



planning, monitoring
& evaluation

Department:
Planning, Monitoring and Evaluation
REPUBLIC OF SOUTH AFRICA

TERMS OF REFERENCE

FOR

REVIEW OF THE NATIONAL EVALUATION POLICY FRAMEWORK

21 MAY 2024

1. INTRODUCTION

Twende Mbele is a multilateral peer-learning initiative between six (6) African countries (Benin, South Africa, Uganda, Kenya, Ghana and Niger) and two regional partners (The Centre for Learning on Evaluation and Results, Anglophone Africa (CLEAR-AA) and the Independent Evaluation Unit of the African Development Bank [IDEV]). The core aim of Twende Mbele is to develop, strengthen and sustain public sector performance monitoring and evaluation systems that improve development policy and programme performance.

Twende Mbele and the Department of Planning, Monitoring and Evaluation (DPME) are collaborating to undertake a review study of the 2019-2024 National Evaluation Policy Framework (NEPF). The aim of the review is to assess the effectiveness, relevance and impact of the 2019 NEPF and provide recommendations for updating and strengthening the 2025-2030 NEPF. The review process recognises changing context, evolving and innovative evaluation approaches as well as practices within the evaluation ecosystem. The review will identify areas of improvement, alignment with current needs and objectives and enhance transparency and accountability in decision-making processes.

2. BACKGROUND

The 1st NEPF was approved by Cabinet in 2011. The policy framework was developed with the determination of (i) foreground importance of evaluation, (ii) institutionalise evaluation system across government linking it to planning and budgeting, (iii) provide a conceptual base for evaluation in government, (iv) outline the roles and responsibilities; (v) improve the quality of evaluations and promote utilisation of evaluation findings and recommendations to improve performance. Since then, a number of evaluation projects assessing government programmes, plans and projects have been implemented.

In 2017/18, the DPME undertook an evaluation of the National Evaluation System (NES) to assess whether the NES had an impact on the programmes and policies evaluated and to determine how the system needs to be strengthened. The evaluation recommendation included a need to strengthen the evaluation mandate, making sure budgets are available for evaluations, capacity development, managing and tracking

evaluations; as well as enhancing the use of evaluation results through communication and improvement plans.

The recommendations from the evaluation of the NES, informed the review process of the NEPF of 2011. The revision was further necessitated by the need to align and assess prevailing challenges informed by performance monitoring information, government priorities and the Medium-Term Strategic Framework (MTSF). Further, a need to incorporate new knowledge, insights and best practices, to strengthen the system and inform institutional changes were identified.

The current NEPF of 2019 in pursuance of strengthening the NES, provides minimum standards for evaluations across government, it is applicable to all three spheres of government and other government components as listed in Public Service Act (PSA) (1994) and Chapter 9 of the Constitution of the Republic of South Africa (1996). The policy further outlines the types of evaluation and their applicability, introduces new evaluation approaches such as sectoral reviews, rapid evaluation and gender responsive evaluations.

As the 2019-2024 government planning cycle comes to an end, DPME is committed to reviewing and revising the policy framework. This review aims to assess the implementation of the policy framework and its effectiveness in improving the delivery of government programmes, projects and interventions in an efficient and impactful manner.

3. PURPOSE OF THE ASSIGNMENT

The purpose of the review study is to understand whether the 2019 National Evaluation Policy Framework (NEPF) is relevant, effective and promotes credible as well as quality evaluations aligned to government goal of assessing performance of programmes, plans and projects. This review study will inform the updating and strengthening the NEPF to better meet the evolving needs, innovations and challenges in evaluation practices.

4. OBJECTIVES

The review of the NEPF seeks to:

- Determine the relevance and alignment of the policy to the current evaluation practices, inclusive of greater use of information communications technologies (ICTs) and the Fourth Industrial Revolution (4IR) innovations.
- Assess whether the policy is achieving its intended outcomes, objectives, and identifying gaps. This includes assessing the extent to which the NEPF has contributed to greater appreciation, production, demand and use of evaluations in public sector planning, budgeting and forecasting of development trajectories.
- Incorporate feedback from stakeholders responsible for implementing the policy (national and provincial public institutions, SOEs and local governments).
- Integrate best practices and innovative approaches into the policy to ensure its effectiveness and efficiency.
- Strengthen the NEPF to better meet the evolving needs and challenges in evaluation practices.

5. STUDY PHASES, ACTIVITIES AND DURATION

PHASE	ACTIVITIES	DURATION
Project Inception	<ul style="list-style-type: none"> • Inception Meeting between Twende Mbele, DPME and the Service Provider to engage and clarify expectations for the project. 	2 nd week June 2024.
	<ul style="list-style-type: none"> • Development of Inception Report (including costed project plan of the deliverables and dates). 	3 rd week June 2024
	<ul style="list-style-type: none"> • Approval of the Inception Report 	4 th week June 2024
Review of Best Practices	<ul style="list-style-type: none"> • Research and analyse best practices in evaluation policy from other countries or organisations to identify 	1 st – 2 nd week July 2024

	innovative approaches and lessons learned that could be applied to the National Evaluation Policy Framework (NEPF).	
Literature Review and Analyse	<ul style="list-style-type: none"> Collect key grey literature from the sampled government institutions that are key stakeholders in the National Evaluation System Collect and review evaluation reports, performance data, other relevant information to assess the impact and effectiveness of the current policy in achieving its objectives. 	3 rd – 4 th week July 2024
Stakeholder consultations	<ul style="list-style-type: none"> Develop data collection instruments and approval 	1 st week August 2024
	<ul style="list-style-type: none"> Meetings, focus groups or surveys to gather inputs from stakeholders on their experiences with the current policy, areas for improvement and emerging trends in evaluation practices 	2 nd – 4 th week August 2024
Engagement with Expert	<ul style="list-style-type: none"> Consultation with evaluation experts, researchers and practitioners to get their insights on the strength and weakness of the current policy and recommendations of enhancements. 	1 st – 2 nd week September 2024.
Analysis and reporting	<ul style="list-style-type: none"> Data Analysis Draft Report (with recommendations for updating and strengthening the NEPF to better meet the evolving needs and challenges in evaluation practices) 	3 rd – 4 th week September 2024

Validation workshop	<ul style="list-style-type: none"> Engage with stakeholders to source inputs into the draft report. 	1 st week October 2024
Revised report	<ul style="list-style-type: none"> Revised draft report incorporating inputs received. 	2 nd week October 2024
Final Report	<ul style="list-style-type: none"> Approval of the final Report 	3 rd week October 2024

The project is expected to be completed within 5 months from the date of appointment by Twende Mbele.

i. Minor deliverables:

- Development of Proposal, (inclusive of a detailed costing plan)
- Consultation and Approval
- Inception report (inclusive of methodology and work plan)
- Best practice benchmark report on Evaluation Policies continentally and internationally.
- Stakeholder and experts mapping report for consultations
- Draft review report with recommendations on sections to be amended/added in the National Evaluation Policy Framework (2019), post consultations and interviews.

ii. Major deliverables:

- Data Analysis and draft Review Report
- Revised Review Report on key amendments and recommendations for the NEPF (2024-2029)
- Approval of the final report

6. STRUCTURE OF THE REPORT ON AMENDMENTS TO NEPF (2019)

Section 1: Background and Introduction to the Policy Review Report. This chapter provides a background, aim and purpose of the National Evaluation Policy Framework.

Section 2: Methodology. This chapter provides a systematic approach used to conduct the review. It outlines the principles, procedures and techniques employed in

gathering and analysing data as well as the justification behind the choices of the methodology.

Section 3: Critique of NEPF (2019) vis-à-vis its objectives and current trends in evaluation practice. This section of the policy review report analyses the extent to which the NEPF (2019) has achieved its objectives. Furthermore, the section assesses the extent to which the 2019 NEPF is consistent with key innovations and developments in evaluation practice in the dynamic post-2020 international and domestic governance and development environment.

Section 3: Best Practices Review and Adaptation. This chapter reviews and recommends the adoption of best practice from other international monitoring and evaluation policies.

Section 5: Findings, Conclusion and Recommendations. This Chapter will draw findings from all the data that was collected and analysed. These findings will be clearly outlined and categorised into themes. The chapter will also conclude on the main findings of the study and identify key lessons to inform how National Evaluation Policy Framework (2024-2029) can be revised to achieve its intended objectives for the next five-year term. Thereafter recommendations will be drafted in a simpler, and straightforward manner to ensure that they are implementable in order to provide clear guidance on what the NEPF Review Study seeks to achieve.

7. Responsibilities

7.1. Responsibilities of the Service Provider:

- Update the Twende Mbele and the Department of Planning, Monitoring and Evaluation (which is the Steering Committee of this review study) of the contents and development of the work, delivery of products and reports.
- Respond to any request for additional information that Twende Mbele and DPME deem necessary for effective supervision of the work carried out.
- Request in advance the information that, in addition to that provided, the service provider consider relevant to effectively fulfil their responsibilities.
- Inform Twende Mbele and DPME of any circumstances that could compromise the smooth running of the review study.

- Maintain at all times an attitude of commitment and respect with the people participating in the process.

7.2. Responsibilities of Twende Mbele and DPME

- The Twende Mbele Secretariat and DPME (represented by their Programme Managers) and other Technical Management Committee country representatives will serve as the Steering Committee for this review study (NEPF)
- The Twende Mbele Secretariat and DPME Programme Managers have the responsibility of maintaining dialogue with the service provider for the duration of the study assignment
- Twende Mbele Secretariat will carry out administrative and financial tasks relating to this review study (NEPF)
- Twende Mbele Secretariat, DPME and the steering committee will review and provide technical inputs to draft reports and revert within five days from the date of confirmation of receipt of such drafts
- Twende Mbele Secretariat and DPME will ensure that the products delivered are of quality and meet the requirements established in these Terms of Reference

8. CONDITIONS OF THE CONTRACT

- The execution of the contract will cover a period of 5 Months from the date of the appointment of the Service Provider.
- The outputs of this review study (NEPF) will be the intellectual property of DPME and Twende Mbele. All publications emanating from this review study are to be the intellectual property of DPME and Twende Mbele.

9. EXPERIENCE AND QUALIFICATIONS OF THE PERSON'(s) SOUGHT

The service provider should possess the following qualifications and experience:

- **Qualification:** A Master's degree in evaluation or research, social science, development studies, or related field. A PhD qualification will serve as an advantage.

- **Experience:** Must have five (5) years' total work experience in evaluations or research. Has worked on at least 3 evaluations of any value and played a lead evaluator role in at least two (2) evaluations.
- Must have **strong understanding of the National Evaluation System.**
- Demonstrate **facilitating stakeholder and expert engagements**
- Good **analytical, writing and communication skills**

10. SUBMISSION OF OFFERS (documents to be submitted by interested parties)

- CV's including copies of qualifications
- 2-page essay on the value of the National Evaluation System and the National Evaluation Policy in South Africa.
- Example of past evaluation report by the applicant (evaluation study for the government will be a key advantage)
- Financial proposal (costed work plan)

Please send your applications to the Programme Manager, **Dr. Ayabulela Dlakavu**
 Email: ayabulela.dlakavu@wits.ac.za and copy **Ms. Nosibabalwe Socikwa** Email:
 nosibabalwe.socikwa@wits.ac.za. **Submission deadline is 31 May 2024.**

11. CRITERIA FOR ASSESSING APPLICATIONS

- Meeting the experience and qualifications required.
- Quality and relevance of the proposed methodology and approach
- Understanding of the purpose and objectives of the review study
- Cost-effectiveness of the proposal with a costed project plan
- Experience working with either Twende Mbele or/and the Department of Planning, Monitoring and Evaluation.
- Being familiar with the National Evaluation Policy, 2019 and the South African National Evaluation System.