



## MONITORING & EVALUATION COMMUNITY OF PRACTICE: OVERVIEW

### Scenario Thinking in M&E: An example in the Post School Education and Training Sector

Date: 15-07-2021

#### 1. PRESENTATIONS (links given in the main report)

<b>1</b>	<b>Title</b>	<b>The context: Post School Education and Training and the PSET CLOUD programme</b>
	Presenter	Rooksana Rajab (JET Education Services)
	Key Theme	The Post School Education and Training Collaboration and Learning Opportunities for the Utilisation of Data (PSET CLOUD) programme is aimed at developing an integrated data ecosystem for the sector to support common understandings and thereby promote collaboration. The presentation outlined the programme overall, and the specific role of scenario planning in the project.
<b>2</b>	<b>Title</b>	<b>Scenario planning methodology used to arrive at the PSET CLOUD scenarios</b>
	Presenter	Rebecca Freeth (REOS Partners)
	Key Theme	The Transformative Scenario methodology was described, with examples of how scenario planning has been used previously in the Mont Fleur and Dinokeng scenarios. The way in which the methodology was applied in the PSET CLOUD project was described, looking at the scope and value of the approach.
<b>3</b>	<b>Title</b>	<b>Selecting indicators and data sources to monitor movement towards or away from selected scenarios over time</b>
	Presenter	Tara Polzer Ngwato (Social Surveys)
	Key Theme	This presentation focused on the why and the how of M&E in relation to scenarios, with particular emphasis on the role of monitoring and tracking scenarios over time. Examples of indicators and data sources were shared.

Standard presentations sharing **TOOLS AND RESOURCES** and **SAMEA UPDATES** were also given.

#### 2. PARTICIPANT TAKEAWAYS (70 participants)

- The benefits of combining transformative scenario thinking, which is open, flexible and multi-perspective, with more rigorous forms of evaluative thinking
- Scenarios as useful tools for prompting conversations, planning and collaborations
- Challenges in relation to accessing quality and reliable data in the PSET ecosystem due to the range of different data sources
- The difficulties of identifying useful indicators (or sets of indicators) to monitor scenarios over time

Links to **Presentations** and **Tools and Resources** on the BRIDGE website are given in the report. Other resources shared include:

<https://www.jet.org.za/news/all-news/launch-pset-scenarios-2021->

<https://www.intrac.org/wpcms/wp-content/uploads/2016/06/Monitoring-and-Evaluation-Series-Scenario-thinking-15.pdf>

# BRIDGE Monitoring & Evaluation Community of Practice

Virtual Meeting held on 15 July 2021

## Scenario Thinking in M&E:

### An example in the Post School Education and Training Sector



#### Background and context

The M&E CoP has been focusing on monitoring and evaluation in relation to the impact of Covid-19 on schooling, but we now shift our attention to the post schooling and skills development context – the Post School Education and Training (PSET) sector. We consider how the sector can be informed by scenario planning as a forward-focused activity that links both qualitative and quantitative indicators.

The M&E CoP is led by BRIDGE together with its partners who bring M&E expertise to the team: Khulisa (Margie Roper: CoP facilitator), SAMEA as the association for M&E professionals, and Tshikululu as a funding body with a focus on M&E. This CoP is funded by the Zenex Foundation.



#### Presentation: The context: Post School Education and Training and the PSET CLOUD programme (JET Education Services – Rooksana Rajab)

Click [here](#) to see presentation

The 'Post School Education and Training Collaboration and Learning Opportunities for the Utilisation of Data' (PSET CLOUD) project is a collaboration between the Manufacturing, Engineering and Related Services SETA (merSETA) and JET Education Services, supported by REOS Partners. The main drivers behind the project are:

- The mismatch between PSET training provision and labour market skills requirements, exemplified by the number of qualifications which do not address employer needs.
- The need to bring employers closer together to address unemployment amongst post school job seekers.

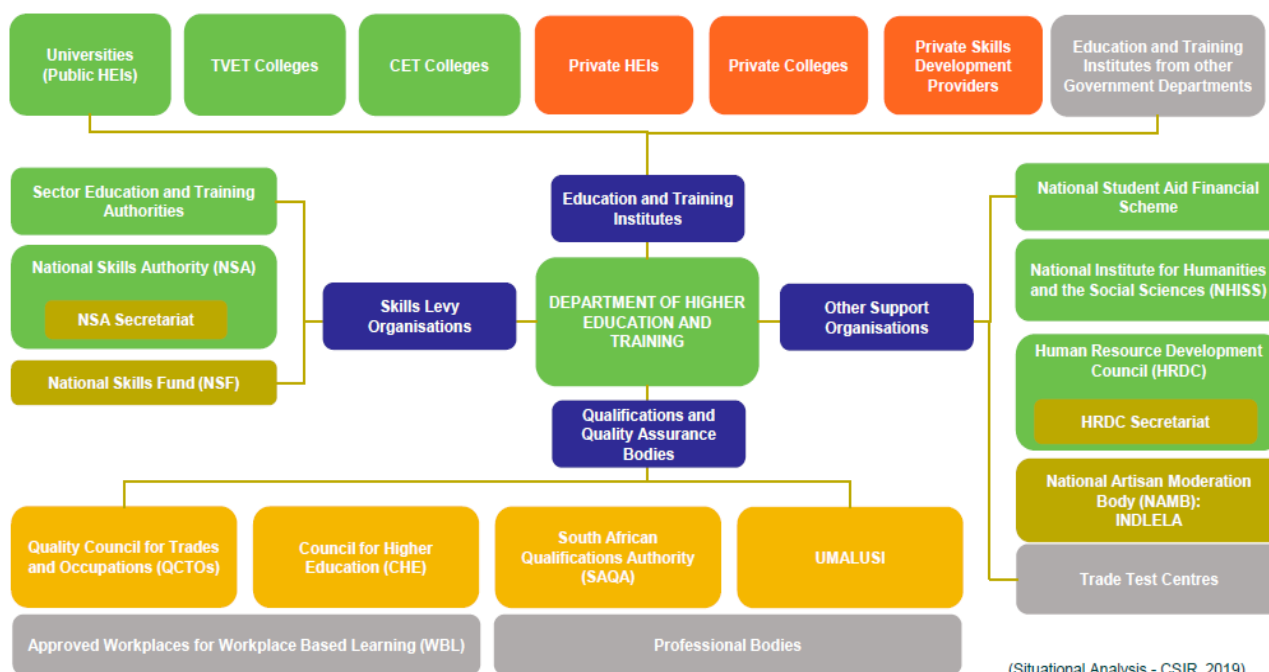
In order to understand and address concerns and needs in relation to the supply and demand gap, different players in skills development require access to useful data. This access can be achieved through an integrated ecosystem which will support common understandings and thereby promote collaboration.

Rooksana gave a brief overview of the skills development ecosystem, as illustrated in the slide below. These include different types of providers, regulatory bodies, support structures for skills development set up by government, and quality assurance bodies dealing with qualifications, assessment and certification. All of these report directly or indirectly to the Department of Higher Education (DHET). One of the issues to be addressed by the PSET CLOUD is the integration of the data generated and disseminated by these bodies.

## The PSET Ecosystem



PSET CLOUD



She then took us through the different phases of the project (see Slides 3, 4 and 7), including the conceptual framework, the Theory of Change, the value proposition, the business case and planned pilots.

Of interest to this CoP is the scenario element, which was used to deepen dialogue and advocacy as a basis for further collaboration. Five multi-stakeholder workshops were held, resulting in narratives and stories which were used as the basis for the four scenarios shown below.

## PSET Scenarios



PSET CLOUD

### SCENARIO 1 Bridge over Troubled Water



*In this scenario, South Africa's public sector struggles to respond to current constraints and the situation spirals downwards. There is a strong privatisation trend, including in the PSET sector, with private providers stepping into the gap. Inequality grows. In a time of increasingly authoritarian rule and populist politics, the PSET sector becomes more fragmented and trust is eroded.*

### SCENARIO 2 The Suspension Bridge



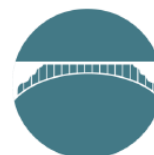
*In this scenario, the government fails to provide political vision. Small-scale entrepreneurs step in to drive modest economic growth. While this results in a more vibrant and self-organising informal economy, it is also an uncoordinated one. This creates work for more people but the work is largely insecure. Growing competitiveness drives individualistic and self-interested attitudes.*

### SCENARIO 3 A Bridge too Far?



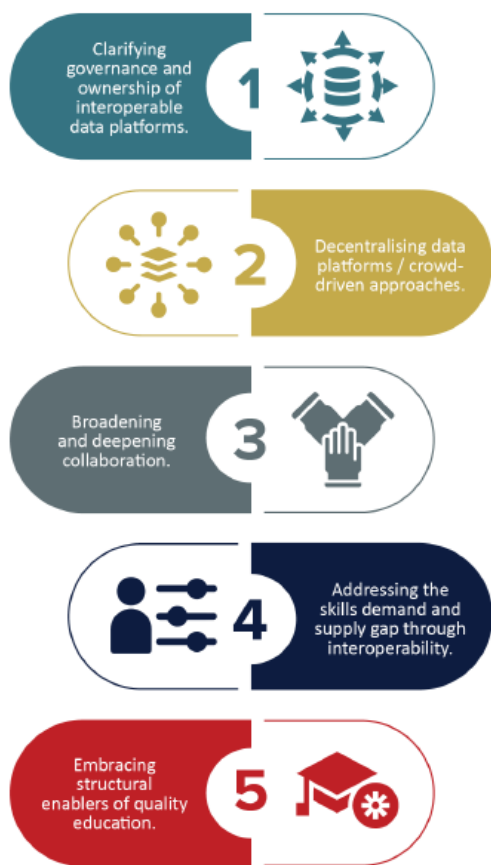
*In this scenario, the government and technocrats become strange bedfellows in the project of economic growth and the government increasingly gives tech industrialists free reign to grow the economy. The technocrats, in turn, pay higher taxes that fund the social grant system. In the absence of meaningful work, citizens focus on personal and community development.*

### SCENARIO 4 Bridge the Gap



*In this scenario, South Africa is on the edge of social and economic crisis. This precipitates increasing recognition of an interdependent future among citizens. Pushed to respond to the palpable threat that technology will displace human labour, the government steps in. Over time, there are modest signals of economic growth and increasing synergy between government, business and citizens.*

## Strategic Priorities



The ‘key uncertainties’ identified through stakeholder discussions were unpacked in relation to the four scenarios. The methodology and detail of the scenarios is clearly explained in the publication **PSET Scenarios 2021-2030: A guide on using scenarios to align skills supply & demand through interoperable data platforms** (April 2021, REOS Partners, JET Education Services and merSETA), which can be accessed on the JET website on this link:

[https://www.jet.org.za/resources?sort\\_on=&sort\\_order=&SearchableText=PSET+CLOUD+Scenarios](https://www.jet.org.za/resources?sort_on=&sort_order=&SearchableText=PSET+CLOUD+Scenarios)

The scenarios led to the formulation of five **strategic priorities** based on questions such as “what if ...”; “what key goals stood out”; “how best to go forward if ...”. Many of the questions around the key priorities shown below still remain unanswered, but these can guide the discussion and collaboration processes.

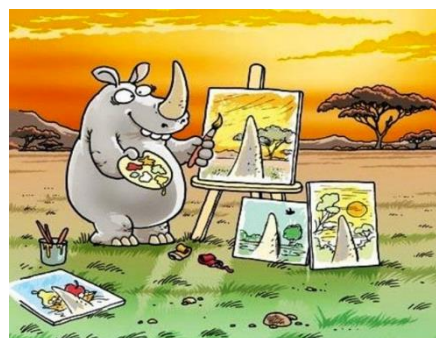


### Presentation: Scenario planning methodology used to arrive at the PSET CLOUD scenarios (REOS Partners – Rebecca Freeth)

Click [here](#) to see presentation

Rebecca’s presentation covered what is meant by the Transformative Scenario methodology. She gave examples of how scenario planning has been used previously in the Mont Fleur and Dinokeng scenarios. She then demonstrated how the methodology was applied in the PSET CLOUD project described in the first presentation.

Scenarios are stories of multiple possible futures that are developed to prompt insights into current and future levers that can inform planning for systemic change. The PSET CLOUD project takes a transformative orientation, involving diverse stakeholders, multiple points of view and collaborative thinking, in order to influence the system (see slide 6). As the cartoon illustrates, our vision can be clouded by our own priorities: we need to hear about the assumptions, paradigms and concerns of others in order to expand the scope of our planning and develop proactive interventions that are relevant and evidence-based.



### Results

1. *Understandings* that are systemic
2. *Relationships* among actors from across the system
3. *Intentions* which take into account the whole system
4. *Capacities* to lead systemic transformation
5. *Actions* to transform the system

Doing Transformative Scenario Planning involves three main phases: convening, construction, and action and disseminations (see Slide 8). The RESULTS listed here need to be considered in the context of systemic change.

The PSET CLOUD project was based on the Theory of Change developed by JET and MerSETA (see Slide 13) highlighting the use of data and evidence to influence the PSET sector. Rebecca made the point that, however strong the business case for an Interoperable Data system may be, and however strong the technology platforms developed may be, if there is no practical collaboration between stakeholders in using and applying the system it will fail. This recognition links to the intention of the scenarios as a mechanism to bring people together and promote collaboration.

The Transformative Scenario Planning methodology was then applied in four steps, including

- Step 1: Convening, drawing on the PSET landscape (see Slide 15)
- Step 2: Observing the system, which led to the development of the seven key uncertainties to inform the scenarios (see Slide 16)
- Step 3: Co-creating the stories, which led to the four scenarios described above (see Slide 17)
- Step 4: Discussing and identifying the strategic implications of each scenario, then considering these through four lenses as shown below.



#### **Leverage points for change:**

*Opportunities to intervene, towards shaping more desirable outcomes.*



#### **Tensions:**

*Competing priorities to be balanced, rather than mutually exclusive choices to be made.*



#### **Forks in the road:**

*Major decisions to be made, which could lead to very different outcomes.*



#### **Red flags:**

*Warning signs and risks worth paying attention to early on so that they do not materialise as surprise disruptors.*

Rebecca then showed us some examples of how these lenses apply to strategic factors such as governance, social cohesion, and how we think about data and technology (see Slides 18 – 21).

Rebecca closed by noting that the partnership is currently busy with step 5, which includes engaging with individual organisations in the PSET sector and doing deep dives into addressing priorities and mapping new data and technology strategies.





## Q&A: Discussion Takeaways

- In our evaluation practice we align to a Theory of Change, but we don't take these potential uncertainty factors into account in the same way. Using scenario planning can help our ToCs become more cognisant of future options.
- The relationship between M&E and scenario planning is complex. What do the different approaches generated by Transformative Scenario Planning (TSP) mean for M&E? We need to bear in mind that, even if they are evidence-based, scenarios are not developed by external experts (e.g. economists): so how rigorous do evaluators have to be in terms of monitoring against the scenarios? The main benefit of building scenarios is more to do with building relationships.
- It was suggested that ToCs could be looked at retrospectively after a TSP process. Using evaluation techniques in combination with TSP can help with being more rigorous in assessing our assumptions. We should focus on the learning opportunities that come with TSP, and think of monitoring and reflective practices in relation to scenario planning.
- The assumptions we make in evaluations are closely linked to potential areas of uncertainty. While M&E monitors and tracks how these assumptions play out, we sometimes neglect to check back against our original assumptions. At what stage do you evaluate the scenario itself, and what corrective measures do you use to align to the future?
- It was noted that it is important to steer away from extreme scenarios, with an 'ideal' scenario at one end and a catastrophic one at the other. We also need to be wary of our own bias towards 'preferred' scenarios. In the PSET CLOUD case study, scenarios are used as a tool for recognising interdependence with others, as a basis for promoting action. In this instance it is less about what is true or what is happening, and more about igniting imagination and intention; that is, it is not just a technical exercise. It is also about framing the challenges in the PSET sector, and harnessing different perspectives: how easily can consensus be reached, and how can it translate into action?



## Selecting indicators, and data sources, to monitor movement towards or away from selected scenarios over time (Tara Polzer Ngwato – Social Surveys)

Tara's presentation focused on the why and the how of M&E in relation to scenarios. She stressed that this has more to do with monitoring an existing set of scenarios, and tracking them year on year to see how these are unfolding, rather than 'evaluating' their applications. The question is: "To what extent are the different aspects of the scenarios coming through?", and not about evaluating the validity of the original scenarios. The aim of scenario monitoring is "To describe the past (monitoring) to inform the future (dialogue for action). The data gathered is not a product or a value, but is instrumental in the sense that it promotes dialogue and influences action.

Tara emphasised the difference between M&E for a structured intervention or programme versus evaluative thinking about what is happening in 'the world'. If one is looking outwards, no one is in control, events in society or in a sector are not a planned programme. In this context M&E is about emerging relationships between factors in order to inform future planning, not working against a programme plan that has been put in place.

The Indlulamithi Scenarios were launched in Johannesburg on 21 June 2018 and comprise three visions of South Africa's future, each typified by a popular dance. They are:

### **iSbhujwa – An enclave bourgeois nation**

Loose-limbed and jumpy, with a frenetic edge, iSbhujwa is a South Africa torn by deepening social divides, daily protests and cynical self-interest.

### **Nayi le Walk – A nation in step with itself**

The precision of steps in Nayi le Walk and the confident spirit denote a country where growing social cohesion, economic expansion and a renewed spirit of constitutionalism get the nation going.

### **Gwara Gwara – A floundering false dawn**

The people of South Africa are torn between immobility and restless energy, and Gwara Gwara is the name for a demoralised land of disorder and decay.

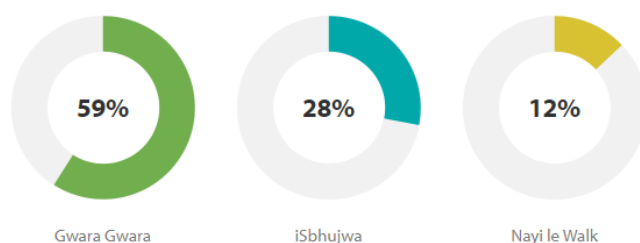
She illustrated this with reference to the Indlulamithi Scenarios which were aimed at gathering data in order to influence agendas and planning priorities. These were developed during the state capture period, based on the recognition that the country was heading in the wrong direction and that there was a need for cross-sectoral conversations in order to promote social cohesion.

Since 2019 the Indlulamithi Barometer has been used to accompany which of these scenarios is coming through. The Barometer is intended to create conversations by bringing in new data each year. Tara noted that the barometer is only one tool. The Indlulamithi Foundation Project supports a number of different methodological elements, including facilitation, economic modelling, policy work and social compacting work.

The Barometer gathers trends through data which are then analysed using a 'range' approach. These are then presented as a simple data visualisations which people may be more inclined to read. As illustrated below, we are currently 59% in Gwara Gwara – this can provoke awareness and conversations that people can relate to.

<https://sascenarios2030.co.za/scenarios-documents/>

## **2021 National Indlulamithi Barometer**



The National **2021 Indlulamithi Barometer** measures trends from July 2020 – May 2021, reflecting South Africa's experience of the Covid 19 pandemic. It shows that South Africa is continuing to move deeper into the **Gwara Gwara** scenario during the course of the pandemic, marking a continued decline in social cohesion levels compared with 2020.

[Barometer 2021 – Scenarios 2030 \(sascenarios2030.co.za\)](https://sascenarios2030.co.za)

Tara shared various processes for the development and use of the Barometer as a scenario monitoring tool. These include:

- Move from complexity to simplicity. The original scenarios were written up as a book (see Slide 3), then repurposed into videos, monologues, plays, dances and so on, so that they could be widely shared across the country.
- Fifty-three indicators were identified (see Slide 6-8); for example, state administrative capacity in relation to various basic services; or number of municipalities with a clean audit. These were then turned into data sets. As noted above, these were shared with the public in more accessible data visualised forms, using a range (e.g. under 50%) rather than actual numbers.
- Keep it flexible: it is important not to get too stuck in particular data sources. Using a range means that more qualitative options can be included, even if precise data is not available (for example, perceptions of power outages: most people would see these as frequent).
- Flexibility is also important in response to events such as the pandemic. In 2020 many of the planned surveys and data collection processes could not happen.
- Use reliable sources (see slides 10-11). Social media is not considered reliable, except for perceptions. Drill into the data – for example, an increase in recorded Gender Based Violence cases could be a good sign, as it could indicate increased trust in the police and the reporting process.
- Global data sets can allow for some comparisons to be made.



### **Breakaway group discussion: main takeaways**

The aim of the group discussion was to give participants an opportunity to think about possible indicators, and data sources for these, for the four scenarios identified for PSET CLOUD. Each group was given one of the ‘uncertainty factors’ identified in the PSET Scenarios.

See page 11 of the PSET CLOUD Scenario Guide:

<https://www.jet.org.za/news/all-news/launch-pset-scenarios-2021-2030>

Uncertainty factor: The Nature of Data Sharing (facilitator: Nyaradzo Muthanha, Tshikululu): The key challenge is the need for a centralised data repository. Currently the South African PSET system is characterised by a multitude of information systems pertaining to its different sub-sectors (such as the Higher Education, the college and Skills Levy sub-sectors). These information systems focus on key dimensions of PSET, such as infrastructure, finance, human resources and student enrolment. These operate under different norms and standards, with different levels of technology and are at different stages of their development in terms of the provision of quality data. What is accurate and complete data? Potential indicators include access indicators (enrolment data to different institutions relative to population) and success indicators (graduation, throughput and dropout rates). The facilitator also shared a slide on data quality principles which were discussed. See below.



## PSET Data Quality Principles Source: PSET Information Policy 2019

Key Principle	Explanation
Accessibility	Accessibility refers to the ease with which data and statistics can be accessed by users, especially the format and medium through which they can be accessed. Available on the DHET website
Accuracy	Accuracy refers to the degree to which the data generated in the PSET sector correctly describes the phenomenon it was designed to measure. Set up quality assurance standards
Credibility	Credibility refers to trustworthiness of the source of data. The Department will set minimum standards for data quality (in line with the South African Statistical Quality Framework (SASQAF) and will reject data that does not meet those standards.
POPIA	The Department, together with DHET entities and PSETIs, will ensure the protection of personal information.
Data Utilisation	The Department, together with DHET entities and PSETIs, commits to intensifying the use of information and statistics by all stakeholders, in particular policymakers, planners at all levels of the PSET sector, budget managers, programme managers, researchers and the public in general, national government, regional and local government structures, employers etc.
Effective Coordination	The Department will establish mechanisms to ensure adequate and appropriate coordination internally, as well as with PSET institutions, DHET entities and other government departments.
Flexibility of Information	Flexibility of the information system refers to the ability to adapt to changes based on the needs, operation and management of the Department.
Relevance	The relevance of statistical information reflects the degree to which it meets the needs of the users. Relevance will be assessed through consultation with internal and external stakeholders
Reliability	Reliability refers to the ability of a system to function under stated conditions for a specified period of time. Reliability may be measured in terms of the quality of data and the ability to handle exceptions.
Standardisation	The Department will ensure the standardisation of the data acquired from the PSET institutions and DHET entities to enable comparability across the PSET sectors.
Timeliness	The timeliness of statistical information refers to the delay between the reference point (or the end of the reference period) to which the information pertains, and the date on which the information becomes available.
Transparency	The manner in which data in the HETMIS is acquired will be made transparent through the publication of system specifications on the departmental website.

Uncertainty factor: The Nature of Collaboration (facilitator: Margie Roper, Khulisa): This group discussed the different levels of trust between different stakeholders and beneficiaries, where collaborations are taking place at both institutional and interventions levels. There was also some discussion on the difficulties of measuring impact in relation to collaboration and partnerships. The key indicator would be the number of emerging partnerships, and the levels at which these operate. Other points made include:

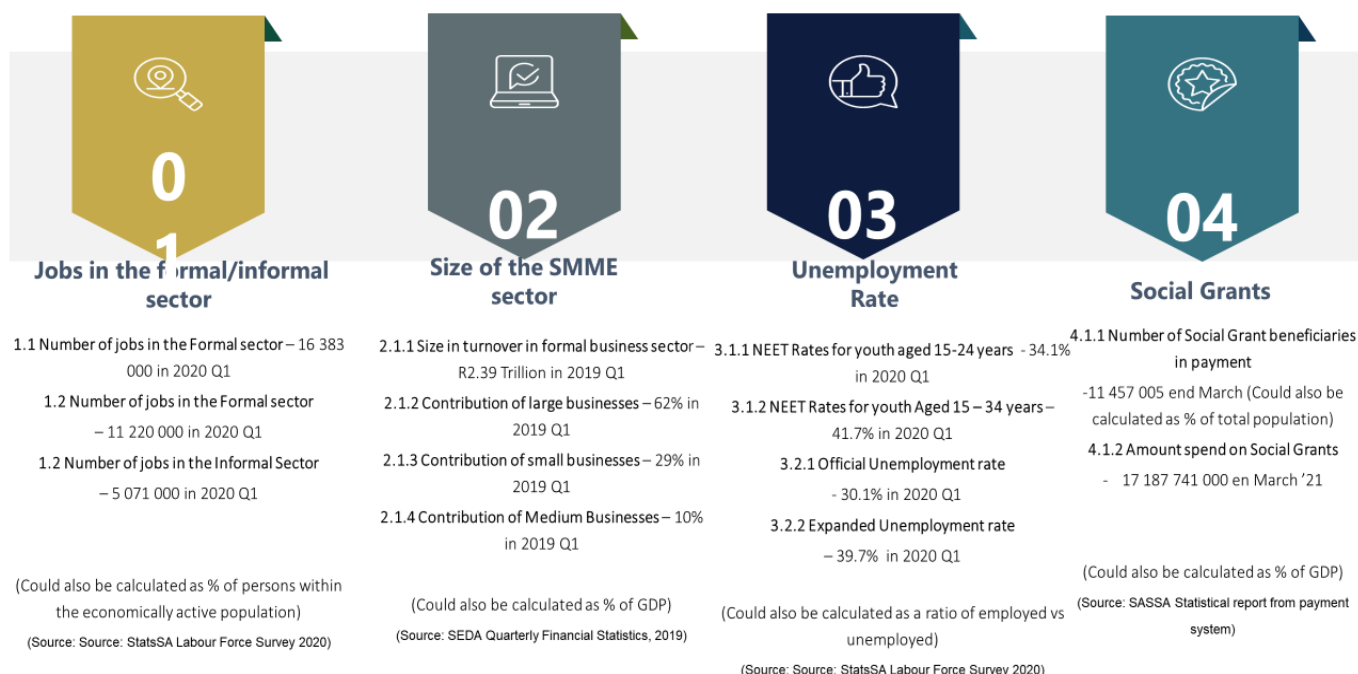
- Trust is an indicator across all scenarios and it is important to monitor it over time as it provides information on the impact of intervention and demonstrate shifts over time.
- Trust in this regard is not only applicable to government, business and NGOs but also in terms of interventions aimed at beneficiaries and stakeholders.
- Scenarios will be very helpful to shape various discussions in organisations and to measure impact differently.
- There is a need to look at indicators holistically, not only as a way to track trust but a range of other indicators such as documenting performance, reporting etc.
- Scenarios are valuable for igniting our imaginations and helping us adopt a different approach to M&E.
- Getting reliable data and identifying the most important data is critical. But data is often difficult to access and not easy to share. There is a need for a central repository.

Uncertainty factor: The Scale of Work (facilitator: Benita Williams, SAMEA): There are a number of standard indicators relating to work which can be drawn on, and conventional sources which can be accessed. But we should not lose sight of the bigger story, which relates to some of the qualitative indicators. While indicators for jobs in the formal and informal sectors would be seen as useful, they would have more value if we had a data point about how many jobs there are and in what size

business these jobs were in (e.g. small, medium etc.) The slide below sums up indicators and sources discussed.

## Possible Indicators and Data Sources to track over time 4

Consider whether the following data indicators would be useful to track the uncertainty of "scale of work" over time



### Uncertainty factor: The Character of Education and Qualifications (facilitator: Leticia Taimo, Khulisa):

This group focused mainly on Scenario 1, which gave the narrative of a dysfunctional public PSET sector while private providers flourish. Indicators for tracking this scenario would include:

- Different skills sets offered by private (offering more relevant skills that get taken up) and public institutions (more hidebound)
- Tracking of graduates and employment matching (comparison of job placements for public and private)
- Datasets from companies, relating to where their employees come from (public/ private).

For Scenario 3, in which training shifts to soft skills, we need to find a data source which maps community-based organisations and their provision.

The presenters reflected on this activity as follows:

- A group like this is a great resource for identifying indicators and sources of data for these scenarios.
- An important takeaway is the usefulness of visuals and audiovisuals for sharing scenarios and data which can spark the conversation and influence planning. No one wants to look at a spreadsheet. When stories touch the heart and soul it makes the difference.
- It is very valuable to unearth the uncertainties and hear people's concerns. To look at these uncertainties through the lens of indicators, with an M&E perspective, really helps with monitoring the scenarios.



## Tools and Resources

Nyaradzo Mutanha from Tshikululu Social Investments reminded CoP participants that useful tools and resources are shared in CoP sessions, usually linked to the topic under discussion. These are also aimed at helping CoP members stay up to date with current contexts, trends and terminology. For this session she shared the following:



## Tools and Resources

➤ Since 2018, JET Education Services and merSETA have been exploring the possibility of an integrated and interoperable digital ecosystem for the post-school education and training (PSET) sector  
<https://www.jet.org.za/news/all-news/launch-pset-scenarios-2021-2030>

➤ INTRACT Scenario Thinking Techniques  
<https://www.intrac.org/wpcms/wp-content/uploads/2016/06/Monitoring-and-Evaluation-Series-Scenario-thinking-15.pdf>

➤ <https://evalc3.net/> An excel app designed for use in M&E

-To identify sub-sets of attributes that describe an intervention & its context, and which are good predictors of the achievement of an outcome of interest;  
-To compare and evaluate the performance of these predictive models;  
-To identify relevant cases for follow-up within-case investigations to uncover any causal mechanisms at work.

## SAMEA UPDATE

Benita Williams gave an update on SAMEA in her capacity as a SAMEA Board member.

- The capacity-building workshops in June hosted a number of local and international speakers and facilitators, and covered current issues and practices in M&E – see Slide 2.
- SAMEA and partners are offering an invaluable immersion opportunity to ‘emerging evaluators’ for workplace experience – see Slide 3 for details and visit <https://www.samea.org.za/sameatalk-listserve>
- See slide 1 for general information on SAMEA.



## FINAL THOUGHTS FROM PARTICIPANTS

We have included comments from both the Chat and the Mentimeter ‘takeaways’ here, as these were very useful and could provide an agenda for further/future discussion.

### Comments on collaboration, dialogue and action

“Creating scenarios, discussing them and working through a transformative strategy, helps provide a useful collaborative approach. How does one ensure that people with different value systems or ideologies are included? And facilitating that discussion to develop the narrative requires skilled facilitators.”

"I have an improved appreciation for the value of scenarios and where and how they might be used. They are not just 'ideal' thinking."

"If the intention is to promote certain action in order to influence things in a certain way, how do you promote these actions?"

"Action can be promoted through a powerful scenario team that is influential in their sector, and ensuring that those people stay connected after the scenarios exercise, so that they can lead and inspire change."

"Dialogue at the starting point is inclusive. A shared understanding is crucial to help understand the evaluation criteria and why particular events or non-events would fit into a particular scenario. This will also assist in effecting the desired (agreed upon) change as well."

"I really like the insightfulness and realism of your approach. Realism is a critical element in monitoring what is in fact happening in different spheres of our society, especially for us in South Africa. This connects ideas with complex and important realities in our country."

#### **Comments/ queries on PSET, data and indicators**

Questions in relation to the Indlulamithi Scenarios:

- Are the indicators weighted?
- Were indicators and ranges developed for every scenario?
- How did you determine where these ranges fit into each scenario? How do we decide "under 20%" is now Gwara Gwara, or that over 50% is "good" and therefore Nayi le walk?

"I like that the scenarios help us to keep track of a constellation of indicators, rather than focus on individual indicators.

"It strikes me that scenarios can complement what M&E does and aims to achieve, but that it needs a really broad range of skills and competencies."

"The idea of uncertainties is very useful, as these can prompt ideas for action."

"What struck me was the value of data in predicting and planning for change in the country.

"The session was very informative. I feel better equipped to engage with colleagues in discussion on the PSET sector. The scenario approach gives one a holistic view of PSET."

"I am more aware of the challenges and value of data in the PSET sector. "

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**Please note:** Our usual practice of including the list of participants and their organisations in the Meeting Highlights is under revision due to the POPI Act.