



Professional Identity of Public Sector Monitoring and Evaluation Practitioners
in South Africa: A Phenomenography

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Declaration

I, Meseret Daniel Desta, by submitting this thesis electronically, declare that the entirety of the work presented in this research report is my own original work. It is being submitted for the degree of Master of Management (MM) at the University of the Witwatersrand, Johannesburg. It has not been submitted before for any degree or examination at any other University.

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Signed at Johannesburg on the 20th day of March 2024.

Signature:

A handwritten signature in black ink, appearing to read 'Meseret D', with a large, stylized flourish extending from the end of the name.

Abstract

The study sought to explore and map the qualitatively different ways M&E practitioners conceptualise their professional identity in the context of the public sector. The inquiry and its findings were contextualised by taking into account experiences of M&E professionals related to the institutional, managerial and administrative settings of their respective organisations as well as their views on the current status and professionalisation journey of M&E in South Africa. This helped to identify different factors that influence the construction and deconstruction as well as the reconstruction of Professional Identity of M&E practitioners in the sector. In addition, the investigation also looked into how Monitoring and Evaluation practitioners navigate the political and institutional context of the Public Sector and engage in the process of (re) examining their professional identities.

The investigation employed a phenomenographic approach to identify, categorise and logically construct an outcome space that presents the qualitatively different ways M & E practitioners perceive their Professional Identity. Nine purposely selected M&E practitioners from the public sector participated in this qualitative study. Data was collected through interviews using a questionnaire composed of both semi-structured and open-ended questions. The phenomenographic analysis revealed four categories of descriptions that depict how M&E practitioners perceive their Professional Identity in a continuum. These categories, hierarchically arranged from least to most sophisticated are Curators of Development Data, Auxiliary to Programme Management, Patron of Accountability and Democracy, and Champions of Development and Transformation.

Key words: Professional Identity, Public Sector, Monitoring and Evaluation

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Dedication

To my husband, Mekbib Solomon Atlaw, with so much love and heartfelt gratitude I dedicate this work to you. Your friendship, prayers, positive attitude, generous spirit, and emotional support were the forces that kept me going at times when the completion of this thesis seemed beyond reach. I couldn't have asked for a better partner on this journey. Thank you for always being there for me and believing in me!!

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Abbreviations

AEA	African Evaluation Association
DPME	Department of Planning, Monitoring and Evaluation
GWMEs	Government Wide Monitoring and Evaluation Systems
M&E	Monitoring and Evaluation
NDP	National Development Plan
NPM	New Public Management
NSG	National School of Governance
PI	Professional Identity
SA	South Africa
SAMEA	South African Monitoring and Evaluation Association
SAQA	South African Qualifications Authority
TOR	Terms of Reference

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Chapter 1: Introduction

Background

Monitoring and Evaluation (M&E) is one of the few professions that have been enjoying remarkable popularity in last few decades in the public and development sectors around the globe as well as South Africa (Abrahams, 2015). The popularity of M&E could be attributed to the fact that the profession brings in critical tools that are instrumental in tracking performance, measuring effectiveness and efficiency as well as upholding accountability in development programmes. (Abrahams, 2015; Mouton, 2010). The other appealing feature of M&E, as a profession, is its trans-disciplinary nature – drawing in expertise (inputs) from different sectors and giving its outputs (evidence) back to these same sectors for the enhancement of their decision-making processes (Abrahams, 2015). In the context of the public sector, M&E has been closely linked to the New Public Management (NPM) and has been used to abate the waning confidence in government, by donors and the general public alike, in its ability to properly implement development programmes and manage public funding responsibly (Mouton, 2010).

In South Africa, in addition to the introduction of NPM to the public sector, as the new administrative doctrine replacing the traditional public administration model, the popularity of M&E in the public sectors got further traction as the need for professionalisation of the public service sectors emerged as one of the cross-cutting themes of the National Development Plan (NDP) of South Africa 2030 (NDP, 2011). The rationale for this endeavour has been the demand for creating a professional culture in the public sector to improve accountability, building service delivery capacity, and advancing overall good governance across all spheres of government (Bonnin & Shaun, 2013). To this effect, as a budding profession, Monitoring and Evaluation (M&E) has been embraced and mainstreamed into the public sector, across board, as a powerful learning, management, and

accountability tool (Wotela, 2017; Naidoo, 2020). As such, it can be argued that M&E has been directly and indirectly benefiting from this professionalisation project spearheaded by the national government of South Africa (SA) in different ways (Abrahams, 2017; Beney et.al, 2015; Masuku & Ijeoma, 2015; Naidoo, 2020).

This is evident in the fact that the Public Service Commission as well as the Department of Planning, Monitoring and Evaluation (DPME) has been serving as custodians of the professionalisation project of M&E in South Africa since the early 2000s (Abrahams, 2017; SAMEA, 2014). Moreover, the establishment of the South Africa Monitoring and Evaluation Association (SAMEA) in 2005 has also given further traction to the evolution of the field to be a full-fledged profession in the country (Abrahams 2015; Abrahams, 2017; Beney et al., 2015; Levin, 2017). Another landmark event worth mentioning in the professionalisation process of M&E in SA was the signing of Terms of Reference (TOR) between SAMEA and DPME in 2014. One of the provisions of this TOR is the commitment garnered from DPME to spearhead and support the professionalisation of M&E South Africa in close collaboration with the SAMEA (Abrahams 2017; Beney et.al, 2015; SAMEA, 2014).

So far, out of the five professional development levels that are stipulated in the TOR (SAMEA, 2014), namely, ‘Agreement on a set of competencies’, ‘Developing specialist skills’, ‘Creditionalisation’, ‘Certification’ and ‘Licence’, M&E in South Africa has managed to attain only two of the levels – ‘Agreement on a set of competencies’, and ‘Developing specialist skills’ (SAMEA, 2014, p.2). The realisation of the last three critical stages – creditionalisation, certification and licensing - remain highly contested and yet to be resolved (Levin, 2017; SAMEA, 2014). According to Greenwood (1957), community sanction that is achieved through the realisation of the last three levels of the process guarantees control, autonomy, and clearly defined boundaries that set apart full-fledged professions from other occupations. This implies that, even if M&E professionals are well qualified and possess the

desired specialised skills, they could still fall short of enjoying full autonomy, authority and statutory recognition as well as strong professional identity in the professional sphere of the country.

In addition to this, it would be vital to position this inquiry in the historical and current context of the public service reform and the subsequent professionalisation discourse which has picked up momentum in the public sector recently (NSG, 2020). This will provide a backdrop of challenges and opportunities that could shape the Professional Identity of M&E practitioners in the sector. Moreover, as a doctrine of the transformation agenda, the influence of the New Public Management (NPM) ethos in the construction/de-construction of the Professional Identity of M&E practitioners in the public sector should also be taken into consideration. NPM which is characterised by privatisation, commercialisation of the service delivery, and its devolved and strong line management control has been criticised for compromising professional autonomy (Beze, 2011; Meuleman, 2008).

Problem Statement

Since the dawn of democracy in 1994 the public sector in SA has been going through staggered levels of transformation. From its early stages of ‘Democratisation and Transformation of the State Machinery’ (1994-2004) to ‘Building Developmental State’ (2004 – present), the need for the professionalisation of the sector sits at the heart of the transformation agenda (DPME, 2014; Muthien, 2014). Moreover, as stipulated in the NDP: Vision 2030, the transformation of the public sector into an ethical and effective developmental machinery has been identified as an indispensable prerequisite for meeting the developmental objectives envisaged in the national document (NDP, 2011 – Chapter 13). One of the strategies that has been identified to assist in materialising these objectives is, attracting and retaining highly skilled people at every sphere of government and cultivating a

sense of professionalism through continuous learning, professional development, improved planning, and performance management (DPME, 2014; NDP, 2011). It is through professionalism that a merit based public service that is resistant to party politics and uninterrupted career longevity - that is insulated from changes in Ministries or political parties - is believed to become a reality (NSG, 2020).

In this regard, the role and contribution of M&E for good governance and professionalisation of the sector has been widely acknowledged. This has led to M&E to be mainstreamed as an essential part of the planning, implementation, and evaluation processes of development programmes across all public sector departments in SA (Naidoo, 2020). However, according to Wotela (2017), the history of M&E in the public sector in SA indicates in many instances the profession has been used as a mere compliance instrument instead of being embraced as a learning and transformation instrument as it is meant to be. Examining how this scenario could possibly affect the way M&E practitioners dispense their professional duties and consequently perception of their Professional Identity will be one of the central aspects of this research undertaking.

On the other hand, the institutionalisation of Monitoring and Evaluation in the public sectors has added a great momentum to the development of the profession in South Africa (Abrahams, 2014; Basheka & Byamugisha; 2015, Levin, 2017; Niadoo, 2020). The longstanding and close collaboration between M&E as a profession and the public sector in South Africa fits into what Muzio et al. (2011) describe as a form of 'cooperative professionalisation' that brought forth new knowledge-based occupations such as management consultancy and project management globally (p.200). This implies that, many organisations, as in the case of the public sector in SA, require the services of professionals to carry out their mandates and in turn many professions evolve out of large organisations by depending on these organisations for career development and job security (Larson, 2018).

This form of symbiotic relationship between professions and organisations presents spectra of opportunities as well as unique and complex challenges to professions and professionals that need to be examined and understood in a nuanced manner (Bourgeault et.al, 2011).

In addition, the New Public Management (NPM) model, in the context of the South African public sector reform and its influence in shaping the experiences of M&E practitioners and subsequently their Professional Identity should also be taken into account. To reiterate, NPM has been introduced in SA as an overarching model for the public sector reform since the year 2000 with the objective of improving efficiency through enforcing cooperative governance, strong command, and control on delivery of services, and audit of both financial and professional outputs (Gumede & Dipholo, 2014; Meuleman, 2008; Naidoo, 2020).

The discussion around NPM in the context of the public service reform and from Professional Identity perspective is particularly relevant since the model has been widely criticised for overruling the dominance and self-regulatory power of professionals in public organisations; hence corroding their Professional Identity (Sehested, 2002). According to Paulsen (2006, p.11) under the NPM professionals get ‘co-opted in managerialism and get trapped into routines of monitoring of performance indicators and budget performance and turn into guardians of the corporate agenda instead of dispensing their own professional duties and responsibilities. Hence examining the implications of this scenario in relation to the construction and perception of Professional Identity of Monitoring and Evaluation practitioners has been found to be imperative.

Moreover, the fact that M&E has not yet achieved full professional status, due to the contested credentialisation, certification and licensing processes, presents yet another challenge for practitioners in terms of negotiating their professional boundary and autonomy (Adams & Saks, 2018; Leicht, 2016). The choice to pursue this inquiry is further augmented

by the fact that not many studies have been done around understanding experiences of M&E professionals in the public sector and their Professional Identity. It has been also established that most of the focus of existing literature around professionalisation of Monitoring and Evaluation in South Africa has been around describing the history of SAMEA, review of the outcome partnership between SAMEA and the public sector, history of professionalisation, advancement of evaluation standards, and challenges and positive contribution of M&E to public and development sector management (Abrahams, 2015; Beney et al., 2015; Basheka & Byamugisha, 2015; Levine, 2017). Little to none is known about the ‘who’ of Monitoring and Evaluation in South Africa and their experiences as professionals. Hence, exploring perceptions of Professional Identity of M&E practitioners in the context of the public sector would assist in gaining a deeper understanding and appreciation of what it is to be an M&E practitioner in South Africa.

Research Question

The main research question investigated in this study is:

How do Monitoring and Evaluation practitioners perceive their professional identities in the context of the public sector in South Africa?

This main research questions were further examined by looking into the following sub-questions:

1. What are the views of Monitoring and Evaluation practitioners in the public sector on the current status and professionalisation journey of the practice?
2. What are some of the factors related to the context and professional experiences in the public sector that influence professional identities of Monitoring and Evaluation practitioners in South Africa?
3. In what ways do these factors impact or influence the construction, reconstruction

and deconstruction of professional identities of Monitoring and Evaluation practitioners?

4. How do Monitoring and Evaluation practitioners navigate the political, managerial, and institutional context of the Public Sector and engage in the process of (re) examining their professional identities?

Research Purpose

The purpose of the research is to explore and analyse the perception of Professional Identity of Monitoring and Evaluation practitioners in the public sector by using a Phenomenographic approach. The exploration and analysis of the topic is contextually augmented by identifying factors that influence and shape perceptions of the professional identity of the practitioners as they negotiate their professional boundaries and autonomy in the public sector as well as considering their experiences and views on the current professional status of M&E practice in South Africa. Participants of the research were drawn from M&E professionals from various public sector domains (national, provincial and local) across the country identified through the database of the South African Monitoring and Evaluation (SAMEA) network as well as through a snowballing technique.

Research Objectives

The research seeks to achieve the following objectives from the enquiry:

1. Identify the views of M&E practitioners on the current professional status of the practice in South Africa.
2. Identify factors that could shape the Professional Identity of M&E practitioners in the public sector.
3. Explore how these factors (political, institutional and managerial) shape perceptions of their Professional Identity through influencing their agency to exercise normative expectations (practice standards, professional boundaries, and autonomy) of M&E as

a profession.

4. Identify the qualitative different ways M&E practitioners perceive their Professional Identity based on their experiences in the public sectors and their views on the current professional status of the practice in South Africa.
5. Explore how M&E practitioners negotiate their Professional Identity within the public sector as they navigate the managerial, institutional, and political terrains of their respective organisations.

Structure of the research report

As mentioned above, this research primarily aimed at identifying the qualitatively different ways in which M&E professionals in the public perceive their professional identity based on their experience as public sector practitioners as well as their view on the current professional status of M&E in South Africa. The following chapter, Chapter 2, starts with providing a review of various seminal and contemporary literature that elucidate on basic frameworks for understanding professions, critical review of a range of theories of professionalisation, discussion around various processes, possible trajectories and emerging global trends in the professionalisation project as well as an overview on the concept of professional identity, construction of Professional Identity and its overall relevance.

Chapter 2 also engages on professionalisation of the public sector in South Africa in relation to the NDP (2030), the public sector reform endeavours undertaken and being undertaken since the dawn of democracy in South Africa, and the adoption and implementation of the NPM. The purpose of this attempt to explore such contextual factors is to provide an overarching backdrop of the study. Supported by various literature, this section draws special attention to the NPM to critically examine its implications and possible impacts on professions and professionals attached to the public sector in relation to enforcing their

professional boundaries, autonomy, and discretion. The last section of this chapter provides a brief history and current status of M&E as a profession in South Africa including challenges related to attaining a full-fledged statutory position.

Chapter 3 presents the ontological, epistemological, and methodological considerations considered in choosing the most appropriate research framework, design and method to systematically and rigorously tackle the research question. This chapter also introduces Phenomenography as the choice of qualitative research approach, with justifications, adopted to examine the perception of Professional Identity of M&E professionals in the public sector. This is followed by detailed descriptions of the research tools and applications used for the selection of research participants, collection, and analysis of raw data. The remaining sections of the chapter deal with subjects of limitations and feasibility of the study, outlining researcher positionality, considerations incorporated to ensure trustworthiness of the research findings, and applications of ethical principles.

Chapter 4 is dedicated to the presentation of research findings generated through the phenomenographic qualitative data analysis. The section begins with providing background information on the professional history, career motivation and aspirations of the research participants which is followed by analysis and summary of the views of participants with regards to the current professional status of M&E in South Africa. This is followed by the presentation of research findings that cover the exploration of the political, institutional and managerial context of research participants based on their experiences in their respective organisations - the key focus being perceptions of other professionals towards M&E, professional boundary, autonomy, and discretion. The chapter also presents findings that reveal how participants engage in the process of (re)examining and (re)negotiating their professional identities as they navigate the political, institutional and managerial realities of the public sector that they are based in. The last section of the chapter is where the findings of

the phenomenographic analysis that mapped out perceptions of Professional Identity of M&E professionals is presented. The section contains the main phenomenographic outputs which is the Outcome Space that includes Categories of description, Dimensions of Variations and depiction of structural relationships between the two.

Chapter 5 concludes the research report by discussing summaries, conclusions and implications of the research findings. The chapter is organised into three sections using a breakdown of subsections like Chapter 4. These sections are the summary and conclusions of the views of participants on current professional Status of M&E, analysis of the organisational context (understood in terms of political, institutional, and managerial settings), and the results of the phenomenographic analysis on perceptions of professional identity of M&E practitioners. The discussions around the implications of these findings provide insights into the dynamism of perceptions of professional identities of public sector M&E practitioners in South Africa, future direction of the professionalisation of M&E in SA as well as potential areas for further and deeper research engagements on the topic.

Chapter 2: Literature Review

This literature review is organised into five separate yet interrelated themes. The first two themes critically engage with a brief discussion on professions and professionalisation to give an overview on the meaning of professions, traits and criteria of professions, and theoretical frameworks and models explaining the processes of professionalisation. This is followed by the third section that discusses the concepts of identity and Professional Identity, factors affecting Professional Identity formation, and the relevance of Professional Identity. The fourth section of the review consists of three parts that bring to attention contextual factors related to professionalisation of the public sector in South Africa, the influence of the New Public Management (NPM) model on professionals working in the public sector, and evolution and current professional status of Monitoring and Evaluation in South Africa. Finally, the proposed conceptual framework of the enquiry drawn up using findings of the literature review has been presented.

Professions and Professionalisation: A Conceptual Overview

The first two realisations made from reviewing the discussion and debates around professions are the facts that discourses have been clearly dominated by Anglo-American context and that there is no clear consensus on what the term professions imply (Caza, 2016; Crook, 2008; Larson, 1977; Saks, 2012). The reason for the latter could be attributed to the fact that different criteria and perspectives have been used to deconstruct the meanings, features or characteristics of professions (Faulconbridge & Muzio, 2012). Also, the challenge of having a universal understanding of professions could be linked to the fact that professions are always in the process of being “socially constructed” (Slaughter & Leslie, 1997, p.4). It is due this reason that Popkewitz (1997) alludes to the need to examine the emergence, evolution, characteristics of professions in the context of the dynamic historical, cultural, socio political and economic contexts that professions exist and operate in.

This being the case, however, in its general form, a profession could be understood as an occupation that involves a prolonged formal training accompanied by social responsibilities that brings opportunities for a job with good remuneration or financial compensation for practitioners (Ellis & Hogard, 2021). Going beyond simple definitions, attempts to systematically analyse vocations, occupations, and professions and theorising about their emergence and the roles they play in society have transpired for almost a century (McGill, 2018). When it comes to their roles in society, Carr-Saunders & Wilson (1933) describes professions as “a major force for stability in society and are a defence against crude forces which threaten steady and peaceful evolution” (p.497). Similarly, in the works of Durkheim (1957) professions have been viewed as desirable moral entities that are essential to ameliorate and stabilise excesses of *laissez faire* in industrial societies.

However, over the years, various scholars have challenged the fidelity of such an idealised view of the professions and used perspectives to critically examine the nature and purpose of professions and the professionalisation process. For example, Johnson (1972) and Larson (1977) describe professions as self-interest elite groups exercising their power with the objective of creating a monopoly over their services, restrict entry and sustain their social standing. Some of the pernicious rhetoric of professions that have been overtly perpetuating the traditions and privileges of the few have been identified are linked to reinforcing hierarchies and unjustified monopolies, elitism, and exclusion of newcomers from ethnic and racial minorities, migrants, and women (Abbott, 1988; Hearn, 1982; Levin, 2017; Roiphe, 2012). Despite these facets of elitism, the egalitarian side of professions get greater emphasis in the discourse that perceives professions as a source of motivation for excluded groups to achieve status and pursue meaningful life aspirations through professional advancement (Roiphe, 2012).

A more comprehensive definition of professions that combines both criteria for recognition as well as their roles in society was provided by Sciulli (2007), who summarised previous attempts by other noted scholars (Michael Burrage, Konrad Jarausch and Hannes Siegrist). According to this definition, a profession is a morally altruistic, full-time, liberal (non-manual) occupation with a specialised training (that have a distinguished scholarly and systematic body of knowledge) holding a monopoly over expert services in the labour market; organised under a self-governing and autonomous entity that examines qualifications and controls entry into the occupations; and sanctions competencies and workplace ethics. According to Sciulli (2007), the level of reward that comes in the form of both material gain and prestige, that members of a profession enjoy, depends not only on their competence but also on the overall regard their contemporaries have toward their expert service measured by the value they add to society in that particular field, time, and context. Moreover, according to Ellis and Hogard's (2021) description, the three core features of a profession, that sum up the criteria presented above, are knowledge (what they know), competency (what they can do) and values that underpin their practice.

Professions and Professionalisation: Theoretical perspectives

The earliest systematic attempt that could be cited as seminal work around establishing criteria of professions was a report put together by Flexner (1915) that was particularly commissioned to examine the emergence of Social Work as a profession in the United States. In this seminal report, Flexner (1915) proposed six core criteria that an occupation needs to formally accomplish to be considered a profession. These six characteristics are: (1) in their nature professions entail essentially intellectual engagements that carries a large individual responsibility, (2) professions draw their raw material for expertise from scientific knowledge and training, (3) the material they devise has a practical benefit or value to society and definite goal, (4) they possess a distinctive (own) language that

could be used to educationally communicate their skills and technique, (5) they tend to be self-organised and autonomous entities, and (6) they are morally altruistic in their motivation. Another classic piece of work by Greenwood (1957) cemented Flexner's six criteria as the traditional gold standard to differentiate professions from other occupations. Greenwood's (1957) list shares two criteria with Flexner, namely, having systematic theory and authority, and reframes the remaining features as having community sanction, ethical codes and culture.

In terms of their theoretical positions, the Flexner (1915) and Greenwood (1957) classifications fall under what is now commonly referred as the taxonomic approach; which is further divided into trait based (Carr-Saunders & Wilson, 1933; Wilensky, 1964) and functional approaches (Ackroyd, 2016; Durkheim, 1917; Parson, 1939; Saks, 1995). The trait-based approach fundamentally assumes that there is an ideal type of profession that represents the essence of what a proper profession should look like; hence any claim of professional status should be assessed using these attributes as measures (Ackroyd, 2016; Saks, 1995). On the other hand, the functionalism approach (Durkheim, 1917; Parson, 1951) pays more attention to the interaction between profession and society in general and focuses on analysing their structural functions in a modern society.

The understanding around functionalism is based on the fundamental notion that asserts "groups and institutions exist because they are functional for society" (Dent et al., 2016, p.16). Functionalism uses the traditional division of labour as a backdrop to discuss the special functions of professions; and posits that there is a naturally evolved relationship between the needs of society and the characteristics of professions (Saks, 1995). According to this view, professionalisation is transactional project in the sense that obtaining recognition and enjoying high status and socio-economic privileges is a trade-off; meaning, society could only recognise and reward those professions found to be possessing esoteric knowledge that adds value of great importance (Leicht, 2016; Saks, 1995).

After examining the two approaches one could conclude that their emphasis is to identify standard criteria that could be used to set apart professions from non-professions. However, both approaches have been criticised for assuming instead of empirically establishing the criteria for professions; for over emphasising aspects of being a profession and neglecting processes involved in becoming a profession; and for being elitist and inherently exclusionary (Scanlon, 2011). Not taking away from the key contributions of the traditional trait and functional approaches in the discourse, that brought forth the basic frameworks for understanding professions, the discussion around professions appears to be reoriented to open the space for a much deeper, critical, and contemporary perspectives that address the limitations of traits based and functionalist theories (Johnson (1972) cited in Hodgson et al., 2015).

In line with this, over the years, more complex and radical micro and macro theoretical perspectives have emerged in the attempt to conceptualise, explain, and critically examine professions and professionalisation. One such perspective that views professions as fields of conflict in the wider power structures is critical theory of Marxism (Ackroyd, 2016; Koytak, 2020; Saks, 2020). According to Saks (2016, 2020), Marxist perspectives fundamentally perceive conflict as basis to understanding social change and uses the capitalist systems instead of the industrial societal context (as it was the case in Durkheim's 1957 analysis and functionalist sociology of Carr-Saunders & Wilson, 1933) as a frame of reference to discuss the role professions as well as the professionalisation process. In this regard, Nolin (2008) points out that the central point of the fourth volume the Capital (Marx's 1976 seminal work on the topic) was elucidating on how the professional class in capitalist society negatively contributes to surplus value. For Marxists, the existence of professional groups needs to be "understood in terms of their relationship with the capital-owning class" (Ackroyd, 2016, p.18).

Further on this point, Saks (2020) identified three variations in the Marxist theory that were summed up from the works of Braverman (1998); Ehrenreich & Ehrenreich (1979); and Navarro (1986). These groups include those identifying the professional-managerial group as agents in service of the interest of the capitalist class through surveillance and capital control; those who view professions as belonging to the capitalist class itself, even if they do not have ownership of the means of production; and those who believed that all or some professional groups were progressively proletarianised or de-professionalised in the labour process for ultimate benefit of the capitalist class (Saks, 2020). The reason why the Marxist theory failed to prevail in the sociology of professions was primarily due to its limitations linked to being too abstract; its self-fulfilling teleological (end purpose) view that claims that the state functions in the interest of the capitalist class (Saks, 2020). According to Saks (2020), the Marxist perspective on sociology of profession ultimately lost its original traction due the political unravelling that happened in Eastern European socialist regimes.

Another critical perspective that puts history and power structures at the centre of its professions and professionalism discourse is Foucauldianism (Foucault, 1979). In short, Foucauldians describe professions as tools used by the state to render populations governable (Saks, 2016). Like Marxists, Foucauldians also believe that structural power dynamics play a critical role in the construction of professions, but conceptualise power itself differently (Saks, 2020). For Foucauldians power transcends politics, meaning it is socialised, dispersed and pervasive (found everywhere including in professions themselves in the form of disciplinary power), and is not always dispensed in confrontational manner or as an act of domination or coercion wielded by an episodic act (Saks, 2020).

Foucauldianism is also distinguished for questioning the rationality of professions and for its notion of governmentality (using professional power and knowledge to make populations governable) that entails the incorporation of professions into the structures of

state governance as instruments of the following three functions: hierarchical observation, normalisation, and examination (Bourke et al., 2015; Saks, 2020). Similar to the Marxist perspective Foucauldianism has been criticised for being too abstract and insufficiently evidenced because its arguments are not open for possibilities of falsification with no concern to address the why question regarding its premises (MacDonald, 1995).

In contrast to the meta philosophical approaches, such as Maxisms and Foucauldianism, that tackle discussions around power structures at macro scale, there are other theoretical perspectives that follow a more micro level approach to do so (Saks, 2020). Of the mico-perspectives, the Interactionist perspective, that was born out of the counterculture movement of the 60s and 70s in North America, is known for being the critique of the whole idea of modernism, including professions and technocratic progresses in favour of a more humanising lifestyles (Saks, 2020). Interactionists view professions as less reverential institutions that come into existence not because of their distinct way they carried out their work, rather through social negotiations that symbolically label some professions better than the others without establishing any meaningful substantive differences amongst them (Becker (1962) cited in Saks, 2020). With regards to limitations, the interactionist view was found to be lacking credibility as its premises are often based on anecdotes instead of empirical data, and for neglecting the role of bigger structures of power, historical factors as well as processes that could determine the success and failure of the professionalisation projects (Saks,1995).

Another micro perspective that could be added to the list is the poststructuralist, interpretive, and discursive approach known as Discourse Analysis (Gee,1999; Osmond-Johnson, 2018). Discourse Analysis brings to attention the connection between language and social reality to examine how language has been used in different forms (oral, non-verbal or written) to create meanings and discursive ideologies in different social contexts (Gee,1999;

Orlowski, 2012; Wodak & Meyer, 2001). In the context of the professions and professionalism, discourse analysis critically examines lexicons that reflect both hegemonic (values and beliefs of privileged social groups) and non-hegemonic discourses that could work either to “sustain unequal relations of power or challenging them” (Orlowski 2012, p.37). The limitation of Discourse Analysis has been pointed out to be its narrow focus on micro workspace setting and its loose understanding of professionalism as a symbol (Saks, 2020).

The shortcomings of the theoretical perspectives reviewed above lead to the exploration of alternative meso and macro-perspectives that could explain the concept of professions and the process of professionalisation in a more comprehensive, empirically feasible, and universally relevant manner. Saks (2020) reckons that one of these theories to be the Neo-Weberian perspective. According to the Neo-Weberian perspective the central force in the professionalisation process that dictates recognition, sanction, and finally social closure is the state (Saks & Adams, 2019). This is in line with the original definition of the modern state (coined by Max Weber) as a compulsory political organisation with legitimate claim of monopoly power and physical forces to enforce and regulate administrative and legal order in a society (Weber, 1968 cited in Saks & Adams 2019). In this frame of understanding the Neo-Weberianism, provides a comprehensive tool to deconstruct the role of the state in professionalisation of occupations through the act of underwriting exclusionary social closure to those occupations assumed to be contributing towards public good and meet the market demand (Abbott,1988; Freidson,1994; Parsons,1954; Saks, 2016).

Parkin (1983), in his book “Marxism and Class Theory: A Bourgeois Critic”, elaborates on what Weber meant by social closure as “the process by which social collectives seek to maximise reward by restricting access to resource and opportunities to a limited circle of eligible” (p.44). From all conflict theory-based approaches what makes Neo-Weberianism

a unique perspective is the way it conceptualises professions as self-interest entities as opposed to perpetuating the notion of altruistic or intrinsic positivity assumed by trait and functionalist approaches (Saks & Adams, 2019). What this implies is that, ultimately, as collective entities with their own self-interest at heart, professions engage not only in setting and maintaining their functional role (standards of competence and ethics) but also navigating the political-economic terrains with the aim of maintaining monopoly and their exclusivity to sustain their social standings (Faulconbridge & Muzio, 2012). The outcome of this exercise is the emergence of hierarchical relationships between leading professions with more power and dominance over other professions that is based on “differential state underwriting” (Saks, 2020, p.6).

Another notable feature of the Neo-Weberian perspective is its flexibility in terms of accommodating other alternative viewpoints such as Marxism and Foucaultianism in its analysis of the professional discourse and its openness to the integration of new spatialities of political economies beyond the Anglo-American context, which to large extent has been dominating the professions and professionalisation discourse globally (Faulconbridge & Muzio, 2012; Larson, 2017; Saks & Adams, 2019). This offers insights into the growing interconnectedness and complexities of the professionalisation project that transcends the boundaries of the nation-state by acknowledging the multilevel supranational forces or players operating in the globalised world and cast a global scale influence on the functional and strategic outcomes of professionalisation in favour of the dominant neo-liberal political and economic order (Faulconbridge & Muzio, 2012).

As mentioned elsewhere, in addition to lending analytical tools that enables scholars to look into the wider dynamics and competitive world of the meso and macro political powers and interest groups involved in the professionalisation project, Neo-Weberianism also addresses the fixation of the Marxist approach on the self-fulfilling notion of the capitalist

state; and resolves the evidential restrictions related to both the Marxist as well as the reflexively deferential taxonomic approaches (Muzio et al., 2011; Saks, 2020). Despite these strong features, the perspective has been criticised for being overly preoccupied with power relations, collective mobility and the monopoly aspects of professionalisation as well as for demeriting the motivation of professions to a narrow self-interest group and downplaying the agency of professions to control the trajectory of their own affairs and development (Halliday, 1987; Saks, 2020).

To conclude, even though the above theoretical perspectives provide frameworks for understanding the dynamisms and subsequent outcomes for professions and professionalisation, contemporary discussions around professions need to also be understood in the context of long-term changes and transformation that have been happening in the post-industrial society, such as, globalisation, feminisation, precarisation, and tertiarisation (Parding et al., 2021). Moreover, in the face of an increasingly heterogeneous professional landscape and growing complexities, it can be concluded that the meaning, role and compositions of professions need to be explored from diverse and dynamic perspectives addressing multi-level engagements (micro, meso and macro). Diversity in this regard implies both spatial and theoretical lenses.

In the interest of this investigation, it has been also noted that, historically, mainstream research and seminal theoretical works about professions and professionalisation underestimated the significance of identity in the understanding of the dynamics of professionalisation (Reed, 2018). In light of this, this investigation is believed to contribute to the knowledge base by attempting to throw light on how the meso level organisational/institutional and professionalisation context pertaining to Monitoring and Evaluation practitioners in South Africa could shape their Professional Identity.

Professionalisation: The Process

Since the 1960s the discourse on professions have shifted from discussion on the traits that define a profession to debates on the way professions evolve or come about (McGill, 2018). The term professionalisation can be simply described as the process through which a particular occupational group obtains the status of profession and sets itself apart from being a simple job or an occupation (Friedson, 1970). In essence all occupations possess a natural tendency to pursue professional status even though remarkably few of the thousands in modern society attain it (Wilensky, 1964). Based on this understanding the logical questions to follow here are how exactly do occupations achieve the status and what processes are to be followed and practical mechanisms involved in this project? Also, is there a single best track that could guarantee a favourable outcome in achieving professional status? And, if different processes exist do they lead to the same outcome? The purpose here is not identifying universally applicable steps, process or mechanism, rather to provide a review of approaches used to understand the Professionalisation project.

In this regard, Mellado & Humanes (2012) identified three possible pathways that occupations could follow to reach a status of profession. These paths are functional (Carr-Saunders and Wilson, 1933); evolutionary (Wilensky, 1964); and revisionist (Friedson, 1986). The requirements for a functional path for professionalisation are achieving criteria of expert knowledge, autonomy and social function; whereas the evolutionary path defines professionalisation as a process that involves establishing a professional group and identity, reaching consensus to define roles; control of candidates' recruitment and members ethical behaviour as well as social acknowledgement (Mellado & Humanes, 2012). On the other hand, according to the revisionist school, mediated by the political, social, and organisational context, the path for professionalisation is wedged by successfully accomplishing tasks related to structural elements (autonomy, professional membership, ethical codes, and full-

time occupation) and attitudinal elements (beliefs and feelings) associated with being a proper profession (Mellado & Humanes, 2012).

Another approach that could be used to further understand the processes of professionalisation is to look into it from the top-down (from above) or bottom-up (with-in) perspective (Faulconbridge & Muzio, 2012; McClelland's 1990 as cited in Osmond-Johnson, 2018). In the traditional sense, traits that underpin professionalisation, namely, collegiality, autonomy, discretion, and self-regulation were said to be born out of the bottom-up pattern of occupational change and control (independent from the direct intervention of the state) with in the professional body itself for the purpose of defending their exclusive right to provide expert services to the public (Evetts, 2011; Faulconbridge & Muzio, 2012). Meanwhile, the top-down perspective gives recognition to the agency, interest and power of state actors and other forces external to the occupational group in influencing and determining the outcome of the professionalisation project (Faulconbridge & Muzio, 2012). Friedson (1986) re-enforces the above position by stating that attaining professional status involves both self-definition that takes place through internal processes as well as getting outside recognition of status through public perception.

Professionalisation has also been articulated in terms of dimensions that it is composed of. For example, Abel (1988) as cited in Hodgson (2015) has identified two key aspects of professionalisation: regulation of production by producers and the production of producers themselves. The first dimension, which is the regulation of production by producers, implies the production, distribution, and consumption of professional services through monopolisation or claims of exclusivity of area of skills and expertise. Success in this regard will lead to attaining state-sanctioned monopoly over exclusive right to provide certain types of service and use of certain titles, for example, Chartered Accountant (Hodgson, 2015). On the other hand, the production of producers aspect has to do with the

attempt to regulate the production of professionals themselves (Abel, 1988 as cited in Hodgson, 2015). This aspect of professionalisation relies on achieving occupational closure by seeking control of entrants to the field through different forms of strict screening criteria that measure skill or mastery level, competence, and credential (Parkin, 1974).

There have also been attempts made by some scholars to put together consolidated models of professionalisation based on empirical studies conducted in their respective fields or professions. The two most notable models in this regard are the works of Houle (1980) and Pavalko (1988) (McGill, 2018). What these two models have in common is that both were developed by teasing out empirical data collected over several years from a variety of occupations to identify consistent features of professionalisation (McGill, 2018). Both models are based on the belief that occupations should not be framed in a binary manner (as either profession or non-profession) but should be placed in a continuum (McGill, 2018).

Houle (1980) provides fourteen features that indicate level of progress towards professionalisation: 1. clarification of mission and function; 2. body of theoretical knowledge; 3. capacity to solve problems; 4. use of practical knowledge; 5. Self-enhancement; 6. formal training; 7. credentialing; 8. creation of a subculture; 9. legal reinforcement; 10. public acceptance; 11. ethical practice; 12. penalties; 13. relationships with other vocations; and 14. relationship with users of service. On the other hand, Pavalko's (1988) model includes eight indicators of level of professionalisation attained by an occupation: (1) theory and intellectual technique, (2) established relevance to social values, (3) training period; (4) clear motivation; (5) autonomy; (6) commitment; (7) sense of community, and (8) codes of ethics. In comparison, even if Pavalko's features are more concise than Houle's, some of the features, like motivation, sense of community and commitment, appear to be abstract and subjective. For this reason, it could be argued that the fourteen features of Houle's professionalisation process appear to be more concrete and

empirically suitable. What is not indicated in both models, however, is if these features emerge in a particular order.

The model that not only identifies stages but also provides the order of progress in which professionalisation takes place, at least in the context of the United States, was put together by Wilensky (1964). Wilensky's (1964) model that came about two decades prior to the previous two models presents occurrences that mark milestones achieved in the professionalisation process in a series of narrative steps (Abbott, 1988). These milestones put in order are: 1. Founding of training school; 2. Founding of university; 3. Formation of local institutions; 4. Formation of national institutions; 5. Passing licensing laws at state level; and 6. Establishing ethical codes. Reflecting on this model Abbott (1988), asserts that these occurrences or events listed by Wilensky (1964) are the result of larger encounters between hidden organisational forces that propel the progress in the direction of professionalisation. What is not clearly indicated in this model is the causal links or why things happen the way they do by using empirical explanations other than common sense theories that simply reflect general views of why things happen in the world (Abbott, 1988).

It should, however, be noted that these models do not in any way imply the existence of a no-one-size fits all track for occupations that guarantees attaining professional status. According to Nolin (2008), the misconception that occupations should follow a single route to professionalisation is the result of a belief that they are homogenous units and lack of homogeneity in professions could be wrongly understood as being at an immature stage in the progress toward professional status. One thing that has been crystal clear from literature is professions are dynamic and constantly evolving (Hodgson et al., 2015). These dynamic changes could be attributed to the fluidity of institutional landscape, complexities related to political, economic circumstance and/or market changes (Sciulli, 2005; Torstendahl, 2005).

Due to this dynamic environment and the diversified professionalisation paths they follow, occupations could, at least transiently, end up falling into different kinds of professional groups (Ackroyd, 2012). Ackroyd's (2012) classification, which is based on the United States and Britain's professionalisation history and contemporary context, contains three groups. The first group, referred to as collegiate or liberal professions (e.g. medicine, law) includes occupation that have attained the highest level of occupational closure, market control and have their own organisations; and the second group known as organisational professions includes occupations with significant degree of occupational closure and effective licensing measures, but majority of them do not own or control their own organisation - hence they work subordinate to executive power of their employees which could be either larger industrial or commercial organisation or the state (e.g. engineers, accountants, social workers) (Ackroyd, 2012). The third group consists of emergent experts classified as corporate professions (e.g., public relations, management consultants, advertisement and information management) (Reed, 2018; Ackroyd, 2012). Corporate professions, that are mainly situated in corporate services, lack key features of traditional professions such as a strong professional body, formalised body of knowledge and social closure, yet they have well defined roles, strong market base, high status, and high pay (Ackroyd, 2012).

When it comes to South Africa, it would not be far-fetched and unreasonable to deduce that formative socio-political and historical events that have been shaping disciplines and professions in the country have been greatly influenced by factors related to the spur of industrialisation exported by colonial dominions and hegemonic capitalist economic systems, policies and practices still dominating the socio-economic and political realms of the country as well as the African continent at large (Naidoo et al., 2017). However, attempts made to contextualise the above discussed theories, models and debates around professions and professionalisation in South Africa have revealed that the history and sociology of

professions has not been approached in consolidated manner; instead, debates are found fragmented along specific topics, for example, post-apartheid racial perspective (Hammond et al., 2009), gender (Clark, 1998), immigration (Chikarara, 2016), and professional boundaries (Beukman, 2005; Hart, 2012; Law & Kruger, 2008; Meintjes & Niemann-Struweg, 2009; Raselekoane, 2019; van der Westhuizen, 2007).

On the other hand, the literature on professionalisation in South Africa mostly concentrate on identifying barriers of attaining full professional statutory status in different occupational settings; discussing feasibility of professionalisation; describing and analysing the negative impacts of delayed professionalisation of different occupations; and providing arguments in favour of getting recognition as a proper profession as conceived in the traditional sense (Beukman, 2005; Hart, 2012; Law & Kruger, 2008; Meintjes & Niemann-Struweg, 2009; Raselekoane, 2019; van der Westhuizen, 2007). The driving force behind these scholarly ventures was to create or maintain the discourse in their particular field of practice in favour of improving the reputation, public understanding, facilitating recognition, and status of the work undertaken in their respective field (Cervero, 1992).

The criteria for recognition and the path for professional designation in South Africa are well articulated in South African Qualifications Authority (SAQA) National Qualifications Framework Act of 2008, Clause 28. According to the policy framework, for an occupation to be recognised as a professional body; a) the occupational entity must be legally registered and must have adequate resources (human and financial) to undertake its functions; b) must have mechanisms in place to protect the public interest and mitigate associated risks with regard to the services provided by its members; c) develop, award, monitor and revoke its professional designations in terms of its own rules, legislation and/or international conventions; d) submit a list of members to SAQA; e) set the criteria to promote and monitor the Continuing Professional Development (CPD) points of its members to meet requirements;

and f) publish a code of conduct and ensure a mechanism for investigating members who have contravened their code of conduct (SAQA, 2008, p.3).

Professional Identity

To understand any kind of identification, in this case Professional Identity, one must first understand identity itself (Ashforth & Corely, 2008). In this regard, the first fundamental question that needs to be answered is what is identity? The concept of identity has been defined using different constructs. For example, Stryker and Serpe (1982) states that “identities are reflexively applied cognitions in the form of answers to the question ‘Who am I?’ (p. 206). Whereas, Ashforth & Corley (2008), describe it as a self or group referential answer to, “Who am I” or “Who are we?”. Identities could transpire in three different dimensions: based on one’s unique individuality (personal identities), being members of groups (social identity), and ascribing to certain roles (role identities) (Ashforth & Mael, 1989; Brewer 1991; Gecas, 1982). Of the three aspects of identity, social identity is the aspect pertinent to this research. One of the most popular definitions, coined by Turner et al. (1992), describes social identities as “categorisation of the self into more inclusive social units that depersonalise the self-concept, where I become, we... a shift toward the perception of self as an interchangeable exemplar of some social category and away from the perception of self as a unique person” (p.52).

Tajfel & Turner (1978) also describes social identity as part of oneself and added that it derives from acknowledgement of membership to a social group that entails value and some emotional significance to the person. Tajfel and Turner (1978) further identified three components of social identity: 1) categorisation (that involves defining and labelling oneself or others in relation to a specific group); 2) identification (that implies the self-image constructed through creation of association with a group); and (3) comparison (engaging in

comparing one's own group with others with the intention of creating favourable biases towards their own group). No matter which forms they assume, identities have some common, central, and enduring characteristics associated with them being socially constructed, multiple, relational, comparative, reflexive, and dynamic (Cooley, 1902; Mead, 1934; Stets & Burke, 2000).

Some of the significant social identities that are shared by members and differentiated between groups include class, ethnicity, gender, race, organisational membership, and occupational role (Ashforth, 2001; Grove, 2019; Turner et al., 1994). The focus of this investigation, perception of Professional Identity, could also be classified as a social identity (Ashforth & Mael 1989). Conceptually, this investigation is based on the ontological notion that identities are socially formed and are the product of past histories, current experiences and future expectation (Caza & Creary, 2016). Identities are expressed through a form of self-authored narratives constructed through "...the conflictual, continuing dialogic of an inner speech where active identities are continually forming" (Holland et al., 2001, p.169). What this position implies is that individuals have the agency to shape and reshape their identity and articulate perceptions of this identity as they interpret and reinterpret their experiences according to "contextual (space), situational (practice) and temporal (time) points of reference" (Caza & Creary, 2016; Grove, 2019, p.38).

The Concept of Professional Identity

Professional Identity, as the subject of this investigation, could be understood as a master identity due to its closeness to the core of self and because of its social significance (Costello, 2005). Professional Identity is defined as the relatively stable and enduring clusters of one's professional self-concept that reflects attributes, beliefs, values, motives and experiences that people use to define themselves in terms of their professional role related to their specialised skill, occupations or vocations (Benveniste, 1987; Ibarra, 1999; Schein,

1978). In short, it is a concept that describes how one perceives himself or herself within their occupational context, how others perceive an individual in a professional setting, and how this is communicated to others (Levy et al., 2014; Neary, 2014).

Professional Identity does not only capture the view of oneself as a professional but also the internalisation of values and norms of the group as part of their own behaviour and self-concept as well as perception of the context in a professional community (Adams et al., 2006; Gibson et al., 2010). The level of congruence, integration and internalisation of the values and norms of the profession or occupational group is critical to envision oneself as part of the professional community (Reisetter et al., 2004). Hence, exploring status of Professional Identity is thought to be helpful to identify the driving forces behind its development, the pace and directions where professional development is heading, advances being made in the field, taking stock of existing opportunities and challenges, and suggesting ways to enhance it (Rozalis & Reich, 2009).

Construction of Professional Identity

Professional Identity is continuously evolving; hence, must be expressed along a continuum scale instead of a fixed point (Sutherland & Markauskaite, 2012). It is also adaptive, an acquired and learned phenomenon, and a product of periods of endurance and interruptions (Grove, 2019; Jebril, 2008; Skorikov & Vondracek, 2011). Like other forms of identities, Professional Identity is also shaped by individual's own social context such as their social status and the profession they belong to, interactions with others in the work environment like clients, colleagues, and other professionals, and the self-interpretation or perception of professional experiences (Gee, 2000; Geijsel & Meijers, 2005; Kelgon, 1978; Trede et al., 2012). These influencing factors could be summarised into categories of individual, relational (dyadic), and collective or group membership (Cascón-Pereira & Hallier, 2012; Sedikides & Brewer, 2001). Even though external influences play an important

role, individual agency has been identified as the most crucial aspect of the process dictating the construction, reconstruction, or deconstructed Professional Identity (Skorikov & Vondracek, 2011).

Further to these, Professional Identity consists of both internal and external aspects that translate into the way individuals see themselves and the way they are seen by others either individually or collectively (Ellis & Hogard, 2021). Individual or personal Professional Identity refers to one's personal work values, skills, and growth as a person (Gazzola & Smith, 2007). On the other hand, collective Professional Identity implies the universal values, expectations, and characteristics of a profession shared among its members (Gale & Austin, 2003). Here it should be noted that, even if there is a possibility of an overlap between one's perception of their personal Professional Identity and perception of their collective identity the two are not isomorphic - meaning it is possible for one to have a strong perception of their personal Professional Identity and yet a weaker collective Professional Identity (Erhard, 2014 cited in Heled & Davidovitch, 2021). A strong and cohesive group Professional Identity is characterised by having clearer perceptions of unique features and values of the profession by practitioners, by those working closely with the practitioner, those in adjacent fields of practice, and the general public (Erhard, 2014 cited in Heled & Davidovitch, 2021).

As mentioned above, Professional Identity development is a continuous process that leads to becoming a professional (Beijaard et al. 2004). Research around PI suggest that it could be shaped in three primary ways: 1) through rhetoric's that inculcate meanings associated with a profession through socialisation processes (like schooling and training) (Fine, 1996; Hall, 1987); 2) by career transitions resulting in adjusting and adopting new professional identities (Ibarra, 1999; Nicholson, 1984); and 3) by life as well as work experiences (Schein, 1978). The construction of PI could be also understood as happening in three cycles. During the first phase of the cycle, professionals rely on external experts (like

faculty members) to gain basic conceptual and experiential understanding of the profession; during the second phase professionals receive feedback from their work supervisors regarding their skills and formal education; and at the third phase new professionals engage in self-evaluation by examining, processing and internalising feedbacks from their supervisors and integrate the feedback with theories they learned during training to arrive at internalised and solidified Professional Identity (Auxier et al., 2003; Brott & Myers, 1999).

Professional Identity (PI) is also understood as a product of multi-dimensional and mutually influencing factors associated with the structural and individual (social and psychological) context of professionals (Caza & Creary, 2016). Some of the factors related to the development of strong Professional Identity have been identified as attachment (a sense of oneness with others in the group), commitment to the group and valuing the group, belief in core values and principles of the profession, and experience of autonomy and self-regulation (Barbour & Lammers, 2015). On the other hand, Molinero & Pereira (2013) listed professional image, perceived congruence with profession, demographic characteristics, and educational experience as factors involved in PI construction and reconstruction. In their research on Professional Identity of Social Workers, Levy et al. (2014), also identified the following four key factors that shape the perception of PI: the way of entry to the profession, future aspirations of the person, the kind and level of academic and professional training they received, and personal resources measured in self-differentiation and sense of coherence. The outcome of the research by Levy et al. (2014) identified three categories of how Social Worker perceived their role as a professional: empathic, intellectual, and intuitive.

Relevance of Professional Identity

Exploring Professional Identity as a cognitive mechanism reveals how professionals think about themselves in relation to their occupations; that in turn throws light on their attitudes and behaviour in their work setting and beyond (Ashforth et al., 2007; Kreiner et al.,

2006; Ibarra, 1999; Pratt et al., 2006). For example, various researches indicate that having a well-defined and strong collective Professional Identity has a positive impact on the status, pride and self-esteem of professionals, cultivates a strong sense of belonging and attachment, enhances knowledge and mastery of skills, which collectively lead to high motivation, strong commitment, and self-efficacy (Ashforth & Mael, 1989; Canrinus et al., 2011; Niemi & Paasivaara, 2007; Skorikov & Vondracek, 2011; Tajfel & Turner, 1978). It has been also established that strong PI boosts one's self-definition, professional status, appreciation of the core values of their profession, and career success by enabling practitioners to fulfil their professional duties and responsibilities in an unreserved manner both collectively as well as in their individual capacity (Gale & Austin, 2003; Grove, 2019; Slay & Smith, 2011). Last but not least, having strong Professional Identity will also facilitate professional values ascribed through group identification to be easily assimilated to one's broader repertoire of collective identities (Pratt, 1998).

In contrast, individuals who work in professions with insufficient cohesiveness lack strong personal professional identification that in turn negatively affects their work quality, professional image or perceived value, confidence in professional opinions, professional survival, and overall career success (Hall, 1968; Ibarra & Barbulescu, 2010; Molineiro, 2013). Lack of strong PI has also been associated with risk of superficial commitment to professional values that leads to poor performance, high work-related stress level, moral distress, value dissonance, decreased self-confidence, and poor decision-making ability at the workspace on the part of professionals (Fitzgerald, 2020). It is for these reasons that Levy et al. (2014) emphasises that Professional Identity should be looked at as an asset that is worth protecting. This is particularly relevant in the contemporary challenging career and professional terrain that is characterised by professional mobility and shifting boundaries in occupational, organisational, national, and global work arrangements that actively and

constantly test the relevance and demand of most occupations (Arthur, 2008; Hall et al., 2002). Compared to traditional organisational settings, the contemporary fluid and borderless career environments present weaker incentives to professional longevity; as such cultivating strong PI serves a key role in sustaining their careers (Bell & Staw, 1989; Weick, 1996).

Furthermore, according to Hall (2002), in the current career context, for people to successfully realise their career potential and goal they need to develop two interrelated capabilities, namely, identity awareness and adaptability. It is only by having strong identity awareness that adaptability to the dynamic career context can be achieved (Hall, 2002).

Threats to having a strong Professional Identity could be linked to different factors. One of these factors is experiencing a non-professional, control oriented, and bureaucratic organisational setting (Randall, 2008). When professionals experience roles confusion, inconsistencies in following practice standards, and lack of autonomy their sense of Professional Identity will be compromised leading them to experience frustration and negative perceptions of their Professional Identity (Wermke et.al, 2019). One also needs to examine the general workplace culture, dynamics of professional boundary maintenance, interprofessional tensions, and jurisdiction disputes to understand how these factors negatively or positively affect the beliefs, attachment, and sense of belonging in the construction of Professional Identity in the workplace (Rothausen, et al., 2015).

Professionalisation of the Public Sector in South Africa

The National Development Plan 2030 (NDP, 2011), which was introduced by the government as a long-term socio-economic development roadmap envisions South Africa (SA) as a developmental state. This has been articulated in chapter thirteen of the NDP that clearly states, “neither social or economic transformation is possible without a capable and developmental state” (NDP, 2011). As there is no consensus on the precise definition, the developmental state concept is better understood by contrasting it with neoclassical economic

model characterised by the latter's long-established belief that state interference is detrimental to economic growth as it disrupts market equilibrium (Gumede & Dipholo, 2014). The critical difference between the two models lies in the degree of state intervention in the economic and development spheres (Caldentey, 2008; Singh & Ovadia, 2018). Instead of leaving economic development and redistribution wealth to the invisible hands of the free market (as it is true in the neoclassical states), developmental states play the leading role in stimulating growth and shaping the structure and output of the economy through regulation of industries and trade, use of fiscal and monetary policies, direct state ownership of key industries, and the redistribution of wealth to tackle poverty and inequality (Singh & Ovadia, 2018; Ukwandu, 2019).

As Ukwandu (2019) rightly put it, having a better and more effective state with strategic, organisational and technical capacity is an indispensable requirement if development is to succeed. This position has also been reinforced in Public Administration Management Bill (PAM) of 2013 that states: "the emerging SA developmental state is democratic, non-racial, interventionist, redistributive, pro-poor, people-centred and participatory." (p.122). For South Africa, this task requires undertaking a massive public sector reform that could address not just the remnants of the ideological and administrative legacies of the apartheid systems but also tackling current challenges that have become endemic to the public sector by instilling a culture of professionalism (Muthien, 2014). The Constitution of the Republic of South Africa (1996), in chapter 10, also lists professionalism of the sector as one of the four principles sought to be guiding the South African public sector reform - the other three being accountability, good governance, and representation.

The professionalisation of the public sector has also been identified as an indispensable alternative to training and using public service cadres as a quick fix to tackle the deficit of skilled professionals that has been widely proven ineffective (DPME, 2014). It

has been also noted that, in order to systematically tackle the skills deficit, the public sector needs to be poised to attract and retain highly skilled people and cultivate a sense of professionalism through continuous learning, professional development, improved planning and performance management (NSG, 2020). According to the National Implementation Framework Towards the Professionalisation of the Public Service (2020), over and above the already recognised occupations with statutory professional bodies, facilitating the professionalisation of certain occupations working in the public sector has been identified as a critical course of action.

Moreover, the professionalisation of the public sector has also been championed as a measure to stabilise the political-administrative interface by creating a non-partisan public service system which is immune to political influence, and thus warranting continuity of public administration through smooth transitions of power (NSG, 2020). This aspiration is in line with the hallmark of public administration tenets that have to do with its relative neutrality in contrast to the power-driven political sphere and the profit-driven private sector (Haque, n.d.).

Administratively, the public sector reform of South Africa that has been rolled out from 1999 to 2009 has been influenced by the New Public Management (NPM) model that replaced the traditional public administration doctrine (Cameron, 2009). Hailed as an administrative revolution or post-bureaucratic paradigm, globally, the NPM takeover of the traditional Weberian public administration doctrine was justified by the perceived weakness of the authoritarian, repressive and conservative traditional bureaucratic model which is characterised by top-down hierarchies, centralised command, stifling red tape, policy-administration divide, and focus on inputs and outputs instead of actual results (Haque, n.d.; Cameron, 2009; O'Flynn, 2007, Stoker, 2006). In addition to its market orientation and economic rationalism the NPM policy framework is primarily underpinned in the notion that

small and decentralised government is superior and essential for effective and efficient public service delivery (O'Flynn, 2007). To this effect various reform measures were put in place to inculcate the NPM values across the public sector in SA (Cameron, 2009).

As indicated above, the fundamental feature of the NPM is the incorporation of private sector market ideologies and management styles into the public sector in the hope and belief that it will stimulate and capacitate the sector for better results and curb the challenges of the traditional administrative model listed above (Hood, 1995). The NPM based reforms are led by principles of decentralised bureaucracy, corporatisation (rearranging civil service department in to free-standing agencies or enterprises), client-centred and pro-market culture, value-for-money, results based performance, managerial freedom, business like service delivery, competition in the public sector through term contracts and tendering procedures, and client orientation (Haque, n.d.; Hood, 1995; Lapuente & Walle, 2020; Rabukula, 2014).

The influence, success and challenges of the NPM in the public sector reform in South Africa has been widely discussed (Cameron, 2009; Rabukula 2014; Vyas-Doorgapersad, 2011). First, the adoption of the NPM model and its approach of outsourcing experienced professionals with specialised knowledge and skills came in handy during the transitional period by reducing the burden on the African National Congress (ANC) government officials who were not skilled enough to take over implementation of the public service (Heywood, 2013). The need for filling these skills gap through the professionalisation of the sector and reconsideration of replacing cadre deployment practices with merit-based recruitment has been identified as key strategies to create a capable public sector (NSG, 2022). The other notable advantage of the NPM in the South African context has been its contribution to the rightsization of the public service sector by reducing the number of duplicate positions to avoid redundancy and increase efficiency in service delivery (Cameron, 2009).

When it comes to criticisms, the implementation of the NPM has been linked to weakening of the public administration by commodifying service delivery (downplaying the role of citizen as mere customers); eroding democratic accountability by making it difficult for citizens to hold officials responsible for poor service delivery (evident in cases where Ministers were able to shift the blame for failure of service delivery to the management of outsourced private sector institutions); reducing the ability of the legislative branch to monitor the sector; enabling the proliferation of patronage from ministers leading to centralisation of political authority; and balkanisation of political units that resulted in the deterioration of the public sector (Cameron, 2009). Due to these reasons the long-term viability of the NPM has been questioned and the search for alternative post-bureaucratic and post-competitive approaches, such as the public value paradigm, is gaining more attention and momentum both in South Africa and worldwide (Moore, 1995; O’Flynn, 2007; Stoker; 2006)

Another criticism of the NPM relates to its negative impact on professions and professionals working in the sector (Ackryod, 2016; Bezes et al.,2012; Cohen, 2002; Hood,1995). In the interest of this research, which is limited to Monitoring and Evaluation (M&E), the relationship between the NPM and M&E as a profession in SA appears to be a complex one. On one hand the cardinal doctrine of NPM, which is shifting emphasis from process accountability towards accountability in terms of results, opened up the niche that brought about the massive demand for M&E; secondly, due to its critical role in ensuring accountability in service delivery, the government have taken interest in the professionalisation of the occupation and has been extending continuous support to that effect (DMPE, 2014). This being the case, however, as it is true for other professions operating under the NPM, M&E could be also a victim of what Sehested (2002) refers to as a “major attack and a declaration of war on the autonomous professional” (p.1516). Sehested (2002)

also indicated that in the NPM context it is eminent that “professionals are presented as the villains and the public managers and politicians as heroes” (p.1516).

The overall intent of new managerialism in NPM is rolling back the domination and power of professionals and replacing it with governing principles of subordination, hierarchy and control by getting rid of professional norms and values, promoting rationality, standardisation, and accountability (Bezes et al., 2012; Dent et al., 2016). Hence, professions attached to the public sector implementing the NPM face the risk of losing their institutional control which in turn relegates them to a position of a mere occupation having lost their status-based professionalism (Bezes et al., 2012; Freidson, 1983; Larson, 1977; Wilensky, 1964). According to Bezes et al. (2012), under the NPM at least four elements of professions fall under threat: their autonomy; their discretionary judgement on the job; their occupational effectiveness, and costs. Furthermore, professional boundary and professions’ claim of jurisdiction that grants control over their area of work also fall under threat (Bezes et al., 2012).

According to Noordegraaf (2007), the level of autonomy professions and professionals enjoy in the public service implementing NPM depends on how bureaucratic the organisational setting is and how the administration relates to their professional model meaning; professions get differential treatment depending on whether or not they are “status based”, “occupational” or “organisational”. However, as dynamic entities, strong professions and professionals do not simply remain managed and measured by the public sector; rather tend to strive to adapt themselves to the organisational and institutional environment through re-organising, re-stratification, or relocating (Ackroyd, 1998; Noordegraaf, 2007). On the contrary, professions with fragmented structures that are dependent on the public sector might have to seek new forms of control and explore new conceptualisation of public professionalism that would ensure their survival and relevance (Noordegraaf, 2007).

Other forms of adaptability of professions and professionals in response to the NPM challenge could range from formally adopting the reforms without allowing them to influence their work to reconfiguration (Dent et al., 2016; Jespersen et al., 2002). It is due to these dynamisms that Noordegraaf (2000) advocates for avoiding the all-or- nothing binary approach and opts for exploring varieties of ways professions and the public sector reconfigure their identity and become either hybrid, organised or connected in the process. What this implies is that, instead of being concerned with self-defence to maintain their status quo, professions need to rejuvenate themselves to adopt NPM realities (Hotho, 2008). In light of this, this research looks into the managerial, organisational and institutional context of public sector departments, that M&E practitioners are based in, to identify contextual factors that could influence their professional experiences, that in turn could influence perception of their Professional Identity. The investigation also throws light on how M&E practitioners navigate the NPM terrain to negotiate their professional status and identity.

Professionalisation of Monitoring and Evaluation in South Africa

The growth of Monitoring and Evaluation in South Africa in the last couple of decades corresponds to the global push for greater transparency and accountability in private, public and non-profit sectors that fund or offer public and private goods and services (PSC, 2012, Mouton, 2010). This growing popularity of M&E could be attributed to its strong predictive and directive capacity as well as to its distinctive tools that are instrumental in tracking performance, measuring effectiveness and efficiency as well as upholding accountability (Masuku & Ijeoma, 2015; Naidoo, 2020). M&E is believed to bring a sense of probity that is essential to democratic governance in the public sector (PSC, 2012). As mentioned elsewhere, in South Africa, the growth of M&E in the public sector received additional momentum with the adoption of the National Development Plan (NDP 2030) in 2011. The NDP (2011) emphasises the critical role that M&E could play in realising the

strategic and developmental objectives related to poverty reduction through enhancing evidence-based decision-making with regards to budgeting, facilitation of project implementation and evaluation processes (NDP, 2011). Despite its potential to guide evidence-based decision making, in M&E has been used, misused, or underused as a reporting and compliance assurance tool instead of a means to improving efficiency and enhancing programmes outcomes and impact (Podems et al., 2014).

The testament to the commitment on the part of the government for the institutionalisation, integration and mainstreaming of M&E in the public sector was the legislative backing that came about in the form of Government-wide Monitoring and Evaluation Policy Systems framework (GWMES) that was developed by the Presidency in 2007 (DPME, 2007). The central objective of the framework is to promote standardisation and homogeneity in M&E practices across all departments within the public sector (Engela & Ajam, 2010). The GWMES document provides elaboration of key M&E concepts and principles, its goals, and three critical components, namely: details of the policy platform, specific M&E products, their functions, and the major actors involved in the implementation of processes (Engela & Ajam, 2010). The GWMES is also a measure that affirms the view that the public sector has become the dominant source of legitimacy and stable market force for Monitoring and Evaluation as a profession (Abrahams, 2014; Basheka & Byamugisha, 2017).

In realisation of these potentials, M&E in South Africa has been pre-emptively evolving to become a full-fledged profession in its own right. According to Levin (2017), this is evident in the growth of its body of knowledge and the refinement of its conceptual tools and practice models through research and publication, development of curricula and training programs at various institutions, the improvement of practice guidelines and ethical standards, and the emergence of a professional body such as the South African Monitoring

and Evaluation Association (SAMEA). The formal conversation among the M&E community about professionalisation of the field started with the establishment of SAMEA in 2005 (Mouton, 2010). According to SAMEA (2014), the first concrete step taken towards professionalisation of M&E, specifically evaluation, was the signing of the Memorandum of Understanding between the SAMEA and the DPME in the presidency on 2 February 2012. The Terms of Reference (TOR) of the partnership between DPME and SAMEA stipulates the roadmap for collaboration for professionalisation of M&E that involves organising capacity building and learning activities, setting up evaluation standards and competencies, reaching a wider group of M&E practitioners to promote its objectives, and encouraging citizen-based Monitoring and Evaluation (SAMEA, 2014).

Even with such continuous support from the government and efforts from the SAMEA, attaining full-fledged professional status (in the traditional sense) through obtaining a statutory standing of its professional body to enforce mechanisms of accreditation, certification and licensing remain unresolved for Monitoring and Evaluation in South Africa (DPME & SAMEA, 2014; Levin, 2017). Abrahams (2015), pointed out the interdisciplinary nature of M&E (despite being one of its strong features) as being an impediment for M&E to establish itself in the historically very discipline-oriented higher education system of South Africa. Hence, as a profession M&E had to emerge as a field of practice instead of a traditional academic discipline with no unified standard of competencies (King et al, 2008 cited on Podems et al., 2015). As such, its professional association, the SAMEA, remains a non-statutory professional association with no vested power to provide professional designation (SAMEA, 2021). This contrasts with professions governed by a Professional Regulatory Body, with exclusive control (endowed through statutory powers or charter) to monitor, regulate and sanction professional practice and ethical standards, award designation of qualification and competence, and protect public interest (SAQA, 2008). This current

professional status of M&E could present practitioners with uncertainties and confusions when it comes to maintaining practice standards, securing professional boundaries, and exercising autonomy, and discretion across diverse fields of practices (Grove, 2019).

Due to this current reality, Podems et al., (2014), question the readiness of South Africa and the feasibility of professionalising Monitoring and Evaluation (specifically evaluation) using the traditional gate keeping approaches, such as, certification, and credentialing. Despite these uncertainties, the need to keep pushing for professionalisation of evaluation has been justified by the need to curb the proliferation of sub-standard evaluation (that negatively impacts management decisions) carried out by unqualified and incompetent people calling themselves evaluators (Podems et al., 2014). Considering this, having no statutory power, the SAMEA has been relying on strengthening both evaluation and evaluators capacity by setting up evaluator competency standards (SAMEA, 2015). In addition to this, SAMEA also offers its members unifying ethical statements, a sense of identity, and a bottom-line for what it means to be an M&E practitioner or evaluator as well as a platform for interaction and information sharing on high quality intellectual and professional standards (Mouton, 2010; SAMEA, 2017).

In summary, this literature review covered scholarly works that have shaped the sociology of professions going as far back as the beginning of the twentieth century. Most of the early works (predominantly based in the western Anglo-Saxon context) provide the taxonomic and functional meanings of professions. This is followed by more theoretical oriented discussions that brought forth various models to explain the roles of professions and processes of professionalisation. These perspectives attempted to systematically capture, deconstruct, and analyse the ever-evolving nature of professions and professionalisation processes at micro, meso and macro levels. The outcome of this exercise indicates that professions are essential social institutions, altruistic in motives, dynamic in nature, having

agency to shape their destiny, but not immune to both negative and positive influences of power struggles, structural factors, market dynamics, and grand social transformations. Like any other institution, the potential of professions to be co-opted for domination and oppression of certain segments of society was also evident from the review.

Reviews around Professional Identity provided conceptual clarity and identified key factors that shape its construction as well as the overall impact it could have on the status, pride, self-esteem, motivation, and career longevity of professionals. In addition to personal professional experiences, it has been also revealed that the quality of Professional Identity is contingent upon the status, level of congruency, integration and internalisation of the values and norms of the profession or occupational group. The literature on sociology of professions in South Africa has been found to be very scant and fragmented along specific topics and professional groups mostly focusing on empirical appeals to justify a speedy facilitation of professionalisation projects for non-traditional emerging professions.

Empirical research on the general subject of Professional Identity in the South African context is also found to be very minimal. Some of areas of interest are related to analysing the socio-historical context of Professional Identity construction (in post-apartheid professional space for historically disadvantaged groups) (Carey, 2018; Erasmus, 2019), Professional Identity formation from the African Ubuntu ontological stance and context of social upheaval (Mokhachane, 2022), and identification of factors in students Professional Identity construction (Deane, 2017; Wilson & Nel, 2019). No empirical research that dealt with Professional Identity of M&E professionals has been identified from review of literature from South Africa. This confirmed the knowledge gap that exists around professionalisation of M&E in general and Professional Identity in particular as stated in the problem statement.

The outcomes of the review of the professionalisation of the public sector in SA, the NPM administrative context and the evolution and current status of professionalisation of

M&E in SA provided the organisational and institutional context that M&E practitioners faced to navigate, consider, and reconsider as they engage in shaping their Professional Identity. In one hand, the push for professionalisation of the public sector appears to create a favourable environment for M&E to flourish in the sector, and, on the other hand, the administrative, institutional, managerial, and political environment exacerbated by the NPM policies and practices could pose potential challenges for professionals in terms of compromising their autonomy and professional boundary. This compounded with the non-statutory professionalisation standing of M&E set the backdrop for this investigation that explores the perception of Professional Identity of M&E practitioners carried out using a Phenomenographic approach.

Conceptual Framework

According to Adom & Hussein (2018), Conceptual Framework is the researcher's blueprint that maps out the structure of how the research problem would be explored. As can be inferred from the literature review presented above and as per the objective of this investigation and the research questions, perception of Professional Identity will be qualitatively explored by considering factors related to personal and collective experiences of M&E professionals in the public sector in SA. Based on the findings of the review of literature, Figure (2.1) depicts the inter-relationship between different factors that come together in shaping or influencing perception of Professional Identity. As per the interpretive theoretical perspective that conceptually and methodologically frames this investigation, the relationship between these factors is expected to be discursive rather than linear.

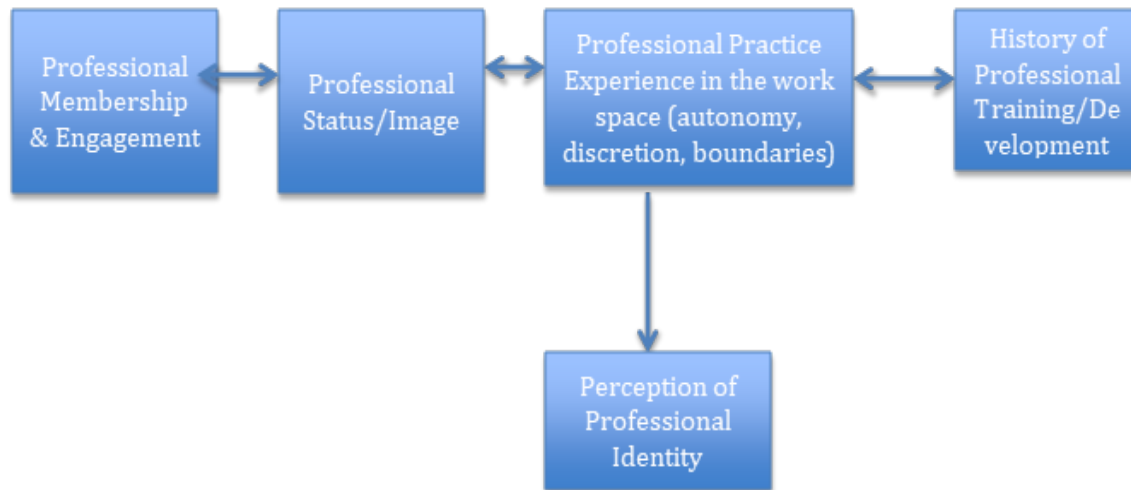


Figure 2.1 Conceptual Framework (Researcher's own illustration).

Chapter 3: Methodology

Introduction and Purpose

This chapter lays-out the considerations made, and processes followed in the selection of the research methodology that is believed to best serve the objective of this investigation and tackle the stipulated research questions. In social sciences the term methodology refers to fundamental assumptions that shape how the research problem is approached and investigation is conducted (Jobin & Turale, 2019). Methodology could also be understood as the study of methods or a strategy of inquiry, or principles regulating scientific investigation and techniques (Guba, 1981; Stenbacka, 2001; Wotela, 2017). The purpose of a research methodology could be summarised as providing the plan of action or the blueprint that explains the design and processes behind the choices that led to the use of particular methods, and justifications on how the implementation of these methods would lead to achieving the desired outcomes of the inquiry (Crotty, 1998). In other words, methodologies dictate methods, in a sense that the choice of a particular methodology (philosophical position) leads to the preference of a particular research method (tool) that is deemed appropriate within a specific research tradition (Patton, 2002).

In principle, choosing the right methodology for a research undertaking must consider how well the design corresponds to the research questions, its fit to the worldview of the researcher, their personality and skills levels, congruence to socio-cultural context or setting of the study, and the characteristics of potential participants (Jobin & Turale, 2019).

According to Merriam (2002), alignment of these critical elements must start with laying a solid and consistent philosophical and theoretical foundation of any empirical inquiry. These philosophical and theoretical foundations for a particular research methodology are primarily found embedded in the overarching research paradigm that has been embraced by the researcher as a best fit to their worldview and scientific pursuit (Guba, 1998).

Research Strategy: Philosophical and Theoretical Framework

The word paradigm originates from the Greek word ‘Paradeikhyai’ that means to show side by side, and it could loosely be understood as a worldview or a set of meta-philosophical assumptions or axiomatic systems shared by a community of scientists across different disciplines about how the world operates, and about truth and nature of reality - including the phenomena in which they are set to examine (Creswell; 2009; Kuhn, 1962; Guba & Lincoln, 1989; Klien & Mayers, 1999). For Babbie (2013), paradigms are implicit models or frames of references that are used to organise our observations and reasonings in order to make sense of things around us. In the context of scientific inquiries, these views comprise core assumptions that form the philosophical basis for a research undertaking that determine the appropriate methodology for an investigation (Creswell, 2009; Guba, 1998).

Elucidating on the nature of paradigm, Lincoln & Guba (2013), state that:

Paradigms rest upon fundamental beliefs that can be enunciated by their proponents.... cannot be justified on any more external objective or fundamental grounds, and they need not be and often are not commensurable; that is, they may not be reducible to common sets of standards by which inconsistencies or conflicts among them can be resolved (p.60).

As mentioned above, the decision to choose the right research paradigm or meta philosophical perspective that subsequently dictates ontological, epistemological, and methodological positions for this research is mostly based on the researcher ontological position (belief in truth and reality), objective of the investigation and the nature/construct of the phenomenon set out to be explored. Ontology (composed of two Greek words ‘onto’ meaning ‘being’ and ‘logia’ meaning ‘study’ or ‘theory’), is a branch of philosophy concerned with the study of the forms, nature and structure of reality, and “what can be known about it” (Antwi & Hamza, 2015, p.2).

Generally, there are three broad and contrasting ontological positions in the discourse of research paradigms (Guba, 1998; Wagner et al., 2012). The first ontological position, that aligns to the Positivist research paradigm, adheres to the belief in the existence of a discrete, objectively verifiable, tangible reality that can be fragmented into independent variables (Wagner, 2011). Conversely, the second ontological position, Constructivism/Interpretivism, defines reality as socially constructed, multiple layered and intangible that should only be studied holistically (Guba & Lincoln, 1989; Ejnavarzala, 2019). On the other hand, the third alternative ontological position, Critical Paradigm, moves us away from both positivism and interpretivism and focuses on the ideals of representation and emancipation by embracing the critical debate around power-laden discourses in society, including the construction of knowledge (Grbich, 2003; Patton, 2002; Slevitch, 2011). Of the three alternatives, this investigation embraces the interpretive paradigm to frame its methodological approach.

The Interpretive Methodology

As indicated above, the interpretive research paradigm aligns with the ontological assumptions that purport reality as socially constructed (Wagner, 2011). Founded on the works of Edmund Husserl's philosophy of phenomenology, Wilhem Dilthy's philosophy of hermeneutics and the contribution of other thinkers such as Martin Heidegger and Max Weber, this ontological position perceives reality as intangible, socially constructed, multi-layered and mind independent (Guba, 1989; Mertens & McLaughlin, 2004; Neuman, 2014; Wagner, et al., 2012). Here the term socially constructed implies that realities are the product of an intentional, active engagement, or interaction of people within a social context bound in space and time, hence cannot be generalised into universal reality (Crotty, 1998).

It is important to highlight that interpretive/constructivist approach does not invalidate the traditional objectivist scientific approaches, but underline that there is so much about the human experience that cannot be observable by directly adopting the principles of inquiry

from natural sciences as social life and human behaviour are qualitatively different from other natural things studied by natural sciences (Mertens & McLaughlin, 2004; Neuman, 2014). Moreover, since reality is assumed to be socially constructed, multiple mental constructions or meanings of a phenomenon are possible, which may even be contradictory to each other (Mertens & McLaughlin, 2004). This ontological stance leads to the subsequent subjective epistemology attune to grasping variations of meanings (multiple realities) that people construct and reconstruct as they interact in their subjective context (Creswell, 2009; Crotty, 1998; Guba, 1988; Patton, 2002). Lincoln and Guba (1989), succinctly describe the epistemology essence of interpretivism by the following statement:

knowledge is not discovered but rather created; it exists only in the time and space framework in which it is generated (p.41).

It is for this reason that the interpretative paradigm favours an application of idiographic (individualised) research approaches instead of a universal (nomothetic) one in order to provide empathetic, detailed, rich and holistic descriptions and interpretation of a phenomenon and its context (Guba, 1988; Neuman, 2014). The other epistemological implication of the paradigm is the non-dualist nature of the relationship between the inquirer and the participants or the knower and the participants (Wagner et al., 2012). Non-dualistic assumption indicates an interactive research process in which the researcher and the participants are poised to be influencing each other throughout the inquiry (Crotty, 1998). As a result of this, the interpretive/constructivist researcher remains actively aware of their own background and positionality in the social world and discursively analyse how these elements could affect their thinking and cognitive processes as they interpret and construct meanings out of the data collected from their interaction with participants (Punch, 1998).

In the context of this research undertaking, conceptualising the research topic, the problem statement, and research questions to explore perceptions of Professional Identity of

Monitoring and Evaluation (M&E) practitioners wouldn't have been possible without embracing the broader constructivist philosophical belief (ontology) that aligns to the existence of multiple subjective realities and the agency of people to construct, shape and re-shape the understanding, perceptions and interpretation of their realities based on their subjective personal experiences across time and space (Bryman, 2012; Wagner et al., 2012). The same goes to the attempt to map out the perceptions of Professional Identity that cannot be reduced to a single reality rather should be understood as a complex, multifaceted and transactional phenomenon (Caza & Creary, 2016).

Flick (2004) affirms the above position by stating that “perception is seen not as a passive-receptive process of representation but as an active constructive process of production (p.89). What could be implied from these assertions is that individuals remain active agents as they interact with other individuals and the society at large in ascribing meanings to different social phenomena. The assumption behind this view is the belief in intersubjectivity - which is the interplay between the personal and the social world that shape the construction and reconstruction of identities (Cooley, 1902). Within this frame of understanding, people shape and re-shape the understanding, perceptions and interpretation of their realities based on their subjective personal experiences across time and space (Bryman, 2012; Wagner et.al, 2012).

In recognition of the complexities and fluidity of identity construction, Vignoles et al., (2006) also posits that one's identity as the individual's subjective psychological experience rather than some idea of materially objective reality of the true self. These assumptions also directly apply to Professional Identity construction and reconstruction as individuals draw experiences to this effect from their personal attributes, interaction within networks of people in their social, work environment, as well as their social positioning (Ashforth et al., 2008; Savin-Baden, 2010). The other relevant assumption that needs to be accounted for in this

discussion has to do with the potential of individuals to possess multiple professional identities (Caza & Creary, 2016). In light of this, it is plausible to conclude that interpretivism/constructivism ontology best captures the essence and the object of the research and the way it needs to be studied.

Research Design

Aligned to its ontological and epistemological roots presented above, this interpretive research inquiry opts for the application of a qualitative methodology. In contrast to the deductive quantitative approach, which is championed by the positivist camp, in qualitative inquiries the scientific method is inductive, and the role of research is generation of theory instead of verification of existing theory (Antwi & Hammza, 2015; Kivunja & Kuyini, 2017). According to Denzin & Lincoln (2013), qualitative researchers study phenomena in their natural settings for the purpose of making sense or interpret the phenomena based on the meaning people attribute to them. As Creswell & Creswell (2018) further stipulate, a qualitative research approach offers tools that will allow gathering rich textual data that facilitates an in-depth investigation into how people interpret their experiences of a particular phenomenon, construct their world and the meaning they ascribe to these experiences.

Qualitative methodology mandates the collection of descriptive soft data presented in the form of textual, verbal, or visual narratives that will be interpreted hermeneutically and dialectically to extract meanings, patterns and variations in how people experience the social world and the draw a subjective meaning from these experiences (Antwi & Hammza, 2015; Cohen et al., 2000; Neuman, 2014). Typically, data is collected in the participants' settings which is then organised, inductively analysed (from particulars to general themes), and finally, interpreted to bring forth a coherent meaning (Neuman, 2014).

It should also be reiterated that due to the non-dualistic nature of qualitative research the researcher remains part and parcel of the research process - from design stage to the

interpretation of results (Wagner et al., 2012). As a result, qualitative researchers are required to immerse themselves in the life-worlds of participants to a varying degree - from being an outside observer to somebody who becomes part of what is being studied to get an insider's perspective (Nieuwenhuis, 2015). Due to this subjective nature of the inquiry, qualitative researchers have a responsibility to disclose their personal values, ideological biases, nature of relationship to research participants and their closeness to the research topic right from the beginning (Crotty, 1998; Wagner et al., 2012). According to Peshkin (1988), there is a possibility that these qualities could, "filter, skew, shape, block, transform, construe and misconstrue what transpires in the research process" (p .17). Peshkin (1988) further alludes that if subjectivity is not confessed and consciously attended it could mute the emic (internal perspective); but if it is handled properly, it could be a virtuous ground for making distinctive contributions on the topic of the research.

Further to this, committing to the qualitative research approach necessitates the application of different kinds of research designs suitable for providing a subjective description of a phenomenon and empathetic understanding of the world of human experiences in their natural setting (Guba & Lincoln, 1989; Kivunja & Kuyini, 2017). Some of the well-known qualitative research designs are Ethnography, Grounded Theory (GT), Narrative Inquiry, Phenomenology, Case Study, and Participatory Action Research (Wagner et al., 2012). As the years go by, the number of qualitative designs has increased as scholars push the boundaries of social research to find new and best ways possible to explore, describe and understand people's experiences and the core meaning of those experiences found at the heart of people's realities (Jobin & Turale, 2019). Phenomenography, which is the approach of choice for this investigation, is one of these relatively new qualitative research techniques that was specifically created for mapping social realities as they are uniquely experienced and

described by a group of people subjectively experiencing the same phenomena in a shared context (Marton, 1986).

To reiterate, pertaining to the subject of this inquiry, which is perception of Professional Identity, the interpretive/constructivist position entailed by Phenomenography rightly accommodates the conception of identity as fluid (continuously co-constructed, shaped, and reshaped), and embedded in one's social historical context (Weinberg, 2008). The other fundamental premise of Phenomenography that has been incorporated to the ontological assumptions of this research is the view that an individual's perception of a particular phenomenon varies depending on the specific aspect or dimension of the phenomenon that is being investigated in a particular instance (Åkerlind, 2005).

Phenomenography: An Overview

Phenomenography is a relatively recent qualitative empirical research approach that was first introduced in the 1970's by a Swedish educational research group known as the Gutenberg group, that included Ference Marton, Roger Saljio and Lennart Svensson, and Lars Owe Dahlgren (Go & Pang, 2021). The approach was born out of attempts made to better understand and explain why students exposed to the same learning problem arrive at varied conceptions, outcomes, or solutions (Marton, 1981). Etymologically, the term 'Phenomenography' has a Greek root that is composed of two words, namely, 'phainomenon' (appearance) and 'graphein' (description) - combined mean description of appearances (Hasselgren & Beach 1997, p.192). Although the approach is still not very popular outside the educational disciplines it has been gaining supporters that have started embracing it as an empirical interdisciplinary research method (Uljens, 1992).

Fundamentally, Phenomenography seeks to uncover the qualitatively different ways in which people experience, perceive, understand, or conceptualise various aspects of shared experiences regarding a particular social phenomenon (Marton & Booth, 1997). The object of

Phenomenographic research “is the variation in awareness or ways of experiencing a particular phenomenon” (Åkerlind, 2012, p.116). The aim of the approach is generating an outcome space that captures a set of descriptive categories that illustrates similarities and differences in how a particular phenomenon is or can be conceived or perceived including their internal architecture (Bernard et al., 1999; Marton, 1981; Ornek, 2008; Trem, 2017; Sjöström, 2002; Svensson, 1997).

Phenomenography Versus Phenomenology

Originally, Phenomenography emerged as an empirical and pragmatic research approach, as such the need for explicating its philosophical (ontological and epistemological) underpinnings were not the prime concern in the beginning (Hasslegren & Beach, 1997; Svensson, 1997). Hence, instead of applying elaborate theoretical frameworks, early empirical researchers used “general assumptions and observations about the human mind” as the philosophical base of their inquiries (Uljens, 1996, p.103). Eventually, however, Phenomenographic researchers started referencing and using phenomenology as a philosophical ground to justify their assumptions about the nature of conceptions and the explorative approach they have adopted (Svensson, 1997). Philosophically, both approaches share the notion of ‘intentionality’ (subject-world relation) and ‘noema and noesis’ (structure and reference) (Bruce, 1994).

Moreover, Phenomenography is also strongly grounded in the phenomenological philosophical notion of lifeworld that asserts that the world is never a world on its own, but it is always an “understood” or “conceived” world (Sandberg, 1997; Uljens, 1992). This being the case, however, Svensson (1997) emphasises that this relationship does not imply that Phenomenography was born out of the phenomenological tradition. On the nature of the relationship between the two approaches, one the originators of Phenomenography, alludes that the two are “no more than a cousin by marriage” (Marton & Booth, 1997, p.117).

Phenomenology and Phenomenography share the etymological root “phenomenon” which in Greek means “to manifest or to bring to light” (Svensson, 1997). The difference between the two approaches rests in the suffixes. The ‘logos’ in Phenomenology has to do with uncovering the essence (meaning and structure) of a phenomenon whereas the ‘graph’ in Phenomenography implies describing the intersubjective variation in people’s conceptualisation of a phenomenon (George, 2016; Larrson & Holmstrom, 2007; Marton, 1981; Stolz, 2020; Svensson, 1997).

The underlying difference between the two approaches lies in their ontological stances of human consciousness. Ontologically, phenomenology can be categorised dualistic as it treats subject and objects separately; whereas, as indicated elsewhere in this chapter, Phenomenography is non-dualistic (subject and object are conceived as inseparable) (George, 2016). Elucidating on Edmund Husserl’s original thoughts on phenomenology, Webb (1997) says the following:

Husserl believed that perception of phenomena to be possible without the contaminating effects of history and intellectual experience. The apprehension of phenomena at the purest level is a direct experiential and perceptual encounter in contrast to normal thought structures (including logic) which belong to the expressive or representational realm (p.199).

On the other hand, instead of capturing unique pre-reflective individual experiences, Phenomenography seeks the collective meanings without involving in the psychological reduction of data (Marton & Booth, 1997). According to Marton & Booth (1997),

...the phenomenologist might ask “How does the person experience her world?”, the Phenomenography would ask something more like, “What are the critical aspects of ways of experiencing the world that make people able to handle it in more or less efficient ways? (p.372).

The other main difference between Phenomenography and phenomenology has to do with the final outcome of their inquiry. Phenomenological analysis leads to identification of meaning units (first-order perspective); whereas Phenomenographic analysis results in identifying variations in conception of a phenomenon as experienced by people (second-order perspective) (Marton & Booth, 1997; Marton & Pong, 2005; Richardson, 1999). This makes the Phenomenographic approach ideal for researchers intending to discover the existence of a phenomenon instead of verifying the extent to which a phenomenon is hypothesised to be out there (Saljo, 1988). Generally speaking, Phenomenography is specifically designed to capture possible variations in the qualitatively different ways people understand one and the same aspect of reality, and how that understanding forms the basis for their actions (Marton & Booth, 1997; Marton & Pong, 2005; Sandberg, 2000).

Assumptions and Basic Concepts in Phenomenography

Marton (1986) identified three lines of Phenomenographic research. The first line of interest explores the qualitative differences in learning outcomes by comparing different approaches of learning. The second line of focus is on the study of qualitative different conceptions of substantive outcomes from content learning within a disciplinary context. The third and final stream of focus of Phenomenography is understanding how individuals conceive various aspects of everyday life or reality. This particular study belongs to the third line, as it seeks to map perceptions of Professional Identity of M&E practitioners in the context of the public sector in South Africa.

As mentioned elsewhere, ontologically Phenomenography maintains a non-dualistic view of reality implying that the person and the world are viewed as inseparable and understood in relation to each other (Marton, 2000). This perspective is the foundation of the relational approach in Phenomenographic research as the object (the phenomenon under investigation) and the research subjects (the people experiencing the phenomenon) are not

viewed or treated separately (Svensson, 1997). This understanding directly translates into an epistemological position founded on the principle of intentionality advocated by Brentano that posits “no hearing without something heard, no believing without something believed, no hoping without something hoped, no striving without something striven for, etc” (Spiegelberg, 1982, p.37 cited in Go & Pang, 2021). In Phenomenography, this knowledge is assumed to be generated by studying the variations of people’s experiences that are believed to represent collective consciousness of a group of people (Marton & Booth, 1997; Svensson, 1997).

As briefly mentioned earlier, Phenomenography’s vested interest in second order perspective as opposed to first-order perspective (normally associated with phenomenology) also sets the approach apart from other similar qualitative research designs (Marton, 1981, Svensson, 1997; Trem, 2017). In second-order perspective (people-moderated descriptions) the interest of the inquiry is to uncover how research participants experienced or conceived an object of the research (aspect of the world or phenomenon) as opposed to attempting to understand the essence or what/how the object is (first-order perspective) (Cibangu & Hepworth, 2016; Marton, 1981; Sjöström & Dahlgren, 2002).

In principle, Phenomenography is concerned with describing things as they are and for this to materialise it assumes that people are capable of accurately expressing their experiences and conceptualisations of a phenomenon (Lyle & Robinson, 2002).

Phenomenography attempts to aggregate these modes of experiences or . . . “forms of thought” into a limited number of categories (Marton 1981, p.181). According to Marton & Booth (1997), in this exercise the unit of Phenomenographic analysis is the way people experiencing something or conceptions – also referred to as a whole quantities of human-world relations. This directs the focus of research to the relationship between the subject and

the phenomenon instead of the aspect of the world or the phenomenon itself (Bowden, 2000; Trem, 2017).

The other major assumption of Phenomenography is premised on the assertion that people's qualitatively different ways of experiencing a phenomenon is limited in number (Marton & Booth, 1997). Go & Pang (2020), elucidate on this stance by asserting that "for a phenomenon to be seen as such and get recognised, it must contain limited number of discernible aspects, and the discernment of these aspects would give rise to a particular way of experiencing it" (p.2). Elaborating on this concept Marton (1988b), states that the basic idea of Phenomenography is grounded in the notion that:

When we ask people about their experience or conceptualisation of various phenomena in the world around them, whether or not these phenomena or aspects have been objects of educational experiences, again and again we find a limited number of qualitatively different ways in which the phenomena or aspect are seen or apprehended (p.189).

The result of Phenomenographic analysis, referred to as "categories of description", depicts an account of a range of qualitatively different but limited ways in which the phenomenon is conceived, perceived, or understood by research participants (Collier-Reed & Ingerman, 2013). These categories are then further compared with each other to establish hierarchical interrelationships among conceptions by using explanatory elements (Marton & Booth, 1997). The final stage of this exercise is drawing up a theoretical scheme known as outcome space that represents the range of conceptions captured in the Phenomenographic inquiry (Åkerlind, 2005). Content wise, the outcome space is composed of two dimensions: the conceptions (descriptive categories) and explanatory dimension also known as dimensions of variation that represents the structural elements used to define and demarcate each conception (Åkerlind, 2005; Bowden & Walsh, 2000).

Marton & Booth (1997) refers to these two logically and dialectically interconnected dimensions of the outcome space as Structure of Awareness that encompass both the referential and structural aspects of the conception. The referential aspect relates to “what the outcome of the experience is”; whereas the structural aspect implies “how the outcome is arranged or the structural relationship between different aspects of the phenomenon” (Haris, 2011, p.111). According to Marton & Booth (1997), the structural aspect is further divided into two sides, an external horizon (that distinguishes and defines the phenomenon from its outer context) and internal horizon (parts or elements of the phenomenon present in the immediate awareness of the individual at a particular moment and context and how they are interrelated and form the whole object).

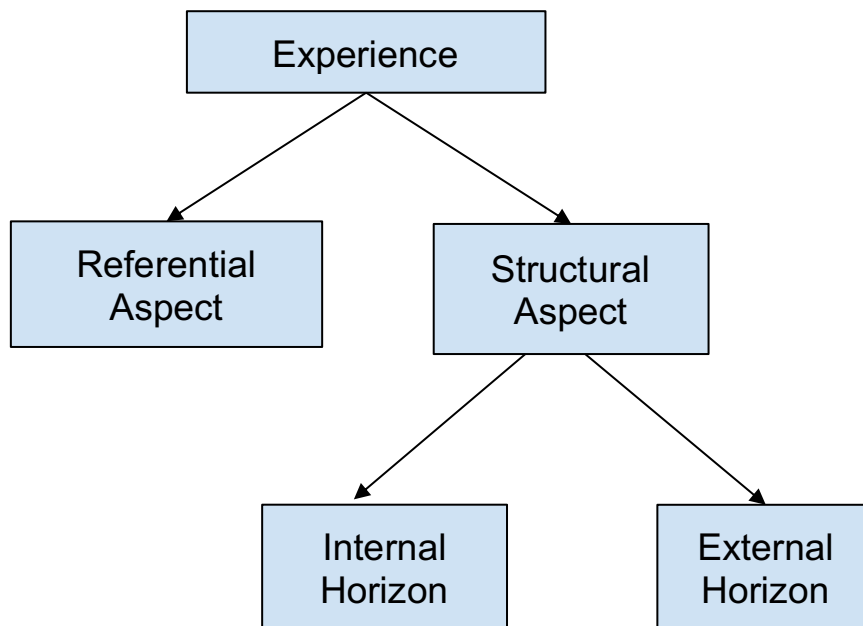


Figure 3.1 Structure of Conception (Marton & Booth, 1997)

Justification for Application of Phenomenography

Phenomenography has been an established methodology in educational research for over four decades (Dall'Alba & Hasselgren, 1996; Marton & Booth, 1997). Gradually, the application of the approach has been embraced by other disciplines outside education such as health sciences, guidance and counselling, corporate governance, and management (Lamb, et.al.,2011; O'Leary & Sandberg, 2017; Zygmunt & Naidoo, 2022). In their investigation of professional competence in managing diversity in organisations, O'Leary & Sandberg (2017), stated two relevant points to justify Phenomenography as the best suited approach to conduct their studies compared to other interpretive methods. First, Phenomenography lends techniques specifically designed to capture possible variations in ways individuals (belonging to a particular group) perceive and enact on aspects of a reality (Marton & Booth, 1997). Secondly, Phenomenographic research is designed to undertake a methodical collective

analysis of data (instead of looking into isolated or individual cases) that will form a logical, multidimensional, and hierarchical picture of the conception of a phenomenon that is to be organised into a larger framework or what Phenomenographers call an outcome space (Sandberg, 2000; Trigwell, 2000).

In addition to the above, through Phenomenography, researchers can also “make sense of how people handle problems, situations, and the world by looking at the way they experience and engage with the world or a particular phenomenon, or situation (Marton & Booth, 1997, p. 111). In the context of organisational management, Phenomenography has been previously used to reveal understandings/conceptions around various aspects of professionalisation, training, performance, and practices (Dall'Alba, 2004; Da Rocha-Pinto, 2019; O'Leary & Sandberg, 2017). In this regard, Lupson & Partington (2011), asserted that Phenomenography could be the best research approach that enables researchers to theorise about how a certain phenomenon in an organisation is experienced and understood by its members collectively.

For instance, in their Phenomenographic research on perception of Professional Identity of a group anaesthesiologist in Sweden, Larsson & Holmström (2005), identified four categories of descriptions or metaphors anaesthesiologists used to describe how they understood their work. These descriptions are professional artists (seeing patients as projects); as Good Samaritans (guiding patients through operations); as servants (serving patients as their professional duty); and as coordinators (leading the team of surgeons to operate on the patients). In South Africa the phenomenographic approach has been used in various context of social research, such as, education (Woollacott, et al., 2014; Konyana, 2001; Ojo & Booth, 2009; Wollacott & Van der Merwe, 2017), refugees (Mavhandu-Mudzusi, 2019), and psychology (Zygmunt, 2024; Zygmunt & Naidoo, 2022).

Another recent Phenomenographic research conducted in South Africa by Mbhele & Makhoba (2022), tackles a Phenomenographic inquiry that examines Audiologists' professional development during community service in KwaZulu-Natal. The study corroborates the assertion that Phenomenography affords the possibility of capturing conceptions that can represent a collective of professionals (Shahvazian, et al., 2016). In consideration of these unique and relevant tools that Phenomenography offers to a spectrum of disciplines, this particular study also adopts the approach to come up with an outcome space that maps out the qualitatively different but hierarchical interrelated ways in which Monitoring and Evaluation practitioners in the public sector perceive their Professional Identity.

Research Tools and Applications

Phenomenographic research procedure consists of three phases, namely, planning, data collection, and analysis (Bowden & Walsh, 2000). The planning phase that includes articulating the research purpose, research questions, and the aim of this research is presented in the first chapter of this report. The focus of this particular section is providing a detailed account of the remaining two aspects - data collection and analysis strategies that include selection of participants, data collection technique and instrument, procedures employed for the analysis and presentation of findings of the final outcome of the Phenomenographic inquiry.

Selection of Participants

Similar to other qualitative inductive approaches Phenomenographic research involves a small group of research participants to collect exploratory data for the purpose of investigating the qualitatively different ways a particular phenomenon can be perceived or understood (Collier-Reed & Ingram, 2013; Kettunen & Tynjälä, 2018; Trem, 2017). In addition to the nature of research questions and intended application of findings, the general

principle that guides the processes of data collection is reaching data saturation observed during the interview process (Sandberg, 1994; Sin, 2010; Trigwell, 2006). In their study entitled, “How Many Interviews Are Enough? An Experiment with Data Saturation and Variability”, Guest et al. (2006) argued that in qualitative research working with large sample size does not necessarily guarantee achieving data saturation and deep interpretation. According to Guest et al. (2006), the most important factor in achieving data saturation is the researcher’s qualities that enables them to discover a great number of ways to richly interpret even the smallest of qualitative data sets.

From the four models of saturation identified by Saunders et al., (2018), namely, theoretical, inductive thematic, a priori thematic saturation and data saturation, a hybrid model that combines data saturation and inductive thematic principles were used to guide sampling size and data collection for this research. In this hybrid model the cut off point for data collection is the degree to which collecting new data brings about a repetition of previous data and redundancy observed in emerging codes or themes. Moreover, consistent with the interpretive framework and inductive methodology used in this inquiry, conceptually and operationally, saturation is understood as incremental or a matter of degree rather than a discrete point as there is always a potential for new conceptions to emerge (Saunders et al., 2018). This understanding corresponds to using conceptual depth as a measure to make decisions regarding sample size (Guest et al., 2020).

Based on literature available on the subject, it could be concluded that, universally, there is no prescriptive ideal sample size written in stone for Phenomenographic research. For example, Larrson & Holmstrom (2007) believed that for Phenomenographic study to discover all possible ways of understanding the phenomenon under investigation, it should preferably have 20 participants to collect data from. This view has also been shared by other researchers (Marton & Booth, 1997; Trem, 2017). However, it has been also noted that some researchers

reported reaching saturation points with as few as 7 or 11 participants (Täks et al., 2014).

Trem (2017) suggests the target sample size appropriate for Phenomenography could be between 10-20 participants with the possibility of adding or decreasing as data is analysed and redundancy is attentively sought.

In line with the requirement of Phenomenographic approach, this research sought to secure a varied sample base purposely selected to maximise diversity of experiences, administrative level and geographical spread (Åkerlind, 2005; Bowden & Green, 2005; Marton & Booth, 1997). For this reason, two different sampling frames were used to identify ten potential participants for the study. The first frame being the SAMEA membership listserv. At the time of the proposal development for this investigation, SAMEA had a total of 401 active members (SAMEA, 2021). Out of which, the majority of them (145) are affiliated with the public sector. Potential participants were recruited from the SAMEA listserv by sending direct email invitations. The second group of participants included M&E practitioners in the public sector, who at the time, were either not active members or not affiliated to SAMEA. This group was reached using a snowballing technique after identifying a key informant. Within each sampling frame participants were purposely selected based on the following inclusion criteria: number of years work experience, representation in terms of geographical spread and government departments.

From the email invites and the snowballing technique, a total of nine participants were secured for the data collection, falling short of one participant from the plan. Backed up by the literature presented above, having nine participants is believed to be sufficient to carry out the Phenomenographic analysis to map perceptions of Professional Identity of M&E practitioners in the public sector. The data from these participants were collected in two phases across a period of eight months. The first phase involved engaging with respondents secured from email invites and second phase with participants contacted using snowballing

technique. It should be noted that, as the first ever inquiry to cover the topic that used a Phenomenographic approach, the aim of this investigation is not necessarily to come up with an exhaustive or a universal prototype of perceptions of Professional Identity of Monitoring and Evaluation practitioners in the South African public sector. Hence, this research should be understood as a preliminary exploratory inquiry of the topic and its findings should be understood within the broad discourse of the professionalisation of Monitoring and Evaluation in South Africa.

Data Collection Instrument

The aim of data collection in Phenomenographic research is to capture the utterances of the participants; hence, unlike other interpretive qualitative approaches, it is not necessary for the researcher to immerse themselves in the culture of the participants (Cope, 2004; Richardson, 1999). There are various techniques that Phenomenographic researchers could choose from for data collection, namely observations, interviews, and drawings (Barnard et al., 1999). However, the most popular or widely used technique in Phenomenographic research is an in-depth interview (Barnard et.al., 2019; Da Rocha-Pinto, 2019; Marton & Booth, 1997). Naturally, the instrument of choice in Phenomenography is an in-depth interviews guide (Brown et al., 2015; Kettunen & Tynjala, 2018; Trem, 2017). The guide consists of preset semi-structured and open-ended questions designed to direct the focus of the interview towards the target phenomenon - in this case perception of the Professional Identity of M&E practitioners (Kettunen & Tynjala, 2018).

As Da Rocha-Pinto (2019) rightly put it, using in-depth interviews in Phenomenographic enables the researcher to capture the “meta-awareness” of participants by encouraging them to openly share their experiences supported by concurrent relevant examples (p.356). Since variation of perceptions is the central precept of the approach that makes understanding of the phenomenon holistically possible, all views reflected during the

interview are entertained with no judgement of right or wrong (Marton & Booth, 1997). One key aspect of a Phenomenographic interview that should be noted here is that, while other qualitative interviews focus either on the stories of the participants or the phenomenon itself, Phenomenographic interviews focus on the relationship between the participant and the phenomenon (Bruce, 1997).

This research also used in-depth participant interviews to collect primary data using an interview guide that included a combination of semi-structured (with a list of basic background questions) and unstructured/open ended questions (for gathering detailed answers or in-depth descriptions) (Trem, 2017; Wagner et al., 2012). The interview questions were formulated in alignment with the main research question and sub-questions of the research. Due to the pandemic (COVID-19) and logistical constraints related to geographical locations of participants conducting face-to-face interviews were not feasible. Hence, all the nine interviews were conducted using the online video meeting platform, Zoom. The length of each interview was about one hour.

Data Collection Procedure: The Interview Process

The style of the Phenomenographic interview can be described as conversational, open ended, and non-directive (Dortins, 2002; Turner & Noble, 2015). Ashworth and Lucas (2000), describe the process as “conversational partnership” between the researcher and participants (p. 302). According to Marton and Booth (1997), Phenomenographic interviews involve two levels of engagements. The first level implies the contact and interpersonal relationship that takes place between the interviewer and the participant; whereas the second level happens at a metacognitive scale as participants engage in recounting their awareness of an experience or a phenomenon relevant to the interview topic or questions. Since the first level of the interview is where rapport is normally established, the recommendation by Sjoström and Dahlgren (2002), to start the process with basic entry questions was applied.

Hence, the interview guide starts with nine entry questions that gather background key information of participants related to number of years of work experience, type of formal/professional training, and field of specialisation. In addition, before starting each interview the researcher took time to introduce herself to the interviewee to create some degree of acquaintance and familiarity.

The second part of the interview guide was structured into two sections. The first section dealt with ten open ended questions directly related to the perceptions of professional experience of participants based on their personal experiences; while the ten questions in the second part focused on understanding the organisational and institutional contexts as perceived by each participant. As per the recommendations of Åkerlind (2005), maximum efforts were made to incorporate as many follow up questions to the primary questions and attention was given to emphasising on ‘why’ questions instead of ‘what’ questions to ‘elicit underlying meaning and intentional attitudes towards the phenomenon being investigated’ (p.65).

The ultimate aim of the open-ended interview questions in this investigation was to reveal the interviewee’s focal awareness regarding perceptions of their Professional Identity, and the role of the researcher was to facilitate/ create an environment that allows participants to freely articulate their experiences with regards to their Professional Identity in their own words. In this process, in order for the respondents express themselves freely, clearly, and thoroughly, Da Rocha-Pinto (2019) brings to attention the need for the researcher to strictly observe the principles of putting interviewees at ease, avoiding leading questions or assessment of answers as right or wrong, allowing participants to think aloud or be doubtful when attempting to answers questions; and if necessary to pause. In this regard, the researcher has put maximum effort to adhere to the above recommendations.

Phenomenographic Data Analysis

Like all other qualitative research designs, Phenomenographic data analysis is inductive in nature (Bernard et al., 1999). However, there is no single agreed upon gold standard analytical procedure that must be followed to do a Phenomenographic data analysis (Ashworth and Lucas, 2000). Literature indicates that there are at least four variations of data analysis procedures differentiated by the stages/steps/protocols they follow to arrive at the final result - the outcome space. The names of researchers associated with these procedures are Åkerlind (2005, 2008), Dahlgren & Fallsberg (2004), Marton et al. (1992), and Saljo (1997). Regardless of the choice of protocol followed for data analysis for research to qualify as Phenomenographic there are three common critical principles that it adheres to. These principles, as summarised by Han & Ellis (2019) include: approaching the analysis as iterative rather than sequential process (Yates et al., 2012), searching for collective meaning of responses instead of describing individual responses (Åkerlind, 2005), and avoiding mere identification and presentation of meanings from responses without establishing variations and relations amongst them (Bruce, 1997).

Table 3.1 Phemomenographic data analysis protocols

Åkerlind, 2005	Dahlgren and Fallsberg, 2004	Marton, 1992	Saljo, 1997
1. Reading through transcripts three times	1. Familiarisation: Going over the data to be familiar with the details.		1. Familiarisation
2. Grouping similar transcript	2. Condensation: Selecting the most representative statements that will be used to uncover patterns.	1. Identification of data which is relevant to the phenomenon being investigated	2. Identification
3. Rearranging groups 3.1. Identifying similarities and differences after further reading. 3.2. Searching for Dimensions of Variations across the scripts. 3.3. Identification of themes linked to a set of different Dimensions of Variations.	3. Comparison: Unpacking similarities and differences to identify variations in meaning.	2. Sorting: Identified data are sorted into 'pools of meaning' according to their similarities	3. Sorting
	4. Grouping statements sorted by similarities	3. Contrasting and categorising: Categories are created by contrasting the pools of meaning.	4. Contrasting and categorising
	5. Articulating the essence of similarities extracted, categorised, and described.		
	6. Labelling: The categories are represented linguistically.		
	7. Contrasting categories.		
		4. Reliability check	5. Reliability check

Note: (Adopted from Han & Ellis, 2019, p.5).

Similar to other qualitative designs, Phenomenographic data analysis across all protocols starts with getting familiarised with the raw data by reading through interview scripts obtained from audio records (Bryman, 2012; Wagner et al., 2012). Before moving into analysing the interview scripts, preliminary steps recommended by Marton (1992) were implemented in preparation for engaging with the raw data. First, the interviews were transcribed verbatim using an online transcribing software (Otter.ai). This was followed by reading through the text, while listening to the audio, many times to get introduced to or familiarised with the empirical material and make corrections on any possible errors picked up along the way. As Marton & Booth (1997), indicated each reading provided the researcher with the opportunity to expand their focal awareness to capture key aspects of the interview to attain holistic understanding of the phenomenon. For Phenomenographic research it is the scripts or raw data collected from participant interviews that form the pool of meanings pertinent to individual as well as the collective cases (Marton & Booth, 1997).

In the next step of the analysis, that is the condensation or reduction of raw data, the best representative statement, or the central part of a longer answer or dialogues will be identified from all interview scripts (Collier-Reed & Ingerman, 2013; Sjostrom & Dahlgren, 2002). Forster (2019) did a comparison of two of the protocols (Marton, 1992 and Åkerlind, 2005) to recommend the best approach to process interviews for the extraction of meaning statements from the interview scripts. The 'Marton way' (Marton, 1992, Marton and Booth, 1997) works by basically reducing the entire interview scripts into a collection of utterances and quotes or excerpts that are believed to represent a distinct meaning drawn from context within the transcripts. This approach leads to the transcripts seceding to be the unit of analysis and replaced by the utterances extracted from the scripts which will then be grouped into different categories based on their similarities (Forster, 2019). Forster (2019) identified the main limitations or criticisms of this approach to be linked to 'cherry-picking' of

utterances that seem to be relevant to the researcher and divorcing utterances or significant statements from their holistic context of the interview that is significant for representing the lifeworld and shifting the analytical focus on individual interviewee instead of the entire group of participants collectively.

On the other hand, the 'Åkerlind way' (Åkerlind, 2005, 2008), treats each interview script as a stand-alone key unit of data sources by keeping its essence intact and separate throughout the data analysis (Forster, 2019). According to Forster (2019) this does not, however, mean that individual interviews represent a single category of description as there is a possibility of having multiple meanings attributed to an experience or a phenomenon found embedded in a single interview script under different circumstances. The comparison of the two approaches ruled out the Åkerlind (2005, 2008) method as more suited to investigate complex issues that could seldom be expressed in a single simplistic statement or utterance (Forster, 2019). The same could be said about inquiries dealing with perceptions of Professional Identity because the expression of conceptions and experiences may emerge in a cumulative form as one reads through many parts of a script and across scripts (Caza & Creary, 2016). It is for this reason that the Åkerlind (2005) protocol was used for the first two stages (familiarisation and condensation) of the data analysis.

As depicted in Table 3, the third stage of Phenomenographic analysis that follows familiarisation and condensation of raw data is the preliminary grouping or classification of similar responses (Han, 2019). This is followed by the fourth step that involves the comparing and contrasting of responses in order to establish borders and categories amongst and between them (Sjostrom & Dahlgren, 2002). It is at this stage of the analysis that the qualitatively distinct conceptions about the phenomenon under investigation emerge in the form of a pool of meanings that will be used to bring together the initial categories of

descriptions (Larsson & Holmstrom; 2007, Marton, 1986). These categories of descriptions are “relative, experiential, context-oriented, and qualitative” (Marton 1986, p. 33).

Ashworth & Lucas (1998), point out that during this stage it is important that Phenomenographic researchers bracket their own prior knowledge and personal belief to fend off any predetermined theoretical structure or pre-authorised conceptions filtering into the identification of categories pertaining to the phenomenon being investigated. Once categories have been identified the next step is naming or labelling categories using appropriate descriptors or linguistic signifiers that best capture the theme or essence of each category (Orgill, 2002; Sjostrom & Dahlgren, 2002). This process is often reiterative as initially formed categories and their descriptions are refined and modified multiple times to arrive at the final stable or internally consistent set of categories (Bowden & Walsh, 2000; Marton & Booth, 2007).

Even if the process to arrive at the categories of description is done through collective analysis, identified categories should distinctively stand out from each other to reflect variations of the experiences (Bowden, 2000). The criteria to identify and articulate the distinctions between the categories could be based on either the referential (difference in meaning) or structural (different part or combinations) aspect of the conception of the phenomenon (Marton & Booth, 1997). Once the descriptive categories are established, what is to follow is explicating the subsequent explanatory dimensions or attributes that differentiate the categories (Marton & Booth, 1997). Explanatory dimensions decode the structural elements of the conceptions and indicate how these elements vary across each category of conceptions (Åkerlind, 2005).

Marton and Booth (1997) put forward three criteria to qualify categories of description to be Phenomenographic: first, each category must represent distinctly/qualitatively different aspect of the experience of a phenomenon; second, the

categories ought to be ‘parsimonious’, meaning having the minimum number of categories that fully grasp variations, and finally they must be logically related (p.125). Here, it should also be noted that when mapping the structural and referential variations in the conception of a particular phenomenon neither the categories of conceptions nor the hierarchically inclusive relationships amongst them are developed from ‘preconceived ideas’, ‘existing theories’ or ‘extant research’, but solely from the empirical data collected from the relevant group of people (Lupson, 2007, p.88).

Finally, using the categories of descriptions, the researcher draws up a larger framework called “Outcome Space” to provide a complete and multi-dimensional picture of the phenomenon by establishing empirical and logical relationships between the categories (Orgill, 2002; Sjostrom & Dahlgren, 2022). Typically, the relationship between categories is expected to be hierarchically inclusive, however, on occasions, there is also a possibility of the relationship turning out to be linear and branched (Larsson & Holmstrom, 2007; Ornek, 2008). Basically, the outcome space generates a theoretical scheme that portrays the range of identified conceptions (captured in the categories of descriptions) and their relationship to each other together with their explanatory dimensions presented in the form of a diagram (prose, graphic form or both) (Åkerlind, 2005; Bowden & Walsh, 2000). Finally, it should be highlighted that the underlying developmental objective of Phenomenography goes beyond mere construction of outcome space; rather use the identification of hierarchy between conceptions to carry out transformative agenda that brings forth movement from least complex to most complex conceptions of the phenomenon (Bowden & Walsh, 2000; Collier-Reed et al., 2009; Marton & Booth, 1997).

Limitations and Feasibility of the Study

This section presents inherent technical (methodological) weaknesses and administrative limitations encountered during the research processes (Wotela, 2017). It should, however, be noted that the intention of pointing out these criticisms is not to detract or devalue Phenomenography as an approach, but to point out areas of limitations so that the researcher could take the necessary precautions (Entwistle, 1997). It should also be noted that some of the critique on Phenomenography around conceptual clarity and explicitness of methods had been addressed and resolved through time (Bowden & Green, 2005). First, as an interpretive approach, Phenomenography not only shares the strength but also challenges that are inherent in all qualitative research designs and methods (Collier-Reed et al., 2009). Some of the major criticisms that Phenomenography shares with all qualitative approaches include issues with subjectivity (risk of influence of the researcher's perspective, experiences, biases, values, and viewpoints), complexity of data analysis, challenge in replication, and limited scope in generalisation of its findings (Mwita, 2022).

Another criticism thrown at Phenomenography is related to the nature and interpretation of categories of descriptions. On this, Alsop and Tempsett (2006) purport that Phenomenographic results provide very little insight into understanding a phenomenon as it only captures a narrow snapshot of what an understanding of a phenomenon or experience might be. In response to this, Webb (1997), suggests that categories of descriptions derived from Phenomenographic data analysis must be treated as heuristic mechanisms that should be taken as initial insights into the phenomenon instead of comprehensive representation of all possible outcomes. Phenomenography has also been often criticised for failing to recognise and integrate contextual factors and demographic variables in the analysis and interpretation of findings to see how these factors are linked to the conceptions/understandings identified (Entwistle, 1997; Saljo, 1997).

Webb (1997) also shares the same view regarding Phenomenography treating participants as vessels of collective conception without giving due consideration to social, historical and cultural contexts of a research that might influence the formulation of identified conceptions. Through time this limitation has been addressed by various prominent researchers who strongly believe that contextual factors should be an integral part of Phenomenographic research analysis and must be presented as internal and external horizons of conceptions of a phenomenon during the construction of the outcome space (Collier-Reed, 2013; Go & Pang, 2021, Marton & Booth, 1997; Saljo, 1997). In this research, this concern has been addressed by collecting contextual data from participants using the three - way analysis approach suggested by Collier-Reed (2013). The approach comprises the context of the research, context of the individual and context of the collective.

Coming to administrative limitations of the study, the major challenge was related to securing enough number of respondents needed to reach data saturation. Even if access to profile and contact details of potential respondents is granted from the public database on the SAMEA website, contacting and getting consent from selected professionals to participate in the research proved challenging and time consuming. Moreover, even if face-to-face interviews are an ideal mode of communication to create rapport with respondents (Wagner et.al, 2012), due to the COVID-19 pandemic interview had to be conducted virtually. Feasibility of the research in terms of cost did not present much challenge, as there was no fieldwork necessary.

Credibility, Transferability, and Dependability

As it is true in quantitative inquiries, rigour and research qualities are also imperative in qualitative approaches (Sin, 2010). Due to the distinctive essence of qualitative research tied to its proclivity to pragmatic traditions, nature of research questions, assumptions around data, and unique research processes the approach entails adoption and application of different

perspective and techniques to rigour and quality assurance befitting to its characteristics (Collier-Reed et al., 2019; Sin, 2010). This venture of formalising criteria of rigour for qualitative research approaches was a process that took decades in the making and it only started to take shape during the period of 1960s to 1980s (Denzin & Lincoln, 2018). The intention of these endeavours was to counter the long-standing criticism from positivist camp that relegated qualitative research as undisciplined, subjective, and “sloppy” and a mere breakaway from the dogmatic positivist standards of validity, reliability and objectivity (Collier-Reed et al., 2019).

In culmination of multiple endeavours, Guba and Lincoln’s (1981, 1985), seminal works “Criteria for Assessing the Trustworthiness of Naturalistic Inquiries” and “Naturalistic Inquiry”, recontextualised concepts of reliability and validity from the quantitative approach and introduced a new perspective and language that encapsulate four new criteria for qualitative research rigour under the auspices of trustworthiness. The constructs of these four criteria are: credibility (testing aspect of truth of findings), fittingness (transferability of findings to other contexts), auditability (consistency of findings if research is replicated), and confirmability (testing if findings are not a function of the biases of the researcher) Guba and Lincoln (1981, 1985). Lincoln and Guba (1986) further refined and condensed these criteria into three constructs of trustworthiness; namely, credibility, transferability, and dependability that could be understood as equivalent constructs of rigour to the quantitative counterparts of internal validity, external validity, reliability respectively (Collier-Reed et al., 2019).

Since Phenomenography shares many underlying assumptions and research dilemmas faced by all interpretive epistemologies, the approach has come to embrace trustworthiness expressed in terms of credibility, transferability, and dependability as an alternative measure of good research, and further adopted its own interpretation of corresponding criteria and accompanying sets of practices to achieve them (Åkerlind, 2005; Ashworth and Lucas, 1998;

Collier-Reed et al., 2019; Kvale, 1996; Sin, 2010). For example, the concern of credibility (internal validity) implies the degree of correspondence between the data obtained from interview scripts and the Categories for Descriptions is a vital element of trustworthiness of Phenomenographic research findings (Mertens and McLaughlin, 2003; Ornek 2008). In a nutshell, credibility of findings in Phenomenography is viewed from the angle for how well the raw data extracted and processed/coded from the interview scripts are full representative of the views of the research participants and only the research participants without infiltration of the researchers' biases, perceptions and/or influence from previous research findings (Collier-Reed, 2009; Sin, 2010).

Phenomenographic researchers use various techniques or verification strategies to ensure credibility or truth value of research findings. According to Morse et al., (2002), the researcher needs to provide a full and open account of these strategies for establishing credibility across the data analysis process starting from condensation of interview scripts to indicate their integration and ensure rigour. Some of these strategies taken into account and actively employed during the interview session, transcription of taped interviews and data condensations stages to ensure credibility of this research include: capturing the true voices of participants by collecting data that reveals overall aspects of the phenomenon without interpretation or influence; full and accurate reporting of all aspects of the interview process (by using flexible open ended questions, capturing immediate response on experiences - not reflected upon answers); exercising conscious discursive reflection on identified positionality; and finally 'bracketing' or filtering out scientific theories, earlier findings, other authoritative resources not to influence data analysis and interpretation (Cossham, 2017; Kelly, 2002).

During the comparison and grouping stages of data analysis, that leads to formulation of categories of descriptions/conceptions, full description of categories accompanied by

adequately illustrated quotes from the interview scripts were used to ensure credibility of the data analysis (Sandberg, 1997). This provides the justification that categorisations of outcomes are faithful representations of experiences and conceptualisations of participants. The additional measure that was taken to ensure credibility of data generation and analysis processes is researcher reflexivity. Roulston (2010), defines reflexivity as “the researcher's ability to be able to self-consciously refer to him or herself in relation to the production of knowledge about the topic” (p.116). In this regard, Roulston ‘s (2010) recommendations that included taking notes during interview sessions on participants' comments and researchers' own reflections in the comments, writing reflective memos immediately after each interview, and continually reviewing and editing the positionality statement of the research were considered and implemented.

Ensuring validity through transferability of findings is another aspect of rigour for qualitative research approaches including Phenomenography (Sin, 2010). Transferability refers to the extent to which findings of a research obtained from individuals or groups could be transferred to the context of the reader (Sin 2010; Wagner et.al, 2012). It should however be noted that transferability is a contested subject in the context of qualitative research. This is because the hallmark of the approach being particularity rather than generalisability (Greene & Caracelli, 1997 cited in Creswell, 2009). What this entails is that, in essence, qualitative research findings are context bound and the social world they are set in is naturally unstable - hence pursuing generalisations of qualitative research findings to a wider setting has been viewed futile (Larsson, 2009; Schwandt, 1997). However, application of the criteria through a case-by-case approach is still found to be relevant, desirable, and achievable (Yin, 2003).

Guided by literature, one of the strategies taken into account to ensure transferability of the findings of this research, at least in case-by-case scenario, is enhancing reader

identification of context familiarity through collecting detailed/thick descriptions of responses from participants regarding their experiences and perceptions related to their Professional Identity) (Larsson, 2009; Wagner, et.al, 2012). Moreover, other considerations such as diversification of sampling when purposefully selecting participants (in terms of years of experience, administrative level, geographical spread, status of professional membership) and provision of detailed descriptions of context of the Phenomenographic research (by providing an overview of organisational and institutional settings) have been included as strategies to enhance transferability of the Phenomenographic findings (Larsson, 2009).

The last construct of trustworthiness, which is dependability or reliability, as it is referred to in quantitative research, implies the extent to which the results of a study are consistent, if replicated (Creswell, 2009; Wagner et al., 2012; Zygmunt, 2014). Similar to the criteria for transferability, context fluidity or the instability of the social world also affects the plausibility of seeking reliability of findings in qualitative research (Sin, 2010). This is also true in Phenomenographic research as categories of description cannot be expected to remain the same because people's conceptions of a phenomenon change depending on their experiences (Zygmunt, 2014). Moreover, the outcome space (which is the final product of data analysis) is not easily replicated because it is a systematic discovery of findings reached through dynamic and reiterative data analysis and validation procedures pertinent to a specific researcher (Cope, 2002; Marton, 1986).

Despite the above limitations, Morse (2002), argues for putting reliability checks in place when conducting qualitative research to enhance analytical accuracy and confirmation of original findings. As a basis for the application of the criteria, Marton (1986) opted to redefine the purpose of reliability measures in Phenomenography as confirmability instead of replicability. Morse (2002) further elucidates on this proposition by asserting that the purpose

of replication of Phenomenographic research is not to reproduce the same result, but for the reprisal or re-examination of the topic of research using a different triangulation technique or checking consistency of results after an interval of time.

There are a number of strategies that have been suggested as options to corroborate dependability/reliability of Phenomenographic research. These include implementing inter-judge reliability check (using independent researcher to perform a parallel analysis for confirmation), dialogical reliability check (conducting open discussions and deliberation with other researchers to reach an agreement on final), and interpretive awareness or reflexivity (Åkerlind, 2005; Saljo, 1997; Sandberg, 1997). Application of both interjudge and dialogical reliability checks has been found unsuitable for this research since the project is part of a master's thesis project that will be assessed and evaluated based on individual merit - hence seeking collaboration with peers and colleagues is deemed inadmissible. Moreover, criticism thrown at both strategies for overlooking researcher procedure or path of discovery (Booth, 1992; Sandberg, 1997) was other reasons why interpretative awareness or reflexivity was adopted as a reliability/dependability check for this research. The strategy was integrated from early stages of data collection to analysis and discussion of findings. Details of the reflexivity accounts are presented in the positionality statement presented below.

Positionality

Positionality in qualitative research dictates that the researchers must identify views, values, and beliefs they may have about the subject under investigation (the research design, process and outputs), the research participants, and the research context - because researchers ethics, personal integrity, social identity, social values and competence may influence the research process (Holmes, 2020). In line with this, it was critical that the researcher consciously and reflexively engage in the research process to filter out any preconceived

ideas, doubts and misconceptions he or she may have about the issues at hand, research participants and context of the research (public sector).

One of the central ontological and epistemological assumptions of the constructivist/interpretive paradigm is that there is no single or absolute reality but many realities that can be enunciated or interpreted based on the values, perspectives, and positions of the researcher (Babbie, 2008; Wagner et.al, 2012). Hence, I conducted this research undertaking and presented its findings with the understanding that my viewpoints will only be one of the many possible interpretations of the experience of participants. I must also indicate that these viewpoints dictating the research process should be understood by taking into consideration my standpoints shaped by me being an immigrant, an able bodied, middle aged, middle class, black woman who is a novice to the profession of Monitoring and Evaluation.

As an emerging M&E professional transitioning from a different field of practice (with its own distinct discipline) the subject of Professional Identity in the M&E context brings a personal interest to me. As a non-South African researcher who has limited knowledge on the political terrains and organisational set up of the public sector and professional environment of M&E in South Africa, I had put an extra effort to get a deeper understanding of the research topic through extensive reading, literature review, and through exploring the context of the research, which is the public sector in SA. Further to this it is imperative that I need to constantly put my biases and pre-existing conceptions in check that I may have about the subject of the study, research participants and context of the research. The above three identifiers (being non-South African, being novice to the profession and my lack of experience in the public sector) will put me in a position of an outsider or non-member among the researcher participants. As an outsider, these positions were advantageous in terms of mitigating any preconception and biases I might have about the topic not to

influence the data analysis. On the other hand, however, being an outsider did present challenges related to accessing participants and my ability to insightfully discuss the subject as an insider researcher may have (Holmes, 2020).

Ethics

Wiles (2013) defines ethics as a branch of philosophy which is concerned with the question of morality (right or wrong intentions and actions). In research, both quantitative and qualitative, the term implies the ethical behaviours to be adhered to by the researcher from the inception of the research problem to the dissemination of research findings, to ensure dignity, protecting privacy, securing self-esteem, and freedom for research participants (Bryman, 2012; Creswell, 2009; Neuman, 2014). Wotela (2017) condensed the core ethical principles of social science research into causing no harm, providing truthful and complete information about the research or no deception, respect for privacy of participants, and obtaining informed consent from participants before involving them in the research. These are particularly critical in qualitative research, such as this one, that requires collecting intimate data from people and intrudes in their lives or experiences (Punch, 1998). The aim of the research design and the characteristics of the target population/sample are identified as the core factors that will dictate ethical decisions that need to be made before proceeding to implement the research process (Oliver, 2003).

There are a range of ethical frameworks that researchers could choose from in order to draw criteria to inform their decision-making processes in identifying and implementing ethical principles across the research process. Israel & Hay (2016) and Wiles (2013) summarised these frameworks into five categories: namely, consequential, non-consequential, principlism, ethics of care, and virtue ethics. In the consequentialist approach, an intent or action is considered morally right as long as it produces a good outcome for the participants and the wider society; whereas non-consequentialist adheres to considerations of

matter of ethics even if the consequences are not beneficial. The third framework, principlism, is a form of non-consequentialism that applies certain standard ethical principles; namely, autonomy, beneficence, non-maleficence, and justice to deal with ethical or moral dilemmas. The fourth approach, ethics of care, commonly used by the feminist and participatory action research approach, emphasises the values of relationship, interdependence, care, meeting needs, and seeking the views of others to make decisions about ethical issues in research. Finally, the last approach, which is virtue ethics, puts the researcher's personal integrity, ideals and values at the centre of ethics related decision makings and expects the researcher to ask the question of what a virtuous researcher would do every time they face an ethical dilemma in the research (Israel & Hay, 2016; Wiles, 2013).

Of the above four options, a combination of the non-consequentialist and principlists frameworks were used to guide ethical decisions for this research. This position aligns with the protocols for ethical principles and procedures for human research that have been put in place by the University of the Witwatersrand for regulation of research projects conducted by students and faculty. As per the risk level classification of the University the target group for this study falls under the low-risk category as the only potential risk involved is that of a discomfort or sensitivity to questions asked. To meet the ethical compliance, an ethics training organised by the University was attended, then an ethics clearance application was submitted for approval. Once the University Ethics certificate was obtained the next step taken was securing permission from the SAMEA to access their database to contact potential participants.

Once respondents have been identified, either through the SAMEA listserv and later through the snowballing technique, they were provided with a Participant Information Sheet and Informed Consent Form. The participant information page provided participants with a brief overview of the research project including expectations and parameters for ethical

engagements. The Consent Form contained information on voluntary participation and right to withdrawal, privacy & confidentiality, benefits & risks of participating in the research, data security, and sharing of results. In preparation for data collection, the completed and signed copies of the consent forms were collected from each participant before engaging them with the interviews. Data collection processes started only after laying these ethical grounds for the research (Babbie, 2008; Bryman, 2012; Wagner et al., 2012).

During the interview process, as indicated in the participant information sheet, participants were assured of confidentiality (protection of information obtained from participants) and their right to skip questions or even withdraw from the session all together anytime during the sessions if need be. After each interview, raw data was stored in password protected devices to ensure privacy and data security (Wotela, 2017). The raw data as well as the semi-processed data from coding will be kept for 5-10 years and will be discarded so it does not fall into the hands of other researchers (Crewell, 2009). During the data analysis and discussion stages of the research, the real names and workplace of participants have been actively concealed by replacing them with pseudo names to secure their privacy (Babbie, 2012). The participants were also provided with the option of requesting access to the final research report if they are interested.

Chapter 4: Presentation and Discussion of Findings

Introduction

This chapter presents the outcome of the data analysis of the inquiry based on the interview transcripts from the nine research participants. Though, traditionally, Phenomenographic analysis starts with the presentation of the categories of descriptions this report opens with providing background information on participants as well as contextual factors related to the experiences of M&E practitioners in relation to their Professional Identity in their respective organisational settings. Providing a robust description of the context of research has been suggested as one of the techniques to ensure rigour of a qualitative research by establishing trustworthiness of findings through enhancing transferability of findings (Collier-Reed et al., 2009; Larsson, 2009; Wagner, et al., 2012).

In this regard, Collier-Reed et al. (2009) provided three dimensions or features of the research context that could be incorporated into a Phenomenographic data analysis. These dimensions include the domain of the researcher, domain of the individual participant, and the domain of the collective. According to Collier-Reed et al. (2009), context related to the domain of the researcher is normally covered when clarifying the purpose, objective, data collection schema, and motivation of the research. Moreover, as per the positionality statements presented in the methods sections the researcher had been actively and reflectively engaged in the act of bracketing their own potential biases to the best of ability during the data analysis process.

The second aspect, which is the domain of the individual context, involves digging deeper into the individual context of participants to focus on the meanings behind utterances that surface in the realm of the focal awareness of participants during interviews. This will enable the researcher to uncover those aspects of the phenomenon that remain in the

background yet shape conception of the phenomenon under investigation. Collier-Reed et al. (2009) relates this context as the thematic awareness in Phenomenographic research. The importance of incorporation of individual context has been also emphasised by Go & Pang (2021) who reiterated the view that people's experience of phenomena is context sensitive. Hence, the authors advise Phenomenographic researchers to intentionally engage in distinguishing and delineating thematic fields in relation to the themes of awareness. This is emphasised as even more critical to inquiries which are embedded in the "lived" context (such as Professional Identity), and an oversight on this matter can lead to ambiguity and compromise the quality of the Phenomenographic results (Go & Pang, 2021).

As identified in the literature review and indicated in the proposed conceptual framework of the inquiry the main contextual factors informing the thematic awareness of participants identified to possibly influence the perception of Professional Identity of M&E practitioners are related to views on status and image of the profession, professional experience in their work context (related to their professional autonomy, boundary and discretion for decision making) and background on professional training and qualification (Figure 2.1). Hence, investigation of the thematic field of the phenomenon (Professional Identity) in the form of identification of the contextual factors were framed along those lines.

Lastly, the domain of the collective, which is the core of the actual Phenomenographic analysis, has been covered by collectively synthesising the empirical data gathered from interviews and arriving at a Phenomenography of the qualitatively different conceptions of perception of Professional Identity of M&E practitioners in the public sector. To reiterate, the identification of a set of qualitatively distinct categories that represent variations in how various people experience a phenomenon is the primary goal of Phenomenographic data analysis (Han & Ellis, 2019). The end product of the data analysis is the outcome space of the Phenomenographic analysis that consists of "comprehensive

expression of the researched phenomena " (Ireland et al., 2009, p.10).

Participant Background and Variations

The research included nine M&E practitioners purposely selected from the public sector in South Africa. The number of years of work experience as an M&E practitioner range from two years to seventeen years. In addition to their current position in the public sector, all nine participants had previous work experiences in the private sector and/or Non-Governmental Organisations (NGOs). All have a Baccalaureate Degree and at least one additional postgraduate degree. In terms of academic qualifications, participants come from a diverse educational background and a mix of multi-disciplinary training such as: Humanities, Public Management and Governance, Financial Economics, Social Work, Physiotherapy, Information Management, Public Policy and Economics, Political Studies, and Public Policy and Administration. All except one reported having a specialist postgraduate diploma in Monitoring and Evaluation or are currently pursuing a postgraduate diploma or a master's degree in the field. The highest education level in the group is a master's degree.

With regards to job positions, M&E practitioners who participated in the interviews hold various specialist, managerial and leadership positions in their respective organisations. These positions include Deputy Director, M&E Specialist, Outcome Facilitator, Strategic and Operational Support, Administrator, Head of Planning and Policy Unit, and in one case a focal person for M&E while holding a specialist position as a Community Physiotherapist. The participants represent all three-tiers of government: two at national level, four at provincial level and three at local/district level. In terms of geographical spread, participants represent the national government as well as two of the largest provinces in South Africa namely, Gauteng and Kwazulu Natal (KZN). Another notable characteristic of the group is that despite having an eclectic academic background, all except two participants primarily identified themselves as M&E professionals. The other two participants prefer to be

professionally addressed in their primary qualifications even if they are actively engaged in M&E practice at the time of the interview.

Professional Motivation and Career Trajectory of Participants

When it comes to motivations or circumstances that led participants to join the field/practice of M&E the summaries of the interview report revealed two categories: those who joined the M&E out of self-initiation or compelled by their own personal professional development goal and those who ended up pursuing M&E nudged by workplace demands. Out of the nine, three participants responded by saying that they were inspired to join the field based on their own personal career ambitions while the remaining six happened to join M&E in response to the demand that emerged in their workspace. Participants could also be grouped into three categories in terms of their membership status and level of involvement in the national M&E professional association - the SAMEA. These categories include those who are active members (three), non-active members (four) and non-members (two). Having participants from diverse membership status is believed to allow for gathering varied reflections on the subject of Professional Identity.

Another aspect of the professional trajectory of participants that has been explored in the investigation was their professional commitment to both Monitoring and Evaluation and the public sector by asking them their career plan for the next five years. First of all, two of the participants (Participant B and D) were considering retirement at the time of the interview so the question was not relevant to them. One participant (Participant A) expressed a very strong allegiance to the public sector by stating that it is “my calling” and considered himself a career civil servant with a Monitoring and Evaluation speciality. Similarly, Participant E stated his intention to keep growing professionally in the public sector and hopes to be “elevated to positions within the space”. Two participants (Participant F and I) indicated that they would like to venture into private consultancy and academia in the future specialising in

the evaluation aspect of the profession eventually leaving the public sector, but wouldn't change the professional field of M&E. Explaining why he would consider leaving the public sector Participant I stated that:

I think the public sector is or tends to be limiting in terms of professional growth and development...quite often the outputs are narrow. And they limit you to what you can do.... I want to be versatile... so consultancy away from the public service will enable me to consult in different sectors or a sector. So that way, I will be able to be versatile, and a more knowledgeable practitioner than when I am subjected to one linear ladder.

Participant D also shares a similar view when it comes to long term career commitment to the public sector by affirming that he does not consider himself a career civil servant but "a lifetime M&E practitioner". He further explained his position by saying that:

My M&E skills should be so good that irrespective of a sector that I find myself in I will still be an effective M&E practitioner... If there is some work that one needs to do in the private sector, that needs the set of skills that I have, I would gladly apply for that. I would gladly take it if I were given. I honestly do not have a name, attachment, any connection to the public sector at all.

When asked the same question Participant C responded by saying the:

I would like and hopefully see myself as either a Deputy Director or Director, either in strategic planning space, or even in the Monitoring and Evaluation space as they feed into each other. If another opportunity arises, I will take it. Definitely. I would take it because after a while, I have come to realise Monitoring and Evaluation can become very redundant if you are doing the same thing over and over and over, especially government reports stay the same. The presentations stay the same. So, there is not much place for creativity or innovation.... So, if there is an opportunity

that arises for me to broaden my professional perspective, I do it.

On the other hand, Participant D sees herself flexible when it comes to her future career direction, commitment to the public sector and M&E as she views her professional objective from a different perspective:

I see my work as a ministry. And I see that I am placed there to serve the people.

Because that is what God really wants me to do...I have never seen myself as

somebody who is after a position whatever, but what does happen is I grow within

wherever I am, public sector or NGO... I see myself either working for an NGO, or

working for the public sector because I am there to serve people... so maybe one

thing that keeps me going is that I never see my executives as the people I am there to serve.

Participants Views on Professional Status M&E in South Africa

As indicated in the conceptual framework of the inquiry, another critical factor that has been identified to influence perception of Professional Identity is status and image of the profession under consideration. In this regard, participants were asked four interrelated questions, namely, “Do you consider M&E as a profession?”; “Why?”; “Are you happy with the current professional status of M&E?”, and “If not, what needs to change”? The summaries of the answers for the first question (“Do you consider M&E as a profession?”) revealed diverse views including “yes”, “no” and “not yet” that led to general categorisation of the status of the profession into two groups: M&E as a stand-alone profession and M&E as a sub/ co-profession. Those who responded by saying that M & E deserves the status and image of a proper profession is mostly because it involves systematic knowledge and due to its role and high value both in the private and public sector. Those who answered by saying not yet and that it cannot qualify as a proper profession had reasons related to M&E lacking strong and distinctive disciplinary grounds or simplicity of its knowledge base, absence of

pertinent statutory professional association, complications related to separation of “Monitoring” and “Evaluation” aspects of the profession (as Participants A stated both should not be conflated together due to possible conflict of interest).

Another notable finding here is that irrespective of the belief that M&E should emerge as either a full-fledged stand-alone profession or co/sub-profession participants agreed that it still needs to keep evolving across all its dimensions. These dimensions include bolstering its knowledge base (discipline) in the education and training systems of the country, clearly (re)defining its boundary from other professions, firmly establishing its values, addressing wrong perceptions about its roles, and strengthening its Professional Body. Moreover, those who believe in its professional stand-alone status seem to be not very satisfied with its status hence put forward recommendations for improvement whereas those in the opposing view believe it is undeserving of the status in the first place because its influence and capacity are simply overstated hence should remain as a co/sub-profession. Responses of participants to questions related to the status and current standing of M&E as profession is presented in Table 4.1 below:

Table 4.1 Summary of views on Professional Status of M&E

Participant	Do you consider M&E as a profession?	Why?	What must change?	Satisfaction with the status of the profession	Category
PA	Yes	“Because it involves the systematic gathering of information”	“So basically, if M&E can be offered in high school, then when students transition to tertiary education, they will have an idea of what M&E is”. “Monitoring and Evaluation should be treated separately”	“Very much satisfied”. “What is satisfying is the fact that, you know, being able to monitor... oversee the project”.	A Stand-Alone Profession
PB	No	“I do not think it is a complex field...I mean it is really common sense”. “I have always seen it as a means. And that has been the biggest problem. And part of my disappointment in	“The issue is, you know, if people start focusing on as I said, you know, the sort of low-level technical aspects rather than real conversation...”.	“It has been elevated to a point higher than where I want to see it”. “And it needs to be told that, essentially, there is hierarchy”	Sub/Co-profession

Participant	Do you consider M&E as a profession?	Why?	What must change?	Satisfaction with the status of the profession	Category
		the years...is that people started focusing on M&E as is the end of everything". "Get a proper degree first, you do economics whatever, do finance or do something real". "And then you can have a short course". "Yeah, so it should be a supporting case to discipline rather than a discipline". "As I said before... you need to have an underlying discipline and knowledge".			
PC	Yes	"Honestly, I would definitely like to see it as a profession. Because yeah, I would like to think even in	"...if it is done correctly, it would carry the value...we only do monitoring. We do not do the	"Honestly, at this point, it feels like we are undermined. We are not getting enough recognition".	A Stand-Alone Profession

Participant	Do you consider M&E as a profession?	Why?	What must change?	Satisfaction with the status of the profession	Category
		the private sector M&E specialists are needed to see if you are reaching those goal" "It should be a profession and a very uplift one"	evaluation side. I think that is where we are lacking. If we actually do the evaluation side and showed units what they are lacking, I think we would carry more value and probably also be more respected and more valued within the department and not just been looked at as a compliance unit"		
PD	No	"No, I am saying it cannot be in my opinion..."	"So, the best way to have monitoring qualification is to link it to policy formulation". "As a huge part, major part if you like, you have got to have two majors. You know, yeah. Let me just say for my master's I	"Yes, particularly because one is able to intervene. Okay, do something about the intelligence gathered, do something about the knowledge gathered to further enhance implementation and change people's lives"	Sub/Co-profession

Participant	Do you consider M&E as a profession?	Why?	What must change?	Satisfaction with the status of the profession	Category
			majoried in development economics as well as demographic. Yeah, something like that. You can have Monitoring and Evaluation as well as economics or development, Monitoring and Evaluation and gender and whatever".		
PE	Not yet	"I think it is on the way. Okay it is still developing; it is something that will still grow. Okay, to be enforced" "...let us use the example of medicine or a doctor. You know that being a doctor you	"It needs a political buy-in to become a profession that makes a difference". "We can see maybe a programme is not working and we may give recommendations to the executive. So, they will make a decision...are we going	"No, I think I am not fully satisfied with the way it has been brought to the level it is held"	A Stand-Alone Profession

Participant	Do you consider M&E as a profession?	Why?	What must change?	Satisfaction with the status of the profession	Category
		have to study a certain programme that you study for a particular seven years, okay. Yeah, when it comes to M&E it is something that you get introduced to because it come from public management and governance or comes because you are streamed with in something that is similar to it”	to use those recommendations? If not, which means those recommendations, have no value for money. So, we are just doing it for us.... I want it to see it move from, like being controlled”. “I would recommend that M&E should actually move from maybe the Presidency and be a Chapter Nine. Because remember, when it is a Chapter Nine institution it has those autonomous powers where it can make decisions. So, like, let’s say the Public Protector will make recommendations and those recommendations		

Participant	Do you consider M&E as a profession?	Why?	What must change?	Satisfaction with the status of the profession	Category
			are very binding can't therefore deviate from them"		
PF	Not yet	"It is a profession in progress". "I see it as work in progress". "maybe it is cross-cutting so much... because M&E is so fluid". "So, it is 'accommodative', it is not a primary field". "It is a sub-field that many different professionals modify to their own work".	"I think SAMEA and maybe by extension the DPME and African Evaluation Association as regulatory bodies should influence the curriculum development and level of standardisation". "Yeah, furthermore, I think it should go a level lower... the fact that M&E starts at post college diploma level, we missed out an opportunity to gain the basic skills in terms of curriculum development and that should start at the fairly low NQF level... when	"I am not disappointed. I am comfortable. I wouldn't say happy.... especially because as a new member or as an entrant"	Sub/Co-profession

Participant	Do you consider M&E as a profession?	Why?	What must change?	Satisfaction with the status of the profession	Category
			you go to NQF level eight, nine and thereafter would have had the primary training so much that it is possible for one to say my primary qualification is Monitoring and Evaluation”		
PG	Yes		“...maybe at some point, we will reach a point where we have an undergraduate proper degree, not on a post graduate level, where one just comes from high school and gets into university and starts doing Monitoring and Evaluation as a	“At the moment, it seems as if it is just a secondary aspect of your career on management skills”.	A Stand-Alone Profession

Participant	Do you consider M&E as a profession?	Why?	What must change?	Satisfaction with the status of the profession	Category
			profession... I think that we will be able to elevate the status of M & E and make it have the dignity that it deserves". "So, if Monitoring and Evaluation can start from the undergrad level being legalised and monitored strictly so I think it can elevate to the status of profession".		
PH	Yes	"I think so because if you are not trained you cannot do anything unless you are referring to tracking of progress reports as M&E". "For me, I take it as a	"I also think everyone thinks they can do "M&E. That is the problem... because where you just check, but people do not understand that M&E is not just about checking progress, it is checking	"I think it means a lot to me. You know I think it is a very interesting space to be in, you learn a lot, you get so much empowered".	A Stand-Alone Profession

Participant	Do you consider M&E as a profession?	Why?	What must change?	Satisfaction with the status of the profession	Category
		profession..even if I have a master's degree, I studied postgraduate diploma because I realised that there is a knowledge of M&E that I do not have"	the indicators towards the outcomes. So, there is that area missing that really lowers the standard of M&E because of lack of understanding". "And most of the time I think that, you know, the way research has been respected, why can't you respect it the same way?" "I think when something is a profession, it goes to higher standard of being professionalised...what I have learned about M&E is that for you to be able to actually do quality work of M&E you have to study until		

Participant	Do you consider M&E as a profession?	Why?	What must change?	Satisfaction with the status of the profession	Category
			Masters because then you have been trained to actually understand the information on how to analyse and interpret information at a high level” “I think maybe the challenge is that M&E never has been put in a professional body like Research Psychology...”		
PI	Yes, but it is still developing	“And the reason I am saying this is, I cannot imagine how I would perform certain aspects of M&E if I do not have a high degree of knowledge, for example, impact evaluation needs a serious or high degree	“But at the same time, as I’m saying, it is also incumbent upon the M&E practitioners to prove the value of M&E”. “I think it’s a very important profession personally, but I do not	“I am not happy with the status that is accorded to M&E quite frankly. But as I was saying from both sides of, you know, the public and other professionals I think there is more accordance, I mean status or rather respect that will still need	A Stand-Alone Profession

Participant	Do you consider M&E as a profession?	Why?	What must change?	Satisfaction with the status of the profession	Category
		of knowledge, at least in research.... I honestly cannot see how I would go about and how I would get away with doing an impact evaluation without advanced understanding of research”.	think that it has reached that point where it is given the status it deserves based on the contribution that it makes. And as I have said, yes, we still have some long way to go particularly as a developing country”.	to be given to this field called M&E” “I’m still saying I still believe that as we move toward, give it ten, fifteen years, it will be a profession... it will gain some status as well”.	

Participants Views on Organisational and Institutional Context

Professional Boundary

As per the conceptual model drawn up in Figure (2.1), the first set of questions that dealt with organisational context centred around experiences of participants with regards to professional boundary in their respective organisations. The findings of the interviews indicate two general views varying along the administrative level. The first view alludes that M&E practitioners experience challenges related to professional boundaries. Participant H (PH) who represented a lower administrative level in the public sector describes her experience by stating that: “actually, I used to love to say that everyone in my organisation is an M&E expert”. She further described the reason behind this by saying: “maybe people think that M&E is an easy task”. She further expressed her frustrations by saying that: “there are things that I have seen happening and most decisions that happen in M&E are made outside M&E and not a single M&E person is being consulted”. This view is also shared by PG, who is also from a local administration level. PG relates the situation to lack of professional boundaries that he mentioned as a common scenario in the public sector. He said: “people take a five-day course calling themselves Monitoring and Evaluation practitioner”. He further suggested that the solution to this challenge is “to increase the bar” for joining the practice by demanding proper qualification and screening of skills.

On the other hand, Participant I (PI) stated that the work culture in his organisation promotes collaborations and sometimes this arrangement may appear as an overlap but “those boundaries are clearly defined” across different professionals. Another similar view on the subject came from PF (representing one of the biggest Metros in SA) who stated that though crossing of professional boundaries in his organisation does not happen so much, if it happened, “I would have probably considered it as a multi-disciplinary or interdisciplinary

cooperation or collaboration”. PA who is from provisional administration level also reported experiencing no issue with regards to professional boundaries as the existing organisation-wide Performance Management System provides clear prescriptions of duties, responsibilities and tasks for everyone in his department. The same goes for PB, PC, PD, and PE who belong to either provincial or national level departments.

Professional Autonomy and Discretion

Unlike professional boundaries, variations in experiences related to professional autonomy are found to correspond to the administration level and positions of authority or rank that participants belong to. Those who work for the public sector at higher offices seem to enjoy more freedom and discretion to make consequential decisions based on their professional capacity. From the nine participants PF, PB, PI and PD belong to this group. For example, PD stated that she enjoys a lot of respect from her counterparts in her organisation when it comes to her professional opinions, and she associates this professional regard to the quality and calibre of people around her. The same goes for another participant (PF) who attested to the autonomy accorded to him in his organisation that allows him to make independent decisions when it comes to designing and enhancing M&E systems. To corroborate this assertion, he talked about one of his recent experiences related to his engagement in refining the M&E system for one of the programmes under his supervision.

He said:

I was given space to refine the programme and the project plan and hatch out the appropriate indicators... so this made me feel like I have a sense of autonomy because I think, generally, I would have been told that no this is how we do things here, this is what we have been told to monitor and this is what we are going to monitor. So I was given the opportunity to demonstrate that I am more professional, a professional who is able to tell the difference between the right indicator and an indicator that makes no

sense.

The fourth Participant who spoke about his positive experience in his organisation (at the provincial level and higher rank) with regards to professional autonomy is (PI). He said:

I am very happy with the autonomy that I have as an M&E practitioner. As I have said, luckily, I am in an organisation where M&E recognised... and it is impersonal. If there is a programme manager that is reporting and based on the M&E principles have not achieved their target, I do not have to apologise for telling them there are targets they did not meet because of X, Y, Z... I do not feel like I am under pressure to do things that are outside M&E. I feel like I have full decision-making powers as far as M&E is concerned.

On the contrary, the remaining five participants have reported having numerous negative experiences related to challenges associated with restricted autonomy to make decisions pertinent to programme management or their involvement in policy issues in their respective organisation. The most common aspects that run across the experiences of participants in this group is the inconsequentiality of their professional input. Participant I (PI), who works at lower administrative rank, had this to say about the devaluation of the professional discretion of M&E practitioners in his organisation:

We can say maybe a particular programme is not working and we may give recommendations, but it is the people that are in the executive that will make the decision. Okay, are we going to use those recommendations? If not, which means we have done an evaluation and there is no value for money... some of the things must be binding...we recommend to our principals, we do not enforce them...if they decide not to take them then the profession would stop there I think this is a South African way now, politicians have the power over a profession.

Participant C (PC) associates the cause for the devaluation of professional autonomy

and the confinement of M&E to the advisory role to the fact that most M&E practitioners do too much Monitoring and very little Evaluation. She said:

If it (M&E) is done in the correct way, I think it would carry value. We do not do the evaluation side. I think that is where we are lacking. If we actually do the evaluation side and show units what they are lacking, I think we carry more value and probably also be more respected and more valued within the department and not just seen as a compliance unit.

She then went on further and described how this experience is affecting the value of her profession by saying that:

When you are putting in the effort from your side, taking your profession seriously and at the end of the day wanting to see your department do good. Um, it does really get to you. You are like, okay, but we have recommended this, we have asked for this...seeing that your recommendation is not taken into consideration and actually the thing you are trying to avoid actually happened, it is like guys, we told. And I think also because, you know it's in a political space, the party's rules overrule the department, essentially.

The restriction on professional autonomy when it comes to enforcing binding professional judgements has been also substantiated by PA and PG. According to (PG), from local/district level, the room for meaningful participation of M&E practitioners in the decision- making process is restricted not only in enforcing recommendation but also during stages of programme planning and implementation. PG elaborates these points by stating that:

We get most of the things from the national, they do the top-down approach. For me this creates a disconnect between the people on the ground and people at the top. So, the understanding is not fluid. So, I think that this is one aspect. And the second thing

is the power struggle. If one says my way, you know, if you are a subordinate, you just have to implement, you do not have to question because if you question, there can be such a problem.

The experience of participant H (PH) is not different from the previous five participants when it comes to professional autonomy. As she said, having a professional independence to make decisions “is not a common thing” and “you need to have a strong character to be able to practise that and really need to stand your ground like I told you”. She also said: “we will have to rebel, just rebel and say this is against the standards”. About such pressure that is compounded with lack of professional boundary in organisation she said:

I think as much as I want to believe I am strong, I think, lately, I have been asking myself whether I am in the right profession, if I want to continue to work in this way.

It has put me to a point where I think I chose to continue with M&E where it is not a good place to do M&E...I told myself that maybe it is time I start to look somewhere.

And also, I am at the point where I am thinking about resigning without a job.

Similarly, PA

Perception Towards M&E Practitioners

The third contextual factor that has been explored in relation to the experiences of M&E practitioners in the public sector is the perception of other colleagues towards M&E as well as the professionals themselves (as described by the participants). The interviews revealed mixed views and trends that did not necessarily correspond to the previous two factors - professional boundary and autonomy. This implies that neither administrative level nor the rank of the practitioners are exclusively associated with a particular trend with respect to perceptions towards M&E practitioners. In addition to rank and administrative level, the designated purpose of M&E and the roles practitioners are prescribed could be taken as the general indicator of how the profession and by association the professionals are being

collectively perceived in an organisation.

The trivialisation of the role of M&E in her organisation as nothing but “just report writing” was raised as one of the wrong perceptions toward the profession by Participant H. She associates the causes of this misconception with lack of understanding of roles and standards of M&E at organisational level. The same issue was raised by PI who used the term “Police of Performance” to describe the general perception of the practice in his organisation. The term is usually used to refer to the role of M&E practitioners in his organisation. He said:

I think it is unfortunate because our role is to provide support for programme managers, if you want to develop a programme that has an impact we should be working with you to develop the programme...I wish we were being seen with an attitude of, oh, this is my colleague, actually my colleague will be able to assist me to improve implementation or design of my programme.

Participant I (PI) did not however hold back from saying that M&E practitioners themselves also contribute to these negative perceptions due to how they carry themselves in their organisation. To quote what he said in this regard:

Before I joined M & E, I used to say these people (M&E practitioners) who are pushing paper, asking for evidence, and chasing us around for evidence... I have experienced a situation in which an M&E practitioner comes across as a police to get me, in a way to trap me, even when they asked particular questions, you then realise that, okay, this person is not with me, it is more of wanting to get me....it is like I have caught you, you are lying. I have seen that this thing is what alienates M&E practitioners and then creates a wedge between programme managers and M&E practitioners. And then people begin to see these guys as police instead of partners”.

In addition to conducting themselves as partners of programme managers, instead of the police, PI also believes that practitioners need to uphold the values and standards of the

profession passionately and also need to continuously clarify and redefine their roles as they engage with other colleagues. As he said: “we must get into the culture of clarifying this (role of supporting programme managers) and emphasising the learning component of M&E. If you are only coming to people at the end of every day, when you just want evidence, people will then begin to think of you as a police...I think may be lastly, M&E practitioners must not act as if they know it all”

Another participant who also emphasises the role of M&E practitioners in changing negative perceptions and devaluation of their profession is PG. PG reckoned M&E practitioners need to “to put in mind that Monitoring and Evaluation is not only about putting people in a spot, but also entrenching the culture of Monitoring and Evaluation. So, as I said in the beginning, the process of making sure that everyone is understanding what is required of them, so that will change this situation”. Participant C also spoke about how her M&E department is being underappreciated and treated as nothing but a “post office” in her organisation where people come and “dump all information” on them. PC relates this scenario with how M&E has been perceived as compliance driven practice as opposed to adding substantial value to programme management. She suggests that: “I think the culture needs to be changed to change people’s mindsets towards M&E... If they can understand the basics, understand what it is, I think then there will be a different type of perception”.

On the other hand, for the remaining six participants (PA, PE, PB, PD, and PF) their experiences related to attitude and perception of other colleagues towards them, and their profession has been reported as positive. Among them PB and PD hold higher leadership positions in national departments that come with authority that buffers negative perceptions towards the profession. On the same token, PE, from one of the highest provincial offices, talked about how status and higher hierarchy positively help with getting respected professionally. He said: “the general perception is that the office of the Premier is the highest

office, and it should be respected”.

Participants A, who also belongs to an organisation at a provincial level, talked about positive attitudes and good reception of the profession from colleagues and departments under his supervision. He said: “I feel that they value us very nicely, they consider our inputs. Okay, so we are not seen as a pain. We are seen as people trying to develop the organisation to be at the standard”. On the other hand, PF who is from a local administration also reckoned that there is an open relationship, no prejudice and negative attitude towards Monitoring and Evaluation practitioners in his organisation by saying that: “I think the perception so far is good, I think there is an open relationship with an open attitude. Yeah, more welcoming attitude towards us”.

Navigating Political, Institutional, and Managerial environment

As discussed in the literature review, only development-oriented, ethical, and professionalised (capable and efficient) civil service can fulfil its commitment to transforming people's lives to the better. As the literature review further revealed, for professionals attached to the public sector, the political and executive interferences as well as the New Public Management (NPM) model that is being used for the administration of the sector present a range of factors that could potentially influence their professional identities. It was for these reasons that the interview questions also explored experiences of participants with regards to the political and administrative issues in their respective organisations pertaining to their professional engagements. The answers to these questions also throw light on how Monitoring and Evaluation practitioners navigate the political, institutional, administrative, and managerial terrain and negotiate their professional role and identity in the process.

The central theme that emerged from the summary of the answers is that for M&E practitioners to professionally survive and thrive in the public sector in SA they need more

than just being knowledgeable in theory of the practice and being equipped with technical skills in Monitoring and Evaluation of development programmes. The implication of this reality on the ground, as summarised from the responses of participants is that M&E professionals use different strategies of political management to negotiate and renegotiate their roles and Professional Identity in their respective organisations.

Participant B (PB), who represents a national level office, described the general managerial, institutional, and political state of national structures and oversight bodies that M&E professionals navigate as “administratively fragmented”, having “uneven professionalisation across administrative levels”, and as “dispersed and diffused”. Further to this he alluded that, “we are practically a one-party state, not because it is an authoritarian government, but because it has the majority... however, each administration level behaves like it is its own political party - there is no unity”. Further to this, PB also talked about the prevalence of poor implementation capacity, under performance and misuse of grants as common features of local municipalities in SA. He also emphasised that apart from the public account financial audit systems many local municipalities lack appropriate M&E structures and staff, and those with an M&E unit, “are not taken seriously and properly empowered”.

As to what motivates M&E professionals to remain productively engaged in their professional duties in this kind of environment, PB stated that, “ in a way people are saying it is good that we are stuck... otherwise, I suppose things could have been much worse in the public sector — you know then you kind of look for sort of more interesting and creative ways” to deal with issues hand. Given the above-mentioned challenges related to capabilities of local municipalities, one of the strategies that his office has been using is optimising existing local structures to carry out monitoring roles instead of installing a “massive monitoring system” that could overburden or “just paralyse” the institutions.

Still on the subject of administrative, managerial, and institutional challenges,

Participant G (PG) talked about his experiences related to fracture in the integration of all administrative levels in the planning, implementation, and decision-making processes when it comes to designing, implementing, and Monitoring and Evaluation of development programmes carried out by his department. He described these processes generally as top-down. As PG said, “my voice is not heard, my thinking is not included or incorporated in making those decisions...skills are not fully explored, especially planning and feedback from the bottom are not considered for improvement”. PG went further on elaborating what he meant by the top-down approach by saying that “what happens is that things are being developed nationally and then us in the province and in the district will have to deliver the output... and some of the programmes and developmental issues, are politically motivated, or they stem from political manifestos or policies”. Hence, as he said, working as an M&E practitioner “requires you to be able to balance politics and evaluation...we are not working in a vacuum”.

On the same topic, Participant C (PC) also shared the view regarding politics being the major motivation and driving force in the public sector by saying that: “It is also really painful to see when the premier is more politically focused than administratively focused because there is a complete disconnect with the way he would commit to certain things in the legislature, not understanding the administrative side; which can cause disjuncture – not understanding the work that goes into”. She added, “it is a political space – the party rules overrule the department essentially... there is not really much you can do because you know you do not have that much to say against the political head”.

On the other hand, Participant E (PE) talked specifically about the direct implication of the top-down approach that is geared toward ideological and political control and how it negatively affects professional autonomy of practitioners by hindering their participation in the design and implementation of M&E systems as well as having a meaningful say on the

utilisation of evidence generated from the systems. He said, “we have to report specific things... report based on what you are given... so other things we deem important we can’t include...it is a rigid process”. For PE political interference is one of the main factors that hold back the profession to reach “to the level” where he wants to see it in South Africa as well as Africa. He said, “I think it is an African way now...politicians have the power over professions”.

PE also touched up on the lack of influence over political leadership on the part of M&E practitioners to enforce recommendations put forth based on the evidence generated regarding the performance and impact of programmes. As he said, “doctors can prescribe something, they say this is a prescription but for us we will have to be at the mercy of our principals...if they say no then it is a no even if ethics are in line”. As a solution to this political interference, PE suggests Monitoring and Evaluation “should actually move from the Presidency and be a Chapter Nine... because remember, when it is a Chapter Nine institution it has those autonomous powers where it can make decisions... So, it's like, let’s say the Public Protector...it looks at elements of accountability, it looks at the element of reporting to the citizens... if it is within the government, then it is within the control of the executive”.

Related to quality of leadership, Participant H (PH) talked about her experience in her department by stating that, “people who make decisions are not even M&E oriented; they do not know what an M&E system is, including how much resource you require...those are the people who make decisions without consulting”. PH finds this environment professionally demotivating and spoke about moments when she questioned if she was in “the right profession”. Speaking of how she negotiates her Professional Identity and draws motivation to keep moving in this space she said, “maybe that one thing that keeps me going is that I never see my executive as the people that I am here to serve ... I am here to serve the people that are embedded in doing my work”. She also talked about how her commitment to public

services comes intrinsically as she regards her work “as a ministry” instead of a mere job.

Participant I (PI) relate the potential source of friction between politicians and M&E practitioners to how the public sector is generally configured and operates in South Africa.

As he said:

A politician remains in position for five years in South Africa. Now, you have got a limited time to implement whatever ideas and programmes that you championed about... and then you will find the M&E professional, wearing these M&E lenses and then beginning to probe and poke some weaknesses in terms of your programme. It might annoy you because you have been elected with this ticket of implementing this programme, but he has this M&E practitioner busy asking difficult questions that you cannot answer. And so I would, I can imagine, as a politician that I might be frustrated because I am under pressure to execute and implement but M&E wants you to take your time and think through about how you will be able to implement those programmes.

For PI, one way of navigating this situation is actively tackling the misconception around the profession that has been perceived as “police of performance”. He alluded that curbing the active isolation of M&E practitioners, to some degree, falls on the shoulders of M&E professionals who should take every opportunity present to demonstrate the value of the professions as “something that is very key and strategic for any entity or government”. He also pointed out that M&E practitioners need to present themselves as allies and “emphasise the learning component of the profession”. On this particular point he said: “...if you are only going to be coming to people at the end of every day, when you just want evidence, people will then begin to think of you as the police”.

Corresponding to her previous responses with regards to professional boundaries and autonomy, Participant B (PB), who represents a national department, emphasised on the

positive aspects of the political and institutional structures in her organisation. She attributed this to the fact that she is positioned at national level, hence most of her engagements are mainly with specialists from relevant departments working under her supervision. She used words like “collaboration”, “passionate” and “respect” to describe her organisational environment.

In contrast, Participant F (PF), described his organisational environment as “largely political”. He alluded to the view that “there are competing interests” between professionals and politicians when it comes to priorities, especially when elections are approaching. During election times, he said, “things that we do are geared towards electioneering, if you like, anything that is professional, I don’t think would be done”. As he further stated, “mandates change over time — currently we are implementing the mandate of the ruling party ...come December (election time) the mandate would change ". According to PF such inconsistencies in implementing mandates do not give “enough room” to exercise professional duties of Monitoring and Evaluation practitioners.

For the question on how he overcomes the pressure of working in such environment PF replied by saying that:

It is something we have learned to work around...it is not something that completely throws one off... we have learned who our principals are and know and adapt to the system at a higher level, but on programme level, we are able to maintain programme originality... and when we report we are able to integrate between the originality of the programme and the need for the new political principles, if you like...so, yeah that is practically how we would go about it.

In the same token another participant (PA) raised the point of how Monitoring and Evaluation practitioners are restricted by the policy framework of the governing parties when it comes to implementation of systems. He said even if the restrictions provide a consistent

framework for implementation and avoid “room for error” there is no opportunity to challenge the policy frameworks. When asked about how he deals with reality his response was “as an individual it is beyond me, beyond my paygrade”. From his response it appears that PA opts to accept the political realities as inevitable and follow a practical approach to surf the political environment.

Results of the Phenomenographic Data Analysis on Perceptions of Professional Identity of M&E Practitioners

This part of the presentation of findings tackles the main research question of the inquiry that attempted to map the qualitatively different ways M&E practitioners in the public sector perceive their Professional Identity. To this effect, participants were asked a question related to how they conceive the core of their profession in terms of its role and value. Procedurally, the iterative Phenomenographic analysis started after the verbatim transcription of interview data followed by repeatedly reading the materials and manually extracting excerpts/utterances that represent meaningful expressions pertaining to the perceptions of Professional Identity. These excerpts or snippets were then used to come up with categories of descriptions based on reorganising, comparing and contrasting utterances to establish variations, similarities and relationships among them and labelling them accordingly (Marton & Booth, 1997).

This is followed by provision of descriptions for each of the four categories identified through the phenomenographic analysis and presentation of illustrative statements that substantiate corresponding categories (Marton, 1994; Bowden, 2000). In terms of the relationship between the four categories of perception of professional identity, the analysis revealed a hierarchically inclusive outcome space in which perception of Professional Identity is arranged from lower order to higher order conceptions. The lower order indicates the most simplistic or incomplete way of conceiving PI; whereas the highest level indicates

the most sophisticated and highly inspired conceptions of Professional Identity of public sector M&E practitioners in South Africa.

Categories of Description of perception of Professional Identity of M&E practitioners

The outcome of the data analysis has identified four qualitatively different ways of perceiving Professional Identity of M&E practitioners that have been labelled using signifiers: Curators of Performance Data; Auxiliaries of Project Management; Patrons of Democracy/Accountability; and Catalyst of Transformation and Development. The relationship between each of these conceptions of Professional Identity are captured and substantiated in the theoretical scheme or the outcome space of the inquiry. The comprehensive result of the Phenomenographic research has been communicated using a graphical representation of the findings or the outcome space presented in Figure(4.1) below:

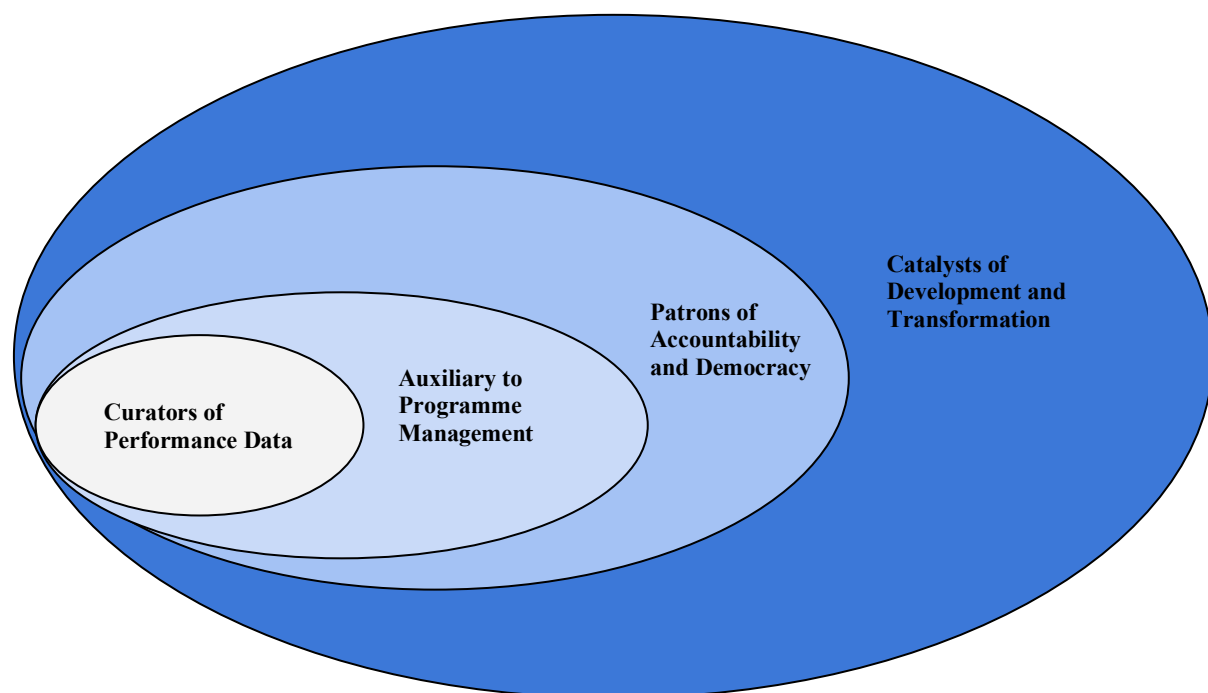


Figure 4.1 Outcome space for Perception of Professional Identity (Researcher's own illustration).

The practitioner's perception of their Professional Identity articulates the conceptions they have about their professional experiences. As can be inferred from the above figure (4.1) and also from Table (4.2) below, the relationship between the Phenomenographic categories appears to depict a progressive trajectory stretching from lower-level conception of PI to higher level conception of PI. Hence, the least complete category is found to be category 1 and the most complete is category 4. Moreover, the categories are found to be relational in the sense that the more complete or higher categories also encapsulate the conceptions from the less complete ones. It should be however noted that having the highest form of PI in the hierarchy, which is Catalysts of Development and Transformation, do not dismiss practitioners' identifications with their lower level yet fundamental role as Curators of Performance Data and engagements as Auxiliaries to Programme Management, and their critical role as Patrons of Democracy to facilitate performance accountability in the public sector.

The categories of descriptions of the Professional Identity can also be viewed along the line of elementary to most sophisticated or aspired Professional Identity. When graphically presented as one moves from the lowest to the highest form of PI (as simulated using progression of the tone of the blue colour from lighter to bold in Figure (4.1)) the perceived roles and core value of Monitoring and Evaluation extend farther from the confines of the job description a participant is assigned to a more complete, richer, and highly inspired identity. The increase in the size of the spheres is used to indicate both inclusivity and continuity that exists across the categories.

Table 4.2 Categories of descriptions, their referential or meaning aspects, and representative statements.

Categories	Referential or meaning aspect	Representative meaning statements/utterances
Curators of Performance Data (<i>CD-CPD</i>)	Elementary role of collecting performance information or data on inputs and outputs of programmes and capturing them into a system, collating and generating reports for consumptions by other departments.	• <i>I am an M&E officer. I would say I am actually an auditor of non-financial performance. (PC)</i> • <i>You know, we would ask, how are we doing against, you know, the five-year development agenda of the government, and then we would ask the relevant questions and gather the relevant information and data to see to what extent we made progress or not. (PB)</i> • <i>So basically, Monitoring and Evaluation is about manipulating information into a system and then generating reports. (PA).</i> • <i>I have a professional responsibility to guide my institution to make Monitoring and Evaluation data available which is important for programme decision making. (PF)</i> • <i>What you do as an M&E practitioner is you judge the information that you are receiving, so you will look at the consistency of the information, you will look at the data quality, and management of information. (PH)</i>
Auxiliary to Programme Management (<i>CD-APM</i>)	Provision of auxiliary support for programme managers in the design of M&E systems (Theory of Change, formulation key performance indicators) and implementation of programmes, priming programmes to be Monitoring and Evaluation ready,	• <i>We assist the departments in obtaining whatever goals they have set, especially in the NDP. (PE)</i> • <i>There are certain things that you could do as an M&E practitioner. And the first thing is to dictate to the programme manager how and what indicator they should be having. You just need to assist them so that they have an indicator in a smart way. (PE)</i>

Categories	Referential or meaning aspect	Representative meaning statements/utterances
	giving feedback on status of performance, and recommendations for improvement. The decisions to actually make these changes are not in the hands of the M&E practitioners.	• <i>Okay, to me, it means basically, it is a middleman between your plans and your annual goal. We are the middlemen to see and monitor your plans. Is it getting to where you want it to go? If not, what are we going to do? Basically, I feel like it's the middleman between your plan and your goal. (PC)</i> • <i>I think, essentially, it is like I said, it is getting you from your plan to your end. That is the core value of M&E. To direct you in the most logical way possible. So, you are not all over the place. So, yeah, giving direction. (PC)</i> • <i>When reporting time comes and a certain programme manager hasn't reached its quarterly goal this is where we would come and assist and say, okay, this is the way forward, this is what we can do, this is what you need to do to get to the end goal, your annual performance plan or your strategic plan, Another way we can help is by the development of your indicators and targets to get to the goal, essentially. (PC)</i> • <i>I locate Monitoring and Evaluation in the management aspect of business. (PG)</i> • <i>So, I feel monitoring is controlling, looking at the results-based management and looking at the processes. (PG)</i> • <i>Straightforward, it would be planning for results. (PI)</i> • <i>When I look at M&E, I just see it as another phase or step for programme management. (PH)</i> • <i>I think, like, what is happening right now, we are busy assisting programmes to develop their M&E systems and we have started from problem analysis. And they will do their concept document, then try to find the problem tree and how they will</i>

Categories	Referential or meaning aspect	Representative meaning statements/utterances
		● <i>solve the problem to come up with the Theory of Change. (PH)</i> ● <i>When I am able to assist a programme manager in developing a programme that will demonstrate through a Theory of Change that it will be able to yield results. (PI)</i> ● <i>In my opinion, the role of an M&E practitioner in an organisation is to provide strategic support and help programme managers to design and implement in a way that will yield results. (PI)</i> ● <i>M&E practitioners should be seen as partners in the design as well as implementation. (PI)</i>
Patrons of Accountability and Democracy (CD-PAD)	Practitioners who perceive their identity in this form relate the core value of their profession as a solemn duty to citizens to uphold democratic principles of accountability to citizens.	● <i>I think most of it is accountability, where we say we are planning for this move on the plan, we have to report remember, we develop documents, like our annual report, we report to the citizens and saying to them, okay, the department has achieved one two three and the other ones did not achieve, and this is true too. So, there is this accountability element which proves accountability and democracy. (PE)</i> ● <i>It is just to develop those public documents and make sure the public sees the tax money is actually being used effectively and efficiently. And then us being able to report to the citizens as well as oversight bodies, so that they hold them accountable as well. (PE).</i> ● <i>Improving good governance in terms of transparency and accountability, legitimising the environment where all developments or activities are happening. (PG)</i> ● <i>So, I can say that the core of Monitoring and Evaluation is</i>

Categories	Referential or meaning aspect	Representative meaning statements/utterances
		<i>where you control resources by asking tough questions, by looking at accountabilities where individuals get to attest and look at results. (PG)</i>
Catalysts of Transformation and Development (CD-CTD)	M&E practitioners perceiving their role in this category do not limit their PI to only the day-to-day design and implementation of M&E systems. They see themselves as a bridge between programme and policy formulation and as outcome facilitators. They believe their professional inputs go beyond improving the quality of a single development programme. They believe their impact has a bigger reach and influence in policy formulations and designing development strategies that would influence policies, change systems and finally bring about desired social transformation on a larger scale.	• <i>The outcome facilitator's job is literally at the centre of monitoring and bit about evaluation, but mainly monitoring. Okay, so one facilitates, how do I put it, it enables monitoring, enables implementation, but does not implement. (PD)</i> • <i>Outcome facilitators do more than just monitor, they monitor and from the lessons, from the knowledge gained from monitoring, then they go into policy work, into programme design work and so on. (PD)</i> • <i>It means making an impact in terms of policy direction. (PG).</i> • <i>Do something about the intelligence gathered, do something about the knowledge gathered to further enhance implementation and change people's lives. (PD)</i> • <i>If you are able to change the system, if one is able to change the policies, maybe people's lives will change. So, I appreciate that. To change these policies and to see how to make the policies to make it better for people on the ground. Yeah, so I truly appreciate that. I really feel blessed. Yeah, it is a bit like continuous improvement, always changing policy, always trying to change people's lives by changing the system rather than project and programme management. (PD)</i> • <i>The opportunity to change the system. Yeah, so it doesn't reproduce poverty. (PD)</i>

Categories	Referential or meaning aspect	Representative meaning statements/utterances
		• <i>We are custodians of the development agenda, which is what we do first, develop the development agenda, you know MTFS and things like that. And then M&E comes in and helps us understand how we are moving forward, where performance is lacking and the nature of that, and what can be done to improve performance overall. (PC)</i> • <i>Basically, for me, I mean M&E, to answer your question is about how we are changing lives (PA)</i> • <i>We contribute towards the wellbeing and betterment of the people or communities. (PF)</i> • <i>So, me being in Monitoring and Evaluation means occupying a space where we are trying to make sure that we do things in an African way or African rooted sort of thinking, not only absorbing some things from the west. (PG)</i> • <i>I am constantly thinking about how we, as Africans, change the status quo, where there is poverty and maladministration, there is poor governance and so on. (PG)</i> • <i>Being able to change people's lives. For me that is very, very important. (PI)</i> • <i>When there is a programme or a policy being processed, I will be the first person that questions the extent to which it will be able to give change to the lives of the people. I always ask the pertinent question in meetings to say to what extent will this give us results? (PI)</i>

As it can be further inferred from the above table some interview scripts contain utterances from participants that represent more than one conception of Professional Identity. This does not however mean that one interviewee who expressed conceptions in one category need to or essentially have conceptions of preceding or the proceeding category. It is also evident that utterances may fall into more than one category or different levels of sophistication or complexity. For example, Participant D (PD) perceived his Professional Identity as both an Auxiliary to Programme Management as well as a Custodian of Accountability/Democracy. Similarly, PI conceived his Professional Identity both as a Patron of Accountability and also as the most complete or sophisticated form of Catalyst of Development and Transformation. The same applies to all the remaining participants except PE, PF and PH whose identification falls under a just single category, which happen to be the least sophisticated categories of Curators of Development Data and Auxiliary to Programme Management. This is an indication that some of the participants have conceptualised their Professional Identity in more than one way -implying the complexity, fluidity, elasticity, and richness of professional identifications that has been pointed out in the review of literature.

Table 4.3 Distribution of participant utterances across Categories of Descriptions

Participant	<i>Category</i>			
	<i>Curator of Performance Data (CD-CPD)</i>	<i>Auxiliary to Programme Management (CD-APM)</i>	<i>Patrons of Accountability and Democracy (CD-PAD)</i>	<i>Catalyst of Transformation and Development (CD-CTD)</i>
<i>PA</i>	<i>x</i>	<i>x</i>		
<i>PB</i>	<i>x</i>	<i>x</i>	<i>x</i>	<i>x</i>
<i>PC</i>	<i>x</i>			<i>x</i>
<i>PD</i>		<i>x</i>		<i>x</i>
<i>PE</i>		<i>x</i>		
<i>PF</i>	<i>x</i>			
<i>PG</i>	<i>x</i>		<i>x</i>	<i>x</i>
<i>PH</i>	<i>x</i>			
<i>PI</i>		<i>x</i>		<i>x</i>

Dimensions of Variations

In Phenomenographic research the second part of the data analysis process involves the simultaneous identification and presentation of the structural elements or the “how” aspects of conceptions also known as explanatory dimensions" or “Dimensions of Variations” (Åkerlind,2005). The first aspect being the referential or the meaning side of the conceptions associated with each of the categories of description presented above (see Table 4.2). Analysis of the structural aspects of a conception is based on the assumption that awareness of a phenomenon is made up of three overlapping areas: the theme, the thematic field, and the margin of awareness (Marton and Booth, 1997). The process of analysing the three levels of structure of awareness involves taking into account the context of the phenomenon in terms of

its internal and external horizons (Marton and Booth, 1997).

In essence, in the context of this research, when research participants were contemplating on questions related to their Professional Identity, their awareness was likely to simultaneously present multiple aspects of the phenomenon that are evoked by their respective context. In Phenomenography these multiple aspects simultaneously presenting in the awareness of participants are collectively known as the thematic field (Marton and Booth, 1997). Out of all aspects making up the thematic field, the internal horizon consists of the central aspects that become the focus of awareness at the given moment. Marton & Booth (2007) refer to these aspects as themes of awareness. In this reflective process, it is believed that participants were fully aware of the context, relationships and essence of their experiences related to their Professional Identity. On the other hand, in the external horizon the structure of awareness encompasses the thematic field and margins of awareness or aspects of the world less focused or not considered to be related to the phenomenon (Marton and Booth, 1997).

The Dimensions of Variations composed of the internal and external horizons combined with the four categories of descriptions provide a holistic view of how M&E practitioners based in the public sector perceive their Professional Identity. Technically, this was accomplished simultaneously extracting common themes and thematic fields that emerge and shared across all nine scripts and across different interview questions. A different symbol of coding was used to differentiate utterances representing possible dimensions of variation from actual conceptions of Professional Identities. Similar to the categories of descriptions, attempts were made to ensure that themes identified as Dimensions of Variations are detailed representatives yet parsimonious.

These variations as explanatory dimensions thread run through and meaningfully link category of description with each other establishing intra-category variations organised in the form of a logical and hierarchical manner. The relationship between the categories of

descriptions and the Dimensions of Variations is presented in the matrix presented in Table (4.4) below. It should be noted that the matrix does not include the third dimension, which is the margin of awareness of the external dimension, as these aspects could be about anything else in the world that is not necessarily relevant to the phenomenon in question.

Table 4.4 The Structural relationship between Categories of Descriptions and Dimensions of Variations

Categories of Descriptions for PI of M&E practitioners	Structural Aspect (Relationship Between perception of PI and its related parts/aspects)											
	(Internal Horizon) Themes/focus of Awareness											(External Horizon) Thematic Field
	Impact level (IL)				Level of autonomy/agency (LA)			Professional Status (PS)				
	Policing of performance (IL-PP)	Compliance/ Accountability (IL-CA)	Learning (IL-L)	Transformation (IL-T)	Auxiliary (LA-A)	Partners (LA-P)	Independent (LA-I)	Sub/Co-profession (PS-CP)	Stand-Alone profession (PS-SAP)			
1. Curators of Performance Data (CD-CPD)	X	X			X			X			X	
2. Auxiliary to programme Management (CD-APM)	X	X	X		X	X		X			X	
3. Patron of Accountability and Democracy (CD-PAD)	X	X	X			X	X		X		X	
4. Catalyst of Development and Transformation (CD-CDT)	X	X	X	X		X	X		X		X	

Analysis of the structural relationship between Categories of Descriptions and Dimensions of Variations

This section looks at the relationship between the four Phenomenographic categories of descriptions and each sub-variation of themes or focus of awareness as they combine and bring about the referential meaning or the “what” of each category of description. The matrix above (Table 4.4) depicts the alignment of each Category of Description to the identified sub-themes or building blocks of the dimension of variations. The same colour scheme that syncs with the Outcome Space (Figure 4.1) is also applied in the Matrix to highlight the trajectory of progressions identified from the Phenomenographic analysis. The Matrix also serves in expanding and further explaining the Outcome Space in a robust manner by incorporation of the internal structure of the category of description to clarify how one category is different from the other while still indicating the continuity and the complexity of perceived Professional Identities of M&E practitioners in the South African public sector.

As indicated in Table (4.4) above, the internal horizon that consists of themes or focus of awareness have been identified as Impact Level, Degree of Perceived Agency/Autonomy, and Perceived Professional Status/Image. These three themes come with their own sub-variations. The relevance of each sub-variation varies depending on the Category of Description under discussion. The first one, that is Impact Level contains four sub-variations that are defined based on the main substantive role M&E practitioners are ascribed, prescribed, or aspired to play in their respective organisations. These role variations include policing, compliance or accountability, learning, and transformation. On the other hand, variations under the theme of Degree of Autonomy are found to be Auxiliary, Partners, and Independent. The third theme of awareness, which is Perceived Professional Status of M&E, is divided into Full Profession and Co-/Sub-profession based on the responses of participants to the question: “Do you think M&E is a profession”?

Category 1. Curators of Performance Data.

This is the most rudimentary and yet foundational Professional Identity (PI) category in this Phenomenographic research. Monitoring and Evaluation practitioners whose PI falls under this category consider the core role and value of Monitoring and Evaluation as gathering, collecting and collating performance data on key indicators attached to the inputs and outputs of a particular programme they are assigned to oversee. The performance data curated by M&E in such a manner is mostly used for the purpose of policing performance and enforcing accountability. Hence, their impact level is restricted to ensuring compliance to reporting of programme inputs and outcomes as stipulated in programme documents. Monitoring and Evaluation practitioners in this group enjoy the least amount of professional autonomy when it comes to making decisions that have to do with design and improvement of development programmes.

At this level M&E practitioners perform their duty in support of programme implementers, managers and directors in their respective organisations to make sure that proper data on key performance indicators are readily available (identified, collected and reported) to higher offices. At this impact level the limits of the duties of M&E ends at compilation of performance reports hence operating as a stand-alone independent professional with strong agency and autonomy is not required from M&E practitioners. This is because they are mostly limited to providing support for programme managers and directors. As basic as this category appears to be, however, it should still be understood as the bedrock that the remaining more complex and sophisticated Professional Identities are founded on.

Category 2: Auxiliary to Programme Management

In addition to carrying over elements of the first category, Professional Identity conceived as Auxiliary to Programme Management entails the core values of M&E practitioners to be part and parcel of the programme management aspect of development programmes. Contrary to the first group, M&E units and professionals are less isolated from other departments or units as they assume more of an empowering and capacity building role instead of simply collecting and collating performance data. In this category duties of M&E practitioners involve provision of technical support and expert advice in the design and implementation of Monitoring and Evaluation systems and the programmes being implemented and supervised under their jurisdictions. As a result, their impact level goes beyond policing and compliance to encompass the learning functions of Monitoring and Evaluation.

Monitoring and Evaluation professionals in this group enjoy a more collaborative partnership with colleagues working alongside and with their direct supervisors compared to the first group. Nevertheless, their supplementary professional position restricts their agency and autonomy from exercising more decision-making roles with respect to programme quality and outcomes. As a result, they operate as a sub/ co-profession to the more established traditional disciplines running the actual implementation of the development programme. What this implies is that even though their expert inputs are broadly valued, and their impact level goes beyond ensuring compliance, their influence outside the programme management realm is restricted to technical support. This leads to Monitoring and Evaluation practitioners having limited autonomy with regards to decision making to influence the direction of programme improvement and policy formulation.

Category 3: Patrons of Accountability and Democracy

This category incorporates the characteristic features of the previous two Professional Identities inclusive of the foundational role of collecting, collating, and reporting performance data. Its impact level for this category of identification is found to be a combination of ensuring compliance as well as learning. This is only possible if measures are taken as consequences of non-compliance go beyond enforcing punitive measures by treating negative incidents as learning opportunities. For M&E practitioners to uphold these positions, they need to have a professional agency elevated from a simple auxiliary position for their inputs to carry weight and become consequential in holding managers, departments as well the government accountable for their actions. Practitioners who conceived their Professional Identity within this category consider their profession as part of a system of democratic institutions that keep a watchful eye on activities and affairs of the government to ensure accountability on behalf of citizens. Playing this role demands having a strong professional agency and independent professional status that ensures freedom from political interference and impartiality. Hence, the aspired impact level of this PI demands having to act independently as a stand-alone profession.

Category 4: Catalysts of Development and Transformation

This category includes M&E practitioners who perceive their Professional Identity extending well beyond the bounds of their departmental and organisational roles and duties articulated in job descriptions. They perceive M&E not as an end by itself but a means to achieve the greater developmental and transformation goals of the country. Their influence comes from cumulatively integrating all the basic roles as curators of data or evidence, from being the right hand to programme managers, defending democracy by ensuring accountability and facilitating outcomes, and finally championing the greater goal of social transformation. Instead of sitting at the fringes of programme management and curating data

for others' consumption they believe they have a critical role to play in the bigger arena of national development.

This PI could be regarded as the highest aspiration of the Monitoring and Evaluation practitioners. This category of PI is founded on the conviction that M&E practitioners oversee curating evidence that is critical and indispensable to bring about success through well-conceived and designed policies, development programmes as well as successful M&E systems. This Professional Identity demands having full agency, a well-defined professional boundary, autonomy and the discretion to influence policy and development decisions. This independent and empowered position is believed to mitigate political influences and interferences from the public sector so practitioners could bring forth their expertise and exercise informed professional judgement, unfettered. For this aspiration to fully materialise M&E as the profession needs to establish itself as a formidable and indispensable force through resolving outstanding aspects of its professionalisation journey. This will ensure the full recognition and acceptance of the range of values that M&E brings to the table.

Chapter 5: Summary, Conclusions, and Implications

Guided by a Phenomenographic framework, the main objective of this research was to identify and discuss the key variations in purposely selected nine M&E practitioners' perception of their Professional Identity based on their experience in the public sector. In addition, the views of participants on the current professional status of Monitoring and Evaluation in South Africa and context of their work experiences were explored to identify salient background features that were used as a framework to put findings of the Phenomenographic analysis into perspective. This was done as per Collier-Reed (2013) suggestions to enhance the external validity/ trustworthiness of the findings. For the sake of setting up the backdrop, the sections to be presented first are the summary of findings on the views of participants on professional status of M&E and the outcomes of the exploration of organisational context. Finally, summary and conclusion of the Phenomenographic findings will be discussed. The implications of the findings are integrated into each section.

Summary, Conclusions and Implications of Views on Professional Status of Monitoring and Evaluation

Research participants in this study included young and upcoming practitioners, mid-level professionals and veterans who are at the cusp of their retirement. Hence, this variation in terms of work experience brought in a mix of views about Professional Identity drawn from a wider scope of experiences. The group included those who are relatively new to the field as well as seasoned ones who were involved in various developmental fields during the inception of the profession itself. The latter are believed to have had a unique view on the professionalisation trajectory of Monitoring and Evaluation as they have witnessed the development of the practice long enough to have a deeper understanding and wider perspective on the subject of the study. In terms of their primary qualifications, the educational background of participants is also found to be quite varied. Most of them are

found to be having backgrounds in humanities but from different fields of studies or disciplines. None of the participants have Monitoring and Evaluation as their primary qualification. It was also evident that the group comprised participants with at least one Postgraduate qualification directly or indirectly related to the practice of Monitoring and Evaluation. Seven out of the nine participants primarily identified themselves as M&E professionals. The other two prefer to be professionally addressed in their primary qualifications but hold M&E as their secondary profession.

When it comes to the professional status of M&E the findings of the research indicate two kinds of views on the part of the participants to the question, Is M&E a proper profession compared to the more established traditional professions? To reiterate what has been established in the literature review, Monitoring and Evaluation is a relatively new profession. Hence, comparing it to the well-established traditional professions such as Medicine, Engineering, Law, etc. doesn't seem fair. As such, the objective of raising such questions was not actually for comparison purposes rather to gather the range of views participants have on the trajectory M&E has been taking in its professionalisation journey. The responses gathered from participants in this regard were not uniform and can be grouped into two.

The first group includes the view that M&E is a proper and stand-alone profession and must be regarded and, in every aspect, treated in such a manner as other well-established professions. The justifications given for this point of view are mostly related to its knowledge base and sets of technical skill that M&E is believed to bring into the field of development and management, and the role it plays in ensuring proper design, implementation, and evaluation of programmes. However, the question that could be asked here is whether having the knowledge and skill base are sufficient enough to elevate M&E to a full-fledged profession as traditionally defined by literature. Traditionally, as it has been uncovered from literature, there are certain critical criteria that need to be met by a budding profession to

attain such status in society and processes to arrive at this position have been found to be rigorous and contentious driven by different macro and micro forces. Hence, one shouldn't make the mistake of confusing participants' views and aspirations for recognition with the profession actually having what it takes to become one, at least in the traditional sense of understanding professions and professionalisation. This begs for a separate investigation that could attempt to dissect the professionalisation processes and trajectory of Monitoring and Evaluation in South Africa both substantively and as a process, to analyse the question further and deeper.

One of the suggestions that are mentioned as a solution to speed up the processes of attaining full professional status by M&E included expanding the bases for its education and speciality training. This is sought to be achieved by introducing the subject in high school curricula and offering the field as a major in undergraduate degree. The second suggestion to ensure the emancipation of M&E as an independent and full-fledged profession was to push for declaring it as a Chapter Nine institution by the government. This radical move is believed to guarantee a statutory authority for credentialisation as well as autonomy for M&E to be able to enforce sanctions on irregularities picked up using performance audits carried out in the public sector.

Obtaining a statutory position has been also pointed out as an antidote that could fend away unnecessary political pressure in the public sector, ensures independence and full discretion on the part of M&E to carry out its core duty unfettered. However, one could argue otherwise by saying that this move could push Monitoring and Evaluation away from what is considered to be the core value of the profession, which is learning. Another suggestion that is believed to fast track the pursuit of professionalisation is to separate the "M" and "E" wings of Monitoring and Evaluation. This is believed to avoid conflict of interest by eliminating biases (if both are carried out by the same expert and in-house). It should be

noted here that from reviewing their current job description and responsibility all research participants were for the most part involved in the Monitoring aspect of programmes not as much in Evaluation.

On the other hand, the second point of view on the professional status of M & E contends not only the possibility but also the necessity of elevating the practice to the traditional level of professional recognition. Participants who hold this view asserted that M&E cannot qualify as a stand-alone profession and is better off if it remains as a co/sub-profession to other discipline-based fields operating in the public and development sector. This contention, however, was not based on questioning the relevance of the practice rather the trend that has been described as an unnecessary elevation of the practice to a stand-alone profession. The reasons behind this are, firstly, the notion that M&E doesn't have a solid theoretical and disciplinary foundation that warrants having a unique niche as a proper profession (the view also shared by Abrahams (2015)). The second reason for this position is the doubt around how effective M&E skills actually are if they are not backed up by a prior primary qualification or having a background of at least one main developmental field such as economics, education, health, agriculture, etc. Hence, as per this viewpoint the most effective M&E expert has been described as the one with a deep substantive knowledge on a particular speciality or field of development required as a basis to design and implement specific Monitoring and Evaluation systems effectively.

Consistent with the view that M&E should be treated as a sub/co-profession, came another recommendation that suggested taking a Developmental Approach to integrate Monitoring and Evaluation as part and parcel of programme implementation and management. This is believed to facilitate learning and on-going decision making as well as avoiding reliance on consultants and experts both in-house and outsourced. This position is consistent with the notion of embracing Monitoring and Evaluation as a learning tool by

making it everybody's business instead of over emphasising on its compliance aspect that requires an expert. This is also suggested as a solution to address the over-selling and over fixation on the institutionalisation of M&E as the primary solution for poor performance and service delivery in the public sector. This has been pointed out as a long-standing trend in the public sector that co-opted M & E to window dress development programmes and keep employees busy with ticking boxes and debating over technicalities instead of actually focusing on changing people's lives.

Taking into consideration the complexity of the path to professionalisation and polarities and contestations on the value of M&E as a profession it appears that pursuing the traditional route for professionalisation may not be the most plausible alternative for Monitoring and Evaluation in South Africa. In literature an alternative perspective that looks into such scenarios has been found to be the neo-institutionalisation discourse (Muzio and Kirkpatrick, 2011). Neo-institutionalisation is an alternative perspective to the traditional linear route to professionalisation where the main processes are dictated by exogenic forces (Powell & DiMaggio, 1991). Given its unique characteristics, it is possible that M&E may not have to follow the traditional route for professionalisation (identified with a strong professional body, formalised body of knowledge and social closure), instead join the class of emerging corporate professions (like public relations, management consultants, advertisement and information management) that base their value and identity on their well-defined roles, strong market base, high status, and high pay (Reed, 2018; Ackroyd, 2012). What can be concluded from the views around the current professional status of M&E, expressed in this small-scale investigation, is that before tackling the dynamics of the exogenic forces, Monitoring and Evaluation, first and foremost, needs to resolve its identity issues internally and then move to take control of forging its own unique paths of professionalisation.

Summary, Conclusions and Implications of Organisational Context

This section presents summaries, conclusions and implications of the findings related to experience of M&E professionals in the public sectors. The summaries and conclusions cover professional boundary, perceptions of others towards M&E professionals, views on professional autonomy in decision making opportunities and processes, and political, managerial, and institutional set up and their impact on professional experiences and identities. First of all, the common denominators that seem to influence the kind of experience Monitoring and Evaluation practitioners have in the public sector are found to be the administrative tier and the rank or post M&E have in their organisation. However, the level of the influence of this factor is not found to be linear and consistent across all themes. The first area that this inconsistency was picked up was professional boundary - which was reported to be well defined for majority participants positioned in higher posts but not so much for those in the lower posts including those in higher administrative tiers. Participants in lower posts reported incidents related to the undermining of their professional boundaries by co-workers who have very little training in the field having poor awareness about its role. On the contrary, those in the middle and higher ranks reported not so much negative experiences related to role confusion and encroaching or overstepping of professional boundaries from other co-workers or professionals.

However, according to the findings of this research, having a clear professional boundary does not necessarily translate into a strong understanding of the value and appreciation of Monitoring and Evaluation on the part of others working alongside M&E practitioners. In this regard, participants, especially those from low ranks and administrative tiers, reported experiences related to misconceptions regarding their roles on the part of their colleagues. This is found to be one of the reasons behind frustrations that lead to questioning their choice of the profession as well as their career longevity in the public sector. This has

been reported to be true both horizontally and vertically. To summarise, the main misconceptions around the role of M&E professionals were linked to treating the M & E department as nothing but a data dumping place and viewing the practitioners as paper pushers and performance policies. Due to these misconceptions participants reported experiencing a strained working relationship with supervisees, feeling of invisibility, powerlessness and underappreciation. The other possible association that can be made with such negative experiences is the fact that out of the nine only one participant considers themselves as a career civil servant expressing an interest in long term commitment to the public sector.

For those at the lower ranks and tiers, experiences related to professional agency and autonomy are not very much different from the above except for pockets of cases where some exceptions were registered. Due to restricted autonomy and professional agency M&E professionals have very little room to contribute to evidence-based decisions pertinent to programme management or policy improvement. As such they have reported experiences or incidents where their expert inputs were disregarded and left inconsequential. This is indicative of how decision-making processes in the Public Sector are mainly politically and ideologically driven instead of being evidence based. It has been also reported that competing interests over priorities of programmes are common in the sector - final say on critical decisions mostly being reserved for those holding political clout instead of professional expertise. In light of this, it would not be too hard to imagine how these experiences could be potentially de-motivating and professionalism emasculating for Monitoring and Evaluation practitioners in the public sector.

In contrast, those who hold high ranking positions either at national and some provisional organisations reported having positive experience when it comes to perceptions of others towards their profession, autonomy, and professional agency. This invokes the

question whether the respect/regard the group reported is due to the political weight their positions carry or due to their actual professional capacity. If the answer to this question is the latter, then all M&E professionals, regardless of the sector and level of positions they are holding, were supposed to get a similar level of respect only due to the merit of their professional capacity as it is automatically owed to other well-established professions. Even if they enjoy better autonomy/agency, it is reported that practitioners at the higher posts and offices still have to deal with challenges related to the general administrative, managerial, institutional, and political state of the national, provincial and local structures and oversight bodies that M&E professionals need to routinely navigate.

Generally, across administrative levels, participants described the M & E systems as dispersed, diffused, administratively fragmented and having uneven levels of professionalism. At local administration levels these challenges are reported to be further exacerbated by lack of appropriate M&E structures and trained and capable staff members directly responsible for the task - the effect of this being the perpetual under performance of development programmes and systems that are meant to measure outcomes and promote learning from implementation processes. The underlying cause of these challenges at the local administrative level have been attributed to flawed government structures characterised by lack of political unity and administrative inequalities, the inability to reconcile the top-down management approach with decentralisation (as dictated by the NPM), and also M&E units not being taken seriously and staff not being properly capacitated, equipped, and empowered.

In light of the above responses, it was also in the interest of the investigation to see how Monitoring and Evaluation practitioners navigate the political, administrative, institutional, and managerial terrains of the public sector. What has been evident from engagements with participants is that M&E practitioners are found to be tactful in juggling

political management and their professional duties. They actively engage in threading the highly politicised sphere of the public sector to resourcefully devising strategies for mitigating challenges related to implementation capacities at structural and programmes levels as well as misconceptions regarding the role of their practice that are rampant in the sector. One of such notable strategies in this regard is optimising existing sub-standard local structures instead of fighting to win political will for installation of complex systems that could potentially collapse already poorly performing units and departments. Participants also mentioned on different occasions that, whenever opportunities are present, M&E practitioners take the leading role in clarifying their role and affirming their values and rightful professional positions instead of waiting on the sidelines and demanding recognition and agency from others. When looked at individually these efforts may seem isolated and inconsequential. Nevertheless, they are indicative of the determination of M&E practitioners to take charge of their own professional destiny in the sector that has been widely described as professionally stifling.

As it has been further revealed from the findings of the Phenomenographic analysis the above discussed experiences do not only reflect how Monitoring and Evaluation practitioners are being perceived and treated by others and the systems in the Public Sector but also how Monitoring and Evaluation practitioners, to some extent, perceive their own Professional Identity - either in a narrow or more inspired manner along a continuum. Even if such associations are not suggestive of causal relationship, these contextual experiences have been picked up as the main themes that are used as the building blocks of conceptions of the professional identity of M&E practitioners. In phenomenographic analysis (presented in the next section) these themes basically inform the construction of the Structure of Awareness (Internal and External horizons) corresponding to the categories of descriptions that represent the variations in Professional Identification of the research participants.

In light of the above discussions, it would be worth investigating how such negative experiences could de-incentivise professionals including M & E practitioners from making long term career commitments in the Public Sector, and possibly resulting in a vicious high staff turnover cycle further sabotaging the professionalisation endeavours currently underway in the public sector. As the findings of this investigation indicate, such negative experiences in the public sector were also linked to the Professional Identity crisis as some participants are forced to question the decision they made to join the programme/field in the first place. As discussed in the literature review section poor or unstable Professional Identity is associated with superficial commitment to professional values that leads to poor performance or productivity, experiencing high work-related stress, values dissonance, decreased self-confidence, and poor decision-making ability on the part of professionals (Fitzgerald, 2020). Hence, the issue of the Professional Identity crisis could be another topic for further investigation that is believed to further enrich the understanding of the experiences of M&E practitioners in the public sector.

Another question that could be asked here is, would these participants feel the same way about their choices if they were working in a different sector? Or could this be the common experience across all sectors for M&E professionals? This also has an implication for further investigation to compare job satisfaction, professional aspiration, and general perception of Professional Identity of Monitoring and Evaluation Practitioners across different sectors - private, public, and non-profit. Finally, it would also be worth looking into the possible effects of the overall professionalisation project that is currently underway in the public sector to see if reforms in that direction would actively tackle the existing political, institutional, managerial, and administrative roadblocks to level the fields for Monitoring and Evaluation practitioners to properly and freely dispense their professional duties

unencumbered. In other words, the question is, in the context of the professionalisation of the public sector would the symbiotic relationship between the public sector and M & E that existed for over a decade continue to be a formidable force that would propel the professions to “full” maturity?

Summary, Conclusions, and Implications of the Phenomenographic Results on Professional Identity of M&E practitioners.

The findings of the Phenomenographic analysis that was carried out for the purpose of identifying the perceptions of M&E professionals in the public sector in South Africa revealed four different ways in which Professional Identity was perceived by the participants. These four conceptions could be arranged hierarchically in a logically inclusive way within the outcome space ranging from lower level to higher level conception of Professional Identity. These categories arranged in that order are Curators of Performance Data, Auxiliary for Programme Management, Patron of Accountability and Democracy, and Catalyst for Development and Transformation. This categorisation shouldn't be understood as role fragmentation, instead as expressions of Professional Identity progressively envisioned from the basic to the most sophisticated or mature one. It should also be noted that the Phenomenographic categories of the inquiry are relational in nature - the more complete or higher categories encapsulate or embrace the essences of the less complete ones along the continuum.

These four categories of PI are further explained using the three dimensions of variation (explanatory dimensions) that reflect focal points or themes in the internal horizon of M&E practitioners' structure of awareness that were surfaced across the interview scripts. These three Dimensions of Variations are impact level, degree of autonomy, and perceived professional status. Each of these dimensions of variation also contain sub-variations that provide a more refined and nuanced explanation for each level of PI and relationships that

exist among the four categories of description. The sub-variations under Impact Level include policing of performance, compliance, learning, and transformation. The next sub-category, which is Degree of Autonomy contains options of auxiliary, partner and independent. Finally, the last dimension of variation, which is Professional Status, is subdivided into co/sub-profession and Stand-Alone profession. As one moves across the four categories of PI on the spectrum, the relevance, application and combination of aspects of Dimensions of Variations and sub-variations assume different shapes. These combinations are the key to understanding the differentials as well as the continuity that exists in the construction of the referential aspect or the meaning of the conception of the phenomenon, which the PI of M&E practitioners in the public sector.

To summarise, the referential meaning of the categories those participants who strongly identify as Curators of Performance Data associate their impact level with the most restrictive roles of policing of performance and ensuring compliance and accountability, and their professional agency as an auxiliary position. The combination of these conceptions under this category leads to understanding the professional status of M&E as a sub/co-profession. On the other hand, those identifying as Auxiliary to Programme Management, in addition to having the basic or foundational roles of policing of performance & compliance, they also assume a relatively wider and richer impact level which includes learning. The understanding of their professional agency also becomes stronger as they assume the role of partners for programme managers. This could be attributed to them being less isolated and having more opportunity to engage in empowering programme managers with knowledge and skills to integrate M&E systems in the design, implementation, and evaluation of development programmes. However, even if they have better agency to exercise more knowledge-based discretion, they still lack the autonomy to make decisions that will

fundamentally impact programme direction. As a result, their professional status remains restricted to a sub/co-profession level.

Those in the third category of PI, which is Patrons of Accountability and Democracy, share a similar perceived impact level (policing of performance and compliance and learning) with the first two groups expect dropping the Auxiliary position from their professional agency. This is attributed to the fact that assuming the duty of upholding democratic principles through ensuring government accountability to programme outcomes on behalf of citizens demands having a strong professional agency and independent professional status free from interference and impartiality which is only possible through achieving a stand-alone and independent professional status.

The last category, which is also the most complete conception of PI identified from the investigation is Catalyst for Development and Transformation. This can also be described as the most inspired level of PI as conceived by the majority of participants. At this level M&E practitioners aspire to have full professional autonomy and agency to be involved not just in day-to-day or routine activities of running M&E systems for compliance and learning but also fully engaged in decision making processes that transform systems as well as people's lives. This way they become more than auxiliaries to programme management, data collectors and report compilers and embrace the role of Catalyst for Development and Transformation by putting the power of data and evidence in their professional disposal to the ultimate developmental and transformational use.

To conclude, it was evident from the findings that M&E practitioners perceived their Professional Identity (PI) in more than one way along the continuum. These multiple expressions have been found to be consistent with the notion of plurality and fluidity of identities including that of PI as discussed in the review of literature (Cooley, 1902; Mead, 1934; Stets & Burke, 2000). The multiple expressions or perception of PI could be also

understood as the reflection of various levels and kinds of roles M&E practitioners are prescribed or aspire to play depending on their job titles, posts, ranks and the administrative level of the public sector they are based at the time of the inquiry. This further confirms the elasticity of the concept of PI - perceptions becoming restrictive or expansive depending on the context of practice (organisational context, the attitude and collective perceptions of other colleagues in their respective workplaces). This being the case, however, another interesting observation made from the research findings is that practitioners at lower levels of posts or ranks in the public sector do not necessarily ascribe to just the lower levels of PI. The implication of these scenarios is that in some instances the aspired identity takes precedence over prescribed identity.

Further to the above, unlike other relatively well-established professions with consistently well-defined and restrictive roles, for budding professions such as M&E, their professional roles and boundaries are still being tested, shaped and reshaped. The implication of this scenario is that the variations in conceptions of PI must be looked at from the vantage point of dynamisms in the professionalisation trajectory instead of fragmentation, as long as expressions fall between the bounds to the core professional values. Finally, the findings and the interpretation of the results of this qualitative Phenomenographic inquiry should be understood as temporally cross-sectional, context bound, and its interpretations of its findings subjective to the researcher. Further research which could look into the phenomenon from a longitudinal and comparative perspective by including participants from other sectors, and involving more than one researcher is believed to increase trustworthiness of findings and enrich understanding of Professional Identity of M&E practitioners by capturing an array of rich professional experiences.

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Annexures

Interview Guide for in-depth interview with M&E practitioners

Background Questions:

1. In what capacity are you serving in your current organisation?
2. How long have you been holding the position?
3. Is this your first public sector job? If not, what other organisations did you work for before and at what capacity?
4. What kind of formal training or education do you have in Monitoring and Evaluation? If not, what is your primary qualification?
5. Do you have any specialty in the field of monitoring and evaluation?
6. If you have more than one qualification, do you identify with all professions equally or do you have a preference?
7. Do you also have work experiences in other sectors like private, non-profit, etc? If yes, in what capacities?
8. How long have you been active in the M&E practice?

Perceptions of Professional Identity

1. What motivated you to join the M&E practice? Tell me about your professional journey leading up to you at this point?
2. What were your perceptions/expectations of the field before you joined the profession?
3. Has this changed or remained the same? If it changed, please explain why and how?
4. In your opinion, do you think Monitoring and Evaluation is a profession, an occupation or something else? What, in your view, distinguishes a profession from an occupation?

5. What does being a Monitoring and Evaluation practitioner mean to you? Have you always felt that way? Why?
6. What do you think is the core of Monitoring and Evaluation? How do you translate this value in your daily practice?
7. What do you think of the professional status of M&E when you compare it to other professions? Are you happy with it? If not, what do you think should change or improve?
8. Do you feel content/satisfied by the work you do? If not, why? If yes, what is the most rewarding aspect of your profession?
9. Where do you see yourself in five years' time professionally?
10. Do you think you would choose to change your profession in the future if opportunities present themselves? If yes, why? If not, why?

Factors influencing Professional Identity.

11. How do you describe the institutional and organisation structure in terms of where the Monitoring and Evaluation unit is positioned? Who do you report to? Are you satisfied by this setup? If yes, why? If not, what do you think should change to facilitate better working conditions for M&E professionals?
12. How do you describe the general attitude of other colleagues or professionals towards Monitoring and Evaluation practitioners and the profession in general in your organization? Can you give me an example of this scenario from one of your experiences?
13. How do these views affect your perception towards your own professional identity?
14. What do you understand about professional autonomy? In your experience do you have experience professional autonomy in your current organization? If not, what do you think is the reason?

15. How do you understand professional boundary? In your experience, do you think there is a clear professional boundary in your current organisation? If not, what do you think is the reason? In what way does this constrain your professional duties?
16. What is your experience when it comes to decision-making processes in your organisation when it comes to matters of your professional duties?
17. In your experience, how involved are you (or your department) when it comes to key decisions making processes pertaining to monitoring and evaluations issues? Can you give me an example of this scenario?
18. Do you think these challenges in any way pose a threat to your professional values, belief, ethical principles and practice standards? If yes, can you give me an example of such an incident?
19. What are the positive aspects of your experience in the public sector so far? What do you appreciate most about it?
20. As an employee of the public sector do you also consider yourself as a career civil servant? If not, what is your reason for that? If you do, how do you negotiate both identities?

Ethic Clearance Certificate



SCHOOL OF GOVERNANCE ETHICS COMMITTEE
CONSTITUTED UNDER THE UNIVERSITY HUMAN RESEARCH ETHICS COMMITTEE (NON-MEDICAL)

CLEARANCE CERTIFICATE**PROTOCOL NUMBER: WSG-2021-29****PROJECT TITLE**

Mapping Perceptions of Professional Identity of Monitoring and Evaluation Practitioners in the Public Sector: A Phenomenography

INVESTIGATOR

Meseret Daniel Desta

SCHOOL/DEPARTMENT OF INVESTIGATOR

Wits School of Governance

DATE CONSIDERED

18 May 2022

DECISION OF THE COMMITTEE

Approved unconditionally

RISK LEVEL

Low Risk

EXPIRY DATE

Date of submission of the project Research Report

ISSUE DATE OF CERTIFICATE

25 May 2022

CHAIRPERSON

 Rekgotsofetsa Chikane

cc: Supervisor: Dr. Angelita Kithatu-Kiwekete

DECLARATION OF INVESTIGATOR

To be completed in duplicate and **ONE COPY** returned to the Chairperson of the School/Department ethics committee.

I fully understand the conditions under which I am authorized to carry out the abovementioned research and I guarantee to ensure compliance with these conditions. Should any departure to be contemplated from the research procedure as approved I/we undertake to resubmit the protocol to the Committee.

 Signature

Date

01 June 2022

PLEASE QUOTE THE PROTOCOL NUMBER ON ALL ENQUIRIES