

## **SOUTH AFRICAN MONITORING AND EVALUATION ASSOCIATION [SAMEA]**

### **ANNUAL GENERAL MEETING – AUGUST 2009**

#### **ANNUAL REPORT**

Another year and another milestone for SAMEA. The central focus for this year's activities has been the organising of the 2nd biennial conference where we are gathered today. Besides the huge task of organising the conference, the SAMEA Board, augmented by three new members – Christel Jacob, David Molapo and Candice Morkel continued to cement its relationships with other local networks such as the GWM&E structure, IDEAS, who had their conference in March this year and internationally with IOCE (International Organization for Cooperation in Evaluation) and 3ie (Impact Evaluation). Several Board members and SAMEA members attended the 3ie/NONIE/AfrEA conference on Impact Evaluation in Cairo during April this year. At this conference a SAMEA Board Member was elected to serve as the secretary of AfrEA.

The Board managed to meet face-to-face only once over this period. This was due to the busy schedules of individuals but several tele-conferences and the continuous flow of emails enabled us to engage with and address the many issues confronting us. At the beginning of this annual cycle, we lost our administrative support and had to advertise the post. We were lucky to acquire the skills of a student but unfortunate in that she had limited time she could offer the organisation. This position has since been re-advertised and Refilwe Masikane has been appointed as the administrator of SAMEA.

To facilitate decision-making and coordination, the Board generally operated as a collective but with an exco (chairperson, deputy-chair and treasurer) who had the task of coordination and oversight. Board members were assigned various portfolios and they provided leadership and direction for these targeted focus points.

#### **Capacity-building and Training portfolio report – Fanie Cloete**

There is a dire need for more and better capacity-building opportunities for M&E professionals in SA. SAMEA's promotion of M&E capacity-building and training focused on three initiatives during the past term:

- 1 Short courses and longer academic programmes on different aspects of M&E for anyone who would like to enhance his/her knowledge of and experience in this field:** Various South African and international short courses and longer academic programmes on different M&E-related issues from different sectoral perspectives are continuously advertised on the SAMATalk listserv and also on the relevant pages of the SAMEA website. Enquiries about such events are regularly referred to the most appropriate sources. A number of SAMEA Board members are among the presenters of these courses. Many such opportunities have not yet been captured on the SAMEA pages, and SAMEA will soon put out another call to course presenters to make use of these facilities.
- 2 PALAMA's M&E training for the GWM&ES:** This programme is intended to be rolled out to all M&E professionals at the national, provincial and local levels of the public sector over the next few years, and eventually also to the private and voluntary sectors who interact with government in this regard. It is an extremely ambitious programme that will probably not meet the expectations that have been created around it as a result of already evident constraints (mostly related to management problems in government). SAMEA members regularly give inputs into the planning and development of the curricula and presentation of the programme, but current delays in the roll-out of the various projects create increasing concerns about the programme's overall feasibility. This means that SAMEA cannot rely on this initiative, and that we have to continue with expanding our own focus on promoting quality M&E training as summarised above.

- 3 Special capacity-building workshops:** The presentation of conferences, pre-conference capacity-building workshops (like those organised for this conference) and other special workshops for this purpose (eg Prof Gert van der Westhuizen's workshops last year on the emerging GWM&ES) in different regions of the country, remains an additional strategic focus for SAMEA to supplement the above initiatives. This could be fruitfully expanded during the next term.

Against this background, it is clear that SAMEA has an important role to play in promoting M&E capacity-building in future, and will continue to do so.

#### **NGO's Donors & CSI - Christel Jacob**

The intention was to produce two events prior to the SAMEA conference in August 2009 that were primarily aimed at M&E within these specific sectors.

Regrettably these events did not materialise. At the time the Board member was in the process of handing over the role of co-ordinator of the accreditation task team to another Board member and in January 2009 the entire board began planning the SAMEA August 2009 conference. This has been both a challenging and rewarding experience.

It is the intention, once this conference is concluded, to take a more active role in ensuring that the NGO/ Donor & CSI sectors of our membership receive specific attention and we hope that with the memberships' assistance and support, SAMEA will host at least 3 sector-specific seminars over the coming year.

#### **Academic publications portfolio – Kevin Kelly**

At the 2008 SAMEA AGM, the SAMEA Board was mandated with pursuing the possibility of founding an evaluation journal. During the course of the past year this was actively pursued by SAMEA, working together with AfrEA.

Towards this end SAMEA convened a panel discussion at the 2009 Cairo 'Perspectives on impact evaluation' conference. The title of the panel was 'Prospects for a scholarly journal focused on African evaluation practice'.

The panel was organised and chaired by Dr Kevin Kelly of SAMEA and panellists were: 1) Dr. Sulley Gariba (President - AfrEA; Executive Director - Institute for Policy Alternatives, Accra; founding President - IDEAS) speaking on 'Making evaluation our own through scholarly and development-oriented evaluation'; 2) Dr. Florence Etta (Chair - Africa Gender and Development Evaluators Network; current chair of AfrEA) speaking on 'What kind of content might we expect from an African evaluation journal?'; 3) Prof. Donna Mertens (Gallaudet University, Washington DC; Past President of the American Evaluation Association; Editorial Board member and incoming editor - New Directions in Evaluation and Journal of Mixed Methods Research) speaking on 'What it takes to start and nurture a new journal'; 4) Bob Williams (Publications Committee - Evaluation Journal of Australasia; Editorial team – Evaluation South Asia; Chair of the International Committee of the American Evaluation Association) speaking on 'Thinking evaluatively about an African evaluation journal'.

The outcome was a mandate to SAMEA to finalise and submit a costed concept document that AfrEA would then consider and seek funding for once the details were decided. This was duly done by SAMEA and a final version was sent to AfrEA for consideration. The suggested title is 'African Journal of Evaluation'. It was proposed as a quarterly, peer-reviewed journal, commencing in 2010; to be published by AfrEA through a commercial publisher. The proposal contains details about editorial and production management and a proposal for an author support programme to assist authors new to scholarly publishing.

The process is currently out of SAMEA's hands. Should the journal come to fruition, and there is a fair likelihood of this, it will be to SAMEA's credit that the organisation has played a significant, and certainly over the last year, leading role in the initiative.

## **Regional chapters and membership – Candice Morkel and Sefiso Khumalo**

Small, regional networks of SAMEA members have been formed which support local events and facilitate the growth of M&E in South Africa. Thus far, five of these networks have organised themselves in SAMEA Chapters. They include: Gauteng, Limpopo, Western Cape, Eastern Cape and KwaZulu-Natal. The establishment of regional SAMEA “chapters” was also intended to increase membership growth as each region attracts enough membership to warrant establishment of a regional chapter.

As part of the activities of the Regional Chapters, Professional Development Seminars on "The State of M&E Institutionalisation in Government" were held in three provinces (Eastern Cape, Western Cape and Gauteng) in May 2008. The purpose of the seminar was three fold: firstly to reflect on the state of M&E institutionalisation in South Africa as key documents reflect; secondly to create an opportunity for the members to engage in critical conversation about these publications and the topic of institutionalization of M&E in South Africa; and thirdly to expose members to a list of key South African M&E publications (available in the public domain) that can guide their thinking about the institutionalisation of M&E in government and to provide members with a copy of these documents for their own use. This seminar series was presented by Prof. Gert van der Westhuizen from the University of Johannesburg on behalf of SAMEA.

### **Strategies for membership growth**

It is foreseen that nine regional Chapters will be established, as each region attracts enough membership to warrant establishment of a regional Chapter. Regional Chapters will be supported or established as follows:

SAMEA will provide financial incentives for regional Chapters to grow. To this end, they will be entitled to a certain percentage of the registration fee of each recruit. In this regard, Chapters will be encouraged to step up the recruitment drive.

A formally established Chapter may approach the national SAMEA body for awarding of a fundraising function. Fundraising for specific projects prioritized by the Chapters will be coordinated and supported by the national SAMEA board, but only if the Chapter has more than 20 signed up and activated members.

- A strategy document for the regional coordination and support has been developed. It was circulated to the membership for the inputs and was approved by the board.
- Support has been provided for the Gauteng Chapter which has conducted a seminar and contact is maintained with members through meetings.
- The Eastern Cape Chapter has been strengthened and it is functional. A seminar was conducted in May 2008.
- Establishment of Limpopo Chapter in May 2009. Three people joined on the spot after the presentation made by the Board member responsible for regional coordination and support.
- Ground work done for the establishment of KwaZulu Natal Chapter. Plans are afoot on establish the chapter in this region.

**General Challenges:** The voluntary nature of the association and the intensity of the commitments of members' formal employment have presented a challenge to the growth and work of the Regional Chapters.

**Membership:** The association has 333 active and paid-up members. There are more members where SAMEA chapters are in existence, than where such chapters do not yet exist.

## **Governance, Policy and Guidelines Portfolio – David Molapo**

### **SAMEA Legal Status Review**

Through involvement of the rest of the board members a decision was made to the effect the legal status of SAMEA be reviewed. The key issues that prompted the decision included tax non-compliance implications, the importance of ensuring that SAMEA operates within the tenets of good corporate governance as well as ensuring the development of a constitution to encapsulate organization chapters.

- A request for proposal was developed and issued to a number of legal firms.
- A number of legal firms responded to the request.
- A discussion was had with the rest of the board.
- It was decided that the cost for the exercise was not affordable by the organization.
- The Treasurer made the board aware that the activity was not budgeted for.
- The exercise was left where the chairperson suggested that he would explore someone who could do the exercise pro bono or at a reasonably low cost.

**Challenges:** Lack of funds for the important task of reviewing the legal form of SAMEA. It is suggested that funds be made available for this important activity in the current year.

## **International Liaison Portfolio – Donna Podems**

This portfolio has encouraged SAMEA to be a part of the wider M&E community. As part of that, we are members of NONIE where we take part in a listserv of idea sharing, IDEAS and take part in various international forums (IOCE). Our Board members have attended (1) the AFREA/3IE conference at their own expense but representing SAMEA, (2) the American Evaluation Association at their own expense and representing SAMEA, and (3) The European Evaluation Association Conference. Further we have invited international guest speakers such as Howard White from 3IE to talk on Impact Evaluation and Jennifer Greene and Jim Rugh to take part in this year's SAMEA Conference. Finally, we are listed on various international websites in order to increase our profile. These include websites such as GLOBAL HIV/AIDS M&E portal, and others.

This portfolio is important to keep SAMEA linked with the wider M&E community.

## **Communications – Marlene Roefs**

The upgrading of the SAMEA website has been the most significant achievement in this portfolio. The new site looks attractive and it has very many functions that are currently not being utilised. This is linked to other challenges we face as an organisation, including lack of administrative support and where the organisation is to be located.

We have not been able to establish the Topical Interest Groups we envisaged last year. 'Fast facts' have not come off the ground yet. We publish updates now and then but a quarterly newsletter has not been developed and published as yet. The main reason for this was that the communications portfolio has concentrated on improving the administration of members and improvement of ICT infrastructure.

## **General reflections:**

South Africa is in the unique position to act as a gateway to Southern Africa and even the rest of Africa. Several international agencies continue to draw on expertise in South Africa to service evaluation needs in Southern Africa and beyond. The newly formed Planning Commission within the Presidency houses a powerful M&E ministry. The World Bank is considering South Africa as a possible site for establishing M&E infrastructure. All S.A. government departments have constituted M&E units or offices of some kind or another. Most universities and several private agencies are offering stand alone courses or integrated courses focusing on aspects of evaluation research, and institutions like PALAMA and SAQA are developing accreditation frameworks that will accommodate wide a range of expertise and participants.

It is in this context that the new Board will have to consider if the portfolios above are essential to and for the future direction of the organisation. As indicated in the brief reports above, many strides have been taken, some objectives have been met but each and every portfolio still has unresolved issues and concerns. The tremendous growth in M&E activities needs to be reflected in the growth in membership of SAMEA. SAMEA started off with approximately 150 signed up members. This grew to 250 a year or so later and we now stand at 333 fully paid 'active' members. We have had new members join fairly regularly but members often fail to renew their membership to the organisation. Recruitment of new members is still important, however, we need to find and use strategies to maintain and retain membership to the organisation.

The Board members' voluntary role is a draining but often rewarding role. Having a successful conference for example makes up for the months, weeks, days and hours toiled. The new Board needs to consider how best to spend their valuable time. Should it be about day-to-day activities such as placing adverts, short-listing and interviewing personnel; making sure that the organisation is registered with appropriate structures and agencies OR can it be about providing advice and guidance about strategic issues confronting the organisation. In the absence of a general secretary/ organiser, the current Board members have done all the things required for the smooth running of the association, with those closest to the administrative functions doing more than those further away. It is therefore important for the new Board to look at the possibility of employing an organiser who can implement decisions taken by the Board, Be this about recruitment, liaising with other organisations and associations and or attending to day-to-day administrative issues.

Closely linked to this recommendation is the issue about the physical location of SAMEA. Since its inception, SAMEA has relied on the goodwill of members, first Khulisa and then Feedback Associates. While this has allowed the organisation space and time to focus on other issues, it remains a concern that needs to be addressed, urgently. All of this will require (financial) resources that cannot be obtained from a low membership fee base.

SAMEA is seen by many as a 'success story'. It is seen as an active association that involves members in decision making and offers opportunities for engagement to its members and those interested in M&E. Several similar attempts across Africa and elsewhere in the world have failed because of (1) lack of resources, (2) personality clashes (3) abuse of resources (4) dis-interested members (5) non-participation of Board members (6) lack of political will etc. SAMEA is not afflicted by any of these 'ailments'. Working diligently and frugally with available resources, ALL SAMEA Board members have generously contributed of their time, expertise and personal resources. We trust that the new Board will continue in this vein and we wish them everything of the best.