BRIDGE MONITORING & EVALUATION COMMUNITY OF PRACTICE

Meeting held on 8 November 2018 at Tshikululu

SETTING THE SCENE

For those new to this community of practice, Benter Okelo as project manager of the M&E CoP gave a brief overview of the 2018 journey, which has taken participants through perspectives on the what, when, how and who of monitoring and evaluation. In partnership with the South African Monitoring and Evaluation Association (SAMEA), CoP meetings have been positioned as a ‘learning space’ to share information, resources and knowledge about M&E, and to build capacity around M&E in the education sector. Collaboration has been extended through the facilitation support (Margie Roper) offered by Khulisa Management Services and the venue support provided by Tshikululu.

PRESENTATION: THE COMPETENT EVALUATOR

[Rhoda Goremucheche, CREST (Centre for Research on Evaluation, Science and Technology), Stellenbosch University]

Rhoda’s presentation has been framed by the work she has done on her PhD, her work at Evaluation Research Agency (ERA) and CREST at Stellenbosch university, as well as her own experiences and observations. The work on Evaluator Competencies was informed by a review of existing frameworks (including that of the Department of Monitoring and Evaluation (DPME), and has been refined by two rounds of feedback from SAMEA ListServe members.

Rhoda noted that this is a broad generic list, and at some point there may need to be sub-levels of detail for evaluators working in different sectors. It is also unlikely that one person could embody all the competencies to an expert degree – as illustrated in the slide shown alongside.

Click here to see Rhoda’s presentation.

Seven domains have been identified in SAMEA Draft Evaluator Competency List (5 October 2018).

Competency domain: Understanding the Evaluation Context (Local, National, Global)

Competency domain: Understanding the Evaluation Context (Organisational)

Competency domain: Understanding the Evaluation Profession and Professional Bodies

Competency domain: Managing Stakeholder and Client Relationships

Competency domain: Conducting an Evaluation

Rhoda emphasized the following points:

- There are some complex issues around commissioners' expectations of evaluations – both when evaluators have been involved in the strategy, planning and design of the intervention, but equally when they are brought in at the end of a programme.
- Different skills might be expected at different stages of the programme process, and at different stages of the evaluation process itself.
- One noticeable trend has been the linkage of log frames to the Sustainable Development Goals (SDCs), which funders like to see.
- Evaluators have a whole bag of 'useful tricks', including both theories and tools; however, if their final recommendations don't speak to the context in which a programme took place then they are not useful.
- Evaluation is still a 'young field' – is it a discipline? Or a profession? What is the role of a professional body?
- In the domain of professional practice, she noted that an evaluator has to be a good researcher, but a good researcher does not necessarily make a good evaluator. There are very specific evaluation skills, tools and strategies that need to be utilised.
- In the domain of conducting evaluations, technical skills around data collection and analysis are not enough. Evaluators need contextual understanding. In some cases, these skills link to the ability to collaborate; for example, designing appropriate evaluation questions must be informed by client needs and beneficiary characteristics. Cross-cultural competence may form part of professional competence, in the sense that evaluators can make relevant connections in a community.

Some discussion points

- The issue of expectations by the commissioning party is complex. Evaluations can be political, and expectations might be linked to the certain goals (such as a desire to upscale) which sometimes leads to requests for changes to reports.
- The M&E field has generated its own terminology which needs to be shared more widely. A common example is the conflation of 'monitoring' and 'evaluation' – those who commission evaluations need to understand that these are two different things, although you can't (or shouldn't) evaluate without monitoring well. Do we need competency standards for monitoring as well?
- What is a 'failed evaluation'? Does this mean the methodology failed, or the data was inaccurate, or the evaluation made recommendations that were not appropriate to the context, or the evaluation failed to meet expectations?

CROSS-CUTTING THEMES

GROUP DISCUSSIONS: INTEGRATING THE COMPETENCIES INTO PRACTICE

@CoP

Participants were given copies of the detailed Draft Evaluator Competency List (5 October 2018). They then worked in a number of groups and addressed two questions:

- What does the competency framework mean for my own skills development in M&E?
- What does the competency framework mean for my organisation's work/ my work as a programme manager in relation to commissioning evaluations?

Key points from report-backs and discussion are summarised below.

The need for understanding policy contexts

- Evaluators need a broad understanding of overall national policies such as the National Development Plan.
- Legislation and regulations as it pertains to specific business sectors are also an important policy context. A key example here would be regulations pertaining to the mining sector, and how these affect programme interventions and their evaluations.
- The Terms of Reference of an evaluation should determine the depth of policy understanding required in an evaluation. But this means that (i) the evaluator will need to be able to assess this; and (ii) the evaluator will need to be able to know where to go or who to partner with to draw on the relevant expertise.

The need for understanding sectoral or socio-economic contexts

- Some examples of specific characteristics of sectors such as health and education were discussed. In a health programme relating to foetal alcohol syndrome, for example, evaluators who are crafting M&E questions need to be sensitive to conditions when asking these questions, and understand the nuances (e.g. are people being honest?) in relation to disclosure in interview situations. How is personal data such as this to be validated?
- Understanding of context will also shape whether or not evaluations produce realistic or unrealistic recommendations. However, it was also noted that there are sometimes tensions between 'evaluator objectivity' and the predispositions of those commissioning the evaluations. Those who have been embedded in a sector for a long time might have their own long-held views or agendas.

Discussion on context (both policy and delivery contexts) illustrated that evaluators need research skills and the ability to draw on the skills and knowledge of sector or subject matter experts. It also raised the question of whether or not evaluators need to choose a sector or field in which they have

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expertise, and focus their energies on this field, or whether they can claim to be 'generic' and offer their services in any field.

Appointing evaluators

- Commissioners of evaluations could use the competencies as a starting point or checklist for choosing which agencies to appoint. However, they would need to build in approaches to validate these: for example, use the competencies for crafting their Terms of Reference, or tailoring interview questions to evaluators.
- Other suggestions/ issues relating to appointing evaluators include:
    - Requesting case studies, which might show how an agency deals with issues such as specific cultural dynamics.
    - There are sometimes grey areas in the appointment of evaluators. For example, evidence linked to previous evaluations may be confidential and can't be shared.
    - There is currently no professional body which quality assures evaluators or evaluation agencies, so other criteria need to be considered. Membership of bodies such as SAMEA indicates a certain level of professionalism.

Some dynamics faced by evaluators

- Evaluators are often faced by unrealistic demands or progress indicators. Often these are set by the funder, and not by the implementer. A key example is the request for 'impact evaluations' in short term programmes. Another example might be unrealistic requests such as '80% improvements in ….'. How do evaluators negotiate for changes in unachievable measures of success?
- Sometimes participants have been prepped to deliver certain answers. Evaluators need to build in ways to cross-check and validate findings to ensure that there is some truth in the findings.
- Recommendations need to be thought through in terms of what would happen if the organisation did, or did not, take these actions.
- Timing issues in terms of whether or not the evaluator is brought in at the beginning of the project can complicate evaluation logistics such as costing. There are difficulties in monitoring and gathering data retrospectively.
- The evaluator needs to have an assertive voice and the ability to be confident and competent in presenting the findings, as well as negotiating and defending these if they are not to the liking of the commissioner or funder.
- If there are too many tensions such as some of those noted above, is it appropriate to pull out of an evaluation?

It was noted that these kinds of issues emphasize the importance of clear and open communication between funders, implementers and evaluators. How do we educate each other in terms of understanding what evaluations can and cannot show?

Finally, it needs to be remembered that the central purpose of evaluation is to inform future strategies in order to deliver better programmes. This is the message that needs to be taken on board by funders, commissioners and evaluators themselves, and shared with implementers and beneficiaries as well. How can the Evaluator Competencies support this goal?

PRESENTATION: EVALUATING THE 2018 M&E CoP AS A LEARNING SPACE

[Melissa King, BRIDGE)

The aim of this session was to map the journey taken by the CoP during 2018, in order to reflect on whether or not we have achieved our aims.

In 2018 BRIDGE and SAMEA combined forces to shape the M&E CoP into a 'learning space' for M&E, with the following aims:

- building capacity in M&E to improve programme development
- sharing M&E information, tools and resources
- spreading good M&E practice
- serving interested beginners as well as well as M&E specialists
- supporting collaboration and partnerships in M&E.

The first CoP meeting of 2018 posed a number of generating questions to participants in order to shape the programme for the year. These were:

What does it mean for the CoP to be a learning space?
How can the range of participants – from beginner to professional – assist each other?
What are the M&E needs / priorities of CoP members?
Can the CoP generate action or outputs outside of CoP meetings?

In response to these discussions, the programme for the year was designed to include:

- Expert inputs on theories and approaches
- Case study inputs: successes & failures
- Bringing together theory and practice
- Interactive debates
- Problem solving and practical discussions
- Guidance from a range of thought leaders
- Sharing of tools and resources

In the four sessions this year these activities have been held in the context of a number of topics. These presentations and debates are captured in the relevant Meeting Highlights.

Click here to see Melissa's presentation

Here are the Meeting Highlights for 2018:

March 2018

May 2018

August 2018

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Taking the CoP forward

- CoP members completed a survey reflection on the role and scope of this CoP.
    - **Action:** The survey will be extended to people not present, and all these results will be collated and shared with the CoP.
- A quick survey of those in the room showed that only a few participants at this meeting (CoP Meeting 4) had attended CoP Meeting 1. While many participants had attended 2 to 3 of the 2018 meeting, there were also some people present for whom this was a first attendance. It was noted, however, that there had been higher levels of consistency in terms of organisations attending even if individuals from those organisations differed. It was also noted that every 2018 CoP meeting had been well attended, with at least 50 participants at each meeting.
    - **Action:** The registers of all four 2018 CoP meetings will be collated and a profile of 2018 participation built up.
- There is an interest in virtual participation, and options here will be explored.

NOTICEBOARD

- Khulisa Management Services has developed a short course for training in M&E, which can be customised according to need. You will find more information on their website, or by clicking https://www.khulisa.com/thought-leadership/me-training-course/.
- A reminder that SAMEA membership for R410.00 per year provides access to webinars, capacity building workshops, tools and resources and other benefits for those interested in M&E. https://www.samea.org.za/
- The African Evaluation Association Conference will be held on 11-15 March 2019 in Ivory Coast. Abstract submission deadlines have been extended. See www.afrea.org.

LIST OF PARTICIPANTS

Facilitator: Margie Roper, Khulisa Management Services

Name	Organisation
Angie Setlhako	UNISA
Caroline Tuckey	Flying Children
Christine Nchapa	Scimat
Anacletta Koloko	Sasol Inzalo
Arista Bouwer	IBL
Bev Johnson	St Stithians Foundation & Thandulwazi
Christine Boxall	Edunova
Claudine Storbeck	Centre for Deaf Studies
Dr Christiaan Visser	Independent
Dumisani Dlamini	Private
Ennis Jones	Obami
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Kylie Grigg	Boys and Girls Clubs of South Africa
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Sandile Mthanti	Sci-Bono
Samuel khoza	Wits University
Simangele Mphahlele	eThuta
Smangele Mathebula	Help2Read
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