



higher education
& training

Department:
Higher Education and Training
REPUBLIC OF SOUTH AFRICA



Rhodes University Research Chair Partnership Initiative for

M&E in a SETA Environment

Online Course (Book) Outline

Final 23 March 2020

Developed by Eureta Rosenberg and Mike Ward

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Finally, the SETA and DHET members who attended the Collaborative Research Working Groups and Learning Events are highly appreciated. We could not have produced these resources without their challenging questions, experience-based contributions and strong commitment to skills for South Africa.

Online Course Overview

This course outline is the final component of Project 9 of the Rhodes University Research Partnership Initiative on Monitoring & Evaluation in a SETA Environment. The initial intention was to produce a book outline to explore publication through a publishing house. However, in the course of implementing the Initiative it became evident that an online course outline would be a more valuable resource. There are several reasons for this:

1. Book production takes long, and building capacity for M&E in a SETA Environment is needed quite urgently.
2. While a book would be more generic and less time-bound, context specific and time-sensitive content seems more needed in the system at this time.
3. Online content can be updated more readily, which may be critical in the current somewhat fluid institutional and policy environment.
4. Capacity development during the implementation of the Research Partnership Initiative is incomplete; more is needed. However, time pressures make participants less likely to attend even short courses. An online course allows busy professionals to work through content when their schedules allow, while retaining some interactive dimension. Online courses are potentially more interactive than working through a book by oneself.
5. Online courses can be accredited; accreditation was important for some participants.



It is proposed that SETA M&E be an elective in an online short course suitable for a variety of professional fields. The elective could be offered through one or more universities, and would be accredited or non-accredited, depending on whether a participant submits assignments or not. The other modules that will be developed are shown in figure 1 for interest. The Core and Generic component will be compulsory for all.

Figure 1: Online Course for Multiple Educational Fields with SETA M&E an Elective

Purpose and Scope of the Course

The purpose of the course is to develop new capacity and strengthen existing capacity for monitoring and evaluation (M&E). The focus is on evaluation for system wide learning, and on monitoring as a stronger and more streamlined contributor to evaluation for learning. The scope is the SETA environment, as a sub-system within the broader Post-School Education and Training (PSET) system in South Africa.

Whose capacity? The following levels of domains of capacity development are identified for the SETA and PSET context:

- Capacity of individuals with specific or general M&E functions (staff, consultants)
- Capacity of organisations to conceptualise, commission, undertake and *use* M&E (SETAs, DHET, NSA)
- Capacity of the system as a whole to contribute to, support and learn from M&E (all PSET role players viz. government, providers and employers).

Capacity building must enable SETAs to be accountable to their stakeholders and in equal measure, to learn from M&E in order to increase their positive impact within their sphere of influence. This course is an opportunity *to develop an aligned, implementable M&E framework that sees PSET as a system and supports systemic and institutional learning as much as organisational accountability*. The online course is potentially broad enough to be also used in a wider PSET landscape.

Intended beneficiaries

Participation in the course and the learning network that may emerge from it, is open to SETA staff and collaborators with M&E and M&E management functions. It is possible and ideal for more than one person from any one SETA to attend, as this may make it easier for new initiatives to be introduced and embedded in the workplace. Participation will also be open to colleagues who work in the SETAs environment, but are staff in another entity e.g. in DHET, NSA, NSF. All participants should be familiar with the government context and at a graduate level. Some background knowledge of and/or experience in M&E would be an advantage, but is not essential. Some prior training in research methodology is important.

A course that supports organisational change

Many other attempts have already been made to improve M&E in a SETA environment. They have not always been successfully implemented. In 2019 the Collaborative Research Working Group (CRWG) therefore proposed change management to accompany this Initiative, so that it would be more readily applied. The change management process started in 2019 by engaging with SETAs and DHET in CRWG meetings, learning events and workshops, to consult them during the development of new M&E framework, tools and guidelines, and at the same time to introduce them to the underlying principles and content. It has been an opportunity for the intended users to engage, give feedback, consider and comment on the implications, and generally prepare the ground for the recommendations to take root within the SETA environment. This co-construction process,

with researchers and SETA stakeholders learning from each other, needs to continue through this online course.

Change management is ideally less a process of consultants coming in to ‘manage’ organisations to change. It is ideally more a process of consultants and stakeholders together preparing the ground for agreed-upon organisational change to take root, and bear fruit. This could be called ‘change support’.

DHET mentioned a possible post-graduate diploma in M&E to be offered by the School of Governance and suggested that the content generated in this Initiative, be included in such a course. A more formal training component could be considered as a further outcome of this online course. An informal and ongoing ‘change support’ process would be an alternative or a complementary process to it. The online course outlined here could be a pilot towards finalising the content for a School of Governance module. It could also be a platform (course-activated learning network) around which the ongoing change support could continue, once the Initiative is finished and CRWG are no longer used for this purpose.

Summary purpose of the course

- Introduce SETA stakeholders to M&E resources
- Engage them in using the resources to strengthen M&E in their contexts, in contextually relevant ways (praxis through formal or informal assignments)
- Familiarise SETA stakeholders with the M&E frameworks, guidelines and tools produced so that they can confidently use and adjust them in own contexts
- Provide *a course-activated learning network* in which role players in the SETA system can work through the challenges of taking on board new frameworks and processes.
- Gather implementation examples, case studies and lessons learnt (interactive engagement with uploaded assignments)
- Share the training material and implementation lessons learnt with other users.

Intended learning outcomes

1. Technical competencies – develop knowledge and skills to:
 - Design and/or commission M&E frameworks and plans
 - Choose suitable methodology for specific evaluation questions
 - Draw up a theory of change and map an outcomes pathway
 - Design M&E instruments for quantitative and/or qualitative data
2. Relational competencies – develop knowledge, skills and attitudes to:
 - Manage the implementation of an M&E plan / evaluation
 - Resource the implementation of an M&E plan
 - Communicate about key aspects of M&E e.g. purpose, suitable methodology
 - Use M&E instruments to gather quantitative and/or qualitative data.

3. Transformational competencies – develop knowledge, skills and values to:
- Envisage suitable ways of doing M&E in a post-school context
 - Introduce a new M&E process in an organisational context
 - Implement a new M&E process in an organisational context

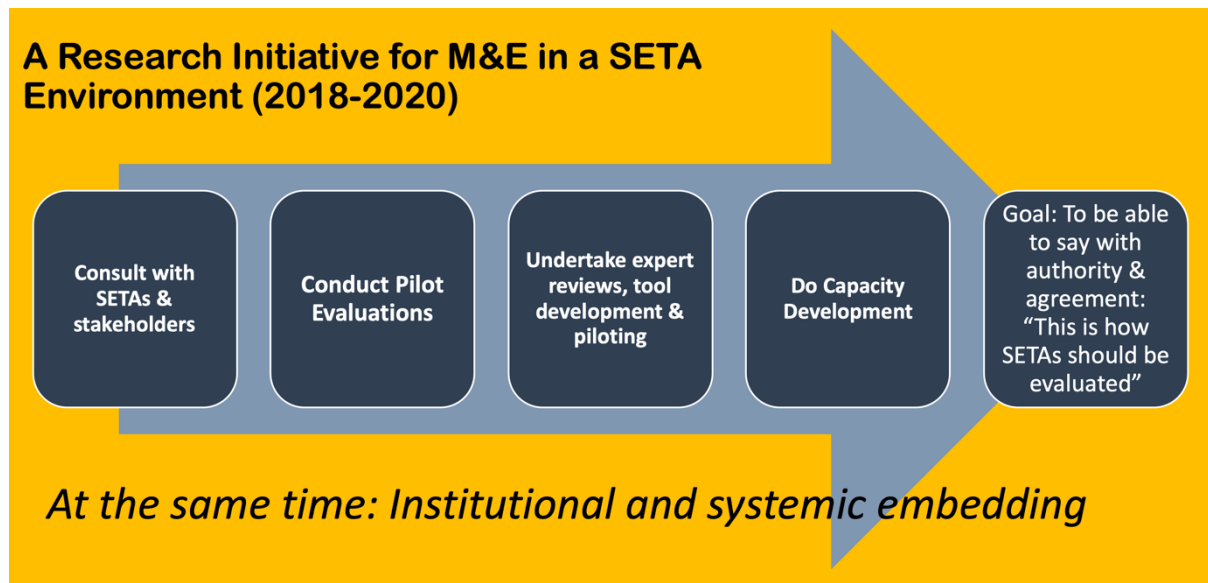


Figure 2 The Change Support Model of the Rhodes University - SETA Research Initiative

Orientation to the Course

Resources and courses on M&E are plentiful. What are the specific features of this course?

The content structure model is to provide some generic content and some context specific content, and to support course participants to find their way around the content and not only identify what is relevant to them, but also, to work with and adapt material so that it becomes even more context relevant. Content is structured with a first level of introductory material (layer 1), and additional layers of (2) supplementary and (3) extension materials.

The delivery model is online, and can be adapted to a blended model, or a face to face taught course.

The underpinning framing for the course is a multi-levelled, activity-based complex *systems* view. PSET in South Africa is a system with various sub-systems (such as SETAs, employers, providers, DHET) interacting with other systems (e.g. the economy, basic education, learners' environments). Systems perspectives are common in various fields including evaluation. The particular systems approach taken here, has three particular dimensions.

The first is that PSET *systems are complex*, meaning there is not a simple one-dimensional or even complicated but predictable relationship between inputs and outputs. Rather, there are multiple and often unforeseen interactions between multiple variables, because systems like PSET are radically open (interacting with many other systems and influenced by multiple environments). From these interactions outcomes emerged that are only partially predictable (see next paragraph).

The second dimensions of the systems orientation of this course is a multi-layered or laminated understanding of reality (*a realist ontology*). A laminated realist ontology (*sensu* Bhaskar) overcomes debates over whether M&E should be qualitative or quantitative; focus on the observable world or on participatory meaning making. It allows evaluators to coherently combine different kinds of data and sources of meaning. It also allows for a non-positivist identification of patterns in social contexts, as evaluators look for underlying mechanisms that give rise to observed trends. Unlike other complex systems perspectives, it therefore allows for *some* prediction and can therefore inform planning and policy making, while taking the high levels of uncertainty in complex systems into account.

Thirdly, the course has a focus on the historically shaped and situated *activity or practices* (Bourdieu) that take place in these systems (e.g. skills planning, training or reporting), as opposed to, say, individual or once-off actions. Activity (*sensu* Leont'ev, 1981, in Engeström and Sannino, 2009) implies a concerted and habituated practice with cultural and historical roots, undertaken by a collective. That is, the course looks at 'how things have generally been done in this context and why'.

Learning is the final feature of the course to consider. The departure point is that there is not enough evaluation that actually contributes to learning by providing credible answers to real questions, and adequately support individuals, organisations and policy makers to make informed decisions; at the same time, there is too much monitoring and reporting, that

does not adequately contribute to evaluation and learning. Learning is a broad concept and it is important to note that in this course, the emphasis is on social and expansive learning. *Social learning* involves individuals and groups, but is ultimately taken up by collectives and embedded into collective practices, organisations and broader institutional contexts (e.g. the adoption of a new framework for M&E in a SETA).

Expansive learning (sense Engeström and Sannino, 2009) is ‘learning what is not yet there’ as groups, organisations or networks grapple with complex problems, of which there are many in the skills landscape.

These forms of learning are distinct from the adoption of already known practices by new entrants into the field, and will form the bulk of the course processes, although the latter will also receive adequate attention. For example, we already know what are useful steps for developing a ‘theory of change’ and this will be shared with course participants. However, it might not yet be known how to conduct a theory of change process in a particular organisation, to reduce the number of indicators against which they report and thereby strengthen their M&E. This will be guided by the course, but must be worked out in context by course participants. Should they be able to do so successfully, or at least develop a deeper understanding why it is not yet possible, it would be an example of social and expansive learning.

Core and Generic Content

The field of monitoring and evaluation across contexts

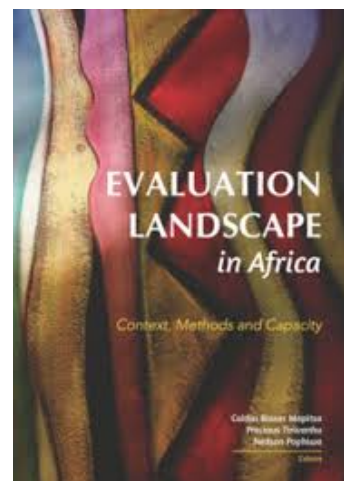
Across contexts and into the skills landscape

Monitoring internationally, in Africa and South Africa

Performance monitoring and compliance cultures

Key resources:

- Introduction to *Evaluation Landscape in Africa*, edited by Blaser Mapitsa, Trivanhu & Popiwa, 2019, Stellenbosch University Press.
- Discussion Briefs, full set



Five generations of theories and approaches

Experimental evaluation

Utilization-focussed evaluation

Fourth generation of constructivist and participatory evaluations

Theory-based evaluation – an emergent fifth generation?

Realist theory-based evaluation

Key resources:

- A history of evaluation in 28 1/2 pages, Chapter 1 in *Realistic Evaluation*, Pawson & Tilley, 1997, SAGE.
- The problems with experimental design, Chapter 2 in *Realistic Evaluation*, Pawson & Tilley, 1997, SAGE.
- Introduction to scientific realism, Chapter 3 in *Realistic Evaluation*, Pawson & Tilley, 1997, SAGE.
- Brousselle & Buregeya, 2018, Theory-based evaluations: Framing the existence of a new theory in evaluation and the rise of the 5th generation. *Evaluation*, 24(2), 153-168. DOI [10.1177/1356389018765487](https://doi.org/10.1177/1356389018765487)

Key Concepts and Terminology

Introductory terms

Monitoring vs Evaluation, Assessments and Reviews

Global goals – the SDGs

Programmes, projects and systems

Impact and outcomes levels

Programme theory - Theories of change; theories of action

Indicators, data, information, findings and results

Quantitative, qualitative and mixed methods

Validity, reliability, reliability and trustworthiness

Learning

Learning as acquisition vs learning as participation

Learning as expansion of the activity and object - Social and Expansive learning

Evaluation types and approaches

Diagnostic evaluation

Design evaluation

Implementation evaluation including tracer studies

Economic evaluations including cost-benefit evaluation

Impact evaluation and contribution analysis

Synthesis and meta-evaluation

Realistic evaluation

Appreciative enquiry

Developmental evaluation

Principle-based evaluation

Activity system evaluation

Course orientation revisited

A systems view and complexity

Activity systems – historically and culturally/institutionally situations practices

Emergence and mechanisms

Realist ontology

Epistemological tenets – validity revisited

2. A Theory of Change and Indicators for SETA M&E

Programme theory and the use of theory of change models revisited

Limitations of indicator-based evaluation and need for additional measures

The drive to track everything leads to failure to track anything well

A proposed Overall Theory of Change (ToC) for SETAs based on key policies

Outcomes mapping, results frameworks and logframes

Selected Indicators for Overall M&E

Implications for role players: DHET, NSA, SETAs, providers, employers & others

Theory of Change and Indicators for the Mandatory Grant

Theory of Change and Indicators for the Discretionary Grant

Key resources (to be expanded):

- Discussion Brief 2 *Working with Theory of Change Models*
- Overall M&E Framework Extract (ToC and Indicators) Updated March 2020
- Discussion Brief 3 *Working with Indicators*

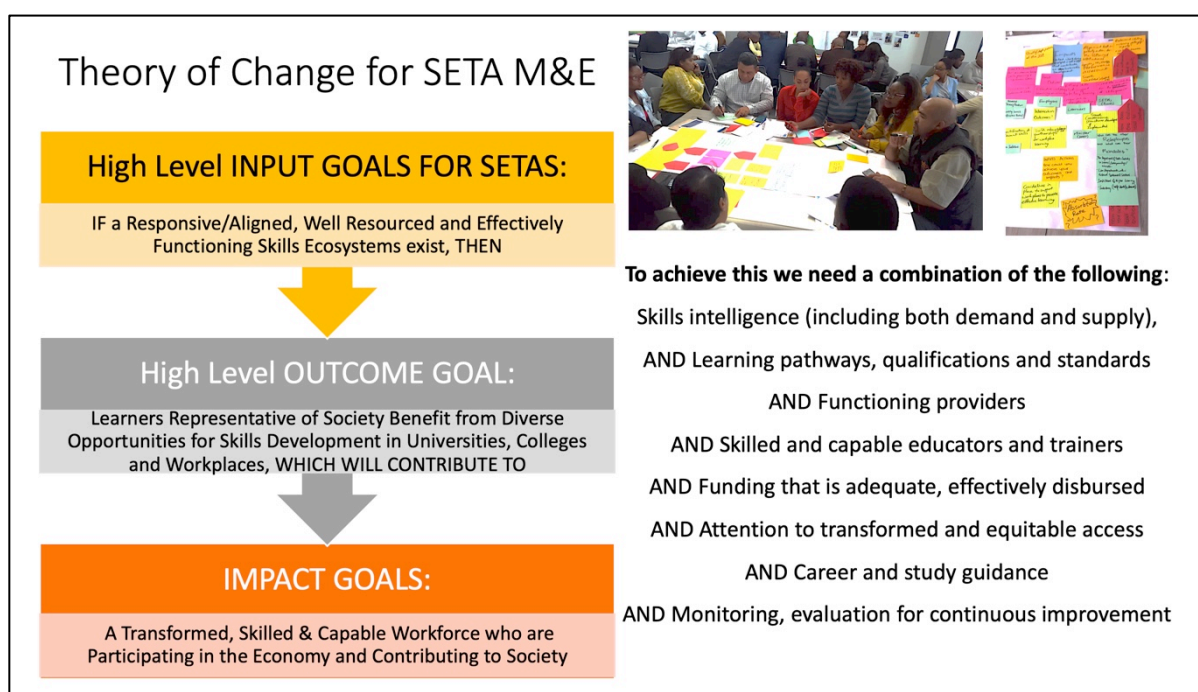


Figure 4: Extract from Overall M&E Framework - High Level Theory of Change for SETA M&E

3. Streamlining and Strengthening Performance Monitoring & Governance

Relationship between performance management and SETA impact

Accountability structures revisited

Indicators for SETA performance management

Targets and other pitfalls of performance management – mitigation strategies

Processes for SETA performance management

Monitoring SETA Governance

Implications for role players: DHET, NSA, SETAs, SETA Boards, & others

Key resources (to be expanded):

- Discussion Brief 5 *Performance Standards and Monitoring*
- Overall M&E Framework Updated March 2020
- Discussion Brief 3 *Working with Indicators*
- Report on SETA Governance (forthcoming)



4. Data Quality and Data Management for SETA M&E

Examples of data in the SETA M&E system

Information challenges in South Africa's PSET system

Specific issues regarding data for SETA M&E

Measures for improving data quality

Measures for improving data management

Implications for role players: DHET, NSA, SETAs, providers, employers & others

Key resources (to be expanded):

- Discussion Brief 4 *Data Management for M&E*
- Discussion Brief 5 *Performance Standards and Monitoring*
- Overall M&E Framework Updated March 2020

DATA MANAGEMENT FOR M&E 4 DISCUSSION BRIEF 4

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SETAs

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BACKGROUND

Efficient and effective data management is a key component of a monitoring and evaluation system. Data management refers to the practice of organising and maintaining data processes to meet ongoing information needs. A data management system should support the capturing, gathering, storage and retrieval of data while simultaneously enhancing collaboration and the creation of new insights and knowledge. In the case of the SETA system, the flow of skills development data from industry and training institutions, through the respective SETAs, to DHET and interested departments and agencies is central to the SETA data management systems. The effectiveness of the M&E system (the ability to learn and make effective skills development decisions) depends critically on the integrity and comprehensiveness of the various data management systems.

SETAs manage data from a wide variety of sources, all requiring and feeding into different levels of reporting. SETAs collect skills training reports from SETA funded programmes, mainly used to track progress on skills development by SETAs themselves. SETAs also rely on industry employers to submit Workplace Skills Plans and Annual Training Reports that contain important data on skills development needs and initiatives related to business and industry. In order to strengthen the SETA M&E system, significant strides have been made within the SETAs, DHET, employers and training providers with regard to data management. As of March 2019, all SETAs create and submit electronic data files in standard formats for inclusion in the Skills Education and Training Management Information System (SETMIS). Despite significant progress on the data management systems, substantial challenges remain in terms of the efficiency and effectiveness of data management within the broader M&E systems in the SETA environment. TAs within the broader skills development policies, plans and strategies.

SETAs play a vital role in addressing a number of key challenges in South Africa, including skills shortages, unemployment, inequality and a globally competitive economy, thus many stakeholders demand data on skills and skills development. But how do we develop this data to move beyond compliance and towards organisational learning and systemic improvement?

5. Conducting Evaluations

Revisiting purpose of evaluation vs monitoring

Evaluation in complex systems

Revisiting types of evaluation

Diagnostic evaluation

Design evaluation

Implementation evaluation

Economic evaluations

Impact evaluation and contribution analysis

Synthesis and meta-evaluation

Appreciative enquiry

Developmental evaluation

Principle-based evaluation

Activity system evaluation

Realistic evaluation

Methods for Data Collection

Surveys

Interviews and focus groups

Workshops

Database

Systematic and meta-review

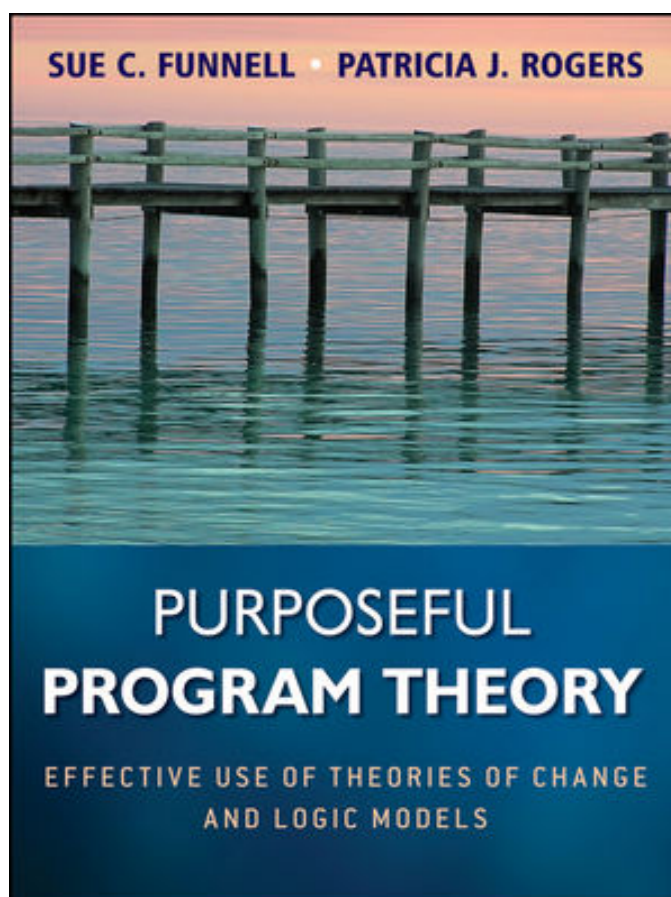
Implications for role players: DHET, NSA, SETAs, providers, employers & others

Application to the Discretionary Grant

Application to the Mandatory Grant

Key resources (to be expanded):

- *Developmental evaluation: Applying complexity concepts to enhance innovation and use.* Patton, MQ, 2010. Guildford Publications.
- Funnell, S.C. and Rogers, P. J. (2011) *Purposeful program theory: effective use of theories of change and logic models.* Jossey-Bass/Wiley.
- How to make evaluations cumulate, Chapter 4 in *Realistic Evaluation*, Pawson & Tilley, 1997, SAGE.



5. Tracer Studies

What is a tracer study?

Examples of tracer studies

Role and purpose of tracer studies in SETA Environments

Limitations of tracer studies

Challenges of tracer studies and how to overcome them

Standardizing some tracer studies across SETAs

Implications for role players: DHET, NSA, SETAs, providers, employers & others

Key resources (to be expanded):

- Discussion Brief 10 *Protocol for Tracer Studies*
- Project 4 Scoping Report (Rogan, 2018)
- Project 4 Synthesis - Standardisation guidelines, Rogan, 2020 forthcoming.



6. Cost Benefit Evaluation

Cost-benefit analysis or evaluation as example of economic evaluations

Role and purpose of cost-benefit evaluations (CBE)

Examples of cost-benefit analyses

Limitations and challenges of economic analyses

Proposed multi-level model for SETA cost-benefit evaluations

Guidelines for using the online CBE tool

Implications for role players: DHET, NSA, SETAs, providers, employers & others

Key resources (to be expanded):

- Discussion Brief 11 *Evaluating Costs and Benefits of Skills Development*
- Project 5 Synthesis Report (Raven, 2020 forthcoming)



7. Making M&E Work in a SETA Environment

Extent to which monitoring and evaluations are used – challenges

Case examples of M&E in use
Wholesale and Retail SETA (2020)
Other

Capacity to conduct, commission
and use M&E

M&E staff and human resources

Working with consultants

Organisations and systems

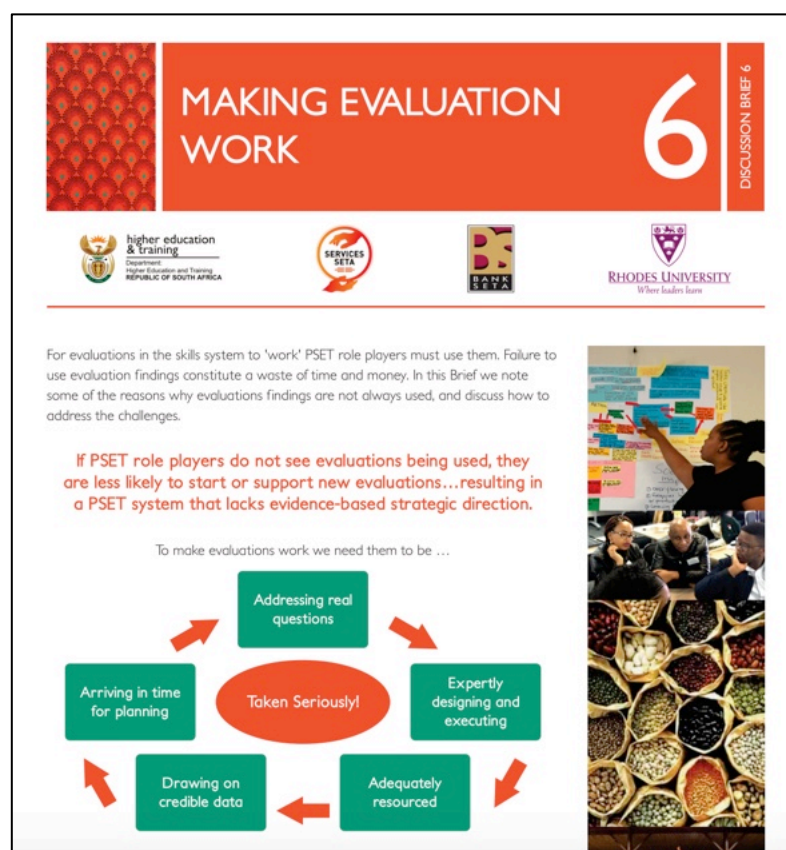
Financial resources and
governance for successful M&E

Streamlined and strengthened
reporting

Platforms and planning processes
for SETA M&E

Implications for role players:

DHET, NSA, SETAs, providers, employers & others



Key resources (to be expanded):

- Overall M&E Framework Updated March 2020
- Guidelines for Implementing the Overall M&E Framework (forthcoming)
- Discussion Brief 6 *Making Evaluation Work*
- Discussion Brief 7 *Strategic Planning Frameworks*
- Discussion Brief 13 *Responsibilities, Functions and Resourcing M&E*

Appendices/Hyperlinks to Research Initiative Materials (online)

Discussion Briefs 1 – 13

SETA M&E Training Materials 5 November 2019

Draft Overall M&E Framework Updated March 2020

Cost Benefits Evaluation Tool (Raven, forthcoming)

Tracer Study Protocol and Standardisation Guidelines (Rogan, forthcoming)

SETA Governance Protocol (forthcoming)