



Strategic Plan 2007-2010

Final Draft 2007



Contents

Table of Contents

Executive Summary	1
Chairs Introduction	1
Vision, Mission and Objectives	3
Vision	4
Mission	4
Objectives	4
Values and principles	4
Values	4
Principles.....	4
Overview 2005 - 2007	5
SAMEA is “on the map”	6
A fully functional entity	7
An emerging community of practice	7
The M&E Environment	9
Strategic Goals	13
Advocacy and awareness.....	14
A platform for inter-action	14
Education and Training.....	15
Professional and ethical standards.....	15
Building the Association.....	16
Strengths, weaknesses, opportunities and threats.....	17
Strengths.....	18
Weaknesses.....	18
Opportunities.....	19
Threats.....	20
Current and planned capacity	20
Financial Strategy.....	21
Flagship Projects	23
A journal of Monitoring and Evaluation.....	24
Capacity building workshops	24
The 2008 SAMEA Conference	25
SAMEA publications	25
Web site development	25
Research.....	25

Executive Summary

SAMEA was formed in 2005 after a year of stakeholder consultation. The aim was to establish an organisation that would promote quality Monitoring and Evaluation that would contribute to the country's development. SAMEA would do this by building a community of practice, committed to sound ethical and professional principles.

From its foundation to 2007 significant progress was made. The organisation is "on the map". It has engaged with government M&E processes, attracted a lot of interest and has taken its mission out into many arenas where M&E is being considered. SAMEA is a fully functional entity, with a credible and competent Board, 300 paid up members, and is fully compliant with legislation. Some progress has been made in building a community of practice, through workshops, the web site, networking and outreach. This has been achieved with limited financial resources, and no permanent paid staff, but a very large quantity of support from donors and personal time committed by the Board and other SAMEA members.

SAMEA is planning for the future in the context of a broadly positive environment. M&E has been identified as a key government priority, including the development of a government wide M&E system. Funding of M&E is being mobilized within government and donor organisations, as well as private companies. With the development of systems of accountability and democratic participation M&E is becoming a socially acceptable and necessary process. Technology is available to enhance M&E practice and make it more accessible and usable.

At the same time there are a number of potential dangers. The increasing legislative requirement for M&E is important, but it could create a climate of compliance. ICT can bring in additional costs and the "ICT divide" will pose challenges where large sections of our country remain without computers. Critically there is the problem of an imperfect market, where the demand for M&E is not matched by a supply of competent and qualified practitioners. Challenges of cost and quality will increase as M&E becomes more integrated into the policy, programme and project implementation.

SAMEA has identified five Strategic Goals. These are:

1. **Advocacy and Awareness:** Continuous advocacy and awareness raising.
2. **A Platform for interaction:** the provision of a platform for inter-action, information sharing and knowledge creation
3. **Education and Training:** addressing the capacity challenges within the field, by promoting and facilitating high quality and accessible education and training opportunities.
4. **Professional and ethical standards:** the promotion of high standards of professional and ethical practice within the field.
5. **Building the Association:** the development of an effective and efficient organisation, including sound governance.

A significant programme of work is being developed for the achievement of these goals. In prioritizing work, cognizance has been taken of the current organisational state of SAMEA.

There are strengths that will be built on. These include: a diverse, knowledgeable and networked Board and membership; a high level of commitment, goodwill and a volunteerism; and a degree of agreement based on consensus rather than rigid policies, systems and procedures.

There are potential weaknesses associated with the way SAMEA works. As SAMEA grows the reliance on busy people to work voluntarily may not be sustainable; the lack of policies and procedures will create tensions; there are a number proposals where greater clarification is needed – for example the proposed journal needs greater conceptual clarity.

The opportunities that exist for SAMEA include: the government wide system for M&E that SAMEA is engaging with; the increased funding available, including in the form of long term partnerships; and the increasing demand for quality and concern for sound professional and ethical practice.

Possible threats include: the danger of focusing too narrowly in particular areas of M&E application; the possible risk of donor funding influencing the direction of the organisation; the danger of losing focus, in trying to meet all the needs at once.

In order to achieve the organisation's goals, SAMEA will retain its primarily voluntary ethos. Board members will continue to do much of the work, and members will be requested to also take on tasks. In order to assist members there will be a strengthening of the administrative function, with greater support for planned activities. This will require SAMEA to establish a head office and ensure that adequate budgets are in place for all planned activities.

The funding for administration will continue to come from membership subscriptions, activities will be planned on the basis of some "in kind" support from stakeholder organisations, projects (such as the 2009 conference) will be managed on the basis of seeking sponsors, and major projects will be achieved through the development of long term partnerships with key players in the M&E field.



Introduction

Chair's Introduction

I am pleased to introduce the SAMEA Strategic Plan for the three years to 2010.

Monitoring and Evaluation is relatively new as a professional field of practice in South Africa. There is a growing awareness of the importance of M&E both within projects and programmes, and in relation to policy implementation.

In projects, particularly those funded by international donors, M&E has been used for some years to check progress, ensure that agreed processes and systems are being applied, and report to donors on achievements in relation to project goals.



Within government M&E has been less systematic, but is now evolving as an essential stage in the policy process. The government document "Towards and Ten Year Review" in 2004 demonstrated both the national commitment to M&E and the power of M&E in policy review processes. This document sets out both the achievements and gaps in public policy implementation and has led to a range of changes, some relatively minor, some quite substantial, in economic, social and industrial strategy.

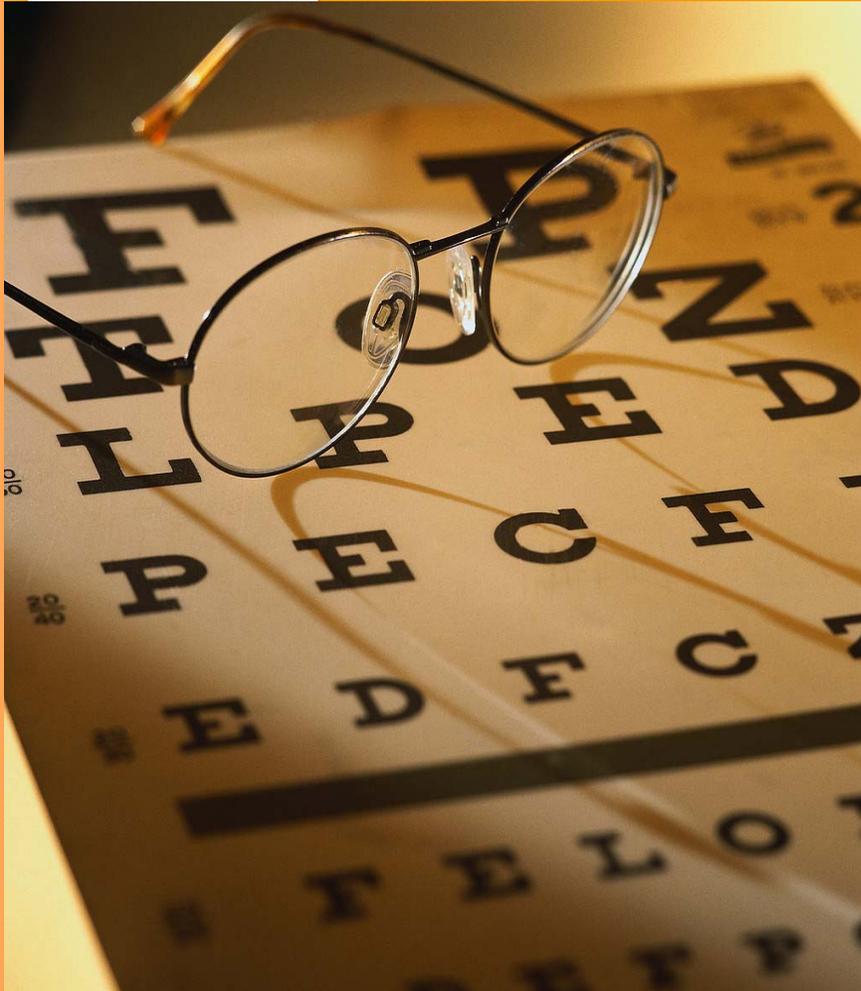
In State of the Nation Addresses the President has identified M&E as a key strategy for improving service delivery. There is now a strong commitment to ensure that policy change is based on a sound assessment of existing policy. The promotion and development of a Government Wide M&E System is one of the most important initiatives being undertaken, and SAMEA is pleased to be associated with this work.

The creation of SAMEA has been welcomed broadly within government, amongst donors, practitioners and academics within the field. Some 300 people have become members of SAMEA, and they have elected a Board of competent and qualified people, who have committed their time to building the organisation and promoting M&E as a profession.

The first Board chaired by Jennifer Bisgard did an excellent job in getting the organisation set up and "on the map". The 2007 conference created a lot of excitement and interest. If all the new applicants for SAMEA membership become paid up, membership could be 500 during this year – a tremendous achievement for a new organisation. The new Board, made up of some previous members and some elected at the conference, has started with great enthusiasm and, as can be seen from this plan, ambition.

I am proud of the work done to date and optimistic about the work set out in this plan being achieved. I hope that SAMEA members will continue to devote time and energy as they have over the last two years, and that donors and other stakeholder will continue to financially support SAMEA projects.

Mark Abrahams
Chairperson



Vision, Mission & Objectives

Vision

Monitoring and Evaluation (M&E) widely recognised in South Africa as a profession and discipline essential for development, and practiced and used in a manner that adds significant value to effective, sustainable development in South Africa.

Mission

SAMEA will cultivate a vibrant community that supports, guides, and strengthens the development of Monitoring and Evaluation in South Africa as an important discipline, profession and instrument for empowerment and accountability.

Objectives

- Provide a platform for interaction and information sharing among all those interested in M&E.
- Promote high quality intellectual, ethical and professional standards in M&E.
- Increase the use of M&E theory and practice.
- Promote the development and adoption of M&E approaches and methods suitable to a South African and development context.
- Promote post-graduate education and continuing professional development in the field of M&E.
- Increase the profile of South African M&E at national and international level.
- Help build understanding of international developments and trends in M&E.
- Be a resource on M&E in South Africa.

Values and Principles

Values

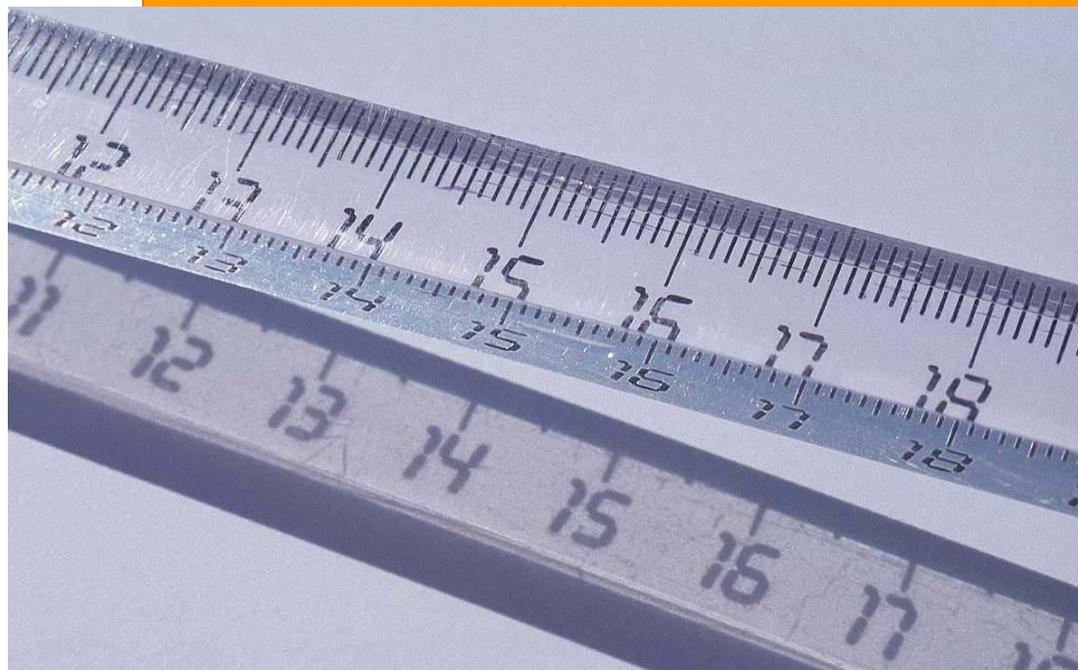
SAMEA holds to the values of:

- Transparency
- Accountability
- Professionalism
- Integrity

Principles

SAMEA believes that M&E should:

- contribute to sustainable development
- be rooted in South African tradition and practice
- be conducted ethically
- support the achievement of equity, redress and poverty reduction



Progress 05 to 07

Overview 2005 - 2007

During 02 and 03 a number of events were organised that provided the platform for debates on promoting M&E within South Africa and the region. After extensive consultation and debate SAMEA was established in 2005. In 2007 SAMEA organised its first national conference, with over 300 M&E practitioners and users taking part. The conference was the culmination of over two years of sustained effort to achieve the organisation's objectives.

At the 2007 Annual Meeting, in line with the Articles of Association, a number of Board members stood down. A new Board of 11 members - six founding members and five new members - was mandated to take the aspirations of the membership and stakeholders forward. The Board, in planning future work, determined that they would acknowledge, assess, and build on, the firm foundations built by the outgoing Board. These foundations include:

SAMEA is “on the map”

- SAMEA has established a web site, which receives substantial interest.
- The SAMEA conference attracted widespread interest and engagement.
- Networks have been established including some initial links with M&E associations in Africa, the US and Europe.
- Key South African institutions engaged in establishing M&E systems are working with, and seeking support from, SAMEA.
- SAMEA ListServe and SAMEATalk have been established and are attracting an increasing level of interest and participation.
- Presentations on the association and its work have been made to a number of government and related structures, as well as some private sector organisations, and international sister organisations.

A fully functional entity

- SAMEA has a founding document, Articles of Association and is registered as a section 21, non-profit, company.
- There are 300 paid up members and many more have applied.
- An online membership application system has been developed and is functioning efficiently.
- There is a functioning Board that meets face to face and in teleconferences and takes all necessary decisions.
- Annual meetings take place and new members are elected each year.
- There is regular communication with members through the web site and email.
- A number of relationships have been established with donors, and the funds made available have enabled SAMEA to stage a major conference.
- SAMEA is complying with Companies Act and other legislative requirements.

An emerging community of practice

- Workshops have been organised around professional and ethical standards, particular aspects of M&E and practical training for M&E practitioners and users. Internationally renowned experts have participated in some of the workshops.
- Prior to the 2007 conference 18 professional development workshops were held with a high level of participation.
- Networks have been established and information is flowing between professionals in the field.
- Increasingly the SAMEA website is becoming a place to advertise M&E education programmes, events, jobs and tenders.
- Advocacy is taking place both by the Board of SAMEA and individual members and there is expanding engagement around what constitutes effective M&E.
- A number of regional structures have been formed as well as interest groups.

As can be seen significant work has been done in the first two years of SAMEA's existence. This has all been achieved without employing staff and without establishing permanent offices and other infrastructure. In fact nearly all this has been achieved through the voluntary time given by Board members and the generosity of donors. One of the challenges facing SAMEA as it enters its next phase of development is to build a viable and sustainable organisation whilst at the same time retaining the high level of volunteerism and goodwill that has enabled such rapid progress to be made to date. It is hoped that this plan will be seen as striking the appropriate balance.



The Environment

The M&E Environment

In planning for the future it is important to assess the environment within which the organisation will seek to achieve its objectives. In broad terms the environment is a conducive one, where the value of M&E is becoming increasingly well understood, and where the will to fund and make use of M&E is strong.

The 2007 State of the Nation Address by President Thabo Mbeki made explicit reference to the importance of monitoring programmes and measuring impact. The Presidency has taken the lead in promoting government wide systems. The Departments of Public Service and Administration, Provincial and Local Government and the Treasury – as well as the Public Service Commission are all committed to increasing the use, and effectiveness, of M&E within government, under the overall leadership of the Presidency. The plans for a single public service and a single integrated government wide system will bring challenges and opportunities.

The first Government 10-year Review in 2004 (Towards and 10 Year Review) was acknowledged as an important step forward in policy monitoring and impact assessment, whilst acknowledging gaps and shortfalls in data and information. Plans for the second 10-year Review are already in place and this will be an important reference point. Currently the emphasis within government is on improving service delivery. However, greater use is also being made of M&E to inform policy review. It can be anticipated that as data, information and knowledge increases in relation to policy implementation there will be greater emphasis on the need for M&E as part of policy analysis and review.

South Africa is also committed to working on M&E within the New Partnership for Africa's Development (NEPAD), and the African Peer Review Mechanism (APRM) is a powerful driving force on the continent. Other international partnerships and commitments will have an impact. The country will need to monitor, and measure impact of Millennium Goal targets. Work with Brazil and India on developmental projects will not only require M&E but will expose gaps in systems and processes, such as in the field of development data, that will influence practice within South Africa. The G8 agreements on Trade, Debt and Aid will need to be monitored so as to ensure that pressure is maintained to turn pledges into practical gains for the continent.

The economics of M&E are changing over time. With the advent of sectoral BEE codes, the common measures that will be used to assess progress provide significant opportunities. As corporate social investment increases as part of the codes, so too will M&E, and with it expanded budgets. The private sector will increasingly recognise the

need for M&E in the context of the 2010 Fifa World Cup, Public Private Partnerships, and partnerships with civil society. Reporting on progress and impact will be important.

A number of global initiatives and trends will have an impact in the field. The Paris Declaration on improving the impact and effectiveness of international aid, the increasing requirement of donors that M&E is included in project design, and recent developments such as PEPVAR (The US HIV/AIDS funding), the planned Blair institute, funding from the Bill Gates Foundation etc, all create an impetus, and potential funding for, M&E within funded projects and programmes. Funding for M&E is set to increase substantially, and so the limited capacity for quality M&E will be stretched, with all the potential consequences of demand exceeding supply.

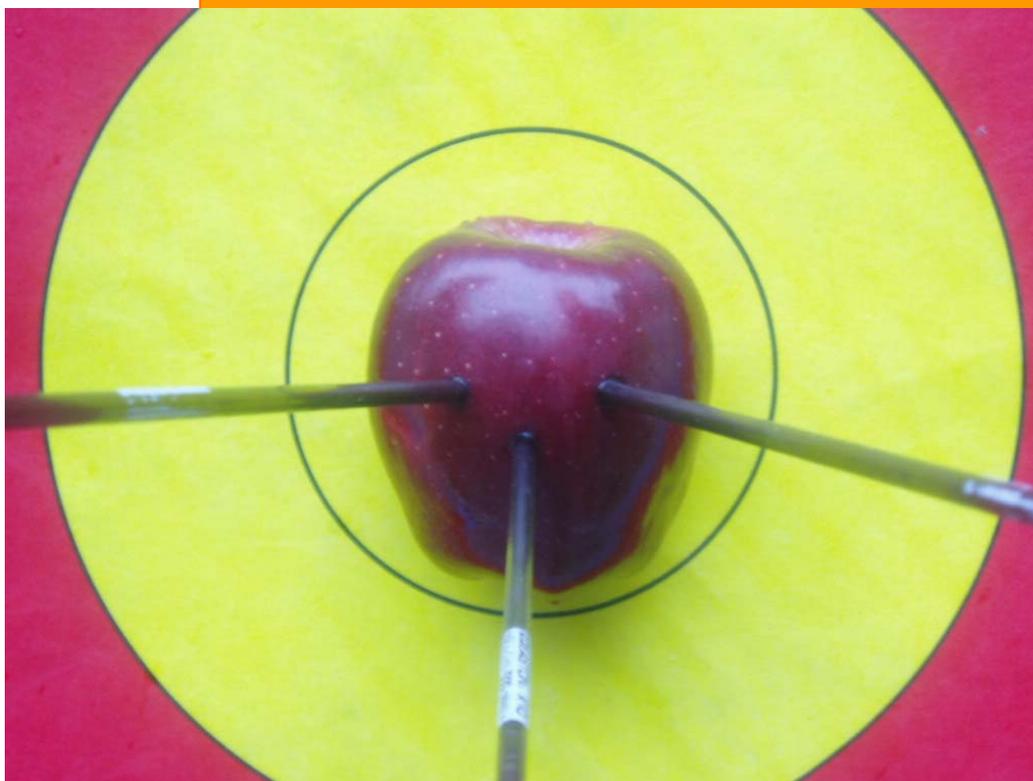
Within communities and in the social sphere changes are under way. The language of M&E is becoming much more common and understood. Social impact is becoming a specialist field, as the techniques of M&E research are recognised as being applicable in the area of social and developmental goals and targets. Methodology is being challenged from the perspective of community engagement and control. Practitioners of M&E will need to be responsive to the concerns of communities and beneficiaries of aid and development projects, who increasingly challenge findings that they do not own.

Innovations and new ICT products will continue to have both positive and potentially damaging implications for M&E practice. On the one hand there are great opportunities to improve information management and manipulation, and for expanding access to the results of M&E processes. On the other hand there is evidence of technology driving M&E within organisations rather than ICT being brought in to assist as a vehicle in implementation. The challenge will be to find a way of integrating M&E with other organisational processes such as ERM, Knowledge Management, Business Intelligence Units, Management Information Systems, etc. Increasingly M&E practitioners will need to have a broad understanding of both ICT developments and the business practices and systems that they bring. Organisations will need to be assisted to manage the market and deal with aggressive sales of ICT "cutting edge" products, so as to ensure that an effective M&E strategy informs ICT acquisition, and not vice-versa.

Within a development context such as that experienced in Africa there is the challenge of access to equipment, software and the web. Whilst reliance on ICT can be reduced, the reality is that many donors now insist on recipients making use of designated electronic platforms. This ICT gap will need to be addressed if M&E is going to permeate the way things are done in rural and remote areas, where arguably it is most needed in the current context.

There is an important shift taking place in the attitude of the G8 towards the United Nations sustainable development agenda, and this will have important implications. The area of environmental impact assessment is a specialist one and one with which M&E practitioners will need to become more familiar. The UN and the International Union for the Conservation of Nature will have specific indicators that will need to be addressed in M&E of projects, programmes and policy implementation.

Legislative and regulatory requirements will increasingly make M&E obligatory, particularly within the public sector. For example the Auditor General reports will expose as wasteful expenditure that is not planned on the basis of sound M&E of previous expenditure. The consequence could well be a culture of technical compliance rather than buy-in. The temptation to make use of “quick and dirty” evaluations, that do not require high professional standards, could cause serious problems for an emerging profession and field of practice. This problem will be exacerbated by a shortage of qualified and experienced M&E practitioners, and the limited number of quality programmes to meet anticipated need. Within the public sector SAMDI is developing a curriculum and there are a number of Universities providing post graduate programmes. However there is likely to be a mismatch of demand and supply for some time and so leadership is needed – both conceptual and strategic - particularly from academics in the field, to ensure that there is adequate capacity built.



Goals

Strategic Goals

Five strategic goals have been set by the SAMEA Board for the period to 2010. These are intended as broad areas of work designed to achieve the vision and mission of the Association within the context described above. Each of the broad focus areas will involve a range of programmes and projects. These are:

Advocacy and awareness

Continuous advocacy and awareness raising which will include:

- Publication of documents developed for, during, and as a result of, the 2007 SAMEA Conference.
- Attendance at, and presentations to, conferences, seminars, and other strategic meetings.
- Continuous development of informative and accessible content for the SAMEA website, and the promotion of the SAMEA site as an important link on other sites.
- Lobbying government and government agencies at all levels on the development and implementation of the planned Government Wide Monitoring and Evaluation System (GWMES).
- Building a profile in the general and well as specialist media by means of regular press releases and articles.
- Mobilising resources for the building of M&E capacity, particularly amongst previously disadvantaged individuals – such as bursaries, internships etc.
- Promoting and facilitating events and award ceremonies designed to recognise excellence and good practice within the field.
- Networking in Southern Africa, Africa and globally with other M&E associations.

A platform for inter-action

The provision of a platform for inter-action, information sharing and knowledge creation, through:

- Organising a bi-annual conference, noting the high standard set in 2007.
- Establishment of a professional journal, either in South Africa or Africa
- Regular newsletters to members.
- Moderated discussions conducted via the web site.
- An increasingly accessible and efficient SAMEAListserve.
- Increasing the quantity, quality, and content, of resources located on the web site.
- The facilitation of seminars and workshops.
- The involvement of members in the development of position papers on key issues facing the profession.
- Opportunities for members to engage in thought leadership and knowledge creation.
- Engaging with M&E associations internationally and the facilitation of events and joint projects with international partners.

Education and Training

Addressing the capacity challenges within the field, by promoting and facilitating high quality and accessible education and training opportunities. This will be achieved by:

- Advertising programmes and courses on the website.
- Identifying, evaluating and recording the needs of members as articulated in enquiries to SAMEA, and periodic surveys.
- Providing advice and, where requested, assistance in curriculum design and programme development.
- Providing advice and assistance to members engaged in unit standard generation, programme evaluation and accreditation.
- Developing partnerships with Higher Education Institutions, with a particular focus on previously disadvantaged universities and technikons. The partnerships will focus on the provision of bursaries, internships, exchanges, research projects, and Continuing Professional Development (CPD) programmes.
- Facilitating CPD seminars for M&E practitioners.

Professional and ethical standards

The promotion of high standards of professional and ethical practice within the field by:

- Continuing engagement with the standards developed by the African Evaluation Association (AFREA), leading to the adaptation, and/or adoption, of the standards.
- Finding ways to recognise and reward good practice.
- Producing guidelines on sound planning, implementation and management of M&E.
- Making guidelines available, via the web site, from other M&E associations, donor agencies and others.
- Setting an example, and providing leadership, by the production and adoption of a code of conduct for SAMEA Board members

Building the Association

The development of an effective and efficient organisation, including sound governance, through:

- The development of a procedures manual to supplement the Articles of Association.
- The development of a guidelines for the establishment of regional structures and Special Interest Groups (SIGs).
- Designing and implementing an annual budget setting process.
- Convening Board meetings at least twice a year.
- Continuation of Board teleconferences between meetings.
- Ensuring that Board members are properly supported, with their expenses paid, when engaged in work for SAMEA.
- The establishment of a SAMEA Head Office whose primary functions will be to:
 - Administer the SAMEA membership system
 - Receive, and respond to, enquiries
 - Ensure effective public relations
 - Co-ordinate events
 - Facilitate the production of SAMEA publications
 - Distribute information and publications
 - Maintain the web site
 - Deal with incoming and outgoing correspondence
 - Provide logistical support to Board members
 - Provide secretarial support to the Board and its sub structures
 - Facilitate teleconferences
 - Maintain minutes and records
 - Support to Board members responsible for portfolios and programmes
- The employment, as required, of professional and administrative staff to support the work of the Association.



SAMEA CAPACITY

Strengths, Weaknesses, Opportunities and Threats

The successes and progress of the organisation have been set out in a previous section, and the overall environment has also been described. These will not be repeated here. The purpose of this section is to examine the internal strengths and weaknesses, and the external opportunities and threats that need to be considered when strategising to achieve SAMEA's strategic goals.

Strengths

The SAMEA Board is very diverse, in terms of M&E focus, gender and race. There are members with positions at universities, some employed within government, some in the non-profit sector and some working in the private sector on M&E. Amongst Board members there is a high degree of knowledge and experience, with some having reputations that cross international borders. The Board is networked with, and able to reach out to and speak on behalf of, a range of constituencies and disciplines. This combination of diversity and capacity is a strength that is important in the process of building SAMEA. Already the Association can boast a strong and diverse membership of over 300, which in turn was reflected in the conference attendance. The Association will build on, and attempt to sustain, these levels of diversity and breadth, and in so doing will sustain the credibility of SAMEA as it strives to earn a leadership position in the profession.

It is a notable feature of SAMEA that much of the work is being done on a voluntary basis by Board members and others. There is such a high level of goodwill towards the organisation both from people willing to give of their time and organisations willing to provide human and other resources, that SAMEA has been able to achieve much of its progress at very little financial cost. It is almost impossible to measure the value of this goodwill, but it is significant and the new Board will attempt to continue in this manner.

It is also notable that much of what has been achieved has been done without policies, procedures and codes. There is a high degree of consensus amongst the leadership, and a commitment to transparency and accountability that enables SAMEA to work without hierarchy and institutional measures.

Weaknesses

The reliance on goodwill and volunteer activism, whilst an undoubted strength, could also be a potential limit, on the development of SAMEA. Some of SAMEA's goals will require consistent work, and people with large workloads as part of their paid employment cannot always be available. So the danger is that some set backs will occur at certain times. In the longer term reliance on so much volunteering may not be sustainable. SAMEA cannot rely solely on trust and understanding amongst the Board and members and so the lack of policies and codes will be a possible weakness in the future.

The other related challenge is the gap between the expectations that have been raised - and the confidence being shown in SAMEA to deliver - and the reality that little is yet in place to justify that confidence. If a very large amount of work is not done speedily expectations will be dashed and the levels of goodwill that exist will be eroded. SAMEA is at a critical stage in its development and needs to build an organisation wherein there is confidence and capacity to deliver.

There are still a number of areas of work where SAMEA's role is not entirely clear. The work set out in the section on Strategic Goals goes some way to resolving some of the issues. It is possible to see at a glance the overall approach and scope of work. However it will be noted that in relation to ethics, professional standards, education and training and research the organisation has still to clarify whether it is a facilitator, a promoter or an implementer. Perhaps it is all of these, but even so there is a need to establish the appropriate balance between these roles. As the membership grows, the demands and expectations of members will become clearer, but the danger of not fully clarifying these issues is that resources can be misdirected to areas of work that are not appropriate, and which result in some core work being neglected. The Board will engage in an annual planning process to determine in more detail exactly what work will be done. Whilst debate will never be closed on these issues it is anticipated that ever greater clarity will be achieved.

The task of assessing member needs and expectations is not an easy one when membership is expanding so rapidly. There has been a survey to inform current thinking, but with the recruitment of large number of new members there is a need to review this and assess again what members need and want.

Opportunities

Looking at the environment within which SAMEA will be working there are many opportunities and it will be a challenge to prioritise and focus. Clearly the growing demand, and resources available, for M&E will provide opportunities for SAMEA to intervene constructively. The possibilities for donor funding, and strategic partnerships, is very great, including in the higher education sector where Board members have strong links. The drive for government wide systems probably provides the opportunity for the greatest impact, along with the M&E being driven by donors within funded projects. As has been stated the demand for M&E exceeds the supply of skilled and competent practitioners and this is a challenge. However it is also probably SAMEA's single greatest opportunity to make an impact. Again this highlights the need for SAMEA to be very clear on what it has to offer at various education and training levels, and in various disciplines. A team of Board members will be giving this issue attention during 2007 and 2008.

Threats

Whilst there are a number of internal risks that have been detailed, and which could pose a threat to SAMEA's development, external threats are less easy to identify. One concern for SAMEA is to ensure that it retains a broad focus and actively seeks to understand and relate to the many disciplines and fields within which M&E is practiced. Whilst it is essential for SAMEA to take advantage of generous funding offers, particularly related to defined partnership projects, it will be important to ensure that SAMEA's independence is retained. The danger of being associated with a particular field of work, or a particular national process, is that credibility could be eroded. Another related threat would be if SAMEA tries to meet all demands immediately and as a result overstretches its (mainly voluntary) resources. In order to address this concern SAMEA has developed a one-year priority action plan as a supplement to this three year plan.

Current and planned capacity

Currently SAMEA is being hosted by generous sponsoring organisations who understand this as being part of their contribution to building an M&E culture in the country. A number of Board members are supported by their employer organisation, who see this as a means of providing in-kind support. Organisations will be encouraged to continue supporting SAMEA in this way. However as the Association grows it will need to gradually become more self sufficient, at least in respect of its Head Office Administrative functions (listed above). In order to achieve this SAMEA will need to rent premises and employ at least one administrator. There will be times when additional administrative support will be needed – for example in the run up to the bi-annual conference.

In relation to the professional work of SAMEA, it is the intention of the Board to maintain the current practice of Board members assuming responsibility for portfolios, programmes and projects, as well as seeking additional voluntary support from members. So for example the work of inviting international speakers to attend conferences and workshops will be done by Board members, as will the work of facilitating workshops or doing presentations at conferences and seminars. However as work expands there will be a need for paid professionals to be employed, initially on a temporary basis and later a full time permanent person who will assist the Board in the co-ordination and management of programmes.

So initially there will be one member of staff employed, with a view to two staff being permanently employed within two years. A budget will be developed that will allow additional administrative and professional assistance to be brought in as required. The budget will also provide for an office and all the equipment needed to run a modern office. Provision will also be made for the expenses of Board members. SAMEA will continue to be a lean organisation, employing the minimum of office space and staff, commensurate with its expanding work load.



Finances

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Financial Strategy

The financial strategy of SAMEA includes four components. These are

Membership contributions to cover basic running costs.

SAMEA will aim to increase paid up membership from the current 300 members to 400 in 2007, 500 in 2008, 600 in 2009 and 700 in 2010. Whilst member fees will remain low, the intention will be to raise adequate income to carry out basic administration. If increases in subscriptions are needed to achieve this then recommendations will be made to the Annual Meeting. It is important that SAMEA is able to fund its basic internal processes and functions from subscription income.

Donations and donations in kind from members.

Many of the services SAMEA offers involve the hiring of premises, printing of leaflets, provision of equipment, laying on of coffee, lunch and so on. Since SAMEA was established it has been the practice of members, and their organisations, to offer to host events and provide such facilities and services. This has enabled much to be achieved that could not have been funded from current levels of membership subscription. It will continue to be the policy to invite members, and stakeholder organisations, to host events. This is only partly a strategy related to funding SAMEA work. It also enables organisations to motivate for SAMEA activities to be put on outside of the main centres, without requiring SAMEA to fund all aspects. So the task of making SAMEA a national organisation, that reaches out into all regions of the country, is a task that is shared within the M&E community.

Partnerships.

Some sponsors of the 2007 conference have indicated an interest in developing a longer term partnership with SAMEA. There will be a concerted effort to develop partnerships within the framework of a partnership strategy. Partnerships will enable SAMEA to not only stage high profile events such as the conference and international workshops, they will also enable resources to be focussed in those fields of practice and sectors that might be neglected otherwise.

Sponsorship of projects and events.

As the Board members develop plans for their respective portfolios to achieve the strategic goals, a number of activities will be developed into budgeted projects. Some of these will be such as to be attractive to sponsoring organisations. It is anticipated, given the growing interest in, and commitment to, M&E, that sponsorship will increase in the years to 2010. Some of the projects will be quite large and will require reserves to be built up over time. SAMEA will be approaching sponsors to commit to these projects, so that the projects can be taken forward with confidence that they will be funded.



Flagship Projects

Flagship Projects

The Board has established a number of teams, each looking at the implementation of the five strategic goals. They will be working on detailed implementation plans and developing budgets for each of the main areas of work. Some of the plans are already understood as being central to SAMEA's work in the next twelve months, and have been identified as Flagship Projects. They are called flagship rather than priority, as they are the high profile work of SAMEA. Some of the lower profile work is equally important, but will not impact so much in the public domain and may not be so dependent on external funding. The following are projects come within this category:

A journal of Monitoring and Evaluation

This is a major endeavour and will become one of the largest and most ambitious of SAMEA's projects. Much conceptual work still needs to be done. For example there were debates raised at the conference on whether it should be a South African, Southern African or African journal. Much research is needed to establish the market, the potential readership, funding models, accountability structures as so on. Once established the journal should be self financing, but the establishment year will be extremely costly. SAMEA will be seeking partners willing to invest in the establishment of this important resource for our emerging profession.

Capacity building workshops

Attendance at the pre-conference workshops was very good, and feed back has indicated a need for ongoing capacity building opportunities for members. There is a team of Board members planning some high level workshops and seminars with key speakers from within South Africa, the continent and internationally. A good working relationship has been developed with other associations who have offered to take part in seminars organised by SAMEA. In addition regional or provincial chapters of SAMEA are being formed and will be planning seminars at a local level. SAMEA does not have a large budget for this work, and will be seeking sponsors. Sponsorship might be offering a convenient venue, with equipment and "hosting" the event, or it may be funding an international speaker's travel and accommodation. Some organisations may have a particular focus within the field of M&E, and may wish to sponsor a series of seminars over a period of years, where that specialist area of practice is explored.

The 2009 SAMEA Conference

Plans have started already for the conference. There is much work to be done, determining the focus, venue, speakers, themes, pre-conference work and so on. What is clear is that the delegate numbers will increase from the 350 in 2007. Sponsorship in 2007 included generous cash amounts, printing of documents (a major expense), and the production of the various conference items such as bags, banners etc. We very much hope that this generosity will be repeated and that additional stakeholders will come forward to associate themselves with the work of SAMEA.

SAMEA publications

Some of the documents developed for the conference were of such a high quality that delegates asked that they be published. This is work currently under way. Other documents are being placed on the SAMEA web site, and from time to time some are seen as lending themselves to publication. Some of the international speakers at SAMEA workshops will produce papers that will be of interest to those unable to attend the actual workshop. SAMEA will be developing a series of position papers on issues of important in the field, and will be aiming to produce them in an attractive and accessible format. Whilst the writing of all of these papers and booklets will mainly be done on a voluntary basis by SAMEA members, the cost of typesetting and printing will need to be found.

Web site development

SAMEA has developed an accessible and user friendly website, and it will continue to be updated and improved. It is planned during the period to 2010 to conduct a complete review of the content, the services and its interactive capacity. The plan is to “relaunch”, probably in 2008. This will be a major project and SAMEA will be seeking a donor funding, and or offers of expertise.

Research

Much of the SAMEA work can be planned on the basis of existing information and knowledge, but there are areas of work that require significant research to be conducted. For example membership needs may seem a simple matter to identify, through a survey. However surveys do not give the contextual information needed to really assess need. A research project is planned around this. Also the education and training needed within the profession is an area that will be explored. What exactly is needed within Higher Education, but also at lower levels, in order to ensure that the country has the capacity to meet the growing needs in relation to M&E? Other research projects will be identified. It is hoped that research funding will be identified to enable SAMEA to take this work further.