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Name	Geraldine Schoeman	Organisation	WAI
Qualifications	- MA (Research Psychology – Environmental and Community Psychology), University of Pretoria, South Africa - BA (Hons), Psychology, University of Pretoria, South Africa		
Countries of Experience	Botswana, Democratic Republic of Congo (DRC), Lesotho, Malawi, Mozambique, South Africa, Swaziland, Zambia, Zimbabwe, Rwanda, Uganda, India	Position	Social and Gender Specialist

Summary of Experience

Geraldine Schoeman is a social development specialist with more than 30 years' experience in research and development activities within complex, multi-disciplinary contexts relating to social empowerment, organisational development, and institutional and individual change management. A specific focus has involved constraints and challenges to water and sanitation related development within African urban and rural contexts, including the capacity and competence needs to deliver against mandates and plans at all levels of government, as well as at grassroots community levels.

Geraldine served as team member (from 2005 to 2010) and co-leader (2010 to 2013) of the multidisciplinary Sanitation Job Creation Programme, aimed at the identification of job creation opportunities and the development of community cooperatives and SMMEs directly and indirectly related to sanitation infrastructure development, associated Operations and Maintenance of dry and wet systems, material development as well as the Health and Hygiene and Social Mobilisation related employment opportunities. The process involved the assessment of the socio-economic situation at local (municipal) level, facilitating an understanding of and assisting the technology choice at grassroots level, identification of key growth and development opportunities emanating from the entire sanitation value chain, the development of implementation plans for Local Economic Development and Livelihoods related projects (including New Venture Creation) and the facilitation of appropriate skills development within the national training and skills development framework for ensuring viable exit opportunities into full-time employment.

Her evidence-based and applied research has served to inform and translate regulatory and policy requirements into implementation frameworks with a focus on the needs of under-served poor communities and the impact of poverty on gender. This has focused, particularly, on the water and sanitation sector, including water for livelihoods and development/ water use security (also referred to as Multiple Water-Use Services) and sanitation. Having worked at project implementation as well as programme and strategic levels, she understands the challenges and complexity of development issues and the expectations of multiple stakeholders and institutions. She has gained extensive practical experience at grass-roots level through her work in poor and marginalized communities.

Her intensive training in Theory of Constraints under the personal mentorship of the world renowned and acclaimed Dr. Eli Goldratt, and her involvement in TOC related programmes and projects, including the Odyssey Programme has allowed Geraldine to develop strong analytical skills and practice analytical rigour. She is able to think clearly, see the bigger picture, to value and integrate multiple perspectives and to understand and articulate complex and/or multidimensional issues in a manner that supports decision-makers at strategic, planning and implementation levels.

Geraldine has authored and co-authored numerous articles, papers, reports, guidelines and policy and strategy documents and has a number of publications to her credit. These include: Community Identified Performance Indicators for Measuring Water (and Sanitation) Services; Field Guide for Participative Development Management in Communities; Guidelines on Participative Management of Water Pollution and Associated Health Risks within the Context of Developing Communities in South Africa; Guidelines for Knowledge Transfer Requirements for the Implementation of Water Treatment Technologies in Developing Communities; Guidelines

for the Establishment of Municipal Customer Services Centres for Water and Sanitation; Guidelines for the Development of Appropriate Communication Strategies at Community-level; Guidelines for Gender Mainstreaming and Social Inclusion in Climate Change; and contributions/chapters to publications including The Southern Africa Development Journal (DBSA); the Water, Science and Technology Journal (IWA), and SADC Water Sector. She has also served as technical reviewer and external editor for, amongst others, the SADC Water Division.

Employment history

2011 - date	Wilson and Associates International
1999 - 2010	Independent Consultant, SADC Region
1998	Lecturer, Medical University of South Africa (MEDUNSA), South Africa
1986 – 1988	Junior Lecturer, University of Pretoria, South Africa
1980-1985	Transactional Analysis Counsellor, Pretoria, South Africa
1970-1979	National Director, SA National Epilepsy League, Pretoria, South Africa

Selected projects

South Africa: Review of South African Successes and Lessons for Improvement of Water Services Delivery at National Scale, DAI Global LLC for USAID WALIS and WHO GLAAS, 2016

Geraldine served as Specialist Contributing Author for this USAID Water for Africa through Leadership and Institutional Support (WALIS) and WHO GLAAS project. The purpose of the study has been to undertake a review of South African successes in water and sanitation to uncover the combination of pathways, processes, policies, and people needed to improve water service delivery at national scale moving forward towards the achievement of the SDGs. South Africa is one of several African countries that had been identified for possible inclusion in the study in collaboration with AMCOW, being selected as representative of four different AMCOW regions. The three other African countries to join South Africa in this review process have been (i) Egypt; (ii) Ethiopia; and (iii) Senegal.

South Africa: Development of a Municipal Skills Intervention Strategy, Action Plan and Capacity Building for the Kgetlengrivier Local Municipality, Department of Water and Sanitation – North West Province and the Kgetlengrivier Local Municipality, April 2014 – July 2015

As Capacity Building, Training and Sustainability Lead Consultant, Geraldine was responsible for critically evaluating the extant institutional capacity within the municipality, as well as the various treatment works, to ensure compliance in respect of the Blue, Green, and No Drop Initiatives and, based on this assessment, to develop a comprehensive strategy and action plan for competence development. Two specific focus areas related to ensuring that the designated process controllers for the wastewater treatment works could undergo a process of Recognition of Prior Learning and skills development, including on-site sludge management as well as the development of funding proposals for the use of wastewater and sludge for agricultural purposes. The project engaged counterparts at all municipal levels, in addition to supporting community-based SMMEs/NVCs/NPOs engaged in the promotion of food security and the productive use of water and wastewater.

Southern Africa: Climate Resilient Infrastructure Development Facility (CRIDF), DFID, 2013 - 2015

Geraldine was a project team member (socio-economic, gender and public participation) for DFID's £20.7m CRIDF programme. She developed a set of Gender Equality and Social Inclusion guidelines, which were used to (i) Efficiently assess the impact of project designs and implementation on women and the poor (including the aged, children, and marginalised groups); (ii) Efficiently assess the extent to which project designs have included participation from women and the poor; and (iii) Ensure adequate sex-disaggregated data and information is captured in the CRIDF monitoring and evaluation system. The guidelines considered compliance with Social Safeguards policies of those IFIs engaged in infrastructure financing under CRIDF, in addition to requirements put in place by UN Conventions, SADC policies (including the 2007 SADC Protocol on Gender and Development,

Gender Mainstreaming Toolkits), relevant member state policies and regulations, the AMCOW Gender Mainstreaming Strategy, and DFID policies on gender equality, pro-poor, and socially inclusive development.

Zambia: The Development of a Detailed Framework and Work Plan to Operationalise the Sanitation Connection Action Plan for Mtendere, Millennium Challenge Account – Zambia (MCA-Zambia) and the Lusaka Water and Sewerage Company (LWSC), 2014

Geraldine served as the Social and Gender Specialist for this project to operationalise the Mtendere Sanitation Connection Action Plan (SCAP). Geraldine supported the development of a Framework and associated Work Plan that addressed (i) institutional constraints at all levels (including within the community) and the mechanisms required to overcome these constraints and build capable institutions and competent individuals; (ii) the development of a supply and demand side Sanitation and Hygiene Information, Education, and Communications Strategy - including the need to ensure gender equity and social inclusion as well as the creation of decent work; (iii) an infrastructure intervention providing a suite of options at household level, appropriate to the current infrastructure investment plan; and (iv) financial mechanisms such as micro financing, sustainable use of grant funding as and when available, and affordability and 'willingness to pay' issues.

Malawi, Social and Stakeholder Assessment of the proposed Lambilambi Dam, (CRIDF), DFID, 2013

Geraldine served as Gender and Social Inclusion Specialist for this CRIDF assessment of the viability of the proposed Lambilambi Dam, addressing its bankability and, from a socio-economic perspective, to determine the support to be provided by CRIDF within the social domain, with a specific focus on gender equity and social inclusion (GESI). Action plans regarding specific assistance were based upon consideration of whether the project was likely to be technically, financially, economically, environmentally, and socially feasible and sustainable, and whether it demonstrated stakeholder support and regulatory compliance. Based on this, specific Social Assessment tasks were formulated for future action which included the need to ensure a focus on, *inter alia*, pro-poor development, gender equity, youth, and social inclusion, key changes in quality of life, poverty alleviation, job creation, and skills development.

Zimbabwe: Social and Stakeholder Assessment of the Ntlalale Rural Water Supply Scheme, (CRIDF), DFID, 2013.

This assignment involved an assessment of the viability of the rehabilitation of the rural water supply system to serve the Ntlalale community, in respect of the necessary equity, attitudinal, institutional, and economic factors, and the established community participation mechanisms that promote the ongoing success of rural community-based water systems. Geraldine assessed the extent to which the proposed project would address significant factors of vulnerability, and offer the potential for employment creation and income generation. The assessment engaged with four categories of vulnerable groups: (i) women requiring ante-natal, peri-natal, and post-natal care; neonates; infants; small children and their mothers; and individuals with severe disease burdens; (ii) teenage female scholars who currently do not attend school during menses; (iii) primary and secondary school pupils who are undernourished and would benefit from school feeding schemes using vegetables grown at schools; and (iv) currently unemployed individuals with high levels of food insecurity who would benefit from potential secondary irrigations schemes.

South Africa / Zimbabwe: Preparation of CRIDF Small Dams and Associated Micro-Infrastructure Strategy, (CRIDF), DFID, 2013.

As the Social, Gender and Participative Specialist, Geraldine supported the preparation of the strategy which formed part of the establishment of the CRIDF Small Dams Programme. The assignment involved extensive stakeholder engagement, social facilitation, participative needs assessment, and primary and secondary research to identify key issues of sustainability within the context of water infrastructure development. Geraldine supported the direct engagement and collection of qualitative and quantitative data at grass-roots level within 24 communities, developing a body of evidence-based knowledge and experience of sustainable small dam and related livelihood infrastructure provision in the SADC region. Geraldine identified factors critical to success for a SADC-wide strategy related to the development of small-scale sand dam infrastructure.

Zambia - The Development of a Detailed Framework and Work Plan to Operationalise the Sanitation Connection Action Plan for Mtendere, Lusaka – The Millennium Challenge Account – Zambia (MCA-Zambia) and the Lusaka Water and Sewerage Company (LWSC) (2013)

The project forms part of the Millennium Challenge Corporation and the Government of Zambia supported Lusaka Water Supply, Sanitation and Drainage (LWSSD) Compact Agreement Component. Its purpose was to

give effect to operationalizing the Mtendere Sanitation Connection Action Plan (SCAP) forming part of the Kaunda Square Sewershed Expansion through the formulation of a detailed sustainable Framework and Work Plan. Under the existing SCAP, two interventions had been identified to address problems being experienced in Mtendere, viz., an Infrastructure Activity and an associated Institutional Strengthening Activity with the overall purpose of creating demand for the new sewer connections in Mtendere and to develop a Framework for a funding mechanism for these connections. Based on the ToR, the Framework and associated Action Plan required that (i) institutional constraints at all levels (including within the community) be identified as well as the associated mechanisms required to overcome these and to build capable institutions and competent individuals; (ii) the development of a supply and demand side Sanitation and Hygiene Marketing/Information, Education and Communications Strategy, including the need to ensure gender equity and social inclusion as well as the creation of decent work; (iii) an infrastructure intervention providing a suite of options at household level, appropriate to the current infrastructure investment plan; and (iv) the financial mechanisms such as micro financing, sustainable use of grant funding as and when available and affordability and 'willingness to pay'. Geraldine served as the Social Consultant for the project.

South Africa: Rapid Response Programme for Good Governance and Effective Regulatory-Based Performance within Water Services Authorities, Water Services Providers, and Associated Water and Wastewater Treatment Works, Department of Water and Sanitation Eastern Cape, 2012

This programme addressed technical and operational issues across the water value chain in the Eastern Cape, designing and implementing proactive interventions aimed at pre-empting crises before they occur through focusing on weak municipalities. Geraldine's role focused on the facilitation of appropriate institutional governance structures and associated individual competence at municipal level, including the design of appropriate organograms and associated staffing standards.

The Development of Staffing Norms and Standards for Water Services Authorities and Water Services Providers (2012)

Geraldine served as the lead consultant in this project which was guided by the needs of the water as well as the cooperative governance and traditional affairs departments (DWS and CoGTA). The project specifically aimed at putting in place a solid basis and the initial basic sets of tools for (i) establishing what factors, issues, standards and delivery imperatives should be considered to determine a norm reflecting the delivery of adequate services within any specific municipality; (ii) developing decision tools for implementing a differentiated approach to the provision of municipal support; (iii) developing appropriate benchmarks for staffing numbers to ensure sufficiency using basic formulas for calculation; and (iv) linking the staffing norms and standards into the municipal Organising Framework for Occupations.

Programme for Sustainable Job Creation for Women, Youth and People Living with Disabilities through Low Cost Sanitation Infrastructure Development and Associated Services Delivery (2007 – 2012)

Geraldine served as team member (from 2005 to 2010) and co-leader (2010 to 2013) of the multidisciplinary Sanitation Job Creation Programme. The programme aimed at the identification of job creation opportunities and the development of community cooperatives and SMMEs directly and indirectly related to sanitation infrastructure development, associated Operations and Maintenance of dry and wet systems, advocacy and training material development as well as the promotion of Health and Hygiene and Social Mobilisation related employment opportunities. The process involved community-based consultation and facilitation (with individuals and groups at community level within urban and rural settings, NGOs, CBOs, FBOs, the private sector, governance, development and financial institutions as well as the public sector at national, regional and local levels); the assessment of the socio-economic situation at local (municipal) level, the identification of key growth and development opportunities, the development of sanitation implementation plans on a participative basis for key Livelihoods related projects, ; the development of a National Capacity Building Framework for Sanitation-related Job Creation; the facilitation of appropriate skills development within the national training and skills development framework to allow viable exit opportunities into full-time employment; and the development of case studies, good practice guidelines, advocacy and training materials in support of the process.

Support in Respect of the Development of Regulations for the Promotion of Municipal Water Governance (2011)

Geraldine Schoeman served as lead consultant in the research and development process to design, align and integrate a Municipal Water Manager Competency Profile (including competency definitions and range requirements) with the CoGTA 'Local Government: Municipal Public Administration Regulations for Senior (Section 57) Managers.

Development of a National Training and Skills Development Framework for Low Cost Sanitation Delivery and associated Job Creation (2010)

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Geraldine served as Principal Consultant for the development of a national training and skills development framework for the Sanitation Job Creation Programme as well as the associated training needs assessments, training curriculum development and skills development facilitation for NVC/SMME PDIs and PDCs within six pilot areas across four provinces.

Strategic Assessment of Sanitation Related Capacity Building Needs of Water Services Authorities. (2009)

Geraldine served as Principal Consultant in respect of this study which aimed at (i) Gaining an understanding of the current status of sanitation service delivery, including its regulatory and institutional context; (ii) Identifying the specific challenges that were being faced by Water Services Authorities (WSAs); and (iii) Proposing strategic interventions for accelerated low cost sanitation service delivery that would be appropriate, sustainable and integrated with broader developmental objectives. The study included a survey, undertaken amongst the 170 municipalities that had been granted water services authority status and a comparison of the results with pre-existing research findings reported by a variety of sector and non-sector role-players.

Development of a National Sanitation Strategy for Sanitation Services Delivery to Informal Urban and Peri-urban Settlements (2008)

Geraldine served as Principal Consultant in this project which aimed at the development of a national strategy for sustainable low-cost sanitation service delivery to the poor within informal urban and peri-urban settlements. A particular area of focus of this project related to an assessment of the needs of women living in informal settlements and the specific requirements from a national strategy to address their involvement (on a comprehensive basis) in the delivery of sanitation.
