uses locally grown crops. This initiative not only addresses immediate nutritional needs, but also strengthens community bonds and supports efforts towards economic stability through enhanced food security.

Key evaluation question 1 findings

  i. Diverse training programmes in areas such as sewing, plumbing and agriculture have **empowered individuals to create and sustain businesses**, fostering economic self-sufficiency and community empowerment.

  ii. **Participants have used their new skills and resources** to establish new enterprises, particularly cooperatives. The provision of starter packs and targeted training and business support has helped participants overcome initial barriers to business creation and legally formalise their businesses.

  iii. **Access to essential business services and infrastructure** such as co-working spaces, virtual offices and rental offices at the SMME Hub has been crucial. This infrastructure has enabled local businesses to professionalise and expand their operations, supporting SMMEs that might otherwise struggle to afford such facilities.

  iv. Training and support have led to **improved farming practices, increased yields and more cultivated land**. However, the lack of land ownership has been a significant impediment, preventing potential investment and the full use of agricultural capabilities.

  v. There were significant **setbacks in loan recovery rates** attributed to misinformation by community trustees, highlighting the critical need for clear communication and proper governance in financial dealings.

5.4.2 Key evaluation question 2: What, if any, are the unintended or undesirable outcomes?

Several key challenges inadvertently affected the initiatives' overall effectiveness.

One significant unintended outcome was the **misunderstanding around the nature of the services provided at the entrepreneurship hubs**. As the hub representative noted: *"Some community members misunderstood the hub's purpose, assuming all services were free. However, those actively using it have benefitted significantly."* This misunderstanding could limit the hub's intended reach and effectiveness, as it could deter serious entrepreneurs who are willing to invest in the services offered.

Another major issue was the mismanagement and misuse of allocated funds, particularly evident in the experience shared by the Phakamani Group, which reported a disastrously low loan recovery rate from a R2 million fund aimed at supporting local businesses. An implementation partner shared: *"Unfortunately, the loan recovery rate was only 16%, meaning 84% of the funds were never repaid. This issue was compounded by misinformation spread by some community trustees, who misled beneficiaries into believing that the loans were non-repayable community grants from Gold Fields. This not only led to widespread non-repayment, but also resulted in the termination of the programme, marking it as a complete failure and a reputational disaster."*

Moreover, natural disasters, specifically drought and logistical challenges, also presented unintended outcomes, such as in Nongoma, where there was *"overwhelming demand, with 1 500 farmers needing support but with only one facilitator per 800 farmers"* (according to an implementing partner) created a bottleneck that limited the effectiveness of the support. Additionally, external factors such as drought conditions in Lephalale exacerbated these challenges, leading many farmers to abandon their agricultural pursuits despite initial enthusiasm and commitment.

These examples illustrate the complex interplay of programme design, community perceptions and external factors that can lead to unintended negative outcomes. Addressing these issues requires clear communication, proper planning and robust management to ensure that future initiatives can mitigate these risks and achieve their intended positive impacts.

Key evaluation question 2 findings

  i.   There was a significant **misunderstanding about the nature of services** provided at the entrepreneurship hubs, leading some community members to assume all services were free, which could deter serious entrepreneurs from using these facilities effectively.

  ii.   The Phakamani Group reported a **disastrously low loan recovery rate of 16%** from a R2 million fund intended for local businesses. Misinformation spread by some community trustees led beneficiaries to believe these funds did not need to be repaid, contributing to widespread non-repayment and the eventual termination of the programme.

  iii. **Drought conditions** in Lephalale compounded the logistical challenges, leading many farmers to quit their agricultural endeavours despite initial commitment, illustrating how external environmental factors can critically affect programme success.

5.4.3 Key evaluation question 3: How relevant are the programmes? How valuable are the partnerships? What is the quality of the programmes?

i. How relevant are the programmes?

The Trust partnered with six implementing partners over the 10-year period to provide enterprise development services in communities. Two implementing partners participated in the survey.

The relevance of enterprise development programmes is highlighted by the tangible social impact they have had on beneficiaries, particularly those typically marginalised in traditional employment sectors. For instance, a participant from the Philani programme, who lives with a disability, found a profound sense of purpose and opportunity in sewing and subsequently aimed to empower others with disabilities by teaching them vocational skills. This initiative underscores the programme's relevance as it addresses specific community needs by providing skills training that enhances both individual livelihoods and communal inclusivity. The participant expressed: *"I felt alive when I was doing sewing as it was something that I love. I wanted to start an NPO to train [others] and take opportunities to them as opposed to them going about looking for opportunities and [being] taken for granted as they sit at home after completing their studies."*

Further demonstrating the programmes' alignment with community needs, another beneficiary detailed her experience with an incubation programme led by the NPO Faded Black Innovations, which facilitated business registration and provided valuable workshops: *"They helped us register our businesses. They helped us get more info about NPO and NPCs ... I got the chance to grow as a businesswoman."* This feedback highlights the programme's effectiveness in fostering entrepreneurial skills and supporting business acumen among community members.

Additionally, the **establishment of the business hub to support economic development** has played a critical role in meeting the community's evolving needs. Initially conceptualised during early community engagements, the hub was tailored to support meetings, workshops and courses for entrepreneurs and NPOs. Over time, it adapted to the community's growing demands, evolving into a co-working space that now provides digital services, virtual office packages and rental office spaces for SMMEs, entrepreneurs and NPOs. A hub representative noted: *"The hub provides digital services, co-working spaces and virtual office packages. It also offers rental offices for SMMEs, training sessions and community support services."* The hub's establishment showcases a strategic approach to capacity building within the community. The hub provides essential services such as financial literacy, budgeting help and guidance on tender applications, directly addressing major capability gaps that often hinder

local entrepreneurs. As one trustee mentioned: *"This initiative addresses the challenge of local businesses struggling to secure procurement opportunities due to capability gaps."*

These programmes exemplify a keen responsiveness to the specific needs and aspirations of the community, making them very relevant. They not only foster economic empowerment and inclusivity, but also adapt to changing demands, ensuring that the support remains aligned with what the beneficiaries need to thrive in a dynamic environment.

ii. How valuable are the partnerships?

The partnerships forged in various enterprise development initiatives have proved to be invaluable for enhancing scope and impact in communities. A compelling example of the strategic value of these partnerships is illustrated by the evolution of the community hub into a co-working space, which adapted to meet the community's changing needs. A hub representative detailed how the hub's transition was supported by significant contributions from external partners: *"The Trust collaborated with SoftTech mine, which contributed R2 million toward renovations."* This partnership not only facilitated necessary physical upgrades, but also helped reposition the hub as self-sustaining, reducing its reliance on Trust funding over time.

Moreover, the hub's strategy includes a proactive approach to securing external funding to ensure its ongoing operation, with the representative mentioning: *"The Trust will subsidise the hub for three years while exploring external funding."* This involves engaging with entities such as the Jobs Fund, demonstrating a clear strategy to leverage partnerships for financial sustainability and extended programme reach for maximum impact.

Partnerships in the agricultural sector present another nuance in terms of value through Lima's engagement with the Trust as part of a broader initiative to support farmers across multiple municipalities. Lima's approach to securing co-funding, which was a requirement for the Jobs Fund, highlights how strategic partnerships can amplify the impact of agricultural support programmes. The inclusion of the SDCT in co-funding sites in Nongoma, Vryheid and Lephalale as part of a larger national programme exemplifies how collaborative efforts can extend resource allocation and enhance programme delivery across a wider geographic area.

These examples underline the strategic importance of partnerships in extending the reach and enhancing the sustainability of community development initiatives. Such partnerships are crucial for pooling resources, sharing expertise and distributing the financial burden, which collectively contribute to the long-term success and sustainability of programmes.

iii. What is the quality of the programmes?

The quality of the interventions, as reflected by quotes from beneficiaries and trustees, underscores a high level of execution and participant support, essential for fostering substantial personal and professional development. Key aspects of this quality include the following dimensions:
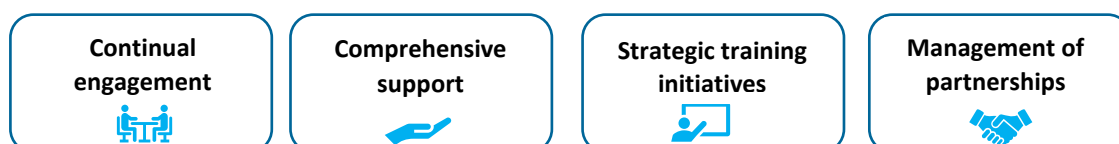
Continual engagement	Comprehensive support	Strategic training initiatives	Management of partnerships

Figure 16: Programmatic quality dimensions

The commitment to **maintaining engagement with beneficiaries** is particularly notable. As one Philani beneficiary pointed out: *"Philani's consistency in terms of follow-ups and check-ins such as group calls, workshops and Zoom meetings, keeps us going."* This ongoing interaction is a key enabler of success and is crucial for sustaining enthusiasm and involvement, ensuring that benefits from the interventions are continually reinforced.

Accessibility and support from facilitators further enhance the quality of interventions. Beneficiaries appreciated the open communication and availability of programme managers. A Philani programme manager was commended for being *"accessible and one can talk to her as needed".* This ensured participants were guided in navigating their developmental journeys effectively.

Structured management and reporting processes, especially in projects such as Lima, highlight the organisational quality of the interventions. One trustee explained the operational details: *"We … appointed Lima to become the project lead and to provide us and the Jobs Fund with reports of … how the project is going, what are the achievements, what are the milestones."*

However, challenges in partnership dynamics, particularly with entities such as Sibanye, reveal that although most partnerships have been successful, some have been problematic. A trustee expressed this challenge: *"We don't have strong relationships with them to influence some of the processes to be quick. But with Gold Fields, it's easy because I can go and speak to Benford. We sit on the same board."*

Key evaluation question 3 findings

   i.   The programmes are very relevant to the community's needs, addressing economic empowerment and providing vocational training that **enhances livelihoods**. For example, a beneficiary living with a disability described how training in sewing not only revitalised his personal sense of purpose, but also empowered him to teach others, enhancing community inclusivity.
   ii. **Partnerships have been instrumental** in extending the reach and enhancing the sustainability of the initiatives. The collaboration with SoftTech mine, which provided significant funding for hub renovations, is a prime example of how partnerships can amplify impact and foster programme sustainability. Similarly, strategic engagement with entities such as the Jobs Fund demonstrates proactive efforts to secure external funding and ensure the hub's long-term viability.
   iii. The quality of the programmes is evident through enablers of success, particularly **continual participant engagement, the accessibility of facilitators and strategic economic support**. Beneficiaries value consistent follow-ups, workshops and the accessibility of programme managers, which ensure ongoing support and effective communication. The establishment of the business hub, which provides crucial services such as financial literacy and guidance on tender applications, also highlights the programme's quality, directly addressing capability gaps and supporting local entrepreneurs.

5.4.4 Key evaluation question 4: How well are resources being used? To what extent is the relationship between inputs and outputs cost-effective and to expected standards? Do the outcomes or achievements of enterprise development programmes represent value for money?

The key evaluation question on resource allocation was explored through qualitative interviews as available programme data did not have expenditure data for grants disbursed or programme budgets, which hindered the evaluators' ability to analyse cost-effectiveness and value for money comprehensively. Results from the analysis revealed that the Phakamani Group misused funds as beneficiaries misunderstood the nature of the loans as grants, a misconception propagated by community trustees. This led to a disastrously low loan recovery rate, significantly undermining the programme's financial sustainability. The group reported: *"Unfortunately, the loan recovery rate was only 16%, meaning 84% of the funds were never repaid."* This situation was exacerbated by trustees misleading entrepreneurs into thinking they did not need to repay because the money was considered *"community money"* from Gold Fields, leading to widespread non-repayment and the eventual termination of the programme.

Contrasting these challenges with other initiatives that achieved a 95% loan recovery rate, as mentioned by the Phakamani Group, underlines the potential for high efficiency under proper management. The

group explained: *"This was a reputational disaster for us. We have a 95% loan recovery rate on nearly R1 billion in other mining communities, but in this case, it was a complete failure."*

Additionally, a trustee raised the issue of legacy commitments. The trustee critiqued past programme engagements for not providing sufficient value for money and merely serving to *"tick the boxes"* of trust expenditure. This highlights a disconnect between past and present programme objectives and the need for alignment to ensure resources are used effectively.

One Seriti beneficiary pointed out a significant issue with the stipend approach in the programme design, advocating a more investment-driven model to enhance sustainability and participant commitment. She suggested: *"Stipends should not be paid before the group is trained on the work and … expectations [should be] managed. Money should be paid through the sale of crops and not stipends."* By linking payment directly to the sale of crops rather than upfront stipends, participants would be encouraged to be more actively involved and invested in the process. This shift could lead to increased productivity and commitment, as beneficiaries would directly benefit from their efforts, potentially enhancing the programme's overall cost-effectiveness and impact.

The evidence suggests that although there are substantial benefits from the interventions, significant improvements in governance, communication and financial management and reporting are essential to achieving the intended cost-effective outcomes and ensuring the sustainability of these initiatives.

Key evaluation question 4 findings

v. A major issue was the misuse of funds because **beneficiaries misunderstood the nature of loans as grants**, influenced by misinformation from community trustees. This led to a loan recovery rate of just 16%, significantly undermining the financial sustainability of programmes.

vi. A Seriti beneficiary advocated a **revision in the stipend payment strategy** to enhance sustainability and ensure participants are more invested in the outcomes.

vii. The findings suggest that although the interventions have benefits, achieving cost-effective outcomes and ensuring programme sustainability require **significant improvements in governance, communication and financial management**. A more detailed analysis, particularly with nuanced data from partners, is necessary to accurately assess cost-effectiveness and refine strategies to maximise the use of resources.

5.4.5 Key evaluation question 5: What are the lessons and recommendations for future programmes and implementation?

The lessons and recommendations derived from the various enterprise development interventions funded by the SDCT revealed significant insights for future improvements. Stakeholders identified several areas of focus, including the necessity for **enhanced community engagement** to ensure services are tailored to actual needs, which might involve more profound interactions with community groups, schools and job seekers. The need to address and rectify common **misconceptions about cooperatives** was also highlighted, emphasising the hard work required for success and dispelling myths about immediate profitability that community members expect when joining cooperatives.

Continual support and follow-ups were pointed out as crucial for maintaining participant engagement and ensuring the long-term impact of programmes. Additionally, stakeholders recognised the importance of reaching out to young people with innovative methods, possibly through social media, to better engage them in developmental activities.

A critical observation involved the establishment of **clear and realistic key performance indicators** at programme inception to ensure goals are achievable and measurable. **Governance and oversight** also emerged as a significant theme, with recommendations to minimise the role of community representatives in decision-making processes to avoid conflicts of interest and ensure programmes are

not manipulated for personal gain. These key lessons and recommendations are depicted in the following table.

Table 23: Summary of key lessons and recommendations from enterprise development stakeholder feedback

Theme	Respondent	Sample quote
Enhanced community engagement	*Hub representative*	*More meaningful engagement [is required] with community groups, schools and job seekers. This will help tailor services to real needs. Additionally, integrating training programmes and partnerships will ensure long-term impact.*
Misconceptions about cooperatives	*Beneficiary*	*There is a myth that is killing cooperatives that I think we need to correct – that is there is money from the word go. People need to understand that running a company is not easy and we will eventually make money if we work hard.*
Continual support and follow-ups	*Beneficiary*	*We would like to have more follow-ups. It would be great to have more sessions like this one, including to see how we are doing.*
Innovative outreach to youth	*Beneficiary*	*Youth really need to be found. We need to find innovative ideas to reach the youth, including using social media. We must create platforms to find the youth and get their ideas and innovations on how to improve their living conditions and empower them.*
Clear and realistic key performance indicators	*Implementing partner*	*I think clear key performance indicators at the beginning are crucial. Funders should spend time at the start establishing an M&E framework that sets realistic, achievable targets.*
Governance and oversight improvements	*Implementing partner*	*We learned the hard way never to allow community representatives on an investment committee again. They became gatekeepers and prioritised their own interests. Community involvement should be minimal.*

Key evaluation question 5 findings

i. It is crucial to **engage more deeply with community groups, schools and job seekers** to ensure that services offered at the hub are effectively tailored to meet real needs. This approach will help to enhance the long-term impact of training programmes and partnerships, as emphasised by the hub representative.

ii. **Addressing common misconceptions about cooperatives is vital**. A beneficiary pointed out the need to correct the myth that cooperatives are immediately profitable, highlighting the importance of educating community members about the realities of running a business and the hard work required for success.

iii. There is a significant **need for ongoing support and follow-ups** with programme participants to maintain engagement and ensure the sustainability of programme impact. Beneficiaries expressed a desire for more frequent interactions and assessments, which would help keep the momentum of the programmes and provide continual support for their development.

5.4.6 Key evaluation question 6: Are the observed changes and outcomes sustainable? To what extent will the positive changes and results of the intervention continue in the long term?

To understand the sustainability dimensions of the observed outcomes, this analysis examines factors identified by various stakeholders as fostering sustainability, elements that require strengthening to enhance sustainability and potential challenges that could affect it in the long term. The figure below provides an overview of these dimensions based on data collected from stakeholders.
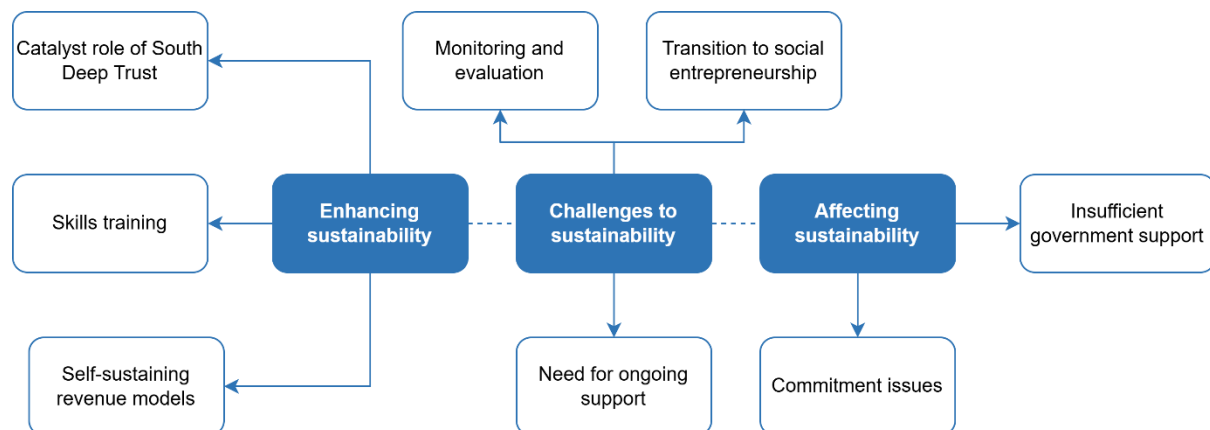

Figure 17: Sustainability factors in enterprise development interventions

The following table provides a structured overview of key factors that facilitate, challenge and affect the sustainability of enterprise development initiatives, reflecting a wide range of perspectives from beneficiaries, trustees, implementing partners and hub representatives. The analysis underscores the importance of continual skills training, which empowers beneficiaries to improve their livelihoods and positively contribute to their communities, creating a sustainable cycle of learning and earning. The Trust's catalyst role is crucial for facilitating connections and opening doors to further opportunities, establishing a sustainable foundation for growth and development. Self-sustaining revenue models, particularly evident in initiatives such as the SMME Hub, demonstrate a model for financial sustainability independent of external funding.

Threats to sustainability, such as the need for ongoing support and effective M&E, highlight the importance of sustained engagement and rigorous assessment to ensure long-term success. Transitioning projects into social entrepreneurship ventures is seen as a means to enhance financial and operational sustainability, reducing dependency on grants or initial seed funding.

A lack of commitment among beneficiaries and insufficient government support are identified as significant factors that could negatively affect sustainability. These elements underline the necessity for clear communication, the setting of realistic expectations and enhanced government involvement and buy-in to support the sustained impact of programmes. These insights, drawn from the discussions and feedback of various stakeholders, are critical for refining strategies to ensure that future initiatives are not only effective in achieving immediate goals, but are also robust enough to endure and thrive in the long term.

Table 24: Overview of sustainability factors in enterprise development initiatives

Theme	Respondent	Sample quote
Skills training	Beneficiary	The [SDCT] has helped us grow by giving us knowledge and skills that we have also been able to teach to others. These skills are also helping us to make money and have a better life for ourselves and our families and help the community.
Catalytic role of the South Deep Trust	Trustee	We also recognised our role as catalysts for change, collaborating with partners and enhancing existing programmes rather than acting as sole funders.
Self-sustaining revenue models	Hub representative	We benchmarked pricing against other co-working spaces and adjusted for affordability. Offices rent for R2 000/month, co-working desks for R1 000/month. These rates include utilities and services. The goal is self-sufficiency within three years, as the Trust [funding] will conclude in 2030.
Need for ongoing support	Beneficiary	There is also need for ongoing support and mentorship to help us to continue.
M&E	Trustee	Enhanced M&E processes are critical to understanding the effectiveness of projects and ensuring they meet their intended goals, thereby supporting sustained impact.
Transition to social entrepreneurship	Trustee	What we have done is, let's say, for a project, we will fund a project for three years, then during the funding period, our project manager would investigate ways in which that project could get into what they call 'social entrepreneurship'.
Commitment issues	Beneficiary	Initially, the cooperatives' work was really good but now it is a challenge as people want to get out of the co-ops and we are experiencing a loss and the project is not as helpful as we need to pay people or they insist and want a share from work they were not doing, which is causing fights.
Insufficient government support	Implementing partner	The programme requires continual external funding, as the Department of Agriculture lacks sufficient support structures in these areas. However, the long-term impact on farmer resilience and business sustainability is clear.

Key evaluation question 6 findings

i. The outcomes observed are sustainable in that the **skills obtained will continue to help beneficiaries** in the long term. Cooperatives require a lot of support to ensure sustainability.
ii. **Ongoing skills development is vital** for enhancing individual capabilities and community well-being, fostering a sustainable cycle of learning and earning.
iii. The Trust significantly **contributes to sustainability by facilitating essential connections and opening doors** for further opportunities, which supports the growth and development of beneficiaries.
iv. **Continual support and mentorship are crucial** to ensure the initiatives' long-term success and help beneficiaries maintain their trajectory of growth.
v. **Enhanced M&E processes are vital** for assessing the effectiveness of projects, ensuring they meet their goals and providing necessary adjustments to maintain their impact over time.

5.4.7 Enterprise development: Case study 1

Sex: Elderly female
Intervention/partner name: Philani Enterprise Development
Community of residence: Waterpan, Westonaria

My enterprise is called Mizamo Yethu Cooperatives and we do gardening. I first learnt about Philani in 2017. I was doing gardening in my yard and one of the local farmers was looking for a valve for their farm and saw that I was doing gardening and said I must go to Philani to learn and attend their training on agriculture. After I took my pension and poverty was rife in the community and I felt I still had energy and wanted to do something with my time and I got into farming. I decided to look for

Empowerment through agriculture: A local farmer proudly shows her harvest

land and luckily I found a piece of land through a white man who needed a water valve for his farm and saw that we were hard working and wanted to do farming. He had a heart for community development and gave us his land so we could do something good for ourselves and the community. He wanted the land to be used to benefit people and the community in the long term.

I attended training where they taught us about how to start cooperatives and they helped us with the paperwork to register with CIPC. After training, they gave us a starter pack with farming equipment including a hose, six spades, six forks, six digging spades, six rakes and two pipes. I learnt a lot and really appreciate Philani and South Deep. Philani and the Trust have made us stand on our own feet by helping us start out in agriculture and not rely on R350 grants.

I have challenges with getting the resources I need to operate the farm and have to do manual labour for everything. We need a tractor, sprinklers and bush cutters to maintain the massive land that we have. We also need a fence. The municipality is not able to help us with any of these things.

Starter pack

Hose6 spades
6 forks
6 digging spades
6 rakes
2 pipes

From soil to harvest: Progress and produce at Mizamo Yethu

5.4.8 Enterprise development: Case study 2

Sex: Elderly male
Intervention/partner name: Philani Enterprise Development
Community of residence: Waterpan, Westonaria

Steward of the soil: A dedicated farmer examines his thriving tomato bushes

My enterprise is called Freshly Living Gardens 307. The way I got started is that I was helping children at a special school and teaching them about agriculture and how to plant vegetables at home. This was because I have background in agronomy. I heard about Philani from women who were learning how to do farming in the community and I went to Philani to also learn. When I got there, I attended training in marketing, pricing and costing to help me sell my produce.

I am passionate about agriculture. I did agronomy and work with garden tools to work the earth. This is not easy as it's too much manual hard work using a spade and fork without a tractor. The earth is so fertile in the area, so we do some farming, and when investors see what we do they get impressed but are not able to help us much as we don't own the land. We have been trying to get a piece of land since 2014 but have not been successful.

The Trust is the only company that helped us irrespective of not having any leases or ownership. They gave us equipment, the starter pack, which has a hose, spades and forks, digging spades, rakes and pipes. We really need land for farming and more resources to help us farm, like a tractor, so we can continue our work.

A guided tour of sustainable farming at Freshly Living Gardens 307

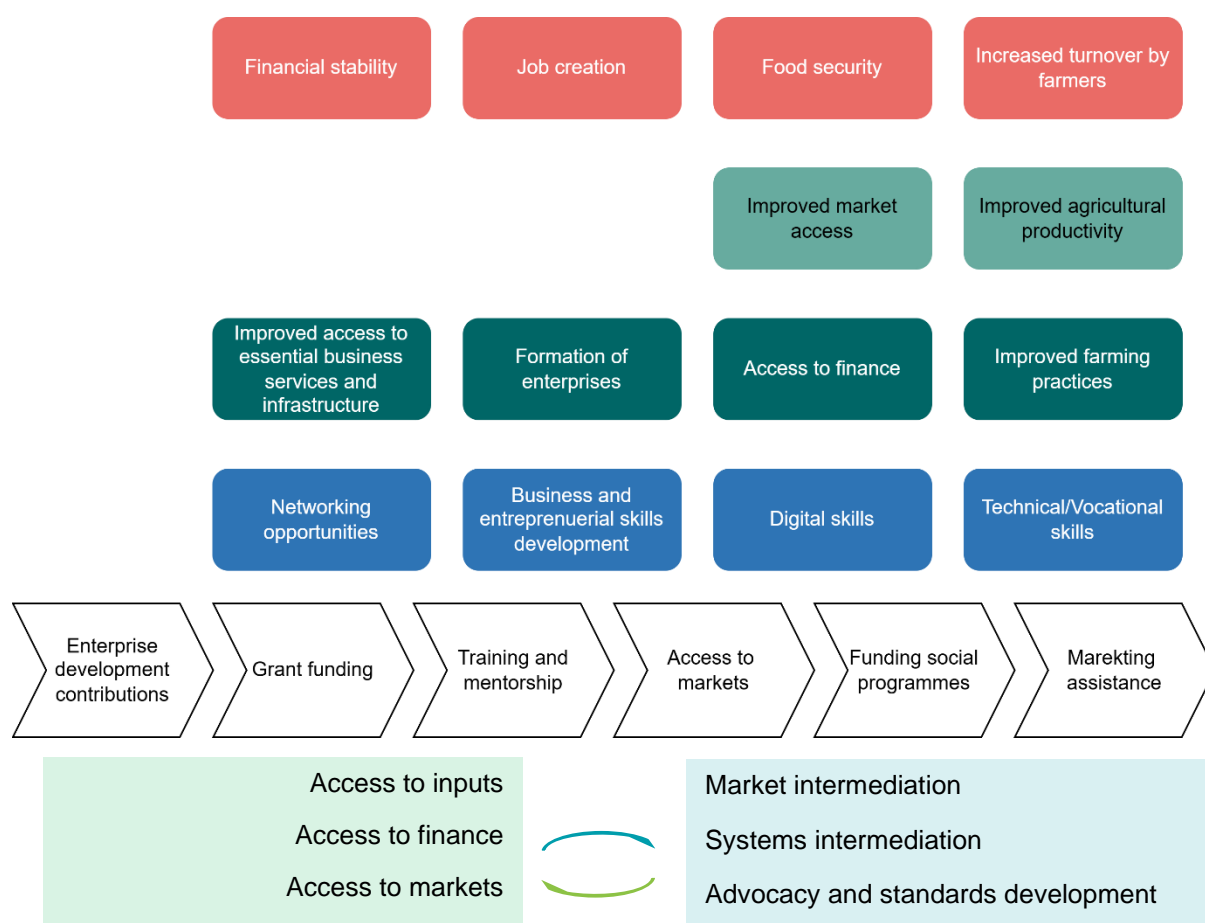## 5.4.9 Enterprise development: Emerging outcomes

Figure 18: Enterprise development: Emerging outcomes

6. LESSONS AND RECOMMENDATIONS

This section draws key lessons from the implementation of the Trusts' programmes and provides practical recommendations for future programming. It reflects on what has worked well, areas that require improvement and how the Trusts can adapt, scale or replicate their efforts to enhance impact. It also highlights opportunities to deepen strategic partnerships and support the long-term sustainability of interventions.

The qualitative evidence across interviewed stakeholders points to several key lessons that have emerged from the implementation of the Trusts' programmes, with implications for future programming and strategic direction. One of the most consistent themes is the **importance of strong governance and ethical leadership**. Trustees reflected on how other community trusts have failed because of poor governance, whereas the Trusts' integrity, transparency and commitment to ethical practices have been foundational to their continued effectiveness.

Another critical lesson was the **value of partnerships and co-funding**. Stakeholders acknowledged that operating in isolation limits the potential for impact. Collaborations with organisations such as the World Gold Council or the Jobs Fund have demonstrated how partnerships can unlock additional resources and scale impact. As one trustee noted, this shift allowed the Trusts to move from being sole funders to **catalysts for broader development**, enabling access to further support from the private sector and government.

Community engagement also emerged as an area requiring renewed attention. Stakeholders noted that regular engagement sessions had previously played an important role in keeping communities

informed and aligned with the Trusts' work, but these had become less frequent. Revitalising this engagement is necessary for maintaining credibility and community trust.

At the programme planning level, there is a growing recognition that **clear evaluation tools and systems to track outcomes** need to be embedded from the start. Stakeholders expressed the need to move beyond counting outputs to tracking long-term outcomes and impacts. There were suggestions for improved **monitoring tools**, better visibility for Trust contributions (such as branded infrastructure) and clearer expectations for reporting and participation in evaluation processes.

There is also a call for the Trusts to **institutionalise needs assessments**, whether through baseline studies or participatory mechanisms, to ensure that community demands are aligned with the Trusts' strategic priorities. Without this, there is a risk of responding in an ad hoc manner rather than through a strategic lens. To that end, some implementing partners highlighted the need for open, two-way communication between the funder and implementers. This would help to ensure a shared understanding of the actual support needed and the implementation approaches that are likely to be effective. One implementing partner noted: *"Over the years, it has become evident that organisations unfamiliar with the realities of rural South Africa often hold unrealistic expectations about what targets are achievable and how they should be met."*

Some stakeholders flagged that it is important to **manage community expectations**. In contexts where mining-linked trusts are seen as unlimited resource providers, the Trusts must be deliberate in communicating their role as catalyst rather than permanent funder. Not doing so creates a risk of deepening dependency and undermining the goal of community empowerment.

Key cross-cutting recommendations emerging from the three focus areas are summarised in the following table.

Table 25: Summary of key recommendations across the three focus areas

Recommendation	Description	Implementation suggestion
Project planning, management and communication	There is a need to enhance how projects are conceptualised, coordinated and communicated to ensure alignment with community realities and expectations. In some instances, programme design lacked key sustainability elements, such as post-shelter economic empowerment for GBVF survivors. Additionally, unclear information sharing, inconsistent feedback loops and weak communication, particularly around initiatives such as the SMME Hub and the suite of services offered, limit the effectiveness and reach of interventions. This is especially important in mining communities where expectations from companies are high and perceived under-delivery can lead to mistrust.	Adopt a more integrated project design process that incorporates sustainability components from the outset (such as post-support pathways for GBV survivors, stronger criteria for seed funding for business development, wraparound support for tertiary students and employability/job-readiness support). Develop a communication strategy that includes regular updates and branding to increase visibility and engagement. Formalise feedback loops with communities and stakeholders through scheduled updates and reporting. Train implementing partners on participatory planning and feedback mechanisms. Where possible, digitise communications and streamline planning workflows for clarity and responsiveness.
Strategic partnerships and collaborations	Established partnerships have helped leverage resources and improve programme delivery. Sustaining gains beyond Trust funding requires deeper collaboration between government and the private sector.	Strengthen existing partnerships with government departments (such as the Department of Social Development and the DBE) and local government to ensure scale and sustainability. Formalise co-funding agreements and build consortiums for collective implementation.

		Explore public-private partnerships for infrastructure and skills development, and have clear protocols and agreements on handover and maintenance. Establish linkages for ongoing or relevant support services for programmes or beneficiaries after funding to ensure sustainability.
Community cohesion and connectedness	Promote social cohesion and connectedness across programme areas to reinforce inclusion, community ownership and long-term sustainability. Although some interventions such as water access and safe spaces contribute to cohesion, this impact is often incidental and not intentionally designed or tracked.	Leverage existing community forums and feedback mechanisms and integrate social cohesion and inclusivity objectives into programme outcomes. Intentionally design elements into programmes that enhance social capital and communal networks. Use participatory mechanisms to co-design and assess initiatives with community members. Embed social cohesion indicators into M&E frameworks.
Impact through evidence-based practices and rigorous M&E	The lack of formal, data-driven M&E systems hinders the tracking of long-term outcomes and limits learning. Stakeholders highlighted the need for rigorous evaluation, clear key performance indicators at programme inception and stronger reporting systems to ensure accountability and drive improvement.	Develop and embed reporting based on a Trust-wide M&E framework with realistic key performance indicators aligned with each programme. Provide M&E training to implementing partners. Digitise and streamline M&E tools and systems for easier data collection, verification, storage and reporting. Institutionalise periodic reviews and learning sessions using M&E data. Ensure comprehensive reporting that includes financial tracking and accountability. Considerations for continued investments and scaling the agriculture initiatives under the enterprise development focus area through the Hub, to maximise the outcome achieved.
Governance and oversight	Governance and oversight emerged as a significant theme, with risks of conflicts of interest and perceived bias where trustees are also community representatives.	Review and revise Trust governance frameworks so they make allowance for independent decision-making for community trustees who often need to make prompt decisions. Introduce third-party oversight or independent adjudication in funding decisions. Provide refresher trustee training on fiduciary duties and ethics.

CONCLUSIONS

This evaluation has provided a comprehensive and evidence-informed reflection on the Trusts' decade-long contribution across education, community welfare and enterprise development. By applying the OECD DAC evaluation criteria of **relevance, with reflections on coherence and efficiency, effectiveness, impact and sustainability**, the assessment reveals that the Trusts have evolved in both strategic intent and delivery, positioning themselves as catalytic actors capable of initiating meaningful, multidimensional change.

Programmes were found to be very relevant to local needs, effectively delivered through well aligned partnerships, and increasingly coherent across sectors and with government and private initiatives. The outcomes documented are largely based on qualitative data as a result of the inability to track an adequate number of social welfare and enterprise development beneficiaries with whom to conduct surveys. However, they indicate shifts in community perceptions, improved trust in institutions and increased aspirations for the future.

The Trusts' efforts to balance immediate needs with systemic, sustainable interventions have created tangible and intangible assets that continue to benefit the communities served. Although challenges remain, particularly in the sustainability of support systems, employment absorption and managing expectations, the Trusts have laid strong foundations for long-term community resilience through investments in infrastructure, inclusive education pathways and enterprise support. With strategic refinement, stronger M&E systems and deeper engagement, the Trusts are well positioned to deepen impact and continue playing a pivotal role in supporting development in mining-affected communities.

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ANNEXURES

Evaluation matrix

Evaluation question	Evaluation sub-questions	Sources of data	Respondents	Analytical methods
KEQ 1. To what extent are the programmes achieving intended outcomes, in the short, medium, and long term?	1.1 What were the observable changes among the beneficiaries during the implementation of the intervention? 1.2 Have there been any notable long-term changes among the beneficiaries or within the broader community as a result of the intervention?	FGD KIIs Survey Data Programme documents Literature review	Implementing Partners Beneficiaries Trustees Sector Experts Community Representatives School Principal Parents	Statistical analysis Thematic qualitative analysis Outcome Harvesting analysis
KEQ 2. What, if any, are the unintended or undesirable outcomes?	2.1 Were there any unintended outcomes, positive or negative, resulting from the intervention? 2.2	KIIs	Implementing Partners Trustees Community Representatives School Principal Parents	Thematic qualitative analysis Outcome Harvesting analysis
KEQ 3. How relevant are the programmes? How valuable are the partnerships? What is the quality of the programmes?	3.1 What were the primary objectives and key activities undertaken during its implementation? How has the intervention evolved over time?	KIIs Survey Data Programme documents Literature review	Implementing Partners Trustees Beneficiaries Sector Experts Community Representatives School Principal Parents	Statistical analysis Thematic qualitative analysis Content analysis
KEQ 4. How well are resources being utilised?	4.1 To what extent is the relationship between inputs and outputs cost-effective and to expected standards? 4.2 Do the outcomes/ achievements of the education and enterprise development programmes represent value for money through comparing costs and outcomes?	KIIs Survey data Programme documents	Implementing Partners Trustees	Statistical analysis Thematic qualitative analysis

KEQ 5. What are the lessons learnt and recommendations for future programmes and implementation?	5.1 What were the main challenges encountered by the organisation during the implementation of the intervention. How were these challenges addressed? 5.2 What specific recommendations and strategies would you recommend to enhance future programming and implementation for maximum impact and sustainability? 5.3	KIIs FGDs	Implementing Partners Beneficiaries Sector Experts Community Representatives School Principal Parents	Thematic qualitative analysis
KEQ 6. Are the observed changes and outcomes sustainable? To what extend will the positive changes and results of the intervention continue in the long term?	6.1 How sustainable is your intervention, can benefits continue without external funding? 6.2 How can the achievements and observed/ perceived positive changes/ outcomes be shared and scaled up for improved programme delivery and greater impact in the community as well as within the broader developmental sector?	KIIs Survey data from Implementing Partners	Implementing Partners Trustees Parents	Statistical analysis Thematic qualitative analysis

Summary of respondents by stakeholder category and data collection method

Stakeholder Category	Data Collection Method	No. of Participants	Roles/organizations
Education implementing partners (NGOs, ECD, colleges)	KII	4	Bokamoso Education (2); EDUMAP College (1); Kagisano Day Care (1)
School leadership and educators	KII	3	One former headmaster and principals of two primary schools
Sector experts / advisors (education, enterprise, social)	KII	5	Senior consultants or NGO representatives (various specialities)
Education program beneficiaries (bursary)	FGD	5	Participants in the bursary programme focus group
Parents / Caregivers (education context)	FGD	9	Parents of early-childhood programme participants
Education program alumni (bursary)	Survey	30	Former bursary recipients (online survey respondents)
Education scholarship recipients	Survey	10	Current scholarship beneficiaries (online survey respondents)
Enterprise development beneficiaries (SME owners)	KII	6	Individual entrepreneurs from various small-business initiatives
Enterprise development implementing partners	KII	5	Seriti Institute (1); Philani Cooperative (1); LIMA Foundation (2); SDECT SMME project (1)
Enterprise cooperative members	FGD	8	Members of the Philani Cooperative Development group
Community welfare implementing partners	KII	3	A re Ageng shelter project (1); MEC Covid-19 food relief (1); Sizabantu HBC (1)
Community welfare beneficiaries (shelter residents)	FGD	27	Residents and staff at the A re Ageng place-of-safety
Programme implementing partners (all focus areas)	Survey	8	Various community development and education agencies (regional partners)
Trustees / Board members	KII	3	South Deep Trust Board members