Trust Maturity **Baseline Assessment** Report Summary

INSPIRE

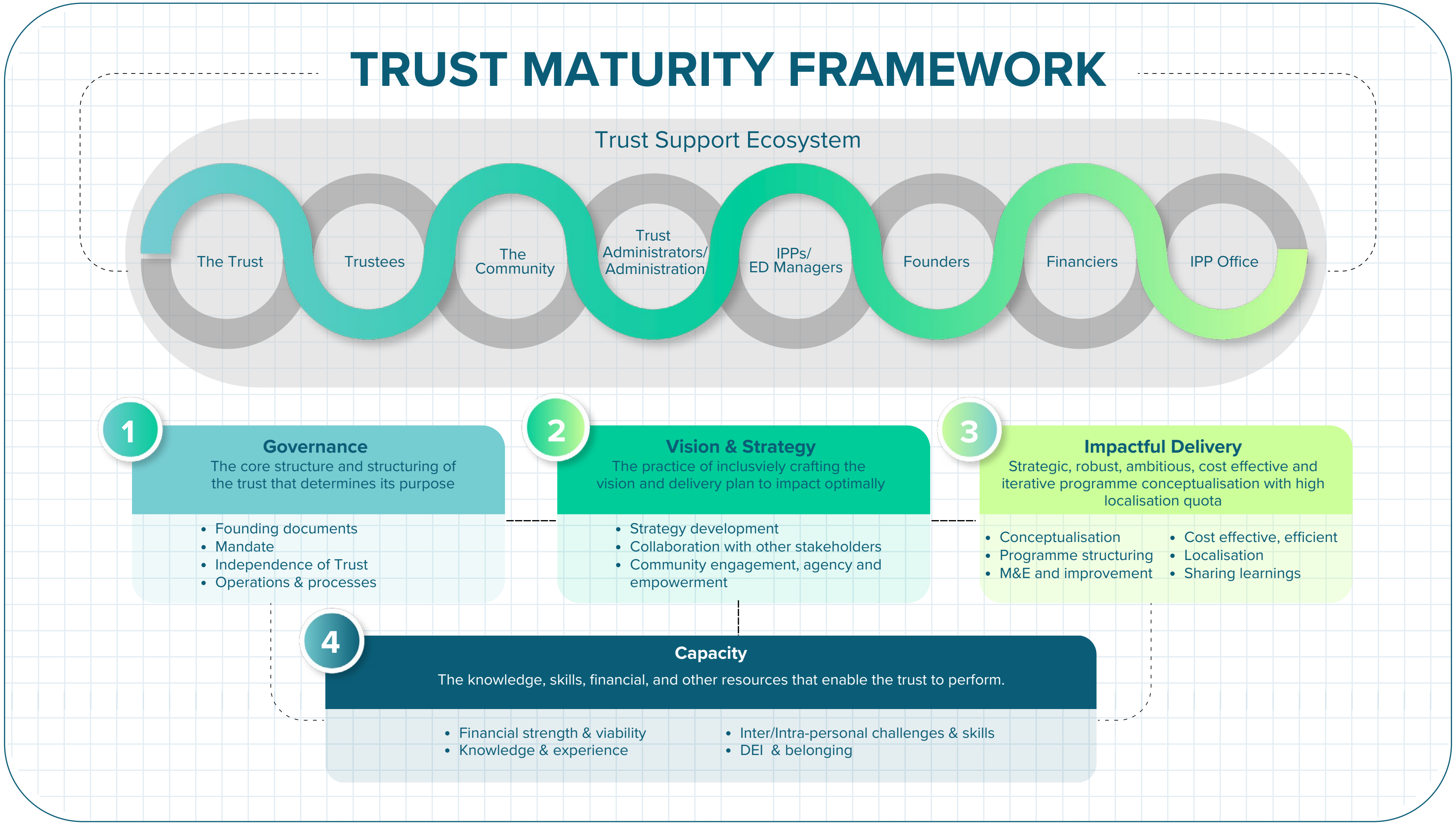
Initiative for Social Performance in Renewable Energy

Community Trusts established under South Africa’s Renewable Energy Independent Power Producer Procurement Programme (REIPPPP) are critical vehicles for translating energy investments into long-term socio-economic development outcomes.

This summary report synthesises findings from the full Trust Maturity Baseline Assessment Report, providing a clear, evidence-based snapshot of trust maturity across participating trusts. The analysis highlights current strengths, identifies systemic gaps, and outlines priority actions required to strengthen governance, impactful delivery, and organisational capability across the ecosystem. The baseline is intended not only as a diagnostic tool, but as a foundation for continuous improvement, targeted support, and sector-wide learning.

TRUST MATURITY FRAMEWORK

The assessment is grounded in the **Trust Maturity Framework (TMF)**, a developmental framework designed to assess how effectively Community Trusts are positioned to govern, manage resources, deliver programmes, and achieve sustainable community impact. The TMF evaluates trusts across four core pillars: Governance, Vision & Strategy, Impactful Delivery, and Capacity. Trust maturity is assessed using a four-level scale ranging from Level 1 (Basic) to Level 4 (Leading Practice). Importantly, the framework positions maturity as a developmental journey rather than a compliance exercise.



METHODOLOGY AND ASSESSMENT PROCESS

The assessment draws on a structured Self-Assessment Tool, facilitated activation workshops, webinars, follow-up validation engagements, and supporting documentation review. Eight Community Trusts participated in the process by completing the **Trust Maturity Self-Assessment Tool**. While seven trusts fully completed the assessment with one trust partially completing their assessment, all available data was incorporated to preserve analytical integrity. The layered methodology strengthened consistency in interpretation, reduced scoring ambiguity, and improved the credibility of the findings.

TRUST ECOSYSTEM PROFILE

The participating trusts represent a diverse cross-section of the REIPPPP ecosystem. Most trusts are relatively young institutions established between 2015 and 2018. Governance structures are generally composed of small to mid-sized boards with both community and independent trustees. Operationally, the ecosystem demonstrates a strong reliance on hybrid and outsourced implementation models. Development priorities are largely concentrated around education, skills development, social development, health, and enterprise development.

MATURITY OVERVIEW

The distribution shows a sector that remains largely developmental in nature, with most trusts clustered within the developing to maturing range. No trust reached Level 4 maturity, reinforcing the need for continued investment in institutional strengthening.

Maturity Level	Number of Trusts
Level 1 (Basic)	1
Level 2 (Developing)	3
Level 3 (Maturing)	3
Level 4 (Leading)	0

KEY FINDINGS

- Vision & Strategy emerges as the strongest pillar, indicating that most trusts have a clear sense of purpose and developmental intent.
- Governance structures are relatively well developed, although transparency and accountability mechanisms remain inconsistent.
- Impactful Delivery and Capacity lag behind governance and strategy, revealing a persistent strategy execution gap across the ecosystem.
- Monitoring, Learning, and Evaluation (MLE) is the most underdeveloped capability area across the participating trusts.
- Trust Maturity is not determined by age alone. Several younger trusts outperformed older trusts due to stronger leadership, governance systems, strategic planning, and operational coherence.
- Capacity constraints relating to staffing, systems, infrastructure, and organisational management continue to undermine sustainability and scale.

QUALITATIVE INSIGHTS FROM WORKSHOPS

Qualitative insights gathered during activation workshops in Gqeberha, Kimberley, and Cape Town reinforced several quantitative findings. Participants noted that while many trusts have formal governance structures in place, trustee roles and responsibilities are not always clearly understood in practice. Strategic plans are often aspirational rather than operational, with limited prioritisation and implementation pathways. Many trusts also reported difficulty in tracking long-term community outcomes and measuring impact beyond expenditure reporting.

The workshops further highlighted significant variation in organisational capacity, particularly regarding staffing models, administrative systems, and technical support. Participants consistently expressed a strong appetite for peer learning, communities of practice, and facilitated support mechanisms. Importantly, the Trust Maturity Self-Assessment Tool was widely regarded not only as an evaluative mechanism, but also as a catalyst for internal reflection, governance dialogue, and trustee accountability.

WHAT DRIVES HIGHER MATURITY

- Strong governance foundations and accountability systems
- Clear and operationalised strategic planning
- Balanced delivery models integrating partnerships and internal management
- Sufficient organisational capacity, including staffing, systems, and financial stability
- Alignment and coherence across governance, strategy, delivery, and capacity

PRIORITY ACTIONS

Short-term priorities should focus on strengthening governance controls, financial administration, and operating model clarity. Medium-term interventions should prioritise Monitoring, Learning, and Evaluation systems, programme design capability, and structured trustee development. Long-term interventions should focus on professionalising trust operations, strengthening digital systems, and establishing regional learning networks and communities of practice.

NEXT STEPS AND STRATEGIC USE OF THE BASELINE

The baseline provides a foundation for ongoing maturity tracking, differentiated support pathways, and evidence-based capacity-building interventions. INSPIRE and its partners can utilise the framework for periodic reassessment, monitoring the impact of technical assistance investments, strengthening funder reporting, and informing strategic decision-making within the REIPPPP ecosystem. The assessment also creates opportunities for peer-learning platforms to support collective sector improvement.

LIMITATIONS

The assessment is based primarily on self-reported data and therefore carries inherent risks of self-assessment bias. The sample size is modest and limited to trusts operating in three provinces, which constrains broader generalisability. Incomplete submissions in certain pillars also limited comparability across all trusts. Despite these limitations, the assessment provides a credible and valuable baseline for understanding institutional maturity across participating REIPPPP Community Trusts.

CONCLUSION

The Trust Maturity Baseline confirms that Community Trusts are central to achieving meaningful socio-economic impact within South Africa's renewable energy transition. While many trusts demonstrate strong governance and strategic intent, their ability to deliver sustained, high-quality outcomes remains constrained by gaps in capacity and execution systems.

Lastly, by embedding the Trust Maturity Framework as an ongoing practice, INSPIRE and its partners can support a shift from fragmented, compliance-driven approaches toward resilient, accountable, and impact-driven institutions capable of delivering long-term community benefit.