



**THE PRESIDENCY  
REPUBLIC OF SOUTH AFRICA**

**DEPARTMENT: PERFORMANCE MONITORING AND EVALUATION**

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**PERFORMANCE MONITORING AND EVALUATION  
CAPACITY DEVELOPMENT STRATEGY**

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## **1 INTRODUCTION**

DPME was promulgated as a new Department in 2010 with a mission to work with partners to improve government performance through Performance Monitoring and Evaluation. The President and Cabinet has mandated the department to facilitate the development of the delivery agreements for cross-cutting priorities and outcomes of government, monitor and evaluate the implementation of these agreements; monitor the performance of individual national and provincial departments; monitor front-line service delivery; manage the Presidential Hotline; carry out evaluations; promote good monitoring and evaluation practices in government; and provide support to delivery institutions to address blockages in delivery.

There are a number of initiatives and efforts to build Monitoring and Evaluation (M&E) systems and capabilities, within and outside the DPME. Whilst there are a range of M&E capacity development initiatives to support M&E systems and capabilities, it has the risk of creating duplication, overlaps and making excessive demands on departments. To address this risk, there is a need for co-ordination of M&E capacity development initiatives and efforts within the DPME and across government.

This Performance Monitoring and Evaluation Capacity Development Strategy 2014 – 2020 (PM&E CDS) seeks to provide high-level guidance, coordination instrument and a plan to strengthen M&E capabilities, systems and processes in government. This strategy attempts to strengthen existing efforts and initiatives in the development and enhancement of M&E capacity in government. DPME as the custodian of Performance Monitoring and Evaluation is to provide strategic leadership and collaborate with key partners who will lead in terms of their respective mandate in M&E capacity development in government.

The strategy addresses the following issues : purpose; principles; scope; policies that inform the strategy; problems and challenges in developing M&E capacity; strategic objective; key pillars of the strategy; overview of the M&E Capacity Development Strategy with description of outputs in each pillar; capacity development approach; funding arrangements; monitoring and evaluation of the strategy; governance requirements, roles and responsibilities of stakeholders; implementation plan and risks and mitigation strategy.

## 2 PURPOSE

The purpose of the PM&E CDS is to enable DPME to provide strategic leadership and coordination of key partners to achieve coherence and integration of M&E capacity development initiatives to improve human and institutional performance in government

## 3 PRINCIPLES

The strategy will be underpinned by the principles described below:

- 3.1 **Developmental** – Partners should promote alignment of M&E capacity development initiatives across national, provincial and local spheres of government. It recognises, values and enhances existing competency, capability and potential, and develops new capacity where required. Partners will seek to promote learning from good practice in the country, stimulate continuous engagement between national departments, provinces and DPME as well as horizontal sharing across provinces around M&E.
- 3.2 **Practical and implementable** – It has clearly defined activities and actions that are specific, measurable, achievable, reliable and timely.
- 3.3 **Sustainable** – It will transfer ownership of managing learning to individual and organisations and has a long-term perspective that will benefit South Africa.
- 3.4 **Consultation and Communication** – It places a high value on stakeholder consultation and participation; it promotes mutual communication process and respect among all partners.
- 3.5 **Holistic** – It has an open systems view that recognises the co-dependence, interrelatedness of various programmes of government and related institutional arrangements.
- 3.6 **Responsive** – It responds to government priorities and needs of individual and departments. It is adaptive and responsive to environmental changes.

## 4 SCOPE

The strategy applies to all national and provincial departments. For purposes of this strategy, the scope of PME capacity development will include to the following key dimensions:

- 4.1 Dimension 1: Monitoring and evaluation leadership
- 4.2 Dimension 2: Integrating planning, budgeting, implementation, monitoring and evaluation
- 4.3 Dimension 3: Monitoring as a management function

- 4.4 Dimension 4: Monitoring and reporting on the implementation of programmes and projects
- 4.5 Dimension 5: Evaluation and Learning
- 4.6 Dimension 6: Information and Knowledge Management of M&E evidence

M&E capacity development will build M&E knowledge, skills and values in response to the training areas identified for the following target groups.

- **M&E users** - will include Legislature, Executive, HODs and SMS - who should be able to assess information collected through the M&E process, and use this information as a tool for taking managerial action and to improve future interventions.
- **Line/ programme managers** – who need generic M&E skills to as part of their routine management function.
- **M&E managers** – who are able to set up an M&E system, manage that system, and produce the quality results to create demand for the use of M&E evidence.
- **M&E Practitioners** – who are be able to apply an evidence-based approach to gather and analyse, present and verify data on the government activities

## **5 POLICIES THAT INFORM M&E CAPACITY DEVELOPMENT STRATEGY**

The following policies inform the development of the Strategy for M&E Capacity Development in government.

- 5.1 **The 1996 Constitution of the Republic of South Africa:** the values and principles which included the principle of separation of powers between the Executive, Judiciary and Legislative Branches of the state. It established three spheres of government with shared and differentiated powers and responsibilities in a semi-federal system of government with oversight bodies reporting directly to Parliament- like the Public Service Commission (PSC); Office of the Auditor General (OAG), Human Rights Commission, Public Protector, Gender Commission.
- 5.2 **The Public Finance Management Act (1999) (PFMA) and the Municipal Finance Management Act (Act 56 of 2003) (MFMA)** moved the public sector from a traditional, rules-based micro-control environment to a modern, principle-based environment characterised by greater flexibility, transparency and accountability. The legislation has made accounting officers responsible for the

resources at their disposal, with significant implications for the skills and competencies required of public officials.

- 5.3 **Government-wide Monitoring & Evaluation (GWME) Policy (2007):** The policy seeks to place the practice of monitoring and evaluation within the broader government management accountability framework and to clarify roles and responsibilities of sector departments.
- 5.4 **Framework on Managing Programme Performance Information, (2007):** provides useful guide on the role of performance information in planning, budgeting and reporting as well as roles and responsibilities in managing and using performance information.
- 5.5 **The South African Statistical Quality Assessment Framework (2008):** Statistics South Africa is responsible for national census and statistics collected by government institutions. Through SASQAF, Statistics SA sets common standards to promote data quality and quality maintenance within a decentralised system of statistics production for internal use by Statistic South Africa and use by other M&E stakeholders.
- 5.6 **National Evaluation Policy Framework (2011):** This policy framework provides guidelines for the establishment of a National Evaluation System across government. Its main purpose is to promote quality evaluations which can be used for learning to improve the effectiveness and impact of government.
- 5.7 **Public Administration Management Bill (2014),** which aims to provide a uniform system of public administration in all the three spheres of government
- 5.8 **The National Development Plan 2030 (2014):** highlights that one of the challenges faced by the country is the uneven public service. This public service is further faced with severe shortage of human resources and specialised skills and these impact adversely not only on the frontline service delivery but also on long term planning and coordination.

## **6 SITUATIONAL ANALYSIS**

In this section the problem statements, and the strategic objectives to the address the problem statements will be described.

### **6.1 Problem Statement 1: The environment does not support the development of high performance organisations.**

The findings of the survey on the State and Use of M&E in 96 National and Provincial Departments conducted (DPME, 2013) demonstrate the need for culture shift from compliance to continuous improvement and learning:

- 27% of respondents cited the lack of a common guiding framework to harmonise M&E concepts and practices across the public service as a problem.
- 60% of M&E staff indicated that they have adequate competencies to implement M&E but need support via a national policy framework for M&E in order for them to be able to get their departments to use M&E more effectively.
- There is absence of a strong M&E culture in government (54% of 96 departments surveyed)
- Senior management often fails to champion M&E
- 61% of departments indicated that the primary barriers to the effective use of M&E is the of focus departments focus more on monitoring activities and outputs rather than outcomes and impacts
- Departments reported that they have poor quality of data and IT systems supporting M&E work; and inadequate capacity development for M&E
- Respondents indicated that there was a need for clarity regarding the different M&E roles and responsibilities of different stakeholders.

## **6.2 Problem Statement 2: Inadequate institutional capacity reflected in lack of effective M&E systems, policies and procedures.**

The findings MPAT 2013/14 scores for departments revealed that:

- 22 out of 156 departments have scored 1 for M&E standard; these departments don't have formal an M&E policy or framework in place
- 20 out of 156 departments don't have standardised mechanisms and/or processes and procedures to collect, manage and store data
- High percentage of departments doesn't have evaluation capacity and plans; and use evidence for decision making.

## **6.3 Problem Statement 3: Inadequate M&E knowledge and skills of officials responsible for M&E function and ineffective use of M&E as a management tool by managers**

The findings of the diagnostic assessment of HR ME practitioners conducted by DPME in 2012/13 indicated that there was a high percentage of respondents with inadequate knowledge/skills in the following areas:

- Monitoring as a management function:
  - Monitoring service delivery improvement in national (30%) and provincial departments (40%)
  - Monitoring human resource management and development in provinces (40%)
  - Monitoring finances in provincial departments (60%)
- Managing M&E information in provinces (50%)
- The following areas in the field of Evaluation and learning
  - Planning evaluations - provincial departments (60%), Office of Premier (80%); national departments (50%)
  - Managing evaluations – provincial departments (60%), national departments (40%), Office of the Premier (60%).
  - These findings have been corroborated by MPAT 2013/14 results that revealed the 29 out of 156 departments have planned or conducted at least one evaluation of a major programme.

#### **6.4 Problem Statement 4: The uncoordinated approach to M&E capacity building by different stakeholders.**

There is a lack of co-ordination amongst government departments and institutions that have their respective roles to play in M&E capacity development. This uncoordinated and lack of an integrated approach to M&E capacity development contributes to weaknesses, overlaps and gaps in the capacity building initiatives.

The above four problem statements inform formulation of key strategic objectives for the M&E Capacity Development Strategy.

## **7 STRATEGIC OBJECTIVES**

The main objectives of this strategy are to:

- 7.1 Create an enabling environment of using M&E evidence for performance improvement
- 7.2 Facilitate institutional M&E capacity in national and provincial departments
- 7.3 Facilitate M&E training to develop individual human capacity
- 7.4 Collaborate with key stakeholders and partners to use M&E evidence to improve organisational performance



## 8 PILLARS OF THE STRATEGY 2014 – 2020

**Table 1: Pillars of the PM&E Capacity Development Strategy 2014 - 2020**

<b>Pillars of the PM&amp;E Capacity Development Strategy 2014 – 2020</b>			
<b>Enabling Environment</b>	<b>Institutional Capacity</b>	<b>Individual Capacity</b>	<b>Stakeholder Co-ordination</b>
<p><b>Key leavers of change</b></p> <ul style="list-style-type: none"> <li>• Leadership to champion the use of M&amp;E evidence to improve performance</li> <li>• Managing the change process to effect individual and organisation culture change</li> <li>• Consultation and Communication with key role players</li> <li>• Knowledge Management</li> </ul>			
<p><b>Broader environmental context</b></p> <ul style="list-style-type: none"> <li>• <b>The embedded systems in government</b> - National Legislature with its oversight bodies; Executive Branch of Government – DPSA Performance Management Systems, National Treasury Finance Management System , Department of Corporate Governance , Sector Systems.</li> <li>• <b>External environment</b> - economic climate, political stability, social norms, technological developments of the international and domestic context</li> </ul>			

The four pillars to this strategy that contribute to sustainable capacity development are enabling environmental, institutional capacity, individual capacity, and stakeholder co-ordination. Each of the pillars is interrelated, and it is only synergy between these pillars contribute to sustainable capacity development to can be achieved. These pillars are briefly described below.

### 8.1 Enabling Environment

Enabling environment refers to the macro system within which organisations and individuals function. It includes the international and domestic economic, political, and social conditions, technological developments and general legislative frameworks. Enabling environment also includes broader public sector context - governance, legislative and policy frameworks of the public sector, including procedures, practices, structures, values and systems.

## **8.2 Institutional Capacity**

Institutional capacity includes organisational design and development, culture, climate, leadership, values, resources, infrastructure, processes and procedures, management systems and technology.

## **8.3 Individual Capacity**

Individual capacity refers to the M&E knowledge, skills, attitude and values demonstrated by staff in performing their job function. Such capacity is developed through formal, non-formal and informal learning. Individual capacity is enhanced through continuous education, performance agreements, reward and sanctions, competency and qualification frameworks, skills programmes and so on.

## **8.4 Stakeholder Co-ordination**

Stakeholder co-ordination refers to the ability of stakeholders to contribute to and support the implementation of the strategy. Stakeholders include any individual or entity with an interest in capacity development. Implementation will require extensive consultation with and participation of interested stakeholders. Each of the strategic pillars will describe in detail in the diagram.

## **8.5 Levers of Change that underpin the strategy**

### **8.5.1 Leadership to champion the use of M&E evidence to improve performance**

Successful public sector transformation can only be achieved through leadership to become the champion of the using evidence to improve organisational behaviour. This will be achieved by leadership empowering their management teams to use evidence to leverage the performance of individuals, teams and the organisation.

### **8.5.2 Managing the change process to effect individual and organisation culture change**

In introducing a new public sector reform process there is a need for a change management plan. The change management plan will prioritise, sequence, pace and co-ordinate the different outputs of the strategy. For PM&E to be sustainable there has to be a shift in individual and organisation culture from mode of compliance to mode of using evidence to making decisions and for continuous improvement, innovation and learning. There is need to develop a cadre of M&E champions of change in the departments who have in-depth

knowledge of M&E and organisational change theory to design, direct, implement and sustain the transformation process in their areas of influence.

### **8.5.3 Consultation and Communication with key role players**

The strategy is based on the principle of consultation and communication with key stakeholders. During the development phase key stakeholders were consulted. Stakeholders included government departments, Office of the Premier, educational and training institutions and organisations, professional bodies, donors, government officials, and capacity development specialists. There will be regular consultation and communication with key stakeholders and partners during the implementation phase of the strategy.

### **8.5.4 Knowledge Management**

The strategy focus on the use of M&E information to enhance departmental performance and ultimately improve service delivery. There is a need for a centralised repository of all PM&E related knowledge and information to capture, store and provide access to the knowledge and information users, and for the repository to act as a platform for networking, collaboration and learning.

## **8.6 Broader Environment**

The strategy recognises that the improvement of performance in government is an integral part of the broader internal and external environment of government that will include the following institutions.

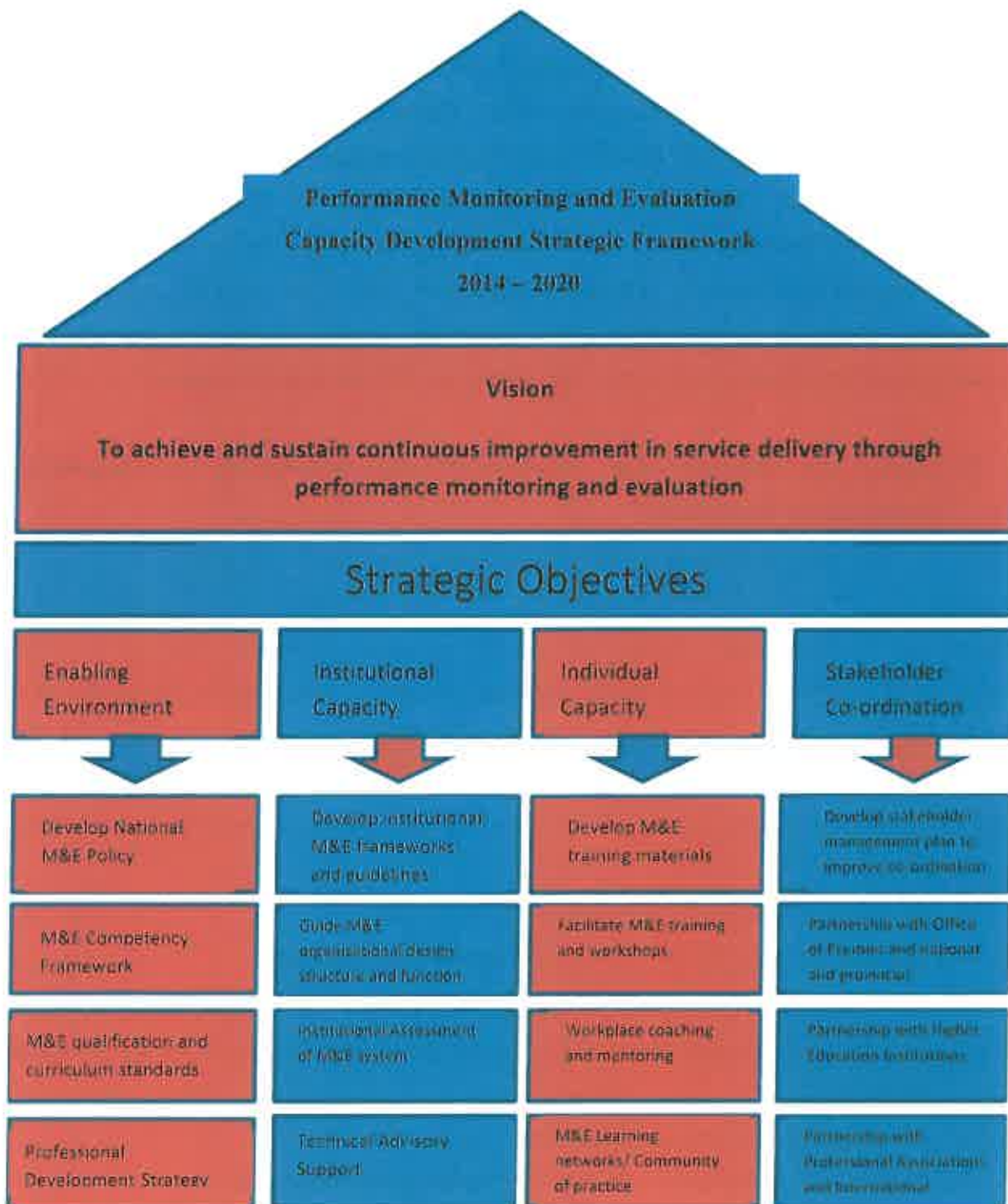
- 8.6.1 **National Treasury's** government-wide performance information capacity, especially in terms of monitoring and reporting against departmental Annual Performance Plans (APPs) and financial reporting.
- 8.6.2 **Statistics South Africa's** role in quality assessing statistical data
- 8.6.3 **The Office of the Auditor General's** role in audits of predetermined performance objectives in particular focus on auditing the extent to which the measures presented on the departmental and municipal plans are properly crafted and reported on. Performance audits (quite similar to evaluations) were done on a few targeted issues.
- 8.6.4 **The Public Service Commission's** role in conducting regular assessment against the constitutional values. It also conducted targeted programme evaluations and partnered with other stakeholders.

- 8.6.5 **The Department of Public Service and Administration** role in monitoring human resource management practices and other corporate governance issues via the Public Management Watch System and other related tools. It also provides regulatory guidance on broader human resource development for the public service staff.
- 8.6.6 **The Department of Co-operative Governance's** role in establishing systems to guide M&E for municipalities. It also built capacity to monitor the indicators of local government performance in collaboration with the South African Local Government Association (SALGA).
- 8.6.7 **The National School of Government** produced standards and curriculum on M&E linked to the work of the above stakeholders. It also conducted training on a demand basis for national and provincial departments.
- 8.6.8 **Sector departments** have a capacity building role to play especially in the local government sphere to assist in strengthening the service delivery mandates.
- 8.6.9 **National Legislature** with its oversight bodies plays a significant role to monitor and evaluate the work of government.
- 8.6.10 **The Department of Higher Education and Training** is one of the key stakeholders to support the requisite capacity building initiatives through training and development.
- 8.6.11 **External environment** will include the economic climate, political stability, social norms, and technological developments of the international and domestic context.

## 9 DETAILED DISCUSSION OF THE PM&E CAPACITY DEVELOPMENT STRATEGY

In the section below each pillar of the strategy will be describe the section below each pillar of the strategy will be described.

Table 2: Performance Monitoring and Evaluation Capacity Development Strategic Framework



In the section below each pillar of the strategy will be described

## **Pillar 1 Enabling Environment**

In the section below each pillar of the strategy will be described.

### **9.1 Pillar 1 Enabling Environment**

#### **a) Output 1.1 Develop and implement National Monitoring and Evaluation policy**

The 2007 Policy Framework for the Government-Wide Monitoring and Evaluation System (GWM&E) sets out to describe a GWM&E system, M&E at an institutional level and the roles and responsibilities for implementing the system. The document is the overarching policy framework for M&E in the South African government and provides the context for supporting frameworks, such as the National Treasury's Framework for Managing Programme Performance Information (National Treasury, 2007) and Stats SA's South African Statistics Quality Assurance Framework (Statistics SA, 2008) and more recently the National Evaluation Policy Framework (DPME, 2011). DPME is currently undergoing consultations towards the development of a discussion document on the principles and approach to PME.

#### **b) Output 1.2 Develop and implement the Monitoring & Evaluation Competency Framework**

There is need to develop an M&E Competency Framework to guide the capacity development initiatives in the public service. The M&E competencies that emerged from conducting the Diagnostic Assessment of M&E Human Resource capacity in 2013 (DPME, 2013) could be used to guide the development of the National Monitoring and Evaluation Competency Framework. The following dimensions were identified by the Diagnostic Assessment of M&E Human Resource capacity in 2013 could be further developed into a fully-fledged M&E Competency framework in consultation with key stakeholders:

- Dimension 1: Monitoring and Evaluation Leadership
- Dimension 2: Integrating Planning, Monitoring and Evaluation
- Dimension 3: Monitoring as a Management Function
- Dimension 4: Monitoring and Reporting on the Implementation of Programmes and Projects
- Dimension 5: Evaluation and Learning
- Dimension 6: Information and Knowledge Management and Use

DPME Evaluation and Research Unit have recently developed the dimension of Evaluation. These evaluation standards and competencies have been circulated and consulted with key partners. The evaluation competency framework (DPME, 2012) need to progress from a guiding document to a regulated standard of minimum competency requirements aligned to DPSA SMS Competency Framework and SMS Handbook, this has to be done in close collaboration with DPSA and the National School of Government. The other dimensions of Monitoring competencies have to be developed in consultation key stakeholders – DPSA, School of Government and Higher Education Institutions, SAMEA, SAQA, and relevant ETQAs and Quality Councils. The framework can then inform the design of job, occupational and learning profiles, developing career path as well as the design of HR development initiatives, learning programmes and performance management.

**c) Output 1.3 Develop and implement Professional Development Strategy**

DPME in partnership with the professional association South African Monitoring and Evaluation Association and other key stakeholders will develop a concept paper on professional development strategy for monitoring and evaluation of professionals. The concept paper on M&E professional development strategy will have to be consulted widely with national and international partners. The professional development strategy will include the exploration of establishing a professional body that will act as a custodian of M&E standards and ethical practice in the profession. The aim of the strategy will be to promote continuous professional development of M&E professionals which will include a range of professional development programmes- completing training courses, presentation and participation at workshops, seminars and conferences, research and publications. Once the professional development strategy has been approved by Cabinet, steering committee will be formed to implement and monitor the strategy.

**d) Outcome 1.4 M&E qualifications and curriculum standards**

The Monitoring and Evaluation competencies will be used in consultation of key stakeholders – DPSA, School of Government and Higher Education Institutions, SAMEA, SAQA, and relevant ETQAs and Quality Councils to develop a M&E qualification matrix and curriculum standards to guide the development of M&E learning programmes for the public service.

## **9.2 Pillar 2: Institutional Capacity**

### **a) Outcome 2.1 Develop and implement the institutional M&E frameworks and guidelines**

DPME has produced a number of M&E frameworks, guidelines, templates and tools of the different programmes – Outcomes Monitoring, Evaluation and Research, Institutional Performance Assessment, Front Line Service Delivery, Citizen Based Monitoring, M&E Policy and Capacity Building - to support the implementation of the PME. The DPME Chief Directorate M&E Policy and Capacity Building in consultation with key stakeholders will play a role of quality assuring the policy documents by providing minimum standards for frameworks and guidelines and ensure they complement each other. The language, use of common terminology, the style of writing, conceptual clarity needs to be consistent across all frameworks and guidelines. DPME programme head will be responsible to facilitate the development and implementation of the M&E frameworks and guidelines with key stakeholders. Offices of the Premier will use the national M&E frameworks and guidelines to develop provincial M&E frameworks and guidelines to respond to their own contextual needs and support provincial departments. Departments will be responsible to set up their internal M&E frameworks and policies, processes and procedures.

### **b) Outcome 2.2 Develop and implement the Guideline on M&E organisational design structure and function**

Whilst the guidelines for M&E organisational design, structure and function has been developed by DPME in consultation with DPSA; this document needs to be further improved through consultation with the Offices of the Premiers and other key stakeholders. DPME in partnership with DPSA need to facilitate the implementation of the guide on M&E organisational design, structure and function in national departments; the Office of the Premier and provincial departments. DPME in partnership with DPSA and the Offices of the Premier will facilitate the implementation of the guideline in provincial departments. Departments with the support from DPME and Office of the Premier will be responsible to set up their internal M&E organisational design, structure and function.

### **c) Outcome 2.3 Conduct regular Institutional Assessment of M&E system**

The scores in the MPAT assessment for the M&E standard will be used identify Departments that need support to strengthen their M&E system. Currently DPME has commissioned a study to examine the state of M&E system in 5 sectors. The research study will help develop



a standardised M&E Systems Effectiveness Assessment Tool to assess the different components of the M&E system. DPME in consultation with relevant sectors will conduct regular institutional assessment of sector M&E systems, with the aim of producing improvement plans and providing targeted institutional capacity to strengthen M&E systems to produce quality data and to stimulate demand for data by decision makers. DPME will also collect data from DPSA HR Connect which is an information system and process for assessing skills gaps.

**d) Outcome 2.4          Develop and implement Technical Advisory Support to strengthen M&E systems**

DPME programme heads in collaboration with key stakeholders will facilitate technical support with selected departments and monitor the implementation of the improvement plan in relation to their programme. For example, in response to the results MPAT of departments and results of the M&E Systems Effectiveness Assessment Tool; DPME in collaboration with partners- National policy departments- DPSA, NT and NSoG will facilitate the development of an improvement plan and technical support to improve organisational performance. Another example of DPME technical support provided by Evaluation and Research Unit to departments in building capacity to implement the National Evaluation Policy Framework. DPME in collaboration with sectors and other partners will develop and standardise an integrated and coordinated support system that enables departments to strengthen their M&E system. Targeted support to Office of the Premier will be strengthened to enable them to support provincial departments.

**9.3 Pillar 3:          Individual Capacity Development**

**a) Outcome 3.1          Develop M&E learning resources - e.g. training material/ case studies**

The supply side findings of diagnostic assessment of HR ME practitioners conducted by DPME in 2012/13 indicated that the availability of M&E training appears to have flourished over the past decade or so, largely as the result of international trends and the development of M&E in government. The length of the training courses ranges from one-day workshops, 3-day to a week short courses; undergraduate modules, postgraduate diplomas and certificates, Masters degrees and PhDs. 69% of all M&E training provision is accessed via short learning programmes delivered by public and private training providers via full or mixed mode delivery, which includes self-study and contact sessions. There is however a need for Higher Education Curriculum Committees to focus on the relevance and responsiveness of the M&E programmes to the developments of the public sector. The

courses developed by DPME will be shared with HEIs. PALAMA/School of Government has to consider revision and upgrading the 20 credit short course offered by into a 120 credit Post graduate M&E Professional Certificate.

**b) Outcome 3.2 Co-ordinate M&E training and workshops with key stakeholders**

The demand side findings of the diagnostic assessment of HR ME practitioners conducted by DPME in 2012/13 indicated the need for training in the following areas

- Monitoring as a management function, in the following areas:
  - Monitoring service delivery improvement in national and provincial departments
  - Monitoring human resource management and development in provinces
- Monitoring finances in provincial departments
- Integrating planning, M&E via the developing log frames (RBM training)
- Understanding current M&E policy frameworks
- Setting up M&E units
- Conducting effective data analysis
- Managing M&E information in provinces
- Evaluation and learning
  - Planning evaluation - provincial departments , Office of Premier ; national departments
  - Managing evaluations – provincial departments, national departments , Office of the Premier

Most recently, the National Development Plan (NDP) 2030 emphasises the need for building a democratic developmental state capable of leading efforts to address the triple challenge of unemployment, poverty and inequality. The National Development Plan highlights the capacity deficit in the state and makes a range of proposals for addressing this problem, including the development of managerial skills.

Within DPME each programme head will take responsibility for the development and provisioning of the training interventions to enable implementation of their respective programmes, the School of Government and Higher Education will take responsibility to design and develop accredited M&E learning programmes to respond to the training needs of the different target groups.

**c) Outcome 3.3 Co-ordinate workplace coaching and mentoring**

Coaching and mentoring will be used to strengthen leadership capacity of M&E professionals. A concept paper on using workplace coaching and mentorship programme will be developed in collaboration with key stakeholders – NSOG, DPISA and Sector Departments. Each programme leader will manage the M&E workplace and mentorship related to their respective programme in collaboration with key stakeholders. DPME will provide the modality for workplace coaching and mentoring, co-ordinate a register of M&E mentors and coaches, and quality assures the coaching and mentorship programme.

**d) Outcome 3.4 M&E Learning network/ Community of Practice**

The National M&E Learning Network is hosted by DPME since 2011. In 2013 learning events were held on a monthly basis whereby M&E practitioners and other role players present on their systems, recent findings from evaluations and other innovations in the RBM terrain. An online discussion forum linked to this network is hosted by the National School of Government.

DPME in collaboration with partners will continue to strengthen National M&E Learning Network. The objectives of the Learning Network will be to:

- Facilitate the building a professional community of practice of M&E practitioners
- Support national and provincial departments including Office of the Premiers to establish and run M&E communities of practice
- Advocate and communicate M&E policies and practices to key stakeholders in government.

The opportunities from lessons learnt the experience of managing learning events will be to use to inform the future approach to hosting learning events. To improve the learning network the following issues will be considered – use of innovative interactive approaches like video conferencing medium to reach wider audience; to strengthen the virtual discussion forum hosted by PALAMA by appointing a moderator; to collaborate internally with programme heads and externally with SAMEA, World Bank, UNDP, HEIs, CLEAR and GIZ to plan a programmer for the year for DPME; and to document the key issues and share the information via DPME website.

DPME with key partners support Offices of Premiers and sectors to establish their own professional communities of practice or learning networks.

#### **9.4 Pillar 4 Stakeholder Co-ordination**

##### **a) Outcome 4.1 Develop stakeholder management plan to improve internal and external co-ordination**

DPME will develop stakeholder management strategy/plan to improve internal and external co-ordination.

#### **Partnership with National Departments, Office of Premier and Provincial Departments**

DPME established as number of M&E forums that focus on M&E capacity development and knowledge sharing; all chaired by DG: DPME (see respective Terms of Reference in the DPME website). The first forum is the Forum of Heads of M&E from National Government Departments. This forum meets on a quarterly basis to promote two-way knowledge sharing between DPME and heads of M&E from national government departments. It acts as a consultative platform for the development of M&E frameworks, guidelines and policy discussion documents. It is also used to reflect on the findings of M&E studies for purposes of advising DPME on the key actions to implement in order to strengthen M&E systems of government.

The second forum comprises Heads of M&E from the Offices of the Premier. Whilst playing the knowledge sharing role as the above forum, the provincial forum also acts as a coordination mechanism to enhance the leadership role of both DPME and the Offices of the Premier on the implementation of various joint M&E programmes across the three spheres of government. The forum plays a key role in facilitating change management between DPME and the Offices of the Premier in relation to inter-governmental relations necessary for the establishment and sustenance of the existing and new M&E systems.

DPME will continuously review the agenda , attendance, format and the content of the proceedings of the Forums to make it purposeful and sustainable.

## **Partnership with National School of Government and Higher Education Institutions**

Whilst each DPME programme head is responsible for working with stakeholders in their programme, M&E Policy and Capacity Building will co-ordinate partnerships with Higher Education Institutions and National School of Government.

DPME and Higher Education Institutions have already agreed to collaborate with each other to strengthen the capabilities, systems and processes that relate to M&E in government and to make Public Administration and Management Schools more responsive to government vision of performance improvement. There were two meetings held with Higher Education Heads of Public Administration Schools.

The objectives of the Forum are:

- To collaborate in planning and implementing joint projects to promote performance improvement in government.
- To share information on M&E policies, competencies and standards in order to inform Public Administration and Management curriculum and learning programmes.
- To identify research areas related to M&E and performance improvement for post graduate research.
- To facilitate a process of knowledge sharing and learning from each other.

DPME, HEIs and National School of Government need to sign Terms of Reference on to organise collaborative projects in the areas described below:

- M&E Standards and Competencies - contribute to the development of M&E standards and competencies.
- M&E Curriculum - use the M&E competency framework to guide the development of new M&E curricula; and to guide the review of existing M&E curricula. The curriculum should be informed by an emerging modern view of monitoring and evaluation that focus on issues such as mainstreaming monitoring as a management function, monitoring of operations management, citizen based monitoring. Use case studies from Management Performance Assessment; evidence from Front Line Service Delivery reports and evaluation findings in the M&E curriculum to bridge the gap between theory and practice. Explore articulation and credit transfer opportunities for DPME evaluation courses, and PALAMA M&E courses towards university M&E learning programmes. Develop targeted M&E programmes, for example, learning programmes for administrative leaders – Heads of Department; and political leaders - ministers and deputy ministers.

- M&E Research and Innovations - facilitate a critical discourse in M&E for performance improvement in the public service and in promotion of national development goals. Identify research topics related innovative approaches in M&E for post graduate studies. Facilitate opportunity for DPME staff to supervise post graduate students and to publish their research in an accredited journal.
- Training and professional development - contribute to training of undergraduate students in M&E.
- Contribute to scaling up in service training as part of continuous professional development in M&E for different target groups. Knowledge sharing and learning of post graduate research evidence to improve performance.

### **Partnership with Professional Associations**

DPME entered into a Memorandum of Understanding with SAMEA, which is being implemented via a Joint Standing Committee with a rotating chairperson. This partnership is an innovation that is aimed at improving M&E capacity development, professionalization of M&E, and co-hosting of conferences in South Africa. The memorandum of understanding is fully endorsed by the various Annual General Meetings of SAMEA, as it acknowledges as respects the independence of both partners, whilst focusing on the common purpose of ensuring continuous development of the M&E practice for better developmental results.

The partnership can build on the achievement of launching of two provincial associations, namely: KwaZulu-Natal Monitoring Evaluation and Research Association (KZN-MERA) and the Eastern Cape SAMEA Chapter, by continuing supporting the fledgling associations by hosting joint events. M&E Policy and Capacity Building will be responsible for facilitating partnership with provincial associations.

DPME in partnership with SAMEA has co-hosted of the SAMEA Biennial Conference together with the PSC in September 2013. The SAMEA Biennial Conference is an important platform to advocate the work of DPME and build capacity of the M&E professionals. DPME needs to continue the partnership with SAMEA in co-hosting future Biennial Conference. SAMEA also provides independent inputs to DPME draft discussion documents, government evaluation competences, standards and guidelines.

DPME has partnered with the World Bank in co-hosting a number of African Regional Workshops. The partnerships with continental and international partners will seek to achieve the following objectives:

- To share experiences from DPME in relation to the implementation of the Outcomes System, Management Performance Assessment Tool, National Evaluation System, Frontline Service Delivery Monitoring, Citizen-Based Monitoring, Presidential Hotline and M&E Capacity Building programmes;
- To stimulate exchange of information between the participating international peer countries on their M&E systems;
- To use the knowledge shared to strengthen countries' interest in and commitment to M&E;
- To discuss how to take forward the lessons learned in a practical way.

DPME will build on existing partnerships by facilitate the development of Terms of Reference for Partnership with Professional Associations and International partners; and co-ordinate partnership with professional Associations and International partners in collaboration of internal and external partners.

## **10 CAPACITY DEVELOPMENT APPROACH**

The following approaches will be used for development of PME capacity

### **10.1 Systems Approach**

A systems approach will contribute to sustainable capacity development. Each of the pillars and its components will constitute an interrelated system, whilst the strategy will develop each part of the system; it will also build the synergy between these pillars. M&E will be assessed in relation to its contribution to other organisational and management system to improve organisational and programme performance.

### **10.2 Short term – medium term- long term solutions**

In the short – to medium term intervention will be to conduct institutional assessment to identify strengths and limitations of the M&E system as performance management tool. The strengths will be used as building block for improvements of the M&E system and the progress to improvements will be monitored.

### **10.3 Differentiated approach**

The strategy recognises that institutions have various levels of M&E capacity and organisational performance, and consequently takes a differentiated approach to implementation. Results from MPAT will be used to identify the level of maturity of the M&E

system and different intervention approaches will be designed to strengthen institutions M&E capability against prescribed standards.

### **11 FUNDING REQUIREMENTS**

Whilst funding for effective implementation of the strategy will be done within each DPME programme through the normal budget process, there will be other sources of funding such as donor support and partner funding.

### **12 MONITORING AND EVALUATION OF THE ICDF**

The Steering Committee will develop a Monitoring and Evaluation Framework linked to the implementation plan. The Steering Committee will monitor the implementation of the strategy on a quarterly basis, and will provide support to take corrective actions if the targets are not met. There will be a formative evaluation of the strategy annually, and a summative evaluation will be done at the end of the project.

### **13 GOVERNANCE REQUIREMENTS**

The strategy will be implemented by the DPME and other strategic partners. The strategy will be part of the DPME and respective department's strategy and annual plans and will be reported annually. Since the strategy also intersects the mandates of other departments and partners, the relevant output will be part of their strategy and annual plans. Normal internal management controls within DPME and partner departments will ensure the strategy and annual plans are implemented successfully.

The Steering Committee will perform the governance and oversight function. The steering committee comprising of relevant partners will be formed to develop an implementation for each financial year; monitor the implementation plan quarterly; and reports will be submitted to Heads of participating partners for each quarter. The Steering Committee will review the strategy annually and when deem necessary.

### **14 ROLES AND RESPONSIBILITIES OF KEY PARTNERS**

Given the complexity and scope of the capacity development, implementation of this strategy will require a collaborative partnership, first, within DPME programmes; second between public and private sector stakeholders. Within government, strategic partnerships in keeping with the principles of cooperative governance are required to address transversal



issues. DPME will play a coordinating and integrating role in these initiatives. The roles and responsibilities of internal and external partners are outlined in Annexure 1.

### 15 IMPLEMENTATION PLAN

DPME’s Chief Directorate M&E Policy and Capacity Building will co-ordinate the implementation and monitoring of this strategy. It will work with the Steering Committee to develop a 5-year implementation plan that identifies key outputs, activities, outcomes targets and responsible persons. The 5-year implementation plan will distinguish the short-to medium-term and long-term outputs. The Programme logic approach will be used to design the implementation plan.

### 16 RISKS AND MITIGATION STRATEGY

The table below identifies the risks to the implementation of the strategy and describes the measures to mitigate them.

**Table 3: Risks and mitigation measures**

Risk	Mitigation measures	Responsibility for risk mitigation
Ineffective governance and accountability structures	The members of the Steering Committee will be nominated by the respective Heads of Departments and nominated members will be held accountable to their respective organizational governance structures	Departmental governance structures
Lack of stakeholder commitment	Letter of commitment signed by respective HOD and quarterly feedback given to HOD on progress made	DPME All Stakeholders
Inadequate funding	Strategy to secure funding from different sources	DPME All Stakeholders
Inadequate capability to implement the strategy	Secure relevant resources to capacitate implementing partners	DPME All Stakeholders

**Signed**

  
.....

**Dr Sean Phillips**

**Director-General: DPME**

**Date:** 24/03/14

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## 18 ANNEXURE 1: ROLES AND RESPONSIBILITIES OF KEY PARTNERS

### 1. External partners

Description of mandates of national and sector departments

- a) The **National Treasury** has a constitutional and national legislative mandate to manage public sector finance matters, including capacity development. NT will take responsibility for
  - i. **Outcome 2.4** Technical Advisory Support to strengthen M&E systems in relation to financial management
  - ii. **Outcome 3.3** Co-ordinate workplace coaching and mentoring in monitoring financial management
  
- b) The **Department of Public Service and Administration** provides the basic values and principles governing public administration, cultivates good HR management and career-development practices, maximizes human potential, promotes HR development, establishes effective HR-related strategic and operational planning in the public service, and establishes critical competencies. DPSA will support the achievement of the following outcomes:
  - i. **Outcome 2.3** Guide M&E organisational design structure and function
  - ii. **Outcome 2.4** Technical Advisory Support to strengthen M&E HR systems
  - iii. **Outcome 3.3** Co-ordinate workplace coaching and mentoring
  
- c) The **Department of Higher Education and Training and Higher Education Institutions** is one of the key stakeholders in the M&E. The department is responsible for providing norms and standards that support the requisite capacity building initiatives through training and development. HEIs will support the achievement of the following outcomes:
  - i. **Outcome 3.2** Co-ordinate M&E training and workshop with key stakeholders
  - ii. **Outcome 1.4** M&E qualifications and curriculum standards
  - iii. **Outcome 4.2** Partnership with Higher Education Institutions and National School of Government
  
- d) The **Department of Cooperative Governance (DCoG)** mandate is to develop and monitor the implementation of various national policies and legislation and provide support to provinces and local government in fulfilling their constitutional legislative obligations. The department also has a mandate of ensuring that strategic

interventions and support is given to the provinces and local government in order to ensure that government policy objectives are met. The National Municipal Capacity Coordination and Monitoring Committee (NMCCMC) have been established and DCOG is taking leadership in its functions. This is meant to coordinate, document and report on capacity building activities supporting municipalities. This committee improvises intergovernmental relationship among departments on capacity building programmes. Establishing such a coordinating committee may assist in minimizing duplication, improper planning and coordination between departmental programmes and capacity building initiatives. DCoG will support the achievement of the following outcomes:

- i. **Outcome 2.4** Technical Advisory Support to strengthen M&E systems in municipalities
- ii. **Outcome 3.2** Co-ordinate M&E training and workshop with key stakeholders in the sector
- iii. **Outcome 3.3** Co-ordinate workplace coaching and mentoring in the sector
- iv. **Outcome 3.4** M&E Learning network/ Community of Practice in the sector

e) **Sector departments** have a capacity building role to play especially in the local government sphere to assist in strengthening the service delivery mandates. For example water, electricity, public works, health and housing among others. The sectoral legislations provide for support to municipalities in discharging its constitutional mandate. Sector departments will support the achievement of the following outcomes:

- i. **Outcome 2.4** Technical Advisory Support to strengthen M&E systems in the respective sector
- ii. **Outcome 3.2** Co-ordinate M&E training and workshop with key stakeholders in the sector
- iii. **Outcome 3.3** Co-ordinate workplace coaching and mentoring in the sector
- iv. **Outcome 3.4** M&E Learning network/ Community of Practice in the sector

## **2. Internal partners**

### **2.1 In Programme 1 (Administration)**

#### **a) Departmental Management**

The Director-General lead the drafting process of the development and implementation of discussion document on PME principles and approach. Further, it will be responsible for:

## **Output 1.1 Develop Monitoring and Evaluation policy**

### **b) Corporate Service (HRM&D)**

Manage PDMS agreement to identify development needs of individuals and provide development opportunities in form of bursaries and sponsorship

### **c) Information Technology Support**

Build capacity of departments using ICT M&E Framework as enabling tool for data management. The ICT M&E framework has to be synchronised to the conceptual M&E framework championed by M&E Policy and Capacity Development Unit. The Unit will contribute to achievement of:

#### **Outcome 2.1 Develop institutional M&E frameworks and guidelines**

### **2.2 In Programme 2 (Outcomes Monitoring and Evaluation)**

#### **a) Outcome Facilitators**

OFs and their teams provide technical support to their respective outcome/sectors in implementation of the delivery agreements. The OFs support the achievement of:

#### **Outcome 2.4 Technical Advisory Support to strengthen PM&E systems**

#### **b) Data support to Programme of Action**

The Data Support Team that manages the Programme of Action engage in building capacity of data forum members to improve their ability to strengthen the quality of data and reporting on the targets against respective outcomes in the delivery agreement.

#### **c) Evaluation and Research**

Building evaluation capacity is embedded in the Evaluation and Research Unit. Their capacity development initiatives include: development of the evaluation competences and standards; design of a number of evaluation courses and training, conducting write shops/workshops develop guidelines to build evaluation capacity, provision of technical advisory support to strengthen Evaluation system; and hosting evaluation learning network/ community of practice. ERU will support the achievement of the following outcomes:

#### **Outcome: Develop Monitoring & Evaluation Competency Framework**

**Outcome 2.1** Develop institutional M&E frameworks and guidelines

**Outcome 2.4** Technical Advisory Support to strengthen M&E systems

**Outcome 3.1** Develop M&E learning resources - e.g. training material/ case studies

- Outcome 3.2** Co-ordinate M&E training and workshop with key stakeholders
- Outcome 3.3** Co-ordinate workplace coaching and mentoring
- Outcome 3.4** M&E Learning network/ Community of Practice

### **3.1 Programme 3 (Institutional Monitoring and Evaluation)**

#### **3.1 MPAT**

The MPAT team works with Office of the Premiers to conduct workshops to orientate departmental officials on the use of the assessment tool. Workshops are held to provide feedback to departments on the assessment scores and supports departments to develop their improvement plans. Case- studies of best practice are developed and master classes are held to discuss the cases. Policy, procedures, tools and templates of the standards are captured in the website. MPAT will support the achievement of the following outcomes:

- Outcome 2.1** Develop institutional M&E frameworks and guidelines
- Outcome 2.3** Institutional Assessment of M&E system
- Outcome 2.4** Technical Advisory Support to strengthen M&E systems
- Outcome 3.1** Develop M&E learning resources - e.g. training material/ case studies
- Outcome 3.2** Co-ordinate M&E training and workshop with key stakeholders
- Outcome 3.3** Co-ordinate workplace coaching and mentoring
- Outcome 3.4** M&E Learning network/ Community of Practice

#### **3.2 Front Line Service Delivery programme**

FLSD hosts workshops with Office of Premier to support the implementation of the programme; feedback sessions are held with implementation sites to advice and monitor the implementation plans. The data from front line monitoring will be developed into case studies. FLSD will support the achievement of the following outcomes:

- Outcome 2.1** Develop institutional M&E frameworks and guidelines
- Outcome 2.3** Institutional Assessment of M&E system
- Outcome 2.4** Technical Advisory Support to strengthen M&E systems
- Outcome 3.1** Develop M&E learning resources - e.g. training material/ case studies
- Outcome 3.2** Co-ordinate M&E training and workshop with key stakeholders
- Outcome 3.4** M&E Learning network/ Community of Practice

#### **3.3 The Citizenship Based Monitoring Programme**

CBM has capacity building initiatives – workshops with key role players and development of case studies - to support the implementation of CBM Framework. CBM will support the achievement of the following outcomes:

- Outcome 2.1**            Develop institutional M&E frameworks and guidelines
- Outcome 2.3**            Institutional Assessment of M&E system
- Outcome 3.1**            Develop M&E learning resources - e.g. training material/ case studies
- Outcome 3.4**            M&E Learning network/ Community of Practice

### **3.4 M&E Policy and M&E Capacity Building Programme**

Chief Directorate M&E Policy and Capacity Building will co-ordinate the implementation of the strategy. The Unit will support The Office of the Director – General in development and implementation of National M&E policy framework.

#### **Output 1.1 Develop Monitoring and Evaluation policy.**

The unit will develop the monitoring competencies in consultation key stakeholders DPSA, School of Government and Higher Education Institutions, SAMEA, SAQA, and relevant ETQAs and Quality Councils.

The unit will support the achievement of the following outcomes:

- Outcome 1.2**            Develop Monitoring & Evaluation Competency Framework
- Outcome 1.3**            Develop Professional Development Strategy
- Outcome 1.4**            M&E qualifications and curriculum standards
- Outcome 2.1**            Develop institutional M&E frameworks and guidelines
- Outcome 2.2**            Guide M&E organisational design structure and function
- Outcome 2.3**            Institutional Assessment of M&E system
- Outcome 2.4**            Technical Advisory Support to strengthen M&E systems
- Outcome 3.1**            Develop M&E learning resources - e.g. training material/ case studies
- Outcome 3.2**            Co-ordinate M&E training and workshop with key stakeholders
- Outcome 3.4**            M&E Learning network/ Community of Practice
- Outcome 4.1**            Develop stakeholder management plan to improve internal and external co-ordination
- Outcome 4.2**            Partnership with Higher Education Institutions and National School of Government
- Outcome 4.3**            Partnership with Office of Premier and national and provincial departments
- Outcome 4.4**            Partnership with Professional Associations and International partners



**19 ANNEXURE 2: GLOSSARY OF TERMS**

Capacity Development	It involves the empowerment and enhancement of individuals and institutions through learning, knowledge and information sharing and the use of innovative approaches to enable them to perform their function effectively and efficiently; to be able to use evidence to solve problems, and to effect transformational and sustainable change in institutions, which in turn will support the achievement of the development goals of society.
Career path	A collection of basic job families, career progression possibilities, and related requirements that enable career progression
Champions of change	Groups or individuals who adopt the strategy and lead the change
Chief Directorate: M&E Policy Capacity Building	A unit in DPME tasked with function of developing M&E capacity in the public service
HR Connect	An information system and process for assessing skills gaps
Knowledge management	An organisational competency that results in improved effectiveness through harnessing and sharing information, knowledge and good practice, and building institutional memory
Learning culture	An environment where learning is encouraged, incentivised, accessible and embraced by the entire organisation
Learning networks	Groups of individuals who learn together, including communities of practice and communities of expert practitioners

National Qualifications Framework	A comprehensive national qualification system approved by the Minister of Higher Education for the classification, registration, publication and articulation of quality-assured national qualifications
Monitoring	Monitoring involves the continuous collecting, analysing, and reporting data on inputs, activities, outputs, outcomes and impacts as well as external factors, in a way that supports effective management and continuous improvement performance
Occupational profile	A summary of the tasks, knowledge, skills, experience, qualifications and other information needed to do a job
Skills programme	Unaccredited training providing practical interventions to bridge the gap between formal learning and workplace skills
Stakeholder	A person or group with a direct interest, involvement, or investment in something
Strategy	a high level plan of an organisation that diagnosis the problem , defines goals and approach, gives direction and scope to key players to achieve the results over short-medium - long-term in order to meet the needs of stakeholders.
Transversal systems	Systems that are applicable across government departments

## **20. ANNEXURE 3: GLOSSARY OF TERMS**

CLEAR	Center for Learning on Evaluation and Results
DPME	Department of Performance Monitoring and Evaluation in the Presidency
DPSA	Department of Public Service Administration
ERU	Evaluation and Research Unit
ETQA	Education and Training Quality Assurance
GIZ	Duetsche Geselleschaft fur Internationale Zusammenarbeit
GWM&E	Government-Wide Monitoring and Evaluation System
HEI	Higher Education Institutions
HR	Human resources
HOD	Head of Departments
IT	Information Technology
KZN-MERA	KwaZulu-Natal Monitoring Evaluation and Research Association
M&E	Monitoring and Evaluation
M&E CDS	Monitoring and Evaluation Capacity Development Strategy
M&E IT	Monitoring and Evaluation Information Technology
MPAT	Management Performance Assessment Tool
NDP	National Development Plan
PALAMA	Public Administration, Leadership and Management Academy
PhD	Doctor of Philosophy
PSC	Public Service Commission
PME	Performance Monitoring and Evaluation
RBM	Results-Based Monitoring
SAMEA	South African Monitoring and Evaluation Association
SAQA	South African Qualification Authority
SMS	Senior Management System
UNDP	United Nations Development Programme
NQF	National Qualifications Framework

