



2024 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 2023

In 2023, SAMEA achieved several milestones, beginning with a successful partner forum that fostered collaboration and shared learning among stakeholders. Through strategic partnerships, SAMEA secured funding from UNICEF for the Young Emerging Evaluators (YEE) program, enabling the participation of seven YEEs in an immersion program co-funded by host organisations. Additionally, an additional YEE received funding from the NDB, enhancing the diversity and reach of our initiatives.

Furthermore, SAMEA organised and hosted an online capacity-building workshop series covering a range of topics pertinent to monitoring and evaluation (M&E), attracting a total of 133 participants. Topics included M&E for Just Transition, Introduction to Research for M&E, Rapid Evaluation, Investing in Impact, Tech-enabled MERL, and Virtual Evaluations, offering valuable insights and skill development opportunities to a broad audience. Additionally, SAMEA secured funding from the Zenex Foundation to enhance our knowledge management capabilities, further strengthening our organisational infrastructure.

In terms of programmatic achievements, SAMEA collaborated with the Department of Planning, Monitoring, and Evaluation (DPME) to develop and launch M&E guidelines for Just Transition, a significant contribution to the evolving field of environmental and social impact evaluation. Moreover, our YEEs provided support to DPME through evidence mapping, showcasing the tangible impact of our capacity-building initiatives. Additionally, organisational growth was evident through the expansion of our secretariat, now comprising three full-time staff members, and improvements in our governance structure, including the development of a comprehensive risk register to ensure effective risk management strategies moving forward. SAMEA's efforts to foster networking and engagement were highlighted by the successful execution of a Round Robin networking event, drawing participants from various provinces and facilitating meaningful connections and knowledge exchange.

THEMATIC PRIORITIES FOR 2024-2025

The Board will continue to focus on the thematic areas identified in our previous strategic plan, adopting a co-creation approach in this work. These include:

1. M&E to support a just transition.
2. M&E for continuous adaptive management, reflection and learning.
3. Made in Africa Evaluation.
4. Tech-enabled MERL.
5. Impact investing.
6. M&E Capacity Building and EEs, competencies and professionalisation.

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

PRIORITIES FOR 2024

1 **M&E and a just transition to climate and ecosystems health (lead Sinenhlanhla Tsekiso)**

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 2021 Hackathon, during which evaluation criteria and guidelines were developed on climate and ecosystems health and transformative equity. Our key activities this for 2024 include:

- Supporting pilots on applying the evaluation criteria and guidelines in new sectors as well as developing relevant monitoring tools and facilitating training to assist with implementation.
- Compendiums of relevant indicators/tools to assist application of the criteria in M&E processes.
- Pilot of planning/ monitoring systems for JT, e.g. linked to PCC
- Supplementary tools to enable better use of criteria and guidelines (linked to M&E for adaptive management)
- Learnings from piloting processes in planning/M&E documented
- Source funding and recruit staff to support the promotion and implementation of the this portfolio

2 **M&E for continuous adaptive management, reflection and learning (lead Khumo Pule)**

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 focused on three aspects of M&E for adaptive management, three rapid evaluations, virtual evaluation guideline, learning and adaptive management in South Africa. Our key activities this for 2024 include:

- Securing funding for Recruitment of an evaluation facilitator and peer reviewer (Mpumalanga evaluations)
- Documenting and dissemination of lessons learned
- Involving EEs in rapid evaluations (Mpumalanga)
- Launch of the virtual evaluations (29 February 2024)
- Working group session on adapting management within the VUCA world (hybrid event)

3 Made in Africa Evaluation (MAE) (lead Sinenhlanhla Tsekiso)

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 evaluators, and it is essential to reconstruct and reposition the value of MAE. Some of the 2023 achievements include the collaboration in the Made in Africa Blog on SAMEA website with CLEAR-AA. The focus for 2024 will be:

- Securing funding for documenting learnings/case studies and MAE and IKS awareness raising
- Build relationships – e.g. Mastercard Foundation, Twende Mbele, Institutions of higher learning

Exploring the use of communities in evaluations

4 Tech-enabled MERL (lead Mutsa Chinyamakobvu)

The Tech-enabled MERL Community of Practice (COP) is envisioned as a space where professionals from different backgrounds can come together to explore the role technology plays in MERL. Through this space, SAMEA hopes to see professionals come together to share knowledge, learn, create a safe space to talk about hard tech topics, and support proactive responses to digital futures.

In the pursuit to contribute to equitable and sustainable development practices in Africa, the CoP envisioned that the MERL Tech CoP will attract young people to MERL by creating a vibrant and informal/relaxed setting where people can network. Ultimately, the MERL Tech CoP contributes to SAMEA's mission to establish vibrant communities that support, guide, and strengthen monitoring and evaluation. The planned activities for 2024 include:

- Promote the development of practical and applicable solutions through the COP
- Run a challenge centered on developing innovative solutions for the global south for elements of the data life cycle and forefront innovative solutions involving machine learning, AI for evaluation, AI policy, and Tech-toolkit development through working group

- Ensure there is continuity in the work by promoting use of cases, demonstrations that receive support through concept clinics are aimed at showcasing during conference
- Through strategic partnerships we want to Enable researchers and practitioners to connect with private and public sector and attract support and collaboration with academic institutions

5 Investing in impact (lead Zulaikha Brey)

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:

- SAMEA's contribution to IISA's IMM course, e.g. through going beyond what IMM is and adding the how; Peer review of course content; provide course facilitators
- CoP continues but potential to blend it with IISA IMM Working Group and contribute to building the IMM guideline and shared resource for IISA IMM WG and SAMEA COP members
- Include potential conference topics:
 - bridging the gap between funders/investors and evaluators (translation)
 - data visualization and communications
 - data verification and assurance – potential role for evaluators
- Contribution to GIIN Impact Investment survey, with a focus on the SA landscape

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 2024-2025 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, and further standardising the EE programme. Our key activities this for 2024 include:

- Emerging Evaluators
 - Strengthen and continue standardisation of work immersion (internship) programme for the 8 Young Emerging Evaluators
 - Scale up the eco-system for the Young Emerging Evaluator programme (with UNICEF, WFP and CLEAR-AA)
 - Increase attendance of the Emerging Evaluators at the conference

- Foster knowledge production by Emerging Evaluators at the conference and as part of the EE programme
- Explore if there is an appetite for a Conference strand “For Youth by Youth”
- Capacity Building
 - Improve professional development workshops as part of the conference
 - Develop a self-paced course (Introduction to research for Evaluation)
- Professionalisation
 - Engage with DPME for the possibility of doing a follow-up study to explore standardisation and link professionalisation with the competency framework
- Competencies
 - Develop Competency self-assessment tool and professional development tool and launch at the 2024 Conference

COMMUNITIES OF PRACTICE

The following communities of practice are active. 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)
Tech-enabled MERL	The role of technology in MERL	Viwe Kutu (viwe@datainnovators.co) Mutsa Chinyamakobvu (mutsacc@gmail.com), Rebecca Mbaya (beckymby@gmail.com)
Investing in Impact	M&E practice within the social investment and private sector	Zulaika Brey (zulaikha.brey@dnaeconomics.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) Stephan Paulsen (eeCOORDINATO@samea.org.za) Nana Davies (nana@southernhemisphere.co.za)

ROLES

The Board in 2024 is Jen Norins (chair), Mutsa Chinyamakobvu (deputy-chair), Anniza de Wet (operations lead and conference chair), Mishkah Jakoet (Treasurer), Zulaikha Bery (Deputy Treasurer and deputy operations lead), Molupe Matsumunyane, Ruth Mojalefa, Nana Davies, Sinenhlanhla Tshekiso, Khumo Pule and Jeffery Tshivase.

Our secretariat consists of three staff: a Coordinator (Marla Naidoo), Administrator (Sivenati Yami), and EE Programme coordinator (Stephan Paulsen).

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

