



2023-5 Summary Strategic Plan

OUR VISION AND MISSION

Vision: Monitoring and evaluation contribute to equitable and sustainable development in South Africa and more widely.

Mission: SAMEA cultivates a vibrant community that supports, guides and strengthens monitoring and evaluation as an important discipline and instrument for equitable and sustainable development.

The SAMEA Theory of Change is in Annex 1.

ACHIEVEMENTS IN 2022

In 2022, as a conference year SAMEA set two key priorities: to build a stronger organisation; and to deliver a successful hybrid conference. The highlight was the first physical conference for 3 years, the 8th Biennial SAMEA Conference 2022 held 21-23 September 2022, co-hosted in partnership with DPME and UNICEF. A total of over 400 delegates from across 14 countries participated in thought-provoking discussions around the 6 themes drawn from the 2021 Hackathon. The evaluation of the event was very positive, with people really enjoying meeting again around M&E. SAMEA also finalised two criteria/guidelines on transformative equity and climate and ecosystem health, and criterion and starting piloting in evaluations. The first phase of the Emerging Evaluators programme, and concurrent mentorship programme, were delivered resulting in the placement of 6 emerging evaluators, two of whom have been absorbed full-time by their respective organisations. Two rapid evaluations were conducted, building on plans done in the hackathon, and the SAMEA-DPME Evidence Mapping Workshop was held to start the process of creating a South African evaluations evidence map.

SAMEA's institutional and individual membership grew steadily to 664, SAMEATALK subscribers increased to 1002, and SAMEA's learning communities provided spaces for interaction and information sharing. Meanwhile SAMEA undertook a thorough review of how members see its work and areas for strengthening. This identified several key gaps in how SAMEA communicates about events, its membership offerings, and more broadly the role of M&E as a useful tool for equitable and sustainable development. Specifically, the review noted that members and stakeholders seek services for networking, engaging with other professionals, learning, and accessing efficiently managed, practical information. The review points to the need to improve the communications of SAMEA services and activities, including the website, a clear communications strategy for better visibility and engagement with stakeholders, and investing in Customer Relations Management software.

THEMATIC PRIORITIES FOR 2023-2025

The Board agreed on a number of **thematic areas** to drive the work of SAMEA over the next 3 years, adopting a co-creation approach in this work. These include:

1. **M&E to support a just transition** to climate and ecosystems health.
2. **M&E for continuous adaptive management**, reflection and learning.
3. **Made in Africa Evaluation**.

4. **MERLTech** - data and technology.
5. **Investing in impact.**
6. **M&E Capacity Building and EEs**, including competencies and professionalisation.

Two other issues are important, and we would like to feel our way as to the appropriate role for SAMEA. These include the contribution M&E can make to **effective leadership** in SA, and how to consider the link between some **planning** roles (such as diagnosis and intervention design) as part of the planning/M&E continuum. During 2023 we will consult on these issues and develop a way forward for 2024+. Contact Ian Goldman (ian.goldman@wits.ac.za) if you would like to participate in these processes.

In terms of SAMEA's sustainability, we will seek to get more programmatic funding around these themes and seek three-year funding and collaborations with partners, with these contributing an overhead to core funding. We also wish to widen institutional membership and collaboration.

PRIORITIES FOR 2023¹

1 M&E and a just transition to climate and ecosystems health (lead Jen Norins)

SAMEA's impacts include that M&E is focusing on critical issues facing the country and world. This thematic area focuses on M&E's role in addressing the crises of climate change, environmental degradation and growing inequities. It builds on the SAMEA Hackathon, during which evaluation criteria and guidelines were developed on climate and ecosystems health and transformative equity. The focus for 2023 is to continue to build buy-in and capacity within government departments, NPOs and the private sector to integrate these two criteria into their planning, monitoring and evaluation. An Evaluation for Just Transition COP was established in 2022 and subgroups are likely to work on:

- Supporting pilots on applying the evaluation criteria and guidelines as well as developing relevant monitoring tools and facilitating trainings to assist with implementation.
- Compendiums of relevant indicators/tools to assist application of the criteria in M&E processes.
- Institutionalising M&E for Just Transition with partners, including DSD, DSI.
- Applying M&E for just transition in the private sector.
- Collating and documenting learnings from different processes and sharing knowledge.

2 M&E for continuous adaptive management, reflection and learning (lead Eleanor Hazell)

M&E needs to find ways to support learning in more rapid and responsive ways, so that the evidence produced feeds into planning, management, and decision-making processes. Adaptive management implies that M&E is part of ongoing learning cycles, where monitoring feeds into reflection and action, evaluation is undertaken before, during and after interventions, and a range of evaluative practices are used to respond to the needs of planning and management. In 2023 SAMEA will focus on three aspects of M&E for adaptive management. We plan to continue to support three **rapid evaluations** a year, which will build the capacity of internal staff and EEs.² We will finalise and pilot the **virtual evaluation** guideline, and we will meet with interested partners to co-develop a conceptual base, approach and plan for taking forward work on **learning and adaptive management** in South Africa.

3 Made in Africa Evaluation (MAE) (lead Takunda Chirau)

Achieving 'Made in Africa Evaluation' (MAE) implies deconstructing many centuries of dominance in Africa by Western and European epistemological paradigms. This includes adopting Africa's endogenous and indigenous paradigms, designed to benefit Africa. The mainstream approaches currently being used in African evaluations marginalise African knowledge systems and African

¹ If you are interested in a particular area please contact Gaynor Nel, the coordinator at coordinator@samea.org.za

² Organisations interested in undertaking or being supported on a rapid evaluation should contact the SAMEA coordinator.

evaluators, and it is essential to reconstruct and reposition the value of MAE. Last year, the Evaluation Hackathon was part of this work to raise awareness on how IKS can be integrated into M&E. SAMEA aims to deepen monitoring and evaluation thinking and practice using MAE and Indigenous Knowledge Systems (IKS) at programmatic and systems level. The focus for 2023 will be on documenting case studies where MAE and IKS were used across Africa and raising awareness by inviting people to share related blogs on the Evaluation for Africa blog site. Webinars will be held to encourage further engagement.

4 MERLTech - data and technology (lead Asgar Bhikoo)

A MERL Tech Community of Practice (COP) is being established as a space where professionals from different backgrounds can come together to explore the role technology plays in monitoring, evaluation, reporting and learning (MERL), sharing knowledge, learning, with a safe space to talk about hard technology topics, and support proactive responses to digital futures. We envision that the MERL Tech CoP will attract young people to MERL by creating a vibrant and informal/relaxed setting where people can network. This year we will be hosting activities such as: virtual channels for engagement, webinars, podcasts, and articles on the sector.

5 Investing in impact (lead Asgar Bhikoo)

The Investing in Impact COP aims to share learning about M&E practice within the social investment and private sector, share knowledge of tools and frameworks that are being used, and any relevant sector information relevant to M&E. It builds on the Investing in Impact conference stream that formed part of the 2019 SAMEA Biennial conference. Our key activities this year include:

- Stakeholder engagement to help co-create the agenda for this working group.
- Webinars to share sector challenges or case examples of how M&E is used in the sector.
- Events to foster the COP and promote peer to peer support and learning.
- Part with other sector bodies to contribute to ongoing discussions to promote the use of M&E for social good (referred to Impact Management and Measurement in the sector)

6 M&E capacity strengthening including emerging evaluators (EEs), competencies and professionalisation (lead Nana Davies)

Key to SAMEA's outcomes is ongoing growth in capacity and professionalism of practice M&E, use of M&E evidence, and a broader, diverse group of M&E professionals. SAMEA contributes to the development of agile M&E professionals through capacity strengthening interventions, such as peer to peer learning, workshops, webinars, and conferences. SAMEA has also developed a set of M&E competencies. In partnership with UNICEF, SAMEA has been driving the development of new M&E professionals through the EE Programme.

The focus for 2023-2025 is to provide knowledge sharing and capacity development building on SAMEA's competency framework, partnering on professionalisation with DPME and the National School of Government. Capacity strengthening activities will be undertaken under SAMEA's different themes such as Just Transition and Adaptive management. The Emerging Evaluator Programme will be standardised, systematised, and scaled up to ensure emerging evaluators gain the practical experience required to become competent professionals in the M&E space and enhance employability, with continued exposure through additional rapid evaluations.

7 Research (2023 focus on evidence map) (lead Babette Rabie)

SAMEA's outcomes include strengthening the capacity to practice M&E through relevant M&E methodology and models, and to increase awareness and demand for M&E evidence. For this research on M&E is key. In 2023 the focus will be on encouraging the uptake of existing evidence and to promote further evaluation in critical but possibly neglected areas. To this it is important to document or 'map' evaluation studies already available. Arising from the 2021 Hackathon, the

parameters and possible action plan for developing a South African evaluations evidence map were produced with DPME, which included this project in its 2022/2023 annual plan. SAMEA supported the DPME in initial evidence mapping capacity building workshop to increase capacity for this substantive task. In 2023, SAMEA will continue to support DPME and other partners to complete the evidence map. Thereafter, SAMEA will encourage the uptake of available evaluation evidence in the map and lobby research producers and commissioners to focus on evaluation studies that may fill gaps in the evidence map and contribute to critical issues affecting South Africa, Africa and the world.

COMMUNITIES OF PRACTICE

The following communities of practice are active or starting. We would like to involve volunteers in all our thematic work, and some of the work promoting SAMEA, such as on communication. Please appropriate contact for the thematic work above or the communities of practice below if you would like to get involved:

Community of practice	Focus	Contact
Evaluation4JustTransition	M&E for a just transition	Jen Norins (jennorins@gmail.com) Cara Hartley (cara@pdg.co.za) for work focusing on private sector
Tech-enabled MERL-Tech	The role of technology in MERL	Viwe Kutu (viwe@datainnovators.co) Mutsa Chinyamakobvu (mutsacc@gmail.com), Rebecca Mbaya (rebecca@datainnovators.co)
Investing in Impact	M&E practice within the social investment and private sector	Asgar Bhikoo (asgar.bhikoo@gmail.com)
SAMEA KZN MERL network	Creating space for continuous regional conversations on M&E.	Tamlynn Fleetwood (tamlynn.fleetwood@gmail.com); Paul Kariuki (pamirry@gmail.com) Jen Norins (jennorins@gmail.com)
Emerging Evaluators Topical Interest Group	Emerging Evaluators	Khumo Fortunate Pule (khumopf@gmail.com) Nana Davies (nana@southernhemisphere.co.za)
BRIDGE Monitoring and Evaluation Community of Practice	Range of topics with different focus areas in a shared context or specific topic	Patience Voller (Gauteng) (patience@bridge.org.za) Maurisa Moloto (WC) (maurisa@bridge.org.za)
Eastern Cape Chapter	Creating space for continuous regional conversations on M&E.	Prof Victor Naidu (victor@dpme.gov.za)

ROLES

The Board in 2023 is Tikwiza Silubonde (chair), Moses Mashingaidze (deputy-chair), Eleanor Hazell (operations lead, and adaptive management), Mishkah Jakoet (Treasurer), Mayibongwe Mncube (Deputy Treasurer), Asgar Bhikoo (Deputy Operations, lead on MERL Tech and Investing in impact), Molupe Matsumunyane, Ian Goldman (lead on partnerships), Jen Norins (lead on membership, communications and just transition), Babette Rabie (lead on research/evidence map), Ruth Mojalefa, Takunda Chirau (lead on MAE), Nana Davies (lead on capacity building, EE and competencies). As of February 2022, our secretariat consists of three staff: a Coordinator (Gaynor Nel), Administrator (Marla Naidoo), and Programme Support (Sivenati Yami). We aim to strengthen this through programme funding

Contact: Gaynor Nel, SAMEA Coordinator, coordinator@samea.org.za

Revised SAMEA TOC as at December 2021 (high resolution version available at www.samea.org.za)

