



## **SAMEA ANNUAL REPORT FOR THE YEAR ENDING 28 FEBRUARY 2007**

SAMEA was founded in November 2005 as a non-profit (section 21) association (Registration number 2005/043931/08).

For more information, see [www.samea.org.za](http://www.samea.org.za) or email [info@samea.org.za](mailto:info@samea.org.za)

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## FOREWORD BY THE SAMEA CHAIRPERSON,

- Chairperson, MS. JENNIFER BISGARD



The South African Monitoring and Evaluation Association (SAMEA) was formed to provide a platform where professionals with an interest in monitoring and evaluation can meet, interact and learn. We have grown from being an informal network (called “South African Evaluation Network or SAENet”) to becoming a formal registered organisation. SAMEA is a non-profit, section 21 company with a membership base. Our membership is made up of those who teach M&E, research M&E, provide M&E services and commission M&E. These include:

- Academics
- M&E Practitioners
- Commissioners of M&E Services (Donors, NGOs, etc.)

SAMEA’s first year of operation has been an exciting and eventful one. We have seen the growth of interest in monitoring and evaluation in South Africa. Donors, NGOs, CBOs, and corporates in South Africa are all exhibiting new and growing interest in monitoring systems, data quality, and evaluation. It is about delivering development programmes, and ensuring accountability and programme improvement through monitoring and evaluation services.

The launch of the South African Government-wide M&E Framework and the development of detailed indicators by the South African Treasury are two key developments in the sector. In President Mbeki’s State of the Nation Address, on 9 February 2007, he discussed the need for M&E capacity and quality data numerous times. He stated:

*“Many of the weaknesses in improving services to the population derive in part from **inadequate capacity and systems to monitor implementation**. As such, in the period leading up to 2009, the issue of the organisation and capacity of the state will remain high on our agenda.”* (Page 9)

For example he called for:

*“All these economic and social programmes form part of our strategies to reduce and eradicate the poverty that continues to afflict many of our people. The work done during the course of last year, by women through the South African Women in Dialogue working with various government departments, including a visit to countries such as Tunisia and Chile where great progress has been made in dealing with poverty, does point to some defects in our systems in this regard. From the experience of this delegation it is clear that we must among other things:*

- **Define clearly the poverty matrix of our country;**
- **Develop a proper database of households living in poverty;**
- *Identify and implement specific interventions relevant to these households;*
- **Monitor progress in these households as the programmes take effect in graduating them out of poverty;**
- *In this context, address all indigence, especially the high numbers of women so affected;*
- *Co-ordinate and align all anti-poverty programmes to maximise impact and avoid wastage and duplication; and,*
- *Accelerate the training of Family Social Workers at professional and auxiliary levels to ensure that identified households are properly supported and monitored.”* (page 7)

It is clear that SAMEA has much to do to support development and capacity building in South Africa. This, our first Annual Report, documents the progress we made in the first year of operating.

I would like to take this opportunity to thank the following:

- The Board Members of SAMEA who have worked incredibly hard with minimal support over the past year. They have devoted much of their own personal and professional time to support and manage SAMEA activities and the innumerable queries that are directed to us;
- Our events intern, Ms. Nomvuzo Mamabola, who has worked tirelessly on setting up our inaugural conference;
- Khulisa Management Services, Feedback Performance Metrics, and the Office of the Public Services Commission who all provided support services to SAMEA at no cost;
- Development IT Services cc who designed and maintain our superb website using open source software.

On a personal note, after devoting two years to the SAENet Task team, followed by chairing the SAMEA board this year, I will be stepping down to go on maternity leave. I will be staying involved with SAMEA but as an individual member and as a passionate proponent of high quality monitoring and evaluation services. I wish the new board chair and members all the best for 2007/8.

Sincerely,



Jennifer Bisgard  
Founding Chair of SAMEA

# 1. THE SAMEA VISION, MISSION & PRIORITIES FOR YEAR ONE

- Deputy Chairperson, Mr. MARK ABRAHAMS



The formation and launch of SAMEA on 5 November 2005 were as a result of wide consultation with particularly those who participated in the SAENet list-serve and the sterling work of Task Team members who gave of their time, expertise and commitment to steer this Association to this stage, its first General Meeting of members. The South African Monitoring and Evaluation Association is a Section 21 Company under the Companies Act, No. 61 of 1973. As such the company is not for gain and applies its income and profits only in promoting the objectives of the Association.

## **1.1. Vision**

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

## **1.2. 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.

## **1.3. Objectives**

- To provide a platform for interaction and information sharing among all those interested in Monitoring and Evaluation.
- To promote high quality intellectual, ethical and professional standards in Monitoring and Evaluation.
- To increase the use of Monitoring and Evaluation theory and practice.
- To promote the development and adoption of Monitoring and Evaluation approaches and methods suitable to a South African and development context.
- To promote post-graduate education and continuing professional development in the field of Monitoring and Evaluation.
- To increase the profile of South African Monitoring and Evaluation at national and international level.
- To help build understanding of international developments and trends in Monitoring and Evaluation.
- To be a resource on Monitoring and Evaluation in South Africa.

How are we doing against each of these objectives?

- The listserv, SAMEATalk, is a vehicle to share information, to keep members informed and involve members in various activities. Regional meetings in Gauteng and the Western Cape have also contributed to dynamic interaction among M&E practitioners.
- SAMEA has been involved in the debate about professional standards with our colleagues in Africa. See the report on standards.
- There is a huge growth in Monitoring and Evaluation and SAMEA can do more to encourage debate around theory and practice.
- The development and promotion of approaches and methods suitable to a South African context will be enhanced through publications and dissemination of best practices. Much more can be done in this regard.
- SAMEA will do its best to encourage and if necessary endorse high quality training and professional development. There are plans to look at accreditation within the National Qualifications Framework (NQF), with the assistance and support from SAQA.
- In its short period of existence, SAMEA has been well represented in Africa as well as the US and the UK. International associations across the globe have extended their congratulations for the launch of SAMEA and have pledged ongoing support to ensure the long term sustainability of SAMEA.

## **1.4. Governance**

Governance means providing the necessary leadership to give credence to the mission statement of the association so that the overall mission can be accomplished. Governance also means taking initiative, staying on top of the game and securing the best deals that will benefit the association and its members. More than this, governance means to stay in touch with the wishes and needs of the members of the association and to involve them as much as is possible in the strategic thinking and planning of the association. This will ensure accountability, transparency and create an environment favourable to a collaborative culture. How has the current Board measured up?

At the launch of SAMEA, the Task Team members became the first Board of Directors of the association. The Directors elected a chairperson, Jennifer Bisgard; a deputy chairperson, Mark Abrahams; a secretary, Lise Kriel; a treasurer, Benita De Wet; and other members were assigned specific portfolios as evident in this report. The executive positions as well as the portfolios provided the necessary structure(s) for the Association to conduct its business. However, all the individuals on this young and vibrant Board have given and contributed well beyond the requirements of any of the executive or portfolio positions they occupied. This was in part necessitated by the resignations of some directors and the absence of a paid secretariat to see to the day to day running of the Association.

Around specific events, like the training (Hazel Symonette) offered by SAMEA and this, the inaugural conference, the Board was forced to employ, albeit on a part-time basis, staff to assist in the administration of the various tasks related to these events.

SAMEA currently relies heavily on the goodwill and commitment of individuals who voluntarily give of their time and resources to the benefit of SAMEA members. We have been informed by more mature associations like the American Evaluation Association (AEA) that, that was exactly how they started. The Board has managed to have regular meetings, a few face-to-face, but generally via teleconferencing and e-mail.

The collective ethos among the directors is encouraging and as individuals they have acted as ambassadors for SAMEA and M&E in South Africa. The Board has been approached to look at issues of accreditation of M&E training, to provide lists of potential service providers and to respond to tender calls. The prevailing response has been to inform members via the SAMEAtalk and or to look at co-opting interested members onto committees to address particular concerns.

Another encouraging development has been the beginnings of 'regional chapters' in Gauteng and the Western Cape. This is where members of SAMEA and other interested individuals, living and working in specific geographic areas, meet to discuss and debate M&E matters that interest, affect or concern them. This type of local involvement has the potential to generate a greater sense of belonging. We are also aware of other collaborative initiatives around M&E (HIV/AIDS) that are emerging independently of SAMEA. We will encourage these organisations and individuals to join SAMEA so that we can strengthen local structures.

The SAMEA membership fee is currently very low. The reasoning for this has been to attract as many members as possible and not to make the cost prohibitive. Even so, people have been slow in joining. Members may have to consider, in the near future, the need for a paid secretariat that will multiply the benefits to members, respond to requests timeously, extend and grow the profile of the association, draw a larger pool of members and share relevant information to all members.

All the current directors have contributed a great deal to ensure good governance. Each and everyone must be applauded. We extend gratitude to those who have indicated that can no longer serve as directors and we invite individuals who are passionate about the field of Monitoring and Evaluation to join and continue good governance of SAMEA.

## 2. THE SAMEA ORGANISATIONAL STRUCTURE

Ms. Jennifer Bisgard



The South African Monitoring and Evaluation Association (SAMEA) Board started with 10 members and over the course of 2006, three board members resigned. The Board would like to take this opportunity to thank More Chakane, Natasha Nel and Lise Kriel for serving on the SAMEA board. Per the SAMEA articles of incorporation, the board members nominated and replaced these individuals with Bongani Magongo and Angela Bester.

### 2.1. Current March 2007 Board Members

Name	Portfolio	Email	Profession	Company
Jennifer Bisgard	Chair	jbisgard@khulisa.com	Director	Khulisa Management Services
Mark Abrahams	Deputy Chair	marka@iafrica.com abrahams@ched.uct.ac.za	Senior Lecturer	University of Cape Town
Benita van Wyk	Treasurer	bvanwyk@feedbackpm.com	Researcher	Feedback Performance Metrics
Bongani Magongo	Standards and Quality Promotion	bongani.magongo@uyf.org.za	Senior Manager: M&E	Umsobomvu Youth Fund
Indran Naidoo	International and Government liaison	indrann@opsc.gov.za	Chief Director: Governance Monitoring	Public Service Commission of South Africa
Kevin Kelly	Training and HIV/AIDS special interest group	kk@cadre.org.za k.kelly@ru.ac.za	Clinical Psychologist	CADRE Institute for Social and Economic Research Rhodes University
Marlene Roefs	Communications	marlene.roefs@gmail.com	Evaluation Research Consultant	Social Dimensions
Nokuzola Mamabolo	Events	nokuzola@zozo-gap.co.za	Consultant	GAP
Angela Bester	Membership	abester@deloitte.co.za ajbester@metroweb.co.za	Director: Consulting	Deloitte & Touche (Southern Africa)

## 2.2. Profile of Board Members



**Jennifer Bisgard** - Chairperson

Jennifer Bisgard is a founding Director of Khulisa Management Services, a prominent monitoring and evaluation firm in South Africa. Established in 1993, Khulisa's evaluation and monitoring work is focused in the education, health and child labour fields. She has led and served on hundreds of evaluation and monitoring assignments for over 120 different clients ranging from South African Government, to donors, NGOs and Corporations based throughout southern Africa.

Jennifer has a BA with honours in Political Science from the University of Michigan and an MA in Social Change and Development from Johns Hopkins University. Prior to establishing Khulisa in 1993, she was a senior education specialist at USAID/Pretoria for five years. She was responsible for the identification, negotiation and implementation of two major basic education initiatives involving grants to over 100 NGOs.



**Mark Abrahams** - Deputy Chairperson and Media Liaison

Mark Abrahams is currently a senior lecturer in the Centre for Higher Education Development (CHED) at UCT. He previously was the Regional Director of the Centre for Community Development of Vista University. It was here that his research interests and passion for rural development, complex community empowerment initiatives and post graduate curriculum research developed. Mark has engaged in and completed several micro- project level evaluations as well as large scale multi-site evaluations. His current research interest is the 'nature, shape, condition, form' of the current South African Evaluation community. He is of the opinion that insight into this community will contribute to the development and structuring of a dynamic and responsive association and hence the growth of Monitoring and Evaluation in the country.



**Benita van Wyk** - Treasurer

Benita van Wyk is a founding partner of Feedback Performance Metrics, a consultancy providing research and data analysis services particularly with regards to sustainable development and the evaluation of development programmes. Ms. Van Wyk is responsible for the design, implementation & management of projects related to monitoring and evaluation and sustainability reporting and has conducted evaluations in a variety of different sectors. Ms. van Wyk has academic training in the field of Research Psychology (University of Pretoria).



**Kevin Kelly** - Training

Kevin Kelly is a Director of CADRE, a South African NPO which specialises in monitoring and evaluation in the HIV/AIDS field. He is also Managing Editor of African Journal of AIDS Research. He and the CADRE team develop M&E protocols and conduct evaluations for HIV/AIDS programmes in South Africa and other countries in the region. They also conduct training programmes for M&E in the HIV/AIDS field. He has experience in evaluation of programmes, inter alia, in the following fields: mass media and communication, youth development, behaviour change, theatre in development, community development, leadership and management training, health systems, education in schools and tertiary institutions, social impact analysis, partnership programmes, decentralisation programmes and school development programmes.

He is currently involved in researching the systems effects of large scale AIDS funding and civil society access to AIDS funding in six African countries. He has published a number of articles and book chapters on programme evaluation methodology and has a strong interest in the utilisation of monitoring and evaluation in programme management and development. His research interests and projects include the role of M&E in HIV/AIDS programme development and integration at the local level.



**Zozo Mamabolo** - Events

Nokuzola (Zozo) Mamabolo is a founding member and Director of Goals And Performance Analysts (GAP) a consulting company that provides technical support and training in Monitoring and Evaluation, focusing on development of M&E systems and on conducting evaluations. Zozo has over the years trained and built capacity in monitoring and evaluation for several Government Departments and Civil Society organisations both in-country and in the Sub Saharan Region. With her national and international experience she has worked with organisations to conduct data quality self assessments and to develop systems for data quality strengthening.

Ms Mamabolo has previously worked for USAID for over ten years as Programme M&E specialist. It was with USAID that she established a career in Strategic Planning and Monitoring and Evaluation. Her skills are anchored by her Social Work and Community Development background (which honed her people-oriented approach. She has completed Certificate Programmes at St Xavier University – Coady Institute; Nova Scotia: People Centered Development and NGO Management Course (Canada) as well as the MEASURE Project – Performance Monitoring and Evaluation Course (North Carolina -USA). Zozo holds an M.A. degree in Social Work from the University of the Witwatersrand.



**Indran Naidoo** - Government and International Liaison

Mr. Indran Naidoo has a background in development studies, having completed an M.A. in rural development at West Virginia University, USA. He also holds certificates in education from Oxford and participated in the Senior Executive Programme between Wits and Harvard. He was awarded several academic scholarships, and is an Abe Bailey Fellow.

He was responsible for setting up the first M&E Directorate in the South African government at the National Department of Land Affairs in 1995. He is currently Chief Director: Governance Monitoring at the Public Service Commission, the oversight body of the SA Government. His responsibilities include

implementing the Public Service M&E System at the national and provincial level. Mr. Naidoo has had wide exposure to the international terrain in development studies and M&E, and has presented papers at several international conferences. He has supported the work that led to the formation of the African Evaluation Association from 1999. In 2004, he was co-Chair for the successful African Evaluation Conference, which was co-hosted between the Public Service Commission and the African Evaluation Association. He is a member of the M&E Task team, responsible for the implementation of the Government-wide M&E System.



**Marlene Roefs** - Communication -

Marlene Roefs embodies Social Dimensions, which is specialised in evaluation research. Besides providing assistance to the M&E Directorate in the Department of Land Affairs, she is conducting a process evaluation of WFP sponsored FIVIMS in South Africa, involved in the Lesotho Highlands socio-economic impact study of the dams, the World Bank service delivery Citizen Report Card study, and other evaluation research projects. She has a passion for local governance development and participatory survey research. Supported by the Human Sciences Research Council, UNDP and the University of the Free State she introduced a Community-Based Information System in Kopanong municipality.

Marlene received her PhD in Social Psychology (Free University, Amsterdam), which was awarded as the best thesis related to political science 2003/2004 by the Dutch Political Science Association.



**Bongani Magongo** - Standards and Quality Promotion

Bongani is a Senior Manager Monitoring and Evaluation for Umsobomvu Youth Fund. Over the past 20 years he has conducted a numerous research and evaluations for Government Departments, International Donor Funding Agencies, Non-governmental Organisations and the Private Sector across Southern Africa. His expertise in monitoring and evaluations includes designing M & E systems and operation procedures, developing M & E frameworks, developing monitoring indicators, designing and conducting evaluations.

Bongani holds a B.Sc in Public Health from North Carolina Central University in USA, MPH from the University of Witwatersrand, Johannesburg, South Africa and has worked for the Centre for Health Policy of the University of Witwatersrand, Health Systems Trust and Centre for AIDS Development Research and Evaluation (CADRE).



**Angela Bester** – Membership

Angela Bester is a Director of Deloitte Consulting and leads the Southern Africa practice in the area of Government Performance, which focuses on monitoring, evaluation and review of government strategies, policies and programmes.

Prior to joining the private sector, Angela held senior positions in the South African Public Service as well as in the NSW (Australia) Public Service. In these public services Angela accumulated a wealth of experience in public sector management, civil service reform and the broad spectrum of development issues (HIV & AIDS, social development, governance, land reform and criminal justice). Angela also held leadership positions in the Forum of South African Directors-General (FOSAD),

serving as a member of the Management Committee and Chairperson of the Social Sector Cluster. She represented the cluster on the President's Working Group with National Religious Leaders.

Angela also spent 3 years as Governance Adviser in the UK Department for International Development (DFID- Southern Africa), where she was responsible for leading the governance portfolio for South Africa, Lesotho and Botswana (SADC headquarters).

### **2.3. New Board Members**

Our articles of association call for board members to serve no more than three years concurrently and for some (at least three) to leave the board every year. This is intended to ensure that leadership is fresh, but, at the same time that there is some continuity.

The following board members have resigned from the board (effective March 31, 2007):

- Jennifer Bisgard
- Nokuzola (Zozo) Mamabola
- Bongani Magongo

SAMEA is holding its first election of board members which began with a drive to get SAMEA members to either nominate colleagues or themselves to serve on the board for 2007/8. Altogether there are nine nominations with five vacancies and members have been asked to vote on-line between March 16 and 26, 2007. The results of the election will be announced at the Annual General Meeting held on March 27, 2007 during the inaugural SAMEA Conference.

## **3. PORTFOLIO REPORT ON MEMBERSHIP**

- MS. ANGELA BESTER



### **3.1. PURPOSE OF THE PORTFOLIO:**

The purpose of the Membership portfolio is to build and maintain a vibrant membership for SAMEA. Importantly, SAMEA is striving to build a broad membership spanning a range of disciplines and inclusive of both the public sector and the private sector. We believe that this diversity in membership will contribute to a richness in ideas, stimulate debate on important issues in the M&E field and help to expand and deepen the knowledge base for M&E in South Africa.

Like many other voluntary organisations, SAMEA is only as strong as its membership. SAMEA relies on the fees from its members and contributions in kind in order to carry out its activities. The annual membership fee is R150 and is discounted to R60 for students who are enrolled at recognized higher education institutions. Some of the benefits our members derive include:

- Access to an international community of M&E practitioners
- Opportunity to participate in expert facilitated discussions
- Access to reserved resources on the SAMEA website
- Reduced rates to professional development events
- Notification of employment and contract opportunities
- Opportunity to advertise in the Directory of Services
- Special initiatives for students
- Right to participate in the affairs and decision-making processes of SAMEA

### **3.2. OVERVIEW OF KEY ACTIVITIES**

During the year under review SAMEA conducted the following key activities to build its membership:

- On-line membership application: We have aimed to make application for membership as easy as possible for prospective members and so we have introduced the SAMEA on-line membership application. This allows our prospective members complete and lodge their applications through the SAMEA website, making the application process more efficient.
- We have also used workshops and forums to promote SAMEA and encourage delegates to become members of SAMEA. The workshop held in August 2006 with Hazel Symonette, a prominent M&E practitioner from the United States provided an opportunity to promote SAMEA membership, though the number of delegates was relatively small.
- SAMEA Board Members through their networks actively encourage individuals to become members of SAMEA.

### **3.3. KEY ACCOMPLISHMENTS**

As at 23 February 2006, SAMEA had 303 registered members, of which 121 are fully paid up members. SAMEA has managed to attract a broad spectrum of members. Practitioners in the public sector, private sector and non-profit sector are well represented, as are academic and research institutions.

The majority of members are based in Gauteng, with smaller numbers in other provinces such as the Western Cape, KwaZulu-Natal and the Eastern Cape. SAMEA has also attracted a small number of members from other countries including Zimbabwe, Swaziland, Namibia, Botswana and Kenya.

### **3.4. LOOKING FORWARD**

The Inaugural SAMEA Conference will undoubtedly increase interest in SAMEA and we expect to see an increase in the membership following the conference. We will however need to be proactive in our approach to membership issues going forward.

Our goal for 2007 will be to increase the number and geographic spread of SAMEA's membership. In order to achieve this we will focus on the following key priorities:

- 1. Reactivate inactive members:** There are 182 lapsed members on our membership register and we aim to reactivate 66 percent of these. The majority are government officials who, with the Government's proposed policy on monitoring and evaluation, can be persuaded to reactivate their membership of SAMEA.
- 2. New membership drive to increase membership in other provinces:** In the medium-to- long term SAMEA would want to achieve a strong membership in all nine provinces. For 2007, the Membership portfolio will focus on two provinces for expanding its membership.
- 3. Enhancements to the membership database:** The current information system used by SAMEA to manage its membership database will be enhanced. This will enable SAMEA to maintain useful information about the membership and can assist in improving communication with members.

## 4. PORTFOLIO REPORT ON EVENTS

- MS. ZOZO MAMABOLO



### 4.1. PURPOSE OF THE PORTFOLIO:

SAMEA has several objectives, among which are the following:

- To provide a platform for interaction and information sharing among all those interested in Monitoring and Evaluation.
- To be a resource on Monitoring and Evaluation in South Africa.

In this regard, SAMEA has organized several events that has seen it progressively live up to the above objectives of providing a sharing platform and of becoming a resource on Monitoring and Evaluation.

The most important event will be the SAMEA Inaugural Conference where SAMEA has made possible a sharing and learning environment with speakers and professional development facilitators drawn from several countries and from different experiences in M&E. The success of this event is a result of unwavering hard work by the Directors, the conference will be a biannual event.

### 4.2. OVERVIEW OF KEY ACTIVITIES and KEY ACCOMPLISHMENTS

Where once M&E practitioners sought information in solitude and where once there was no active debate on ethics and standards, SAMEA has organised several events:

- In August 2006 SAMEA arranged workshops by Hazel Symonette. The workshops were held in Pretoria, Johannesburg and Cape Town. The workshops gave SAMEA presence as well as served the information needs of those who are practitioners and consumers of Monitoring and Evaluation services. To these workshops, SAMEA provided an opportunity for a vibrant discussion and review of the African Evaluation Association (AfrEA) evaluation standards, as a base for adaptation for own SA Practitioners' use.
- Statistics SA was invited to the same workshops to share with the M&E world of practitioners, some practical ways of accessing SA Census Data.
- SAMEA was invited to participate in a round table discussion on the Public Service Commission (PSC) State of the Public Service Report 2006.
- Praxis Computing / Tshikululu investments requested SAMEA members with Evaluation experience to assist with the first forum event to which Praxis invited some of their grant making clients to talk about M&E.
- Gauteng Chapter and Cape Town Evaluation
- SAMEA has attended several events to share information on its existence and objectives with students and to recruit for membership:

- University of Pretoria School of Public Health to address students -November 2006
- Government-wide Monitoring and Impact Evaluation Seminar for Policymakers ( June 2006)

### **4.3. LOOKING FORWARD**

Over the next year, the Events portfolio will do the pre-planning for the 2009 SAMEA conference, host the 2007/8 Annual General Meeting and promote SAMEA through public meetings and short courses, such as a two-day workshop by STATS SA on how to utilise data. SAMEA will also be encouraging the development of branches such as the SAMEA Gauteng and Western Cape branch and topical interest groups.

## 5. PORTFOLIO REPORT ON TRAINING

- MR. KEVIN KELLY



### 5.1. PURPOSE OF THE PORTFOLIO

The portfolio on education and training is oriented on the following goals to:

- Promote education and training in M&E;
- Monitor training standards and promote high quality of training;
- Make available information about M&E training initiatives;
- Promote specialisation in the field;
- Promote research into monitoring and evaluation and publication of the same; and
- Promote sharing of monitoring and evaluation experience through symposia and conferences.

### 5.2. OVERVIEW OF KEY ACTIVITIES

The following education and training activities have been conducted by SAMEA during its first year of operation.

#### **Workshops by Hazel Symonette**

In August SAMEA hosted three professional development seminars by Dr Hazel Symonette, from the University of Wisconsin. These were conducted in Pretoria (2 days), Johannesburg (1 day) and Cape Town (1 day), and were attended by a small but appreciative audience of about 20 people in all. The theme was “Cultivating Self as a Responsive Instrument” and the workshops focused on monitoring and evaluation of tertiary institution diversity programmes. Dr Symonette’s inspiring embodiment of a creative and person-centred orientation to evaluation practice were a fitting launch activity for the training programme of the new association.

#### **Training Endorsement**

The SAMEA Board has been approached on a number of occasions by agencies wishing to have their training programmes endorsed. The Board went so far as to develop a rating process for evaluating the quality of course outlines and curricula, but discontinued discussions in this area when it became apparent that there was need for much more groundwork before meaningful progress could be made. It became increasingly clear that SAMEA needs to clarify its mandate in this area. Whereas it is strongly interested in promoting high standards in the field it is not necessarily and appropriate accreditation or regulatory authority. It was resolved that SAMEA would need to conduct an assessment of education and training in the M&E field and to take stock of the perspectives of the various institutions involved before it goes further with this initiative. Until this is done SAMEA will promote education and training but will steer away from endorsing or accrediting particular programmes. In regard to the conference professional development training programme, there was a call for proposals and submissions were selected for inclusion in the programme

by a process of peer review using specific criteria, which were defined with reference to the objectives of the conference.

### **Preparation for SAMEA Conference**

Preparations for SAMEA's inaugural conference in March 2007 have been a major activity of SAMEA during the latter half of 2006 and in early 2007. The 'Evaluation in action' conference is SAMEA's first major public showing and it is expected that its success will greatly boost the profile and status of SAMEA in South Africa.

Planning for the conference has involved extensive commitments of time and resources on the part of the SAMEA board. The conference has also involved a number of volunteers and has led to SAMEA securing the services of its first paid assistant, who has been drawn-in specifically for assisting with the conference.

The conference will be preceded by a professional development programme including 18 training workshops on a range of topics from introductory to more specialised issues. The main conference programme includes oral and poster presentations, panel discussions and key-note addresses. The theme of the conference is 'Evaluation in action'. Within this broad theme the conference is focused on: utilisation of evaluation practices and findings in programme development, management and implementation; knowledge management within organisations and programmes; the challenges of building evaluation systems for tiered, multi-sectoral and multi-partnered programmes; and building evaluation capacity.

Links with various public agencies including the Public Service Commission, Statistics South Africa and the South African Management Development Institute have been established through the conference.

### **5.3. KEY ACCOMPLISHMENTS**

SAMEA set out to be a resource for education and training in M&E in South Africa. We hope that we have shown to our membership that we are serious about providing opportunities in this area.

Preparation for the first South African monitoring and evaluation conference has been no small feat on the part of the organizing committee. The conference has greatly increased the profile of SAMEA, nationally and internationally. Our membership has grown notably through conference publicity and we believe that conference will be a significant boost to our attempts to build a South African community of practitioners. We have been greatly encouraged by the well wishes and support from sponsors and supporters. We believe that the conference is an historic moment in the development of M&E in South Africa and we expect it will provide a major impetus to growth and consolidation in the area.

## 5.4. LOOKING FORWARD

After the conference, SAMEA will need to look to a number of issues that are growing in importance and about which the board has already had discussions.

- **Review of M&E training:** SAMEA is frequently approached with requests for information on training opportunities in M&E. It will be important in the year ahead to review what training opportunities are available in South Africa. This review should look at the content of curricula and assess coverage of specialized areas. On the basis of this SAMEA will be in a position to take a more active role in guiding professional development in M&E.
- **Standards:** There are a good many practitioners and institutions offering training in M&E and SAMEA has been approached by a number of them enquiring about having their training programmes endorsed by SAMEA, or seeking advice on accreditation of their programmes. This is an important issue and SAMEA needs to decide what role it should adopt in this area. It is hoped in the year ahead that SAMEA will establish a task group which will engage with other key actors in this area, in the interest of promoting high standards in M&E practice and training. The halted 'endorsement of training' discussions that the SAMEA board engaged in will need to be resumed, but working with other institutions. Our ultimate role in this area will have to emerge from these discussions.
- **Professional Development Opportunities:** SAMEA is committed to understanding and responding to the professional development needs of its members. SAMEA never intends to be a training institution itself, but to promote and host training programmes provided by others. The type of programmes which we will host in the year ahead depend in large part to what we learn from the conference about the professional development needs of our members and from the review of training mentioned above. SAMEA is conducting an evaluation of the conference and it is hoped that from this we will gain a better understanding of what we should focus on. The conference will also provide a valuable opportunity to take stock of what other agencies and institutions are doing to promote education and training in M&E and standards enhancement.
- **Open Learning Opportunities:** As well as facilitating training opportunities we hope in the year ahead to use the internet to a greater extent for professional development purposes. This will include focused internet discussions on topical issues. We also plan to promote the further development of SAMEA chapters and special focus groups, which will draw attention to the need for professional development in specialised areas of our discipline.
- **SAMEA 2 Conference:** The board will start planning for its next biannual conference to take place in 2009, building on the experience gained in the March 2007 conference

## 6. PORTFOLIO REPORT ON COMMUNICATIONS

- DR. MARLENE ROEFS



### 6.1. PURPOSE OF THE PORTFOLIO

An important task of the SAMEA's Communications Portfolio and one of the priority tasks of the Association is to publicise the existence of the Association amongst potential members and promote subscription to the Association. These 'marketing' efforts target the public, private, civil society, research, and academic sectors first in South Africa and subsequently in the region.

In addition to presenting SAMEA, the portfolio facilitates internal communication. This entails providing and maintaining proper information systems. This function is shared with the Secretariat, which dissolved when the responsible Board Member resigned.

However, the portfolio's main aim is to stimulate interaction among users and practitioners of M&E and sharing of relevant M&E information with colleagues within South Africa, in the region, and beyond. Indeed, one of the key objectives of the Association is to provide a platform for interaction and information sharing among all those interested in monitoring and evaluation. The portfolio plays a critical role in such a catalyst function of the Association. For this purpose the portfolio's objective is to provide a valuable resource on monitoring and evaluation in the region.

### 6.2. OVERVIEW OF KEY ACTIVITIES

For the promotion of SAMEA, internal communication, and sharing of information to take effect, the portfolio with the invaluable assistance of the Secretariat, developed first an ICT infrastructure consisting of the following components:

- Development of data bases on resources and (potential) members;
- Development of communication channels between Board members via Yahoo and Google groups;
- Setting up of a SAMEA listserv – *SAMEAtalk* – for members and non-members; and
- Design and development of web portal developed by Development IT Solutions based on open source software only.

While refining this infrastructure, the focus has shifted to attracting people to the website and to the *SAMEAtalk* listserv. In addition to these electronic communication tools, flyers have been developed and distributed to promote SAMEA and the Association's events.

The third step in getting closer to becoming an information resource of note is to generate, collect, organize, disseminate, debate and evaluate information on M&E. Thus far, activities engaged in include the population of the website with interesting papers, evaluation guidelines and useful links as well as announcements of job opportunities training and other M&E events. The latter are also being distributed through the *SAMEAtalk* listserv.

### 6.3. KEY ACCOMPLISHMENTS

Not so much an accomplishment of the portfolio itself but an important output is the SAMEA website one can visit at <http://www.samea.org.za>. The website is an interactive web portal which has been developed by using open-source software only. We thank Bert Roefs from Development IT Solutions for assisting us unselfishly with highly professional services.

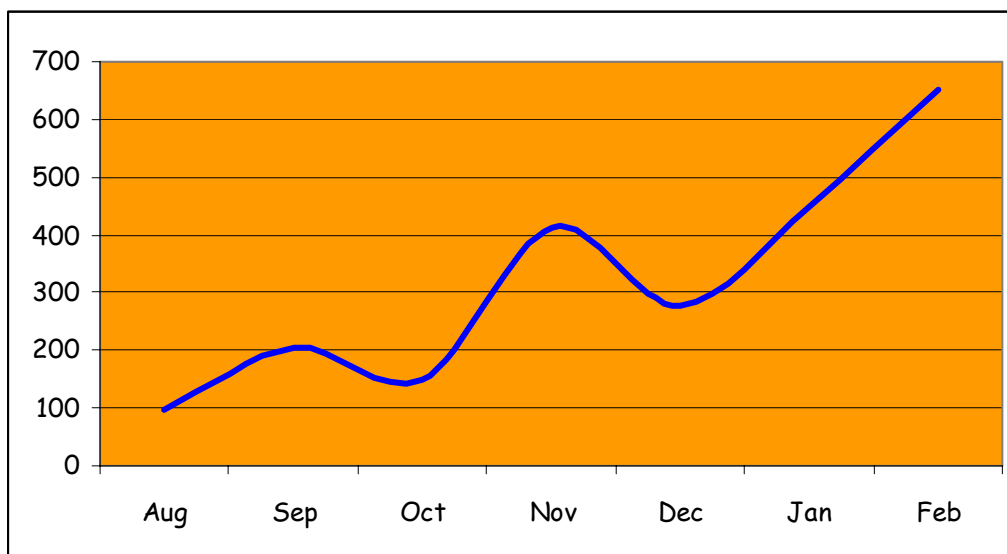
Amongst other features, the portal includes:

- notification of conferences, training and other professional opportunities;
- a repository for standards of practice, guidelines, tools, bibliographies, and links to resources; and
- a directory of practitioners / expertise linked to that of the African Evaluation Association.

Visitors can download these resources, whereas members are also allowed to add to them.

The portal was launched in July 2007 during the Government-Wide Monitoring and Impact Evaluation Seminar for Policymakers at Pretoria held in June 2006. This event offered access to government, international donor agencies and academic and research institutions. The approximately 200 participants were informed about SAMEA's objectives and among other things how to communicate with the organisation.

The graph below shows how hits to our site have increased over the past 6 month (from August 2006 to February 2007). About half of these are 'new' visits. Although the total number of visits is not that high, the graph shows a promising increase over time.



**Figure 1: SAMEA web portal Visits from August 2006 to February 2007.**

The decrease in visits over December clearly relates to reduced work-related internet traffic over the festive season. The reason for the decrease in October, however, is less obvious.

Another major achievement has been the setting up and activation of SAMEAtalk. SAMEAtalk allows one to communicate with colleagues, share interesting information, advertise employment opportunities and promote training courses and other activities of interest to the evaluation community in South Africa. A weekly update on training and job opportunities and other M&E news is being sent out. These messages are being received by approximately 120 SAMEAtalk members (117 at 25 February 2007). However, members are only just beginning to use SAMEAtalk as a platform for discussion and gathering information.

## **6.4. LOOKING FORWARD**

Having the communication infrastructure in place, we can focus on appropriate maintenance of the infrastructure and improvements in the system. This will require administrative support in the form of Secretariat and securing finances for IT maintenance services.

A second key area for improvement relates to the quality and quantity of information SAMEA shares via the web portal, SAMEAtalk listserv but also through more direct interaction with M&E users and practitioners. Topical Interest Groups (TIG) and or Key Information Areas could be formed around which SAMEA focuses its information organisation and dissemination. The Inaugural Conference serves as a first barometer and opportunity to form such clusters of topics and content.

In accordance with the objectives of SAMEA, however, (1) monitoring and evaluation approaches and methods suitable to a South African and development context, (2) post-graduate education and continuing professional development, and (3) understanding of international developments and trends in monitoring and evaluation form overarching areas of interest.

Typical means to promote information sharing that will be further developed over 2007/2008 include:

- Quarterly online newsletter on development in M&E in South Africa, including reports on SAMEA activities, Chapter meetings and other events.
- “Fast Facts for Evaluation Role Players” which delivers bite-sized pieces of evaluation information on a daily basis via SAMEATalk. These snippets could web-referenced for more detailed information.
- Engagement with print media and quarterly inputs on M&E praxis in South Africa and the region.

Thirdly, action will need to be undertaken by the Communications portfolio to promote interaction between M&E practitioners and users. One way of doing that is through providing comments on Fast Facts by SAMEA Board members and others invited by the SAMEA talk moderator. This will likely stimulate debate. In addition, invitations to more actively use the website will be sent out to relevant organisations and individuals, while Board and Chapter members will need to lead by example. In addition to the electronic media, the print media will be invited and lobbied to print relevant discussion on a regular basis.

## 7. PORTFOLIO REPORT ON STANDARDS AND QUALITY PROMOTION

- Mr. BONGANI MAGONGO



### 7.1. PURPOSE OF THE PORTFOLIO:

Is to assist in the establishment of processes through which the quality, professionalism and ethics of monitoring and evaluation in South Africa can be enhanced, including further development of guidelines, principles and acceptable frameworks to be used by evaluators when conducting evaluations.

### 7.2. OVERVIEW OF KEY ACTIVITIES

#### Seminar on standards and ethics

The SAMEA Evaluation standards and ethics Seminar was held on the 3<sup>rd</sup> August 2006 at the HSRC Building in Pretoria. The aim of the seminar was to kick-start the process of debating and laying a foundation for establishing standard and ethics guidelines for African evaluators. The seminar presented the following areas:

1. Evaluation resources/census community profile software from STATS SA: this discussion was led by Mr. Edroy Christians from STATS-SA
2. International experience on ethics and standards: this discussion was lead by Dr. Hazel Symonette from the University of Wisconsin, USA
3. African evaluation guidelines – standards and ethics: this discussion was led by Mr. Bongani Magongo SAMEA Board Member and Senior Manager Monitoring and Evaluation at Umsobomvu Youth Fund

The seminar took a form of interactive discussions where participants and facilitators debated and discussed these concepts and issues.

#### Review of the African Evaluation Guidelines (AEG) 2006/7 version.

A Team of thirty African evaluators was selected to meet and review the 2002 version of the African Evaluation Guidelines in Niamey, Niger in October 2006. The SAMEA Board member responsible for standards and ethics Mr. Bongani Magongo represented SAMEA in the expert group review team of AEG meeting. The review team discussed and reviewed the guidelines under the following broad questions:

1. What are the main obstacles to quality and useful evaluations in Africa?
2. Are the current AEG categorisation in 4 broad principles (utility, feasibility, propriety, accuracy) take into sufficient account the obstacles experienced by African evaluators?
3. Would a systematic implementation of the AEG (current version) by all evaluation's stakeholders be sufficient to avoid obstacles to quality and usefulness?
4. How to better ensure AEG's appropriation and institutionalisation in Africa and within international development partners' community?

A subcommittee made of Mr. Moctar Sow from Senegal, Mr. Bongani Magongo from South Africa and Mr. Greenwell Mukwavi from Zambia were tasked to finalize the guidelines and make it available for discussion and adoption during the 2007 African Evaluators Association Conference held in Niamey, Niger. This task was completed in January 2007 and a revised version of the guidelines was submitted to AfrEA for translation into French and other languages recognized by AfrEA.

To note, the following recommendations were made by the expert groups to national associations affiliated to AfrEA on how they can apply the guidelines during evaluations.

- Each association or national network must discuss the AEG and provide feedback to AfrEA.
- Each association or national network must apply the AEG when conducting evaluations and share their outcomes with AfrEA.
- National associations or networks must use all available channels of communication that exist in their country for promote the use of the AEG when conducting evaluations.
- National associations and networks must develop a list of evaluators who apply the AEG when conducting evaluations at to promote the use and share experiences of using the guidelines.

### **7.3. KEY ACCOMPLISHMENTS**

A successful seminar was held in Pretoria on standards and ethics with attendance of more than 30 people to kick start the debate on standards and ethics of evaluations in South Africa. This debate, however, needs to be intensified.

SAMEA has been able to contribute substantially in the revision and drafting of the current African Evaluation Guidelines. The guidelines need to be shared widely with SAMEA membership.

### **7.4. LOOKING FORWARD**

- Efforts must be made to plan regional workshops on standards and ethics using the Provincial SAMEA chapters meeting.
- Evaluation guidelines, standards and tools for measurements must be included in M & E training programs as to standardize evaluation practice in South Africa.
- The current AEG needs to be adapted to suit local context and practice; this can be achieved through dialogue amongst SAMEA members and evaluators in general in the country.

## 8. PORTFOLIO REPORT ON INTERNATIONAL AND GOVERNMENT LIAISON

- MR. INDRAN NAIDOO



### **8.1. PURPOSE OF THE PORTFOLIO:**

The primary purpose of the portfolio is to increase the exposure of SAMEA to the international M&E community, and to the government M&E sector in South Africa. This aims to increase the profile of South African M&E internationally in order to enhance collaboration and the sharing of expertise. M&E has now become a priority of government and SAMEA supports this emerging community of practitioners by providing training and networking opportunities. This is important in a context like South Africa where M&E is relatively new, and where there are high expectations as to what it can do to drive the transformational agenda of government. It is thus critical that M&E is practiced ethically, correctly and strategically.

The execution of this portfolio is directly relevant to the objectives set out for SAMEA. This has been realised through increasing the membership of SAMEA from the government sector. In this regard it has also provided a very important resource for developing the practice of M&E in the country. Through several presentations made internationally on M&E in the South African government, interest in what is being done here has been ignited, resulting in useful networks and collaboration. These presentations have helped to gain critical insight into our systems, and these have been incorporated into system design and implementation.

M&E in South Africa is now clearly recognised internationally as making a meaningful contribution to accountability, transparency and learning in government. It's more immediate impact has been the provision of a home for M&E practitioners in the country, where they can feel supported as they go about setting up and implementing M&E systems in their departments.

### **8.2. OVERVIEW OF KEY ACTIVITIES**

#### Increasing membership of SAMEA from the government sector

The key forums responsible for M&E in government were identified where SAMEA information was distributed. This was done at both the national and provincial level. In addition, at several of the presentations made by the PSC, reference was made to SAMEA, what it stood for, and the benefits of membership. These meetings have generally been well-attended by high profile individuals responsible for M&E.

#### Presentations made internationally over the reporting period.

Presentations were made at the following key international forums which explicitly referred to the role played by SAMEA in supporting the development of M&E in South Africa. PSC officials attended the following conferences.

- *The Malaysian Evaluation Association Conference*, Kuala Lumpur, Malaysia, March 2006. A paper was presented by Director-General of the PSC, Ms. Odette Ramsingh and Mr. Mashwahle Diphofa, Deputy-Director-General: M&E.
- The *Sussex Development Evaluation Seminar* held at Sussex University, United Kingdom, October 2006. Presentations by Director-General of the PSC, Ms. Odette Ramsingh and Mr. Indran Naidoo, Chief Director: Governance Monitoring.
- The *United Kingdom/European Evaluation Association Conference*, London, October 2006. Two presentations were made by Mr. Indran Naidoo, Chief Director; Governance Monitoring.
- *The African Evaluation Association Conference*, Niger, January 2007. This was attended by Commissioner N.X. Diseko, Mr. Sifiso Ngema (Director) and Dr. Sefiso Khumalo (Deputy-Director).

#### Presentations made in South Africa

The work of SAMEA was also profiled at the following conferences and seminars.

- The 2<sup>nd</sup> Senior Management Conference, Free State, 30 August 2006
- The National Research Foundation, March 2006
- The Department of Public Service and Administration Service delivery Summit, July 2006
- Monitoring and Impact Assessment Seminar, 19-23 June 2006
- The Monitoring and Evaluation Task team (management structure for the roll-out of the Government-wide M&E System)
- Several of the PSC reports that were presented to the Legislatures and departments made mention of SAMEA
- The Human Resource Development Conference: Correctional Services, March 2007

#### Co-hosting of the Inaugural SAMEA Conference

- The Public Services Commission (PSC), in collaboration with its Donor partner, the GTZ, decided to co-host the Inaugural Conference of SAMEA. In addition to providing direct funding (R200 000 from the GTZ and R50 000 from the PSC), the PSC also brought in the South African Management Development Institute (SAMDI) as a “in-kind” sponsor.
- This event will prove to be a catalyst to draw in more of the government sector, which is expected to be well represented at the Conference.
- The inputs from government have been co-ordinated from this Portfolio.
- The PSC has also invited members of the Portfolio Committee on Public Administration to this Conference.

In addition to the PSC/GTZ funding, donations for the SAMEA Inaugural Conference were gratefully received from the Zenex Foundation and the Development Bank of Southern Africa (DBSA).

### **8.3. KEY ACCOMPLISHMENTS**

The key accomplishments have been in ensuring that SAMEA is a credible and known player in M&E in the government sector. This sector looks upon SAMEA to provide professional support and advice as required. The support given for the co-hosting of the Inaugural Conference may be considered a highlight.

## **8.4. LOOKING FORWARD**

The main objectives for 2007 will be to:

- Develop provincial government M&E networks, that can link to regional and provincial chapters;
- Support platforms where M&E findings can be disseminated and debated;
- Set up an M&E in government link on the SAMEA website, which will contain key M&E reports from this sector; and
- Increase exposure of SAMEA to the international community.

## 9 PORTFOLIO REPORT OF THE SAMEA TREASURER

-Ms. BENITA VAN WYK



### 9.1 PURPOSE OF THE PORTFOLIO:

This portfolio is critical in ensuring that sufficient funds are available for carrying out the SAMEA mission and to ensure that good governance in as far as financial control is maintained.

### 9.2 OVERVIEW OF KEY ACTIVITIES

**Developing, Implementing and Maintaining systems for good financial control.** Procedures for purchase orders, invoicing and refunding of expenses incurred on behalf of SAMEA was developed, implemented and used throughout the year.

**The treasurer ensured that SAMEA complies with Companies Act and other financial requirements** by maintaining financial records in accordance with GAAP. *Megan Els Accountants* volunteered time to keep the financial records of SAMEA up to date and Audited financial statements for the financial year ending 28 February will be available by the end of April 2007. SAMEA is also registered for e-filing with SARS and submitted its tax returns in accordance with SARS requirements. SAMEA has applied for tax exemption.

SAMEA was incorporated as a section 21 company and registered with CIPRO.

After the resignation of some board members and the appointment of replacement board members, the company registration documents lodged with CIPRO was appended.

**Developing, implementing and maintaining systems for receiving and disbursing funds from South African and International sources.** In order to keep costs as low as possible, a basic current account is held with Investec Bank in the Name of SAMEA. Most of the receipts are currently received via electronic transfer into the SAMEA account, or via bank deposit at any ABSA branch. For international receipts, electronic transfers via SWIFT has been arranged. A continuing challenge is reconciling payments reflected on the bank account with individual members if proof of payment is not sent through by the depositor. High administrative costs on effecting international transfers are also a challenge. Options for incorporating more flexible payment approaches at minimal cost need to be considered in future.

**Developing strategies for fund-raising.** Fundraising is currently linked to specific projects. Seminars, and the upcoming conference is expected to build the profile of SAMEA and provide a source of revenue which will be used to fund operational costs of the organisation, and make it easier to embark on more projects. Sponsorships for the conference have allowed SAMEA to pass on significant saving to its membership. We hope that more sponsors would agree to get involved with the important activities of SAMEA.

In the past year, some of the operational costs (e.g. making photocopies for board meetings, telephone costs, mail and postage) were financed from membership fees. The organisational expenditure is kept as low as possible by seeking zero-cost solutions where possible. In-kind contributions from board members and their employers / organisations are however very key in keeping costs low: volunteer time, free venues, providing basic organisational infrastructure and ad hoc expenses are often carried out of the pockets of the board members or provided in-kind by their organisations. On the long term this is not a sustainable fundraising strategy. It is expected that as the organisation becomes more established, SAMEA's organisational resources would expand to meet the service expectations of the membership.

**Contracting with service providers, sponsors etc.** SAMEA keeps contracts with all of its consultants (e.g. admin support for seminars and the conference) which clearly stipulates the outputs required, quality standards, expected timelines for delivery and payment terms. Written agreements with all sponsors are also kept in place where mutual expectations and benefits are clearly delineated.

**Custodianship together with the Chairperson and Deputy Chair over the SAMEA financial resources.** The SAMEA chairperson and SAMEA treasurer have dual signing rights on the SAMEA account, and the SAMEA deputy- chair makes up the third person with fiduciary responsibility as stipulated in our founding documents. Bank statements are reviewed periodically and financial statements are periodically presented to the whole board.

**Fielding queries from members about payment procedures.** Since the resignation of the secretary "Proofs of payment" are received by the treasurer and queries with regards to payments are fielded. These queries are often just to confirm information already on the website and on the documentation sent to members, but still amounts to a significant amount of calls per month.

**Responding to requests for registering on Supplier Databases.**

Particularly since SAMEA announced its intention to host a conference, the number of requests from government departments and other organisations to register on their supplier databases have increased significantly. SAMEA has obtained the necessary tax clearance certificates, bank reference letters, ID documents from directors, and completed registration forms for approximately 20 databases. This tedious administrative task takes up a significant amount of volunteer time since each database registration form is different and requires a bank stamp. In some instances the forms requires a signature in front of a commissioner of oaths.

### **9.3 KEY ACCOMPLISHMENTS**

Provide here anything that your portfolio achieved in 2006 that members should take special note of.

- SAMEA has been successful in attracting sponsorships for the 2007 conference.
- Networking with potential funders on behalf of SAMEA was done at the AfrEA conference in Niger in January 2007.
- Being able to run the treasury portfolio at no cost to SAMEA by recruiting a volunteer to take care of accounting and auditing.

## **9.4 LOOKING FORWARD**

Over the next year, the following are the priorities:

1. A sustainable funding strategy should be developed and actively pursued by the whole board. Soliciting funding from donors based on projects is likely to be the most sustainable strategy. Partnerships with government departments and other organisations should be actively pursued in order to ensure that the organisational infrastructure is available.
2. Good governance and custodianship over the funding should be maintained, and communicated to the membership. Keeping membership fees as low as possible should allow
3. A solution for making regular and dependable administrative support available to the organisation would ensure that SAMEA can deliver the levels of service expected from a professional organisation. Interruptions in availability and lack of accountability are often associated with volunteers and would continue to impact on SAMEA's ability to deliver on its commitments.