

CONCEPT NOTE

A Roadmap for a programme to strengthen evaluation in South Africa

December 2015

Context

- Evaluation in South Africa is an emerging practice that has taken root in response to efforts to improve programme performance and impact and increase accountability.
- The development of evaluation has been championed by a range of stakeholders and is increasingly part of the private sector's work as well.
- The demand for evaluation services has increased significantly over the past few years and is expected to continue increasing in the coming decade. While there are some high quality evaluations undertaken, in many instances the quality of the products needs to be improved.
- The value that evaluations can provide in improving the performance of programmes and projects also needs to be better understood by the parties that commission them, who should use the knowledge and insights they deliver.
- Overall, it is recognised that evaluation in South Africa needs strengthening and that requirements of all system stakeholders need to be addressed more effectively.

Process

- In 2009 SAMEA initiated an effort to start thinking about what competencies evaluators need. In 2012, DPME supported the development of evaluation standards and competencies for evaluators and government staff managing evaluations with the assistance of SAMEA
- In 2015 SAMEA and DPME made use of DFID funds to commission research to inform an evidence-based Roadmap for the professionalization of evaluation.
- The research included a literature review, a benchmarking study and a situational analysis and was very helpful in informing the discussion at the SAMEA Conference and amongst stakeholders.
- The research was very clear in revealing that it would be premature to seek to professionalise evaluation given South Africa's current evaluation environment and that the focus should instead be on **strengthening** the practice amongst **all stakeholder groups**, particularly (but not only) evaluators, the commissioners and users of evaluation and programme beneficiary groups.
- In December 2015 a workshop was held in Johannesburg in order to review all the work that had been done and to propose specific actions for strengthening evaluation in South Africa. The workshop was an opportunity to engage SAMEA Board members, government and other stakeholders, including donor representatives.
- It was agreed at the workshop that **the evaluation ecosystem needs to be better understood and that the specific needs of particular stakeholder groups must be considered in developing a process to**

strengthen evaluation. It was also noted that evaluation as a formal field of practice needs to be better supported by capacity building and human resource planning interventions. **SAMEA's current inability to play the role that is needed to strengthen evaluation in South Africa** was also noted and it was agreed that for it play its role as a Voluntary Organisations for Promoting Evaluation, **it needs to enhance its capacity and improve its performance.**

Next steps:

- A three-year process for strengthening evaluation was proposed at the December workshop and is described below. It comprises four work streams and activities and outputs are suggested for each.
- Feedback on this programme proposal is sought.

Outcomes:

- The proposed Evaluation Strengthening programme seeks to achieve four distinct outcomes:
 1. There is a better understanding of the emerging evaluation context in South Africa (RESEARCH)
 2. The competence of all key evaluation stakeholders in South Africa is improved (CAPACITY BUILDING)
 3. An inclusive and differentiated M&E community of practice is thriving (STRENGTHEN PROFESSIONAL ASSOCIATION FRAMEWORK)
 4. There is a greater awareness of the value and use of evaluation amongst all relevant stakeholders (AWARENESS)

Results for Year One: 2016	Research	<ul style="list-style-type: none"> • A research programme is developed and implemented including reviewing existing research on evaluation in SA; mapping stakeholders and their capacity development and other needs and developing a standard glossary of terms and concepts. • A research agenda is adopted in collaboration with HEIs and events are held to share findings and present awards. • Students are encouraged to take on Masters topics researching and documenting lessons from the actively developing evaluation systems • A process to accredit the AEJ is developed and implemented.
	Capacity Building	<ul style="list-style-type: none"> • The current list of Competencies is reviewed and revised. • The SAMEA website is improved and significantly upgraded with input from Board members and other key stakeholders. • The Jean King visit is facilitated and used for a Strengthening Evaluation road show. • A directory is posted on the SAMEA website that provides a comprehensive overview of the SA capacity building offering including e-learning opportunities which will be updated annually. • At least 4 Community of Practice meetings are hosted, with key interesting funders on board.

	SAMEA Framework	<ul style="list-style-type: none"> • SAMEA Governance framework (Board Charter and Mol) and administrative capacity are in place to enable it to play a stronger role. • 3-year Strategy and implementation plan approved by Board and members. • Financial sustainability model adopted. • Member interest groups are determined and their needs identified. • Other VOPE offerings are reviewed to inform SAMEA offering. • A comprehensive and appropriately differentiated Plan for providing services to members is adopted.
	Awareness	<ul style="list-style-type: none"> • Results from the mapping exercise are shared in accessible formats. • An awareness and communications strategy based on the mapping is designed. • Evaluation is connected to the local government elections.

Results for Year Two: 2017	Research	<ul style="list-style-type: none"> • A review of how evaluation is being undertaken by different stakeholders in terms of methods, approaches and ethics is completed. • The SA, African and European evaluation contexts and approaches to strengthening evaluation are compared and contrasted and lessons are identified. • Papers and presentations presented at the SAMEA conference are published in a special edition of the AEJ. • Continue researching and documenting lessons from the actively developing evaluation systems
	Capacity Building	<ul style="list-style-type: none"> • A comprehensive Annual Calendar of training events including e-learning opportunities is prepared and disseminated. • A repository of useful documents is maintained on the SAMEA website and it is refreshed regularly and the Listserv is made more useful and of a higher quality. • A trainers' forum is established and it is ensured it offers real value to participants. • An Open Forum on Quality Assurance is hosted. • Peer review structures are established. • The SAMEA Conference plays a clear capacity building role by raising the bar significantly and tailoring streams with content specially curated to meet needs of stakeholder groups at different levels.
	SAMEA Framework	<ul style="list-style-type: none"> • SAMEA secretariat manages administrative and service delivery tasks effectively.

		<ul style="list-style-type: none"> • Contracts are concluded with external sources of funding. • Successful ongoing delivery of services to members.
	Awareness	<ul style="list-style-type: none"> • The awareness and communications strategy are implemented, delivering the products identified during the mapping exercise. • The awareness processes inform the Conference theme and related activities.

Results for Year Three: 2018	Research	<ul style="list-style-type: none"> • Undertake a review of how evaluation is being used by different stakeholders in terms of methods, approaches and ethics.
	Capacity Building	<ul style="list-style-type: none"> • Define and focus on emerging evaluators • Advocate for internships and mentorship programmes and support their implementation where possible. • Advocate for scholarships. • Best practice x4 (variety of sectors).
	SAMEA Framework	<ul style="list-style-type: none"> • Evaluation of member services and a revision of the offering.
	Awareness	<ul style="list-style-type: none"> • Continue implementation of the awareness and communication strategy, drawing on results from the other outcomes. • Undertake activities to showcase progress.

END.