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Institutionalising the evaluation function: A South African study of impartiality, use and cost

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ABSTRACT

Purpose: This article explores the implications of outsourcing the evaluation function in South Africa, a context where there is a mismatch between evaluation supply and demand. It unpacks the tradeoffs between internal and external evaluation, and challenges some commonly held assumptions about both.

Approach: Based on experiences as an internal evaluator, external evaluator, evaluation manager, and building evaluation capacity, the author explores how each role changes when evaluation is a scarce skill, and looks at implications outsourcing has for both the organization, and the evaluation.

Findings: The purpose of the evaluation must drive the decision to outsource. However, with changing models of collaboration, there may be hybrid options that allow organizations to build evaluation capacity.

Practical implications: Organisations are faced with a trade-off between commissioning an evaluation, and building internal evaluation capacity. To better understand each approach, it is important to consider the purpose and context of the evaluation. This shifts some commonly held assumptions about internal and external evaluations. Re-examining these assumptions will help organizations make a more informed decision about an evaluation approach.

Originality/value: The field of evaluation is particularly concerned with evaluation use. Most of the literature on this has focused on the approach of individual evaluators, and insufficient attention has been paid to the institutional architecture of the evaluation. This article considers how some of the organisational structures around an evaluation contribute to evidence use, and the case study of South Africa also shifts the focus to the central but overlooked role of context in the debate.

1. Introduction

Monitoring and evaluation (M&E) is a mushrooming field in South Africa (Abrahams, 2015). The growing national evaluation system is strengthening demand for evaluation skills, but the locally available supply of skilled evaluators is not well matched to this demand (Basheka & Byamugisha, 2015; Goldman et al., 2018; Segone, 2009). While government training organisations and higher education institutions are collaborating to strengthen evaluation capacity in the long run (Tirivanhu, Robertson, Waller, & Chirau, 2018), the sector remains emergent (Morkel & Ramasobama, 2017; Tarsilla, 2014). As a result, the ways in which evaluation practice is being institutionalized varies, and there is a need to consider emergent evidence on the strengths and weaknesses of developing an evaluation system that relies on internal M&E staff, versus one centered on managing external evaluation consultants. There are many assumptions about how internal and external evaluations operate, but the literature on the strengths and weaknesses of each approach has tended to have a disproportionate focus on the individual evaluator, and insufficient attention to the organizational and contextual factors that affect the effectiveness of evaluation systems (Abrahams, 2015; Goldman et al., 2018; Posavac, 2015; Tarsilla, 2014). This article addresses this gap by using a systems lens to question some widely held assumptions about the implications of institutionalizing evaluation practice.

This article argues that the monitoring and evaluation function often spans two distinct, but interconnected purposes that have different implications for organizational location. If they are not clearly understood, then the implications can be misconstrued (Davidson, 2013; Lub, 2015). Monitoring tends to speak to the efficiency and effectiveness through which organisations work towards predefined organizational objectives, and is often closely linked to the audit and accountability purpose of an M&E system (Cronin & Sadan, 2015). Evaluation, on the other hand, speaks to broader governance decisions around whether objectives are being met, and whether the programme

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implemented in context makes these objectives achievable. This is more closely linked to fields of organizational learning ad change (Mayne, 2017). In an ideal world, monitoring should take place for evaluation in a way that links the management and governance functions in organisations (Mertens & Wilson, 2018). However, in a South African context, there is usually unevenness in monitoring and evaluation systems, with monitoring domineering over evaluation (Abrahams, 2015; Cloete et al., 2014; Porter & Goldman, 2013).

This article explores the purpose of monitoring and evaluation systems in South Africa, and the implications this has for institutional arrangements. It draws on the author's experiences in jointly leading a program to strengthen national evaluation system in South Africa, giving them unique insight into both the structure and purpose of South Africa's national evaluation system, and also the varied landscape of capacity experienced within departments, and within the evaluation practice space.

In deciding whether to structure the evaluation function internally or externally, key organizational considerations are around impartiality, cost, and use (Beaulieu, Diouf, & Jobbins, 2016; Conley-Tyler, 2005; Ssentamu, 2018). In general, external evaluations are perceived as more impartial. However, rates paid to external consultants are seen as higher than maintaining internal M&E staff. The use of evaluation findings are mixed; internal evaluation staff are seen as producing results that are more contextualized, thus easier to use, while external evaluators may have more legitimacy, making institutional arrangement's impact on use complex (Conley-Tyler, 2005). This article will explore these assumptions in more detail, and unpack the extent to which these assumptions hold in the specific South African evaluation context. In the discussion section, it will emerge that changes in both organizational context and the field of monitoring and evaluation are changing the debate around internal and external evaluations. As a result, new options are emerging that call into question these binary distinctions, and may give us new ways of thinking about organizational evaluation arrangements.

1.1. The evaluation profession in South Africa

Evaluation is an emergent profession in South Africa (Podems, Goldman, & Jacob, 2013). While the field has seen incredible growth over the past decade, it remains characterized by an unevenness of appropriate skills (Cloete et al., 2014). Empirical data about evaluation supply is still formative. The recent development of a database of evaluations in the region developed in a partnership between the Centre for Research on Evaluation, Science, and Technology (CREST) and the Centre for Learning on Evaluation and Results Anglophone Africa (CLEAR-AA) laid a foundation for understanding evaluation skills. However, a shortage of evaluation practitioners is in line with the shortage of skills in many other sectors, and linked to a complicated history that has shaped inequality, educational levels, and transformation in the country and the region (Erasmus & Breier, 2009).

The evaluation sector in Africa has historically been linked to the donor community (Mouton, 2010), and it is only in the last decade that serious attention has been given to a regionalization of the evaluation profession (Basheka & Byamugisha, 2015). While in some fields the issue of transformation may be around equality, in monitoring and evaluation, it is a fundamental part of appropriate evaluation skills, since it links to a range of factors from the purpose of M&E, to buy-in from stakeholders, and the epistemological view for interpreting data, and ultimately the values and organizational culture (Lub, 2015; Matsiliza, 2012).

When considering how to structure the evaluation function within an organisation, South Africa is a specific context, and is characterized by inequality, resource constraints, and varied skills availability. This context will be discussed in more detail below, but similar considerations may be shared by organisations anywhere which face certain common contextual factors such as resource constraints, or work in technical sector that require a particularly scarce expertise. The considerations discussed below around deciding how to embed the evaluation function within the organisation on the basis of identifying the purpose of evaluation for the organization, and ensuring that the skills are appropriate to the organisation's needs, are universal.

1.2. Expectations about the evaluation function

As national evaluation systems are growing in Africa, it is evident that external evaluations are built as a golden standard for independence and impartiality. This is evident through evaluation policies explicitly focusing on government staff's function of managing evaluations (rather than conducting them) (Goldman et al., 2018), as well as capacity building approaches that focus on strengthening processes of commissioning and managing evaluations in the public sector, as opposed to practice (Morkel & Ramasobama, 2017).

This is understandable, given evaluation's donor roots in the region, a compliance requirement for external evaluations has also led to an assumption that evaluations should be conducted through an external consultant. This gave rise to an initial good practice expectation across sectors (Vedung, 2017; Wadsworth, 2016). However, this norm was established by organisations based in more developed economies, where the skills in the evaluation field were widely available, and management systems to use these skills were strong. In these contexts, external evaluations can serve to triangulate the already robust internal monitoring and evaluation data. The tradeoff between putting organizational resources to building internal evaluation capacity and buying external evaluation support then becomes a question of strategy. To understand the implications of this trade off, it is important to unpack the purpose of evaluation and the assumptions around outsourcing the evaluation function, then explore if these hold in a South African context.

1.3. Impartiality

One of the primary reasons the evaluation function is outsourced is because it is presumed external evaluators will be more impartial, because they are not subjected to the political pressures and internal dynamics of the organization or programme they are evaluating (Conley-Tyler, 2005). Foundational scholars in the evaluation space claim, Braskamp, Brandenburg, and Ory, 1987: 65) and Weiss (1972) argue that external evaluators are unbiased and more straightforward about their recommendations. This comes from an assumption that internal evaluators may face negative consequences for communicating critical findings. Later scholars, such as Guenther and Falk (2007) engage with the complexity of evaluator identity and institutional location, pointing out that objectivity is not exclusively a function of externality. This debate is compounded in Africa, where many external evaluators come from the global North (Basheka & Byamugisha, 2015; Jayawickrama, 2013; Mouton, 2010). As a result, even among external evaluators, there is a tradeoff around the contextual understanding and relevance of analysis and understanding, and perception of impartiality.

If an organization is already lacking a culture of learning or improvement, to the extent that it prevents the internal M&E system from functioning to guide decision making, it remains unlikely that an external evaluation findings will be met with the culture or systems to create meaningful change. Furthermore, in a South African context and others where there is a shortage of appropriately skilled evaluators, the consultant community is relatively small (Mouton, 2010; Podems et al., 2013). Most individuals are part of the same professional network, and circulate through a small set of organisations. This means reputations are important, and furthermore, consultants have an incentive to give the evaluation results that will guarantee they are hired again in the future. In this context, it may not be accurate to assume that outsourcing will necessarily solve the problem of impartiality (Podems et al., 2013). While the pressures on internal evaluators and external

evaluators may differ, one does not necessarily guarantee more neutrality.

Finally, in looking at impartiality, it is critical to consider different forms of impartiality. It has been a longstanding dilemma of evaluators that contextual knowledge of being close to a programme is balanced off the different contextual knowledge and experience held by someone eternally (Maeckelbergh, 2016). Outsourcing an evaluation to a consultant does not remove someone's life experiences, values and perspectives, which a consultant has as much as an employee. Similarly, a consultant will not feel pressure from organizational culture to produce a specific evaluative result. However, their livelihood as a consultant is still dependent on their reputation as an evaluator. Whether or not the evaluator is internal or external, the organizational leadership may either punish, or reward the evaluator for being critical and objective, and it is likely that both an internal and an external evaluator has a relatively strong incentive to navigate the organizational culture around this (Dyna Barroso, Sarode, & Yu, 2016).

1.4. Use

The South African national evaluation system is explicit about its focus on evaluation use being central to its design (Goldman et al., 2018). The issue of utilization-focussed evaluation has become critical to the design of evaluation systems (Patton, 1997), so many debates around institutionalizing evaluation capacity internally or externally focus on the issue of use (Conley-Tyler, 2005). Evaluation consultants are trained to adopt participatory approaches to their work, with an expectation that this will increase the likelihood that evaluation findings will be considered useful and legitimate. As one experienced evaluator summarizes, "without a strong collaborative process, internal evaluation builds resistance instead of results" (Kniker, 2011). From this standpoint, an internal evaluator holds many advantages. They are familiar with the organization and the space within which it works, while an external evaluator, in addition to being new to the organization, may also be new to the technical field within which the organization works. An internal evaluator is likely to have a more nuanced understanding of the priorities of the organizational leadership, what information will be useful, and which angles and arguments are most likely to be persuasive. They will also be in a position to continue to advocate for action once the evaluation has been completed. Internal evaluators are likely to be well knowledgeable about the context in which the program was implemented. An internal evaluator has leverage of understanding the context and prepare evaluation findings in a manner that influences utilization of results (Shapiro & Blackwell, 1987).

Conley-Tyler (2005) and Mathison (1994) indicates that organizational leaders see external evaluation findings as more credible. This implies that an organization dedicated to learning may invest more in implementing the findings of an external evaluation. However, due to a consultant's more limited knowledge of the programme and operating environment, and organization may have to invest more resources in ensuring an evaluation's findings are useable. There is little empirical research, even from more strongly resourced contexts, on whether outsourcing the evaluation function changes the quality of results (Patton, 1997). However, for the purposes of using the evaluation findings, perceptions are as important as empirical quality.

A further factor in whether an evaluation will be useful and used is around the timeliness of the evaluation (Johnson, 1998). Particularly in rapidly changing contexts, an evaluation is only likely to be useful if it is conducted in a timely way, able to deliver relevant insights in time to change programmatic direction. Internal evaluators are often better placed both to act rapidly, as they may have less to learn about the programme and the organization, and also because the startup process may be faster if no procurement process is required.

1.5. Cost

There is a widespread assumption that external evaluators are more expensive than internal evaluators (Conley-Tyler, 2005). However, it is important to carefully interrogate which costs should be measured. It is true that the daily rate of a consultant is likely to be significantly higher than the daily rate of an internal organisational staff member, even with similar levels of experience and educational qualifications. In a context where there is a mismatch between the supply and demand of skills, however, this difference may decrease somewhat since salaries for full time staff come close to being on par with consultants, particularly with the public sector driving employment.

Just looking at the cost of the evaluator's time for the evaluation period is not an adequate measure of the true cost of the evaluation. First of all, the staff time cost of managing the evaluation is significant, and outsourcing the evaluation will increase these costs notably (Cloete et al., 2014). This is particularly true when evaluation skills are scarce, and there may need to be a compromise between specific areas of technical knowledge or methodological expertise in the evaluation team. This means that evaluation managers will need to be particularly engaged, and well versed in evaluation practice to ensure the results are robust. Secondly, there is an added cost to implementing the recommendations from the evaluation. An evaluation that has been outsourced will come from a perspective that is not familiar with the processes within the organization, and will need to be 'internalised' to be used. An internal evaluation will not require this additional step (Volkov & Baron, 2011). Finally, the more participatory the outsourced evaluator is in his or her methods of evaluation, the more organizational resources will be drawn on to conduct the evaluation.

Finally, a critical issue that is overlooked in costing is a reduction of the discussion of outsourcing a specific evaluation to the cost of that particular evaluation alone. If an organization is working to build up its internal monitoring and evaluation capacity, carrying out an internal evaluation could be a good way of training emerging staff into new skill set, as they may be required to learn specific methods or approaches of a project. Additionally, an internally conducted evaluation provides an opportunity for the managers of the programme being evaluated, who are likely to be involved in the recommendations, to be directly involved in the evaluation implementation (Patton, 1997). Similarly, if there is an expectation that a large number of evaluations will be outsourced in the coming years, the capacity to commission and manage evaluations is important, and growing this skills set among relevant staff is important (Cloete et al., 2014). While the cost considerations are certainly different for internal and externally conducted evaluations, they must be examined on a case-by-case basis considering a broad range of factors. Simply looking at the comparative salaries of the evaluators is not sufficient.

Internal and external evaluations will be used differently, and they will have different cost implications for an organization. There are no normative approaches to evaluation that can be applied across different situations and context. However, each organization should carefully examine assumptions they hold about outsourcing evaluations, and ensure that they are appropriate in each specific organizational context, and for the purposes of each evaluation.

2. Discussion

The decision of whether or not to outsource evaluations should depend first on what the organisation hopes to accomplish from a specific evaluation, as well as the evaluation function more broadly (Guerra-López & Hicks, 2015). Additionally, the organisation should consider the evaluation landscape and the availability of appropriate skills. This can inform the extent to which the organization may want to nurture evaluation capacity internally, as well as the cost difference in hiring staff and consultants.

The immediate question of whether the evaluation is serving

primarily a function of management, or governance should weigh into the decision making (Blaser Mapitsa and Tsotsotso, forthcoming). Evaluations that are looking at process and implementation tend to be heavily ensconced in the organisations dynamics and culture. They do not always require extensive specialist knowledge in the context within which the organization is working, and people working within the organization's monitoring and evaluation system may be well placed to carry out the evaluation (Goyal & Howlett, 2019). An evaluation that is looking at the governance and purpose of a programme will necessitate an evaluator that has a deeper knowledge of the technical matter, and it would also be served by a broader understanding of the environment within which the organization operates. It may be an asset to be embedded in an organizational perspective. This has been the conclusion of South Africa's Department of Trade and Industry, which has championed involvement in South Africa's national evaluation system, but at the same time, as a result of having commissioned evaluations externally and building management capacity, has grown an internal evaluation unit in parallel (DPME, 2018). This is due to an acknowledgement that both capacities serve different purposes.

However, this is not where the considerations end. South African managers should ask a range of other questions before deciding whether or not to outsource an evaluation. Who is the target audience of the evaluation? If the evaluation is to meet donor requirements, an external evaluation may be required to serve a compliance function. While South Africa's public sector has limited donor funding, this is an exception in Africa, and the non-profit sector may still rely on external evaluations for donor compliance (Bornstein, 2006). However, if the evaluation is to respond to stakeholder or beneficiary demands, it may not be possible to find a consultant that has an adequate understanding of the worldview of the beneficiaries to deliver a useable product. Goyal and Howlett (2019), for example, have demonstrated that internal evaluations tend to have a more micro focus, while external evaluations may include broader, meso-level analysis, making the choice around where to institutionalize evaluation a strategic decision around organizational positioning.

A further consideration is around planning for organizational development and capacity building. Both conducting evaluations, and managing and commissioning evaluations requires a specific set of skills and knowledge. Evaluations are an opportunity to grow either skill within the organization, and taking a long term approach that takes into account future needs should help guide the decision. This is particularly important in a context where you are not able to take for granted that you will be able to bring in to the organization specific skills without a period of capacity development. While part of this is around organisational priority setting, the availability of capacity development efforts. Capacity development efforts around commissioning and managing evaluations are not always core to academic curricula, and government capacity development agencies do not always have the requisite skills and experiences in evaluation to strengthen this area within organisations (Tirivanhu, Waller, and Robertson). In fact, currently none of the existing qualifications on evaluation take the management of evaluation as a core stakeholder lens for their skills development (Xenex Foundation, 2018)

A final consideration on where to institutionalize the evaluation function links to the timeframe of the project, and when decisions need to be made about its planning and design. Internal evaluations may be better placed to complete an evaluation quickly. The Department of Planning, Monitoring and Evaluation is increasingly prioritizing methods and approaches that look at rapid assessments and other evaluation approaches that manage to gather and analyse data within policy relevant timelines (DPME, 2018). However, depending on management, challenges of ensuring the availability of staff capacity at all levels to contribute content to an evaluation will not necessarily be removed by insourcing the evaluation.

3. Conclusion

The decision about insourcing or outsourcing evaluations must be taken on a case by case basis. Such a decision should be based on a better understanding of organisational needs and capacity. Several commonly held assumptions about internal or external evaluation should be interrogated. As the article has argued, conventional wisdom about the cost of outsourcing evaluations, the most appropriate skills, and the greatest likelihood that the evaluation results will be used may not hold in contexts where evaluator skills are scarce.

As forms of collaboration are changing, new organizational structures call into question some of the fundamental differences between an internal and an external evaluator. As a result, a range of hybrid options are emerging, that are gaining traction in the evaluation space, and may be useful in other arenas (Bourgeois, Hart, Townsend, & Gagné, 2011; Goyal & Howlett, 2019; Nevo, 2018). Social change networks, and coalitions that are working in complex environments are applying evaluation approaches that engage with complexity theory (Bamberger et al., 2015). These organizations are pioneering new models of institutionalizing the evaluation function by promoting peer learning, collaboration between internal and external evaluation systems, and generally making organizational barriers more permeable (Phillips, Goldman, Gasa, Akhalwaya, & Leon, 2014). As these changes take place, maintaining a strong focus on the purpose of evaluation will allow for a stronger, more contextualized analysis around the best institutional arrangements to achieve this purpose.

It is important that organisations, particularly in the global South, continue to document their experiences in institutionalizing monitoring and evaluation systems and functions in diverse ways. Until scholars, managers, and evaluators have a shared analysis of the implications of different institutional arrangements in different organizational contexts, the debate on outsourcing evaluations will not move forward.

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