

Office on the Status of Disabled Persons, OSDP South Africa

– Impacts of it's Activities

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**Department for Democracy
and Social Development**

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Sida Evalution 03/34

**Department for Democracy
and Social Development**

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Executive Summary

Introduction

This report evaluates the second phase of support provided by Sweden and Sida to the Office on the Status of Disabled Persons (OSDP), housed within the Presidency. The total financial support, from 1998, has amounted to 35.5 MSEK and the current agreement ends in 2003. The business plan that OSDP is currently implementing is partly financed by Sida. It is a multifaceted business plan, aimed at ensuring that disabled persons have access to government services and are integrated into society.

The overall purpose of the Sida supported project was to create an enabling environment that would lead to the full participation and equalisation of disabled persons within South African society. The thrust has been on facilitating processes that would ensure (a) disability issues are put on the political agenda of government and; (b) civil society will be strengthened to continue playing its role of advising and supporting government policies and programmes on disability.

This evaluation was knowledge oriented, with the primary emphasis on generating lessons learnt through the project. Thus the emphasis was on constructively critiquing achievements with the view of identifying key lessons learnt, giving main recommendations for enhancing what has been achieved and finding solutions to weaknesses. The consultants also probed recommendations for ongoing implementation and sustaining achievement.

This Executive Summary serves to highlight key issues, the details of which are contained in the main report.

Context of Support

Sida's support started four years into South Africa's new democracy. Key points to note are:

- The focus on creating the environment for a better life for all South Africans by providing for their basic political, social, economic and human rights.
- The development of appropriate policies and legislation to give effect to the political intentions of the government of the day was prioritised.
- Disability issues were a critical component that required a strategic shift to emphasise the creation of equal opportunities for disabled persons.

A Transforming Country

South Africa is a new democracy. It is dealing with the legacies of apartheid as well as introducing and entrenching its own democratic values, principles and morality. Key points to note are:

- Democratic systems, processes, progressive legislation and policies had to first be established for effective implementation and provision of services.
- Development and transformation is an evolving system that constitutes distinct but often inter-related and connected stages, parallel but sometimes linear and/or intertwining, varied but with the same focal point. Each new stage brings on new challenges that often require an adjustment to original strategies, tactics and plans.
- This programme of support was not spared from the organic transformation processes that were and continue to be underway in the country.
- Transformation in the South African context implies reconstruction of the entire South African society, including political, social and economic transformation.

- The provision of services, given the huge backlog, inevitably leads to competing demands on the country's budget.
- Needs in respect of housing is as great and important to the needs in respect of education, making dividing available resources to meet these needs an odious task.
- This programme is but one of the many simultaneous social and economic programmes that the South African government is dealing with.
- The need for CSOs and DPOs to re-define their roles and responsibilities to create a clear but complementary separation between government's responsibilities and that of civil society.
- The impact of the shift of donor funding away from CSOs and DPOs on their ability to manage the transition.

Impacts

There has been significant progress regarding disability issues during the era of democracy in South Africa. Most, if not all, of this progress would have been difficult to achieve without the additional support from Sida. Impacts can be found at several levels in the South African society, nationally and locally, in government and in business. Key points to note are:

- An Integrated National Disability Strategy (INDS) has been developed and adopted by Cabinet.
- Participation of disabled persons in the formulation of related legislation such as the Employment Equity Act.
- The election of disabled persons as political representatives at all spheres of government.
- The appointment of disabled persons at senior levels in the public service
- The establishment of national and provincial offices, located within the Presidency and Premier's offices respectively
- The establishment of national and provincial Inter-departmental Co-ordinating Committees (IDCCs).
- The establishment, in some local government structures of disability councils
- The appointment of additional staff and/or established special units in line departments
- The establishment of the South African Federal Council on Disability (SAFCD)
- Raised awareness on disability issues through training and capacity building;
- A Swedish/SA Exchange Programme has been carried out, creating links between the disability movements in the two societies;
- An improvement in the provision of services to disabled persons e.g. more disabled persons are receiving disability grants and disabled persons have more access to education, social services and employment
- Government has acknowledged its responsibility in respect of disability issues.
- Possibly the INDS has also inspired to replication in other countries.

OSDP outputs

The activities of the OSDP business plans involve all levels of society and several different means of change, including organisation, policy training and opinion building. Key points to note are:

- Some activities were directly related to the strengthening of OSDP
- Some activities focused on the surrounding infrastructure – developing departments, creating the SAFCD and supporting of provinces.

- Some activities concentrated on opinion building in society
- Some activities were aimed at supporting DPOs.
- The different activities in the Business Plans represent an integrated approach. Many areas were undertaken simultaneously, and there is an interaction both between departmental levels and between means: Value and structural change.

Lessons learnt

The combination of strategies and tactics that simultaneously addressed change in values and organisational structures provided the necessary conditions for pushing the issue forward: The INDS was a necessary platform for building up the organisational structures; the gradually built up organisational structures were necessary to implement the INDS. Key points to note are:

- The logical stages of the strategic approach e.g. first ensuring that disability issues were driven at a political level by disabled persons before embarking on the development of a policy paper.
- The range of strategies and tactics adopted; again in a coherent and logical manner with a clear rationale for each. For example, the approach of developing INDS – a policy framework with guidelines and recommendations first, as opposed to an Act – served a multiple of functions that an Act would not have achieved with the same degree of success.
- The need for an enabling environment, and if one does not exist, to create this as a first step, to ensure effective implementation of plans and approach adopted.
- The need for plans and approaches to maximise political impact as well as practical service delivery gains. For example, establishing OSDP as an agent in government was a strategy designed to reflect and ensure government’s unequivocal commitment to dealing with disability issues. Positioning of the OSDP offices in the Presidency and Premier’s offices served to ensure access to “the highest political levels” and to provide visible legitimacy to drive disability issues.
- The need for the roles and responsibilities of structures to be clearly defined.

Factors Influencing Impact

Some of the factors impacting on the degree of achievement were/are outside the direct control of the disability sector. Others are more internal in nature; through proper review and assessment they could be corrected to enhance implementation. Key points to note are:

- The general lack of sufficient financial and human resources for disability work
- “Competing interests” of other transformation issues such as gender and youth.
- Remaining attitudes of dependency and victimisation of some disabled persons.
- The loss of leadership in civil society, the different strategic approaches by DPOs and the fact that they work at different paces.
- Traditional approach of exchange visits in respect of the exchange programme
- Blurring/perceived duplication of roles and responsibilities and stakeholders having different perceptions of the roles of central structures
- The enormity of the challenges and structures, including the OSDP being reactive and responsive to every demand
- The IDCC not having its own budget allocation
- No or little sanctions when disability issues have not been handled in accordance with the INDS.
- Results for disabled persons have not always shown in practice – or when they have, the results are not made visible to others.

Recommendations

A number of recommendations could be extracted from the lessons learnt, both in an international – South and North – and a South African context. Furthermore, such recommendations could also be interesting in societal areas outside the disability context. Key points to note are:

- Positioning and reinforcement of the disability issue through securing political commitment and increasing/raising existing levels of awareness in government and society in general
- The need to change attitudes in society
- The need to establish the proper structures and strategies and to ensure that they are realistic and sustainable
- A realistic assessment of the human and financial resources required for implementation
- The need to have specific targets and an organisational development strategy
- Integration of the disability issue and combination of means for change

Challenges in the South African context

The key challenge facing the country as a whole and inclusive of disability issues is implementation and delivery! Two key focus areas in the context of this challenge and specific to disability issues are:

1. *The development of a Specific Disability Act*
2. *Ensuring participation of disabled persons in the economy*

Other specific areas requiring attention in the immediate and near future include

- Assisting other African countries to begin or improve their approaches, particularly through the Decade Secretariat which is being hosted by South Africa
- Reviewing implementation thus far with the purpose of addressing weaknesses, improving on the strengths and replicating best practices or “what worked/works” on a national scale.

Sida involvement

Further Swedish support towards achievement of the long-term goal of the project would appear interesting in a regional context. Thus Swedish support to promotion of disability issues in the Southern African region or possibly Africa as a whole should be considered at two levels:

1. Support in different respects to share out the South African experiences for production of training material, setting up conferences, development of monitoring tools etc.
2. Limited support to specific activities of OSDP contributing to its long term objective that would also be of interest in a regional context e.g. the creation of a database reflecting skills and knowledge of disabled persons, or development of plans for conversion of sheltered workshops into viable business entities.

1. INTRODUCTION

The Swedish Government, through Sida, entered into a partnership with the South African Government, in 1995, to support the development of disability strategies in the country.

The Office on the Status of Disabled Persons (OSDP), housed within the Presidency, has been supported by Sweden and Sida since 1998. The total financial support amounted to 35.5 MSEK and the current agreement ends in 2003. The business plan that OSDP is currently implementing is partly financed by Sida. It is a multifaceted business plan, aimed at ensuring that disabled persons have access to government services and are integrated into society.

The overall purpose of the project was to create an enabling environment that will lead to the full participation and equalisation of disabled persons within the South African society. The thrust has been on facilitating processes that would ensure that a) disability issues are put on the political agenda of government and b) civil society will be strengthened to continue playing its role of advising and supporting government policies and programmes on disability.

Purpose and scope of the evaluation

The evaluation was knowledge oriented, with the primary emphasis on generating lessons learnt through the project.

The evaluation concentrated on an assessment of the impact of activities that implemented under the OSDP/Sida Business Plan and the exchange programme between SHIA – the Swedish disability organisation – and South African disability organisations. It focuses on the second cycle of support i.e. the period 2000 to the present. An initial review of the OSDP/Sida Business Plan was done in February 2000, and commented on the first cycle of support from 1998 to 2000. This review report is part of the documentation perused by this evaluation team and the issues raised therein have been incorporated where relevant.

2. APPROACH AND METHODOLOGY

A team of two persons has carried out the assignment: a South African consultant, Ms Safoora Sadek, and a Swedish consultant, Dr Peter Winai, InterManage. In dialogue with Sida, it was agreed that the evaluation would broadly evaluate the impact of the initiatives resulting from the support and to identify key lessons learnt that could assist with replicating best practices where possible. The Terms of Reference indicated¹.

Thus the emphasis of the evaluation was on constructively critiquing achievements with the view of identifying key lessons learnt, giving main recommendations for enhancing what has been achieved and finding solutions to weaknesses. The consultants also probed recommendations for ongoing implementation and sustaining achievement. In terms of this focus, key questions asked were:

1. How would you describe the impact on several levels, mainly:
 - The target group of disabled persons?
 - National and provincial government departments?
 - National and provincial DPOs?
 - The relationship between OSDP and SHIA?
 - OSDP offices at national and provincial level?

¹ The Terms of Reference are appended in Annex 1.

2. Did you participate in the exchange programme/twinning agreements and the training programmes? Did it assist in your work?
3. What worked and what did not work? If it did not work, why?
4. In retrospect, is there anything you would do differently?
5. If you had to advise any other country who wanted to achieve what you had, what would your advise be?
6. What do you think are the key challenges facing the disability sector currently and in the future? What strategies would you adopt to address these?

There were certain considerations that impacted on the approach and methodology of the evaluation: The evaluation was contracted within a short timeframe which impacted on the number of interviews and focus groups that could be conducted both in South Africa and Sweden. Given these constraints, Sida and the consultants, in a joint meeting at the beginning of the evaluation, agreed that a strategic sample of key role players would be focused on. Thus interviews were conducted with national OSDP staff, some national departments, representatives of national DPOs and a field visit to one province. The provincial visit included separate meetings with provincial representatives of government as well as provincial DPOs. Information gained from interviews and meetings was supplemented with relevant documentation review.

3. Context of support

It is a well-known and documented fact, including in previous evaluations and reports that disability issues and the rights and needs of disabled persons did not feature on the apartheid government's agenda.

This report therefore focuses on the recent and current context, rather than explaining the situation under apartheid and is based on the assumption that the apartheid context has been adequately explained.

Sida's support was provided four years into the new democracy. This period, described as the first term of democratic governance, was characterised by establishing the appropriate and relevant policy and legislation to affect the political intentions of the government of the day. In a nutshell, the focus was on creating the environment for a better life for all South Africans by providing for their basic political, human, social and economic rights in a developmental and sustainable manner. Within this framework, disability issues was recognised as a critical component that had to be addressed.

The key challenge was to locate disability issues and address them from a rights based approach and to move away from the welfare and medical model that focused on disabilities rather than abilities. This significant strategic shift emphasised the need to create equal opportunities for disabled persons to participate in the social and economic life of the country as all other citizens. It is an approach that recognises that disabled persons are entitled to the same rights as all other people.

The policies and processes developed around disability issues and that continue to influence strategy and tactics is located within the principles of the Reconstruction and Development Programme (RDP). The RDP spells out the need for development initiatives to be:

- People centred (must be meeting the needs of people)
- People driven (community people must participate in developing and implementing policies and programmes)

- Sustainable (environmentally, financially, etc)

A further influence on the policies and processes is the fact that disabled persons, as a result of the legacy of apartheid, are amongst the poorest of the poor, in that under the apartheid dispensation they were not accorded access to education, job opportunities and/or social benefits. Thus dealing with the issue of disability necessitates dealing with poverty alleviation and socio-economic development.

4. A transforming country

South Africa is a new democracy. It is dealing with the legacies of apartheid as well as introducing and entrenching its own democratic values, principles and morality. Democratic systems and processes, progressive legislation and policies, which were absent during apartheid, had to first be established for effective implementation and provision of services.

The very nature of development and transformation is that it is an evolving system. The evolution process constitutes stages, distinct but often inter-related and connected, parallel but sometimes linear and/or intertwining, varied but with the same focal point. Each new stage brings on new challenges that often require an adjustment to original strategies, tactics and plans. Naturally, this programme of support was not spared from the organic transformation processes that were and continue to be underway in the country. For example, under the apartheid regime, disabled people were essentially treated as “persona non grata”. Changing and transforming this negative status quo meant going through several stages. The first stage involved ensuring that disabled people were elected into parliament and located at the centre of political decision-making. The next stage involved establishing an institutional structure to facilitate, co-ordinate and implement the placing of disability issues on the political agenda (hence the emergence of the OSDP). This was followed by the development of a disability policy framework, the Integrated National Disability Strategy (INDS). The effective implementation of this policy required the establishment of government co-ordination structures hence the establishment of the National and Provincial Inter-departmental Co-ordinating Committees (IDCC) and the Provincial Forum. The formation of these structures highlighted the bottlenecks regarding implementation of the INDS leading to a review of strategic approaches and adjustments. This is but a broad-brush expose to illustrate the transforming context within which the Sida support was utilised.

Transformation in the South African context implies reconstruction of the entire South African society. This reconstruction includes political transformation – the right to vote, transparency, good governance, etc – as well as social and economic transformation to include the provision of education, houses, health care, etc on an equal basis. The provision of services in particular – all of which were in an equally bad state during apartheid – inevitably leads to competing demands on the country’s budget. Again the legacy of apartheid and the situation inherited by the democratic government is such that the needs in respect of housing is as great and important to the needs in respect of education, making dividing available resources to meet these needs an odious task. It is important to note that this programme is but one of the many simultaneous social and economic programmes that the South African government is dealing with. The integrating of disability issues into these programmes still has to go some way in ensuring that the needs and rights of disabled people do not fall by the way side.

Another feature of South Africa’s transformation is the fact that many of the politicians elected in 1994, particularly those representing liberation organisations like the ANC and the PAC, did not have the necessary experience and skills to engage speedily with the policy and legislation making processes. This has changed over time. Elected officials are now more able to deal with the passing of legislation and policy more speedily and effectively. The induction for such politicians included basic introductions

to parliamentary processes, rules, procedures, etc. Thus the first few years of democracy served both as a “training” period as well as a period in which the framework for the implementation of democracy and sustainable socio-economic development was established.

Sida’s support was also directed at strengthening Disabled Peoples’ Organisations (DPOs) to play an active advisory and support role in ensuring that government does indeed take responsibility for providing for the needs and rights of disabled persons. During the apartheid era, civil society organisations (CSOs), including disabled peoples organisations (DPOs) in the main were adversaries of government. The lack of provision of services to the vast majority of South Africans led to most CSO’s playing the role of service providers. This included DPOs. Within the context of this role, CSOs and DPOs had direct knowledge of the needs of people as well as an understanding of the root causes of their problems. This knowledge was translated into sector specific visions for a future democratic South Africa and served as a basis for the RDP. With the onset of democracy, CSOs and DPOs had to re-define their roles and responsibilities in terms of creating a clear but complementary separation between government’s responsibilities and that of civil society. Many CSOs and DPOs also opted for the strategy of placing their leaders, either as politicians or as senior civil servants, to ensure the presence of committed drivers for their sector/issue within government. The negative impact of this strategy was that CSOs and DPOs were left without strategic political leaders. The strategy was implemented without sufficient consideration to the development of a secondary core of leadership to manage this transition. The ability of CSOs and DPOs to manage the transition was also severely impacted on by the shift of donor funding away from them to government. This decision of donors was based on the understanding that the service provision role of CSOs and DPOs would immediately be taken over by government. However, in retrospect, this decision did not acknowledge the fact that the first few years of democratic governance would be focused on the *development of appropriate policies* for service delivery to be implemented. CSOs and DPOs thus continued to play some service delivery role during this period, albeit with reduced financial resources.

5. Impacts

It can be concluded that there has been significant progress regarding disability issues during the era of democracy in South Africa. It can also be declared with a high degree of certainty that most, if not all, of this progress would have been difficult to achieve without the additional support from Sida. Below, the impact in different respects and spheres is described in more detail. Following the narrative description is a table, giving a summary of the impacts. In the following chapter 6, outputs aimed at the various impacts are highlighted.

5.1. Policy and legislative framework

An Integrated National Disability Strategy (INDS) has been developed and adopted by Cabinet. The INDS provides a comprehensive framework for ensuring the integration of disability issues into all political, social and economic programmes of the country. It provides a vision and coherent value structure for driving disability issues in government and society. It also provides guidelines relevant to each line department to facilitate and assist with implementation on a sector/issue basis. The INDS was developed in a participatory manner. A baseline framework document was subjected to vigorous debate and discussion by all stakeholders on a national and provincial level. The process itself served to raise awareness on a developmental and rights based approach to dealing with disability. An additional positive impact of the process was securing the commitment and buy-in of participants.

The INDS laid the foundation for the active contribution of the disability sector in the development and adoption of related legislation. Both disabled persons from government and civil society

participated in formulating important legislation that facilitates social and economic empowerment of disabled persons such as the Employment Equity Act, The Promotion of Equality Act, Procurement legislation in the context of Black Economic Empowerment, to name but a few. The Employment Equity Act makes it compulsory for all employers to ensure that disabled persons constitute at least 2% of their full staff complement. One of the aims of the procurement legislation is to promote businesses of disabled persons through the awarding of contracts to such businesses or to consortiums and joint ventures involving such businesses.

The INDS, the first ever policy framework on disability to be developed and adopted at the highest political level in Africa, has been hailed by other African countries as a solid basis on which to build their own frameworks. Some countries are even considering replicating the INDS with adjustments to suit their particular contexts.

5.2. Development of implementation structures/processes

Political & Senior Decision-Making Representation

The South African Government, at all three spheres, boasts a high number of disabled persons elected as politicians, an achievement considering the short period of democracy and the inclusion of disability issues onto the political agenda. The number of disabled persons elected as political representative has steadily increased since 1994. Current figures stand at 8 persons in National Parliament and 35 local government councillors. The South African government and the disability sector has a whole has made a concerted effort to ensure that disabled persons serve on all government institutions, such as the South African Human Rights Commission and the Youth Commission. The current Deputy-Chairperson of the Youth Commission is a disabled person. The significance of this approach is that participation in such structures is touted as a right and not just as a means to further advocate for disability issues. The disability sector has also advocated for and achieved the appointment of disabled persons in the civil service some of whom are in relatively senior positions, such as the Director of the OSDP. The previous director of the OSDP has been appointed as a Chief Director in the policy section of The Presidency. Another example is the appointment of a director at the National Department of Agriculture.

Office on the Status of Disabled Persons (OSDP)

A national office and 9 provincial offices have been established. The national office is located within the Office of the Presidency and staff report directly to the Minister in the Presidency. The rationale for locating the OSDP within the Presidency was to ensure responsibility and accountability for disability issues at the highest political level and to facilitate the placing of disability issues that may require political decisions on the agenda of Cabinet meetings. The provincial offices are located within the Offices of the Premiers for the same reason. The offices have served an important initiating and co-ordination role such as establishing the Inter-Departmental Co-ordinating Committees (IDCCs) and convening their meetings. They have, and continue to serve as a first port of call for both government and civil society dealing with disability issues, especially advising on implementation of the INDS. In addition, they (the national office in particular) are responsible for managing and implementing all disability related international mechanisms, processes and systems. The current Director of the national office serves on the UN's Ad-hoc Committee dealing with the proposed UN Convention "Towards a Comprehensive & Integral International Convention to Promote & Protect the rights of People with Disabilities. Staff at the national OSDP comprise the Director, two deputy directors (one

of these positions is currently vacant) and 4 administrative staff at various levels of the civil service. Based on the workload of the OSDP, these staff members, although employed into specific jobs, often have to engage with tasks and responsibilities outside of their defined job descriptions – a reflection of the commitment of the staff.

IDCCs

Inter Departmental Co-ordinating Committees have been established at both national and provincial levels. The IDCCs comprise representatives from all government departments and is convened and chaired by the OSDP. The main purpose is to provide a structured and formal opportunity for departments to discuss approaches to implementation, problems experienced, projects engaged in, challenges experienced and possible solutions to these. In “return” the OSDP benefits a first hand account/report of the level of implementation and the issues requiring political consideration.

Local Government Councils

The approach to co-ordinating and monitoring the implementation of the INDS at a local government level has taken the form of establishing disability councils rather than OSDP offices. This is still at an infant stage and has only been achieved in some municipalities. The main reason for this is that the transformation of local government structures was only recently finalised. Prior to this, local government issues were managed by Transitional Councils, which by their very nature made it difficult to initiate structures. The form of the structures is often determined by the role and function of each sphere of government.

Line Department Units

Most line Departments at national and provincial levels have established “transformation units” including a disability component or they have established specific disability units. Some departments have appointed additional staff to serve as focal points. These staff and units usually have a direct relationship with their relevant OSDP offices, and serve as departmental representatives on the IDCCs. The transformation units are tasked with the responsibility of ensuring that disability issues are reflected in each line department’s policies and programmes and that these are implemented. Thus these units monitor and advise the department on opportunities whereby disabled persons can either be beneficiaries or implementers in respect of the department’s programmes; the extent to which the department has met its employment equity targets on disabled people; budget allocations for disability issues, etc. Progress or the lack thereof are reported to the OSDP office on a regular basis and discussed individually and through the IDCC.

5.3. The South African Federal Council on Disability (SAFCD)

As explained earlier in the report, the disability movement in South Africa comprises many Disabled People’s Organisations (DPOs). These DPOs span the spectrum of local community based structures, to provincial and national structures. Most of the national structures are focused on the nature of a particular disability e.g. the Deaf Association of South Africa (DEAFSA) while organisations such as the Disabled People of South Africa (DPSA) have a broader base of affiliates and members regardless of the nature of their disability. Some of the Sida support, channelled through the national OSDP, was to bring these various DPOs together into broad network leading to the establishment of the SAFCD.

Thus a platform was created for DPOs with diverse ideological positions to find common ground, i.e. it unified the disability movement and helped them to identify and work on common issues. The building of trust and confidence between DPOs who previously had distant and sometimes adversarial relationships with each other, through their participation in the SAFCD, contributed to strengthening DPO advocacy work. In the name of the SAFCD, they were able to lobby on particular issues as one voice, without subsuming or losing their individual identities or lobby positions/issues. The formation of the SAFCD also assisted DPOs to position themselves within the transitional period. Another positive consequence was the transformation of DPOs themselves, particularly those that were not development oriented. The SAFCD also served as an easy access, one-stop contact point for government. On a strategic level, the SAFCD successfully met the challenge of uniting the voice of DPOs, building trust and confidence between them and serving as a one-stop contact point for government. In the process, an additional challenge that arose was the clear division of functions of the SAFCD and its member organisations. With the establishment of the secretariat office, these functions were sometimes duplicated, resulting in minor tensions and confusion about the networking and co-ordinating role of the SAFCD as opposed to an implementing role. Despite this, members' organisations benefited from the research and training activities performed by the secretariat staff. With the closure of the SAFCD office, other avenues for sustaining these much needed skills and capacity must be addressed. One possibility is the re-locating of these functions and staff within member organisations.

5.4. Training and capacity building

The National OSDP, working with external training service providers, developed and managed training and capacity building courses for civil servants employed at all spheres of government. Two levels of training were provided: basic general management skills (project, financial management, etc) and policy skills (development and analysis of policy, the INDS, budgeting for policy implementation). The training is organised into 2/3 modules of 3 days each with a total of 9 nine days training provided per group of participants. Each group comprises 20/25 participants. The participants are usually the programme managers dealing with disability whether they are located within the transformation or human resources departments. The Director Generals of national departments, the provincial OSDPs and the Heads of Departments of provincial departments nominate/choose participants for the courses. Thus far, 25 people have been trained on a national level and 70 on a provincial level. Training of local government staff has started. The training has raised awareness amongst civil servants and provided necessary information and strategies for implementation of the INDS. It has also contributed to the development of a cadre of leaders and drivers within the public service.

5.5. Swedish/SA exchange

The purpose of the exchange programme was to create stronger and more structured links between the SA and the Swedish disability movements. It was envisaged that the programme would allow for each country to share their perspectives and experiences with the other and that this linking will increase each country's international perspective. The understanding was that through the exchange programme there would be increased dialogue and debate on problems and solutions regarding disability issues – internationally and country specific.

Broadly, the programme was seen as useful in that both partners developed new perspectives, had the opportunities to articulate their ideas and experiences and to explore the ways in which each country dealt with disability issues. Swedish participants in the programme attribute the recent positive changes in Sweden's disability policy to the exchange programme.

Initially, the exchange programme primarily focused on the partnership between OSDP and SHIA with the view of enhancing networking between Sweden and SA as well as with other countries. For a number of reasons, this partnership did not work as well as intended, e.g.:

- SHIA was unable to provide constructive and valuable feedback to OSDP on the reports they submitted. This was mainly due to SHIA's inadequate understanding of the context within which OSDP was working.
- SHIA is an NGO and OSDP is a government structure. They thus have different roles, which imply necessary differences in perspective and mandate.

These difficulties were highlighted in the mid-term assessment and was the basis on which the partnership was restructured to focus on two components, namely: the exchange programme itself and information activities.

The Exchange Programme:

After the mid-term assessment, the SAFCD was given responsibility for co-ordinating and managing this element of the programme. General feedback was that the programme was interesting. At the same time, critical issues were raised such as:

- Whether the benefits and value accrued to the organisations or to individual participants;
- To what extent did individual participants impart and share their experiences on return to their respective countries;
- The impact of the age imbalance age of participants: the Swedes were generally older than the South Africans, and they also demanded a higher standard of accommodation and service during the visits.
- The impact of the perceived different standards that soured rather than enhanced relationships
- Whether the cost/expense of the programme can be justified in terms of the limited benefit and impact.

The programme was gradually reduced; one explanation given was that there was no mechanism to maintain it. Furthermore, reports from the exchange component were not provided on a regular basis.

Information Activities

The reporting by the Swedish journalist Malena Sjöberg formed the core of this element of the programme. Her main task was to record and comment on the exchange visits and the related processes. A number of reports, available in both English and Swedish, have been produced. They detail the integrated strategy from different perspectives; the processes engaged as well as the impacts. However, to date, the reports have not been widely disseminated. One of the reasons cited for this was that the task was not properly defined at the initial stages; another reason was the change in co-ordination from OSDP to SAFCD/DPSA. Presently, however, both DPSA and SHIA have ambitious plans for the dissemination of the “synthesis report” which is about to be finalised.

5.6. Provision of services/service delivery

The groundwork for the provision of services has to a large extent been done. Government has acknowledged its responsibility in respect of delivery on disability issues Awareness has been raised within government, organised civil society and the private sector. Disabled persons are more informed

of their rights and in a slightly better position to claim them. Notwithstanding the many problems related to service delivery across the board, and the policy focus of the first term of governance, some delivery of services to disabled people has been implemented.

More disabled persons are receiving disability grants. Disabled persons have more access to education, social services and employment. The Department of Education has developed a White Paper on Inclusive Education that has been adopted by government. Implementation of this White Paper 6 has already been piloted in some schools in 3 provinces and the Department is developing an implementation manual for replicating in other parts of the country. Through the Department of Housing, government has approved the provision of an additional amount of money to housing subsidies for disabled people who have additional expenses related to making their houses accessible. The Department of Transport has been engaging with the taxi industry around the Recapitalisation of Taxis towards ensuring that some of the new taxis are accessible to disabled people. More people have been gainfully employed since the introduction of the Employment Equity Act than in the previous history of the country. None of these gains could have been achieved without the OSDP. Firstly, the OSDP co-ordinated and developed the INDS, which is the framework used for the abovementioned progressive policies and programmes. Secondly, OSDP staff themselves actively participated in tasks teams developing these policies and programmes such as the team established by the Department of Labour on the Employment Equity Act. Thirdly, the OSDP, given its close working relationship with DPOs, was able to facilitate and ensure the contributions of disabled persons inputs into these processes and outcomes. Through the IDCC and the individual transformation units, the OSDP monitors the provision of service delivery and makes recommendations on improvements if this is required. The OSDP is currently co-ordinating the development of a “working” definition of disability in order to implement Government’s pronouncement to provide free primary health care to disabled people. This definition is necessary to avoid an abuse of this service by people who do not qualify and to ensure that disabled people are the rightful beneficiaries.

The OSDP in Mpumalanga Province embarked on an interesting Service Delivery Innovation Project. The aims of the project were to accelerate service delivery and raise awareness amongst disabled persons of the government’s services available to them. OSDP co-ordinated the project but it was implemented with the involvement of other role players such as DPOs, media, and government departments. A service package was developed with each role player making their specific contribution e.g. the provincial Department of Housing contribution was information on applying for housing subsidies. The provincial IDCC played a key role in co-ordinating this process. The project was implemented over 3 days covering 9 poverty stricken areas in the province. One hundred and fifty (150) officials from all government departments, working in teams of 30 each, provided services to people that were transported to the focal point for delivery. In one of the areas 130 applications for social grant were completed. Approximately 4000 people were reached over the 3 days and services provided ranged from applications for identity documents and social grants to the provision of assistive devices by the Department of Health. The OSDP is in the process of developing a manual on implementing this project for replication in other parts of the country.

Another innovative programme initiated by the OSDP in Mpumalanga is the Community Based Rehabilitation (CBR) project. Like the service delivery programme it is being done in partnership with other role players (i.e. government departments and DPOs). The aim of the programme is to identify and inform disabled people of their rights and to ensure provision of services by disabled people themselves. Activities include for example, mobility orientation training for blind people, in their own communities. This particular activity is implemented in partnership with a DPO, the Council of the Blind. The OSDP also hopes to see this project being replicated in other provinces.

1. The Impact on HIV/Aids

South Africa has the highest incidence of HIV/AIDS worldwide. It is therefore inevitable that this pandemic cuts across all sectors of society, including disabled persons. Thus, although the business plans developed for this programme of support did not specify activities focusing on HIV/AIDS, some activities were embarked on as a response to a natural need.

In 2000, the South African Government released its HIV/AIDS/STD Strategic Plan for the country. The disability sector, while welcoming the strategy in general terms, raised concerns about the strategy's "lack of insight and vision with respect to the inclusion of disabled persons within the Strategy"¹

Generally disabled persons continue to be ill informed about the dangers and impact of HIV/AIDS, the protection measures that can be taken to prevent infection and the options available for infected and affected persons. This is attributable to:

- Insufficient and inappropriate educational information to meet the needs of disabled persons e.g. no information in Braille for blind persons and no sign language interpretation for deaf persons;
- Insufficient exposure of disabled persons to these material and information
- The general stigma attached to disabled persons results in a denial of their sexual identity, sexual abuse, their being sexually active beings, etc.

The disability sector, in responding to the HIV/AIDS/STD Strategic Plan under the auspices of the South African Federal Council on Disability (SAFCD), undertook research on the specific needs of disabled persons in relation to HIV/AIDS. The findings of this research is detailed in a comprehensive report and submission to the Department of Health regarding the needs of deaf, blind and intellectually disabled persons; users and survivors of psychiatry; disabled women; disabled youth; people living with epilepsy; physically disabled people and deaf blind people.

Specific recommendations included in this submission were:

- Increased involvement of the disability sector in development of materials; training of interpreters and rehabilitation workers, etc
- DPOs more involved in the management aspect of the Strategy
- Promoting safer sex programmes must include life skills programmes, translation of material into Braille and sign language, training health care workers in sign language and inter-active skills
- Educational programmes must be presented with a sense of understanding and sensitivity
- Training and awareness raising for parents, health care workers and society in general to bring about changes in attitudes that are discriminatory
- Necessary social support to disabled persons on positive diagnosis
- Research amongst the disability sector to determine the level of HIV incidence and specific action-research to develop and test accessible information formats and presentation
- Strengthening of inter-departmental and inter-sectoral responses

The above mentioned submission, including the recommendations were the result of various activities such as:

- A disability sector summit. One of the decisions of that each disability specific organization will develop and lead the implementation of its disability specific strategy

¹ SANAC Disability Sector Report by Hendrietta Ipeleng Bogopane 2000–2001

- Capacity building workshops in all 9 provinces, and 360 disabled persons were trained. The theme of the workshops was “exploring the connection, the impact and priorities, HIV/AIDS and disability”
- Disability Specific Workshops. 300 blind people participated in an awareness-raising workshop; 135 disabled women participated in another awareness raising workshop. Need analysis workshops were held with deaf persons, needs analysis workshops.
- The development of sign language terminology with the full participation of all schools of deaf children throughout the country. Thirty-four schools were visited and engaged on the issue.
- A draft code of ethics was developed and a capacity building workshop for interpreters was held.

Through the IDCC, the OSDP, Department of Health and particularly the Department of Social Services has embarked on in-depth discussions on the relationship between HIV/AIDS and disability. These discussions culminated in an in-principle agreement that persons affected with full-blown AIDS will be considered disabled and thus qualify for disability grants. This agreement is in line with the World Health Organisation (WHO) approach to the issue of HIV/AIDS and disability. The Department of Social Services is currently revising its assessment tool in respect of social grants and will be including this agreement in its revised tool.

One of the challenges on this particular issue is addressing the impact of HIV/AIDS on disabled persons and their particular needs in this regard in a manner that does not further aggravate the existing stigma attached to disability. Some people and organisations within the disability movement have expressed concerns that direct linking of HIV/AIDS and disability will suggest causal links and misunderstanding that all disabled persons are HIV positive, etc. Such negative stereotyping can only worsen the plight of disabled persons and take disability issues two steps backwards. The OSDP, working closely with Sida’s HIV/AIDS coordinator based at the Pretoria office, began processes that would allow the disability sector to discuss how to deal with this sensitive issue. A concept paper was developed and a national workshop was planned. Unfortunately, the workshop was not held since the Sida coordinator who was described as the “driver” on this initiative had left the employment of Sida.

Table of impacts

Impact	Level	Type of impact	Ex. of indicators
1. Policy framework (INDS) in place			
1a. Provision of coherent value structure	National and provincial levels	Value change, awareness, integration of values; secured commitment	Use of language; signs of commitment
1b. Development and adoption of related legislation	National and provincial levels	Value change, new legislation	Reflections in legislation: Employment Equity Act, Procurement Act, Promotion of Equality Act, etc.
1c. Possible replication of INDS in other countries	International	Value/policy impact	Source of inspiration, statements ¹
2. Implementation structures and processes			
2a. Political and senior decision making representation	National, provincial and local levels	Political representation	Figures of representation
2b. OSDPs established	National and provincial levels	Organisational	Structure and staff
2c. IDCCs established	National and provincial levels	Organisational forum for exchange of ideas and mutual support	Structures established, regular meetings, appointed staff
2d. Some local government structures have established disability councils.	Local government	Organisational	Structures of disability councils
2e. Some departments have appointed additional staff and/or established special units to serve as focal points	National and provincial levels	Organisational	Specially appointed staff
3. Establishment of the SAFCD	DPOs	Organisational, value ground	Common ideological ground DPOs were able to lobby on particular issues as one voice Easy access, one-stop contact point for government
4. Raised awareness through training and capacity building	Civil servants, public managers at national and provincial level	Value change, awareness	Increased knowledge, awareness, implementation strategies
5. Swedish/SA Exchange Programme	International	Values/policy	Linkages/interaction
6. Provision of services/Service delivery			
6a. Disability issues have been raised in society	All levels, including civil society and private sector	Value change	Demand for initiatives from private sector

¹ This point has been mentioned in several interviews, but has not been possible to verify.

Impact	Level	Type of impact	Ex. of indicators
6b. Government has acknowledged its responsibility in respect of disability issues.	National and provincial government	Organisational/ Accountability	Offices dealing with disability issues are accountable to the highest political level nationally and provincially.
6c. More disabled persons are receiving disability grants	Disabled persons	Organisational, procedural	Actual receipt of grants; E.g. Mpumalanga project
Disabled persons have more access to education, social services and employment	Disabled persons	Organisational, procedural	Actual access to education, social services and employment;
7. HIV/AIDS	Society	Awareness of HIV/AIDS in disability context; Strategies, procedures for involvement.	Recommendations; agreements; Summit & workshops sign language terminology

Table 1. List of impacts, level and type of impact and examples of indicators of the impact.

6. Output

The activities in the Business Plans of OSDP - first and revised – focus on certain main areas of output, namely

- A. Development of OSDP*
- B. Policy development at national level*
- C. Development of SAFDC*
- D. Development at province and local level*
- E. Support to disability groups*
- F. Opinion building in society*
- G. Twinning between South Africa and Sweden*
- H. Regional co-operation*

In order to clearly relate outputs to the impacts at different levels, the activities are clustered under the above headings; the numbers refer to the separate activities in the Business Plans (where 1:1 refers to Activity/output 1 in the first Business Plan, and 2:1 refers to activity/output 1 in the revised Business Plan etc.).

A. Development of OSDP

Organisational structure (item 1:2, 2:2)

Staff development, including provincial level (item 1:3, 2:3)

New Business Plan (item 1:15, 2:15)

B. Policy development at national level and enforcement of national policies

Government policies & guidelines (item 1:1) and position papers (item 2:1)

Special training programmes for line ministries (item 1:4) and ability and will to implement of key decision makers (item 2:4)

Status legislation (item 2:5)

Monitoring system for INDS (items 1:6 and 2:6)

C. Development of SAFDC and co-ordination of civil society disability formations

Establishment of SAFCD (1:7) and Memory of understanding for relations between Government and civil society (2:7)

Programme (research and information) for SAFCD (1:14 and 2:14)

D. Development at province and local level

Development of database on services for disabled persons (1:10 and 2:10)

Training of training material and execution of training of councillors (1:11) and Training of public opinion builders (2:11)

E. Support to disability groups

Support to organisational and advocacy skills of marginalised disability groups (1:8, 2:8)

F. Opinion building in society

Media strategy and Awareness campaign (1:12, 2:12)

Criteria and policy guidelines for DPO to access government funds (1:9, 2:9)

G. Twinning between South Africa and Sweden

Twinning arrangements in the field of disability programmes (1:13, 2:13)

H. Regional co-operation

Southern African Federation on Disability co-operation programme on research and information dissemination for organisations dealing with disability issues.

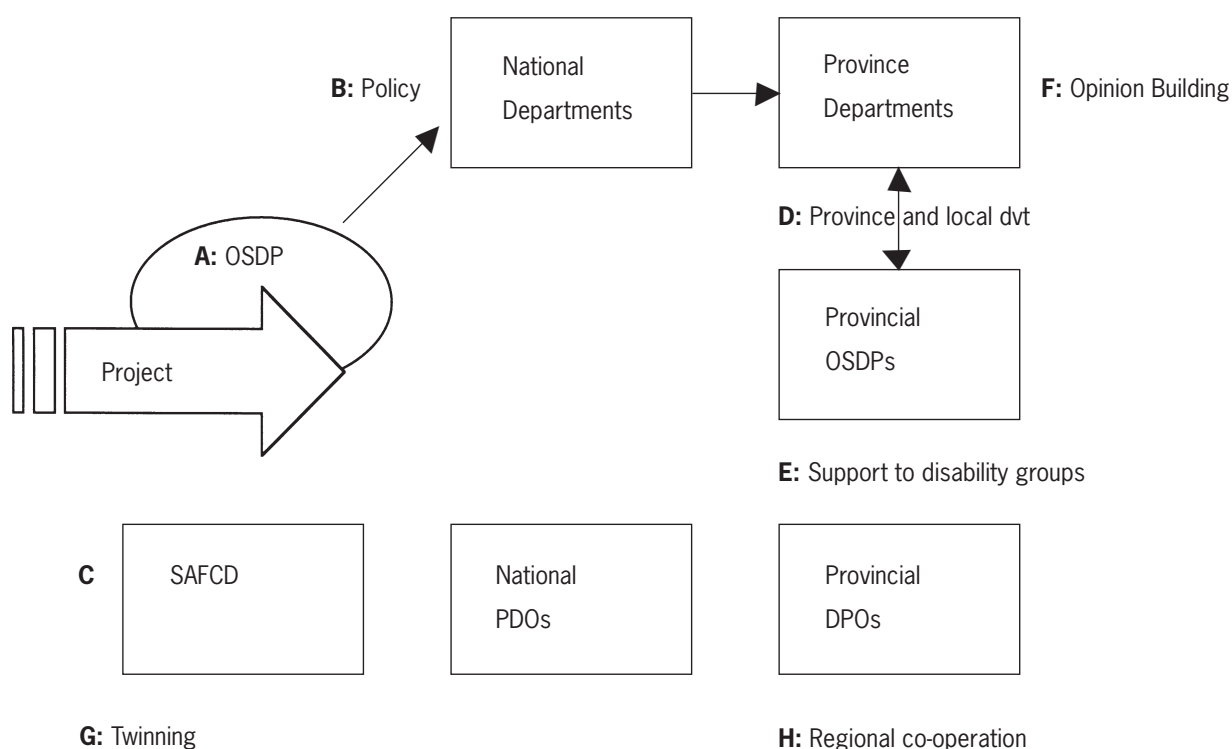


Figure 1. Business Plan activities related to departmental levels and areas. The block letters in the diagram refer to the activity clusters described above.

The above diagram illustrate that the activities of the OSDP business plans involve all levels of society and several different means of change, including organisation, policy training and opinion building. Thus activities of type A are directly related to the strengthening of OSDP itself, whereas other activities are focused on the surrounding infrastructure – departments (B), SAFCD (C) and provinces (D). Some concentrate on opinion building in society (E) and still others aim at the support of disability groups. It may indicate the tough task of OSDP in monitoring the Business Plan.

Several of the activities have indeed been carried out; others have been reformulated or pushed forward in time. Limited capacity and budgets have restrained implementation of activities, and in fact under-utilisation of funds. (This point is further elaborated on in section 6.2 Factors influencing impact.)

The INDS is an integrated strategy. As described above, the different activities of the Business Plans also represent an integrated approach. Many areas are tackled at the same time, and there is an interaction both between departmental levels and between means: value and structural change.

The diagram also illustrates the challenges from a management point of view, to monitor activities of such wide range. Although all activities are definitely relevant, their implementation and monitoring require great capacity – greater than that of the OSDP. From this point of view, the achievements of the OSDP and the project appear even more impressive.

7. Lessons learnt

A combined strategy of value change and institution building

Some of the items below have earlier been commented on as impacts. Certain aspects deserve to be specifically mentioned to highlight the combination of means to achieve the ends of increasing both awareness and implementation capacity.

Election of disabled persons as political representatives

This strategy proved to be a valuable first step. It ensured that disability issues were driven at a political level by disabled persons. When issues were placed on the political agenda they were from an informed basis. It served to increase awareness amongst non-disabled persons, in government and the public in general, of disability issues. This in turn created an additional awareness within government of the necessary costs attached to inclusion of disabled persons in mainstream life and that any stated intention must be supported with the appropriate resource allocation (human and financial). This has been acknowledged in practice by, for example, the National Assembly. Changes were made to the structure as well as to the rules of parliament to accommodate disabled politicians. For rules relating to the presence of non-politicians within the parliamentary chamber during debates was amended to allow for a sign language interpreter. Structural changes to allow access for persons in wheelchairs were made. The costs of these were borne by parliament.

INDS – comprehensive policy framework and related legislation

The approach of developing a policy framework with guidelines and recommendations first - as opposed to an Act – served a multiple of functions that an Act would not have achieved with the same degree of success. The title of the policy paper – INTEGRATED NATIONAL DISABILITY STRATEGY (INDS) in itself points to the culture that the INDS was designed to inculcate. This culture of integration of disability issues, of a developmental approach that recognises the rights of disabled persons are the same as other people, etc was a necessary pre-requisite for any implementation and enforcement of these rights. It also served to raise awareness and secure commitment and buy-in from all sectors of society. As a “living” policy document, its implementation highlighted strengths and weaknesses in the approach and allowed for easier adjustments than an Act would have done. The key factor to note in terms of this approach was the emphasis on creating an understanding and awareness. This would have a longer-term impact in the sense that change would arise from understanding rather than from fear of legal reprisal.

The disability sector was able to use the INDS as a basis for their contribution to other related legislation such as the Employment Equity Act, thus infusing thinking and values in different sectors of society.

The natural progression and implementation of the INDS has raised a critical question of whether the INDS should now be translated into a Disability Act. A policy framework such as the INDS provided – and continues to provide – a vision and coherent value structure for driving disability issues in government and society. The pros and cons of a Disability Act are still being discussed. These include the question of whether a Disability Act would contradict the disability movements’ position on the need for integration and mainstreaming. Would the Act require the establishment of a separate and new Ministry or will it be politically administered by the Minister in the Presidency? Does this remove responsibility from other Ministers to develop and report on their individual attempts and progress on disability issues? Views that support a Disability Act is that the conditions now require a consolidation of the various disparate pieces of legislation; that an Act is enforceable and has more legal weight than a policy paper; that an Act would focus on consolidation and not integration in the traditional sense,

etc. Time has to be set aside and resources provided for these discussions to be held in a more structured and outcome oriented manner.

Agent in government

Firstly the creation of a structure within government to drive and co-ordinate the implementation of its policy was a strategy designed to reflect and ensure government's unequivocal commitment to dealing with disability issues. *Secondly*, the positioning of the OSDP offices in the Presidency and Premier's offices served to ensure access to "the highest political levels" and to provide visible legitimacy to drive disability issues. *Thirdly* the creation of these offices indicated an understanding that disability issues – given its previous history and the legacy of apartheid – required dedicated focus and resources to ensure that it became and remains an integral part of transformation and an indicator against which true transformation and democracy can be assessed.

Other structures gradually coming up

The essential approach to the development of other structures has been informed by roles, responsibilities and lines of reporting and accountability – of and between each sphere of government; of and between each line department.

Central government:

The co-ordinating structure at department level was gradually developed, with the IDCC as a mechanism, and the appointment of staff responsible for disability issues and/or the establishment of special units. The formation of the IDCC acknowledged that implementation and integration of disability issues into government policies and programmes, particularly as a developmental issue, was a new concept and required structured support. It also served as a useful forum for exchanging ideas, information about projects and their implementation and identifying weaknesses. The IDCC thus serves as a useful generator of issues that need to be considered and/or reviewed to enhance implementation.

Provincial government

In the Provinces, OSDPs were established in the Premier's offices. These were followed by Provincial IDCCs and the appointment of staff responsible for disability issues in each department. In addition to the IDCCs, a Provincial Forum, comprising representatives from all the provincial offices meet a minimum of twice a year. Like the IDCC, it serves as a forum for exchange of ideas, initiating of projects and to provide the National OSDP with an overview of activities and the status quo within provinces.

Local government

The strategy of establishing disability councils rather than OSDP offices in municipalities is cognisant of the structure, functioning and role of local government. It acknowledges that local government is essentially the service delivery "arm" /sphere of government. Some councils have been established but their effectiveness is still to be assessed.

DPO Co-ordinating structure: SAFCD

This strategy is directly related to the particular political and civil society context of South Africa. The differing ideologies and priorities of various DPOs posed a potential threat to their ability to positively influence other sectors of society. The common ground and goal of the DPOs often was often shadowed by their differences and the formation of the SAFCD served to assist the DPOs to focus on their commonalities rather than differences and to appreciate their differences as a healthy tension rather than one that should divide the disability movement. The aim was to foster the "United we

stand, Divided we fall” concept. The achievements, as stated earlier in the report, were the uniting of the DPO movement; the building of trust and confidence amongst DPOs, and serving as a one-stop point for government. The challenges related to maintaining its networking and co-ordinating role and not becoming an organisation in its own right; not drawing financial resources away from their member organisations, setting up the appropriate administrative infrastructure without building an “empire”.

Building Capacity for Implementation

Although training is not a core function of the OSDP, a strategic decision was taken that the OSDP in partnership with other service providers would provide training on the INDS and some basic project management skills to the public service. The rationale was that the OSDP was best placed as the key driver of the INDS, to develop and “pilot” training on understanding and implementing the strategy. The training programmes driven with determination both at central and province level also supported the development of structures and a cadre of informed and skilled “drivers” as well as raising of awareness within the civil service.

Combination of actual impacts in terms of value and organisational structures

In fact, the combination of strategies and tactics that simultaneously addressed change in values and organisational structures provided the necessary conditions for pushing the issue forward: The INDS was a necessary platform for building up the organisational structures; the gradually built up organisational structures were necessary to implement the INDS.

Factors influencing impact

The impact mentioned above was not achieved without its share of problems. Some of the factors impacting on the degree of achievement were/are outside the direct control of the disability sector. Others are more internal in nature; through proper review and assessment they could be corrected to enhance implementation. The factors listed below are not given in any order of priority or significance – mainly because in their own particular contexts they are considered to be of equal importance.

Lack of financial and human resources

The general lack of sufficient financial and human resources in the OSDP offices and line departments resulted in some instances in a curtailing of activities, an over burdening on the time of existing staff affecting productivity levels and projects being implemented at a minimum rather than a maximum level. The public service generally has been characterised by huge staff turnover, either through lateral and vertical transfers and promotions or loss to other sectors of society, particularly the private sector. This has a definite impact on continuity and in the instance of disability issues means the loss of knowledgeable and trained personnel. The OSDP requires additional staff with specific skills for example, media/communications skills, economic (SMME development, macroeconomic frameworks, etc) skills. Current underspending of financial resources, has in the main, been the result of insufficient capacity to implement projects.

Competing interests

Another factor impacting on the extent to which disability issues have been prioritised in line departments is the “competing interests” of other transformation issues such as gender and youth. Apart from the Presidency, these transformation issues are clustered in line departments nationally and provincially. The “competition” is present at the level of financial resource allocation and prioritising. The bureaucracy of the public service, which defines the lines of decision-making, accountability and reporting, also defines the position of disability issues in the pecking order of concerns that have to be dealt with at a senior management level. The posts created to disability issues have in the main been at

the lower levels of the public service, with staff that have very little or no decision making authority. The extent to which senior managers have prioritised dealing with disability issues as part of their expected performance has differed between departments thus also leading to uneven implementation. Likewise, integration of disability within and between departments has been affected by different levels of understanding, commitment and ability.

Remaining attitudes of dependency

While the level of awareness in all sectors of society, particularly in government has been raised, this has not always been translated into tangible change of attitudes. One of the factors impacting on the implementation of development-oriented projects has been the attitude of dependency and victimisation of some disabled persons. For example the attempt to change existing sheltered workshops into viable small business entities is meeting some resistance from disabled persons concerned about the loss of their disability grant if they are gainfully employed. The level of readiness of society in general to embrace and facilitate disabled persons active and full participation as part of communities also impacts negatively on the implementation of projects.

Leadership in civil society

As explained in the section on impacts, the loss of leadership in civil society, the different strategic approaches by DPOs and the fact that they work at different paces impacted on the ability of the disability movement to sustain its active monitoring and change agent role. The internal changes and insufficient financial resources in some instances resulted in a weakening of DPOs regular contact with communities thus exacerbating the challenge of changing the attitudes and raising the level of readiness of disabled persons and the community at large for the envisioned changes.

Traditional approach in exchange programme

The twinning programme was implemented in a fairly traditional manner of exchange visits. Creative alternate methods that could maximise impact at the same costs do not seem to have been explored. The programme did not make provision for follow-up work or sustainability of learnings making any evaluation of the impact difficult.

Duplication of roles

The number and levels of co-ordinating structures that were established in some instances resulted in a blurring/perceived duplication of roles and responsibilities. The effort taken to clarify the specific mandates and deal with the resultant confusion and sometimes tension detracted valuable time away from projects and implementation. The lack of or unclear authority of structures in terms of enforcing and sanctioning participation, implementation of tasks, etc also had a negative impact on their functioning. While the mandates of each structure is clearly demarcated and documented as such, the practice due to the nature and huge load of demands and challenges, meant that sometimes structures had to respond immediately and instinctively resulting in the impression of blurring and duplication of roles.

Lack of role understanding

The stakeholders have perceived the roles of the central bodies differently. This may go for the OSDP itself, but particularly for the SAFCD and the DPSA. It may be argued that the formal roles of these bodies have indeed been formulated clearly. Notwithstanding, they have not been crystal clear as perceived by different actors. The OSDP is often inundated with requests of an implementation and information sharing nature. In practice and where possible, these requests are referred to other appropriate organisations, line departments and institutions. These requests, largely from the general

public indicate a lack of understanding of the monitoring, evaluation and co-ordinating role of the OSDP. The DPSA, prior to the formation of the SAFCD and unlike its other national member organisations, operated on a more generic scale. DPSA membership was not confined to a specific type of disability nor did it confine its work to addressing specific disability issues. In this sense, it served as a broad umbrella organisation of most disabled persons irrespective of their disability. It thus united and harnessed the efforts of disabled persons to work towards generic changes in the provision of socio-economic and human rights to disabled persons. However, the key distinguishing factor of the DPSA was the ideological and development framework within which it operated and continues to operate. This distinguishing feature has not always been understood by persons outside of the DPO movement.

Over-responsive to demands

The enormity of the challenges and the insufficient collective expertise on disability issues to deal with the challenges often resulted in structures including the OSDP being reactive and responsive to every demand which sometimes may have kept them from fulfilling their mandate.

A visible problem, both at central OSDP level and at provincial level, has been the very ambitious programmes, reflected in Business Plans with – too - many items to handle (see also Chapter 6 Output).

Obviously, plans have been too great in relation to capacity. Furthermore, plans have been difficult to follow up, due to lack of indicators and monitoring mechanisms.

Lack of capacity for IDCC work

The IDCC has not had its own budget allocated for driving its programme in the departments, thus dependent on allocations from the departments themselves. This has not been a successful arrangement. Furthermore, although acknowledged by many as a successful structure with impact on the departments, the problem of too low status has been observed: Gradually, new people have been chosen to represent their departments, often more junior than their predecessors. This is a bureaucratic phenomenon often observed, indicating that a project or activity is not given the same significance by senior management as before.

Possible to deviate and not deliver

There have been no or little sanctions, when disability issues have not been handled in accordance with the INDS. The absence of consequences can be observed at several levels: In the departments, in governmental institutions and in society as a whole, e.g. in business.

Lack of visible results on the ground

The “package” of value and organisational structure manifest high ambitions regarding the status of disability in society. However, results for disabled persons have not always shown in practice – or when they have, the results are not made visible to others.

High expectations – time to deliver

The lack of visible results is not a specific problem linked to disability issues. More generally, implementation has to go hand in hand with structures (both legal and organisational). Institution building at higher levels has to take place before action on the ground.

Furthermore, management and implementation capacity have not been matching the capacity to develop visions and strategies. Specifically, there has been a lack of key performance indicators, KPIs, linked to objectives of the INDS and plans.

The role of the Provinces

Provincial commitment has, with a few exceptions, been good but varying. In some instances, like the case of Mpumalanga, the Province has in fact been moving ahead in that it has implemented programmes as explained above in this report, on its own initiative and not by passively waiting for direction and instructions from the National office. It can be learnt that

inter alia advantage should be taken of the progressive forces as pilots of development, while at the same time not leaving out the slower actors. Due to time constraints the team was unable to do field trips and interviews in other provinces, thus unable to comment in detail on the activities embarked on in other provinces. However, based on the review of documents for this evaluation, the team has been able to surmise that in general, provincial commitments and activities have been good.

The role of the Dedicated

Whereas good transformation management always has to be an interactive balance between value changes and development of organisational structure, the presence of dedicated driving forces is also necessary. Typically, a dedicated might want all at once. People then expect delivery

– the ideas implemented. In order to implement reforms on the ground, “dull” management is necessary. Initiatives must not be subdued by exaggerated demands for elaborated proposals or bureaucratic culture not permitting new ideas. But strategies have to be specified in business plans, and the infrastructure in terms of organisation has to match the vision and strategies.

The dedicated driving forces have to be encouraged and not held back, but supported and sometimes restricted by structure¹.

8. RECOMMENDATIONS

There is probably no absolutely right way of implementing a strategy like the INDS. If there is, the story of implementing the rights of disabled persons in South Africa is doubtless a good example. It represents a fine example of interaction between value changes and institution building, balancing the drive of the dedicated with structure. The strategy of creating a policy and institutional base to facilitate implementation appears to have been most appropriate.

However, notwithstanding this acknowledgement, it is good to be able to show manifest results from a short, medium and long-term perspective. What are manifest results? In fact results like structures built or knowledge acquired also “count”, if they are verified by reliable means. This is where key performance indicators for each stage are valuable. Usually short term objectives/goals reflect the necessary conditions/ situation that have to be in place in order to proceed to the next stage - medium term objectives- which in turn indicate the conditions and situation that have to be in place for achievement of the long term objective/goal. Thus, objectives and goals for the short, medium and long term have to be inter-related and in a sense clearly indicating the steps towards the long-term objectives.

A number of recommendations could be extracted from the lessons learnt, both in an international – South and North - and a South African context. Furthermore, such recommendations could also be interesting outside the disability context.

¹ The shepherd guides the flock by encouraging the slow ones lagging behind, but also slowing the fast ones ahead to hold the company together. This is a metaphor we owe to Nelson Mandela. (Long Walk to Freedom, the Autobiography of Nelson Mandela, McDonald Purnell 1994.)

To be carried forward in a regional and South context:

In summary, some of the issues that need to be considered in replicating the approach taken by the South African government are listed below. Items 1-3 relate to the general positioning of the disability issue in society, items 4-10 aim at giving the issue structure and items 11-17 concern integration and combination of means for change in society.

A. Positioning and reinforcement of the disability issue:

1. The existing levels of political commitment and the strategy required to secure/increase this. For example, **position the OSDP body at high level in government!** The physical location/ position of a change agent at high governmental level is critical, both because of the actual access to central decision makers and because of the legitimacy acknowledged by the position. The physical location, however, must be supported by a high level of appointment within the office and direct lines of reporting and accountability to key political decision-makers.
2. The need to **increase/raise existing levels of awareness** in government and society in general and as the foundation for implementation. This should be one of the core functions of the change agent within government as well as of DPOs. The change agent within government should focus its energies on raising awareness within government and of raising awareness of government services amongst the public. DPOs should focus their energies on raising awareness in society in general.
3. The approach to **changing attitudes in society**, whether this change should be introduced in stages, what these stages are and whether they require a broad enabling framework in the form of a policy paper or more stringent enforceable methods as required by an Act. The approach adopted by South Africa, of addressing the issue of changing attitudes in stages appears to be a more realistic and manageable way. It allows for gradual but meaningful and longer-lasting impact in that the change is facilitated through a number of activities and steps rather than being enforced as a to-down legal instruction. The strategies and tactics for each step/activity can then be developed on the basis of where people are.

Providing structure and strategies for change:

4. The type of structures required for co-ordination and implementation, their respective mandates, their relationships to each other, their decision-making powers and authority and their lines of accountability and reporting. **Set up realistic and sustainable structures!** As with the OSDP itself, structures have to be sustainable in relation to budgets. This is not to say that budgets should be taken for granted. Clarify and explain the roles of structures! The roles of the important actors and organisational structures have to be clarified, also to others. In a society where people have fought for democracy together, it may not appear natural that roles have changed.
5. A realistic assessment of the human and financial resources required for implementation; the sources of these resources and viable allocations thereof. **Budget line for disability issues!** A forceful way to secure resources for disability issues is to provide for them in the budget, nationally and at all levels.
6. **An OSDP has a huge task – give it specific targets!** The huge mission of an OSDP or body with similar issues to handle must not become the enemy of implementation. The mission and capacity have to match. The OSDP case demonstrates that much can be achieved also with limited resources. The opposite side of the coin is that the structure has to be sustainable and realistic in relation to budget constraints. Experience shows that concentration on monitoring of

change in combination with the role of advocacy is a forceful combination. Monitoring in this context implies keeping an eye on both value and institutional change, including legislation as well as organisational structures.

- 7. Create an organisational development strategy** including sustainable skills development, staff retention, career pathing, etc plans.
- 8. Involve senior management!** Strategies have to be developed to involve senior management. It is a well-known fact that senior management will deviate from development issues that are not directly pressing – or rewarding. Mechanisms that have been proposed are disability issues as standing slots/agenda points in management meetings, inclusion in performance agreements, accountability for induction programmes and improvement of advocacy skills at focal points in government.
- 9. Provide ongoing educational support!** Training has to be an ongoing activity. Induction programmes need to be repeated and adjusted, responding to turnover, rotation of appointments and institutional change.
- 10. Show visible results – use KPIs to explain results!** Results should be possible to follow, also such results that are not close to the ground, but steps on the way to tangible implementation. KPIs geared towards catching development in different respects – legislation, institutional capacity etc. have to be developed, to monitor and explain progression both to “insiders and outsiders”.

Integration of the disability issue and combination of means for change:

- 11. Clarify existing socio-economic needs of disabled persons** and the extent to which government currently provides for these.
- 12. Spell out the existing attitudes and concerns of disabled persons** themselves so that any changes proposed are cognisant of this.
- 13. Investigate the potential to form partnerships** with other sectors of society thus developing a stronger support base as well as pooling of resources.
- 14. Define the specific and combined role of each sector of society**, reflecting these in policies and programmes.
- 15. Combine means in a conscious way!** Enforcing an integrated national disability strategy means working with legislation, new structures, education and other means of influence.
- 16. Take care of the dedicated** – give them support and structure!

Challenges in the South African context

The key challenge facing the country as a whole and inclusive of disability issues is implementation and delivery!

Two key focus areas in the context of this challenge and specific to disability issues are:

1. The development of a Specific Disability Act

An enabling environment has been created by the INDS. Legal sanctions, minimum standards, etc are reflected in related but separate pieces of legislation. The groundwork has been done for the consolidation of these various pieces of legislation into a single legally enforcing mechanism. However, great caution must be exercised to ensure that the principles of integration and mainstreaming of disability issues is not sacrificed in this process. This includes ensuring that

political responsibility remains a collective government responsibility and does not get shifted to a single person/minister/department.

2. *Ensuring participation of disabled persons in the economy*

Enabling legislation and the environment, that provide various and substantial opportunities, for the active participation of disabled persons in the economy, has been established. Despite this economic participation of disabled persons remains low. There are several contributory factors to this status quo, factors that would have to be addressed in whatever strategy and plans are developed to address this focus area:

- The need to shift from a “grants” based solution to the right/opportunities to work.
- The need to ensure that disabled persons receive the necessary skills and training that would allow them to compete in the job market
- Ensuring that implementation of the Employment Equity Act does not result in employment of disabled persons only at low unskilled levels of employment but that they are also employed in senior management positions, particularly in the private sector.
- The conversion of protected and sheltered workshops into well resources and viable profit making businesses
- The effective implementation of learnerships towards provision of skills required to build the economy rather than skills that may not be used in the immediate or near future
- The provision of skills and information to small businesses of disabled persons to maximise gaining from the preferential black economic empowerment procurement policies of government.
- The development of a database of the existing skills and knowledge base of disabled persons for provision to potential employers within all sectors of society.

Other specific areas requiring attention in the immediate and near future are:

- The handing over of the training function to SAMDI
- Further strengthening of DPOs, leadership and advocacy capacity building, and revitalising of a DPO co-ordinating structure (SAFCD?) to continue building on the gains mentioned in the section on impacts
- Ensuring that disabled persons as the poorest of the poor are a specific target group in poverty alleviation and other development projects
- Enhancing and improving co-ordination and integration in government structures
- Increasing the number of staff and the budget in relation to the OSDP structures
- Assisting other African countries to begin or improve their approaches, particularly through the Decade Secretariat which is being hosted by South Africa
- Further establishment of disability councils in municipalities referred to in the section on Development of Implementation structures/processes.
- Reviewing implementation thus far with the purpose of addressing weaknesses, improving on the strengths and replicating best practices or “what worked/works” on a national scale.

Sida involvement

The need for financial resources to meet the above-mentioned challenges is clear. The South African government, while committed to increasing its resource allocation for disability issues continue to face

the huge challenge of competing demands on its finances. Further Swedish support towards achievement of the long-term goal of the project would appear interesting in a regional context.

Thus Swedish support to promotion of disability issues in the Southern African region or possibly Africa as a whole should be considered at two levels:

1. Support in different respects to share out the South African experiences for production of training material, setting up conferences, development of monitoring tools etc.
2. Limited support to specific activities of OSDP contributing to its long term objective that would also be of interest in a regional context e.g. the creation of a database reflecting skills and knowledge of disabled persons, or development of plans for conversion of sheltered workshops into viable business entities.

Terms of reference for the evaluation of OSDP/Sida project.**1 Background**

The Office on the Status of Disabled Persons (OSDP), housed within the Presidency, has been supported by the government of Sweden (Sida) since 1998 with a total of 35.5 million Swedish Kronor. The current agreement runs until 2003. The OSDP is currently in the process of implementing a business plan that is partly funded by Sida. This business plan is a multi-faceted one and is aimed at ensuring that disabled persons have access to government services and are integrated into mainstream society.

The overall purpose of the project is to create an enabling environment that will lead to the full participation and equalisation of disabled persons within South African society.

2 Purpose and Scope of the Evaluation

The evaluation shall be a knowledge-orientated one with the primary emphasis on the generating lessons learned through this project.

The evaluation shall assess the impact of the activities implemented under the OSDP/Sida Business Plan and the exchange programme between SHIA, the Swedish disability organisation and South African disability organisations. The evaluation should assess the achievement of the planned outputs.

The immediate objective of the evaluation is to investigate, assess and report on the implementation of the activities in the OSDP/Sida Business Plan.

The evaluation will assess and report on the effectiveness of the implementation and service delivery strategies aimed at empowering disabled people.

The evaluation will assess and report on the outcomes of the twinning/exchange programme between Sweden and South Africa.

3 The Assignment (issues to be covered in the evaluation)

The evaluation consultants should undertake the following:

- 1.1 Study the OSDP/Sida Business Plan, other related policy documents and the status reports.
- 1.2 Assess whether all outputs envisaged within the Business Plan were achieved. Indicate any changes that were introduced during the implementation process.
- 1.3 Study and report on the readiness and the responsiveness of government departments on the need to integrate disability components in line with the objectives of the INDS and the OSDP/Sida Business Plan.
- 1.4 Interview persons involved in the twinning arrangements/exchange programme between Swedish and South African disability organisations and comment on and evaluate the outcome of the arrangements.
- 1.5 Interview and assess the partnership that exists between OSDP and SHIA.
- 1.6 Evaluate the outcome and outreach of the reporting done by Swedish journalist Malena Sjöberg as part of the SHIA cooperation.

- 1.7 Comment on and assess the impact of the training of senior government officials and local government councillors.
- 1.8 (a) Assess the linkages, roles and issues related to the provincial OSDP's and the development of emerging models.
- (b) Assess and report on the impact of training provincial government officials
- 1.9 What impact has the Swedish support had on the capacity of OSDP to implement its Business Plan?
- 1.10 Assess and report on the general impact of the Business Plan on the marginalised disability groups
- 1.11 Analyse the outcomes of all the research work conducted as part of the implementation of the OSDP/Sida Business Plan.
- 1.12 Comment on the constraints and opportunities encountered by the OSDP Implementation Team.

4 Methodology, Evaluation Team and Time Schedule

The evaluation is to cover the entire duration of the project, from its inception in 1998 to June 2003. Special focus and attention, however, must be given to the period January 2001 to June 2003. This is in light of the fact that a review was commissioned for the first period.

The consultancy days required for the evaluation are 25.

The evaluation will be conducted by a team consisting of a Swedish and South African consultant.

The South African consultant shall be appointed by OSDP and the Swedish consultant by Sida.

The Swedish consultant shall be the team leader.

The Swedish consultant shall undertake the Swedish leg of the evaluation.

The consultants shall divide the South African leg of the evaluation as they deem fit.

5 Reporting

The consultants shall make a brief presentation of the preliminary main findings to the Embassy before leaving South Africa. The draft report shall be submitted to Sida/DESA, the Embassy in Pretoria and the OSDP electronically and in two hardcopies (air-/surface mailed or delivered) no later than June 25 June 2003.

The final report shall be submitted to Sida/DESA, the Embassy and the OSDP again electronically and in 2 hardcopies each. This should be done by no later than 31 July 2003. The evaluation report must be presented in a way that enables publication without further editing. Subject to decision by Sida, the report will be published in the series *Sida Evaluations*.

List of people interviewed

1. Mr Maluti (National Department of Health)
2. Ms S.Mhasibe (National Department of Social Services and Development)
3. Mr A.K. Dube (Consultant – 1st Evaluation Report)
4. Mr Mzondeki (Chairperson - SAFCD)
5. Ms Mxolisi (Executive Committee Member of SAFCD and DPSA)
6. Mr S.Chalken (Previous National Director of OSDP)
7. Ms Sebenzile Matsebula (National Director – OSDP)
8. Mpumulanga OSDP Staff (focus group meeting with 4 staff members)
9. Robert Masambo (Head of Mpumalanga OSDP)
10. Mpumalanga Inter Departmental Committee Meeting (focus group meeting with 10 provincial departments)
11. Mpumulanga DEAFSA and DICAG (disabled peoples organizations, focus group meeting)
12. Mr Palime (Deputy Director – National OSDP)
13. Minister Essop Pahad (The Presidency)
14. Ms Malin EkmanAldén (Secretary General, SHIA, Stockholm)
15. Mr Gunnar Hellberg (SHIA, Stockholm)
16. Mr Lennart Nilsson (Consultant, Stockholm)
17. Ms Barbro Carlsson (F. Secretary General, SHIA, Stockholm)
18. Ms Anne Ljung (Sida Pretoria)
19. Mr Bram Naidoo (Sida Pretoria)
20. Ms Eva Falkenberg (Sida Stockholm)
21. Mr Thomas Kjellson (Sida Stockholm)

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Tomas Hertzman, Dan Vadjnal, Valts Vilnitis
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