

CREST's M&E Learning Collective 2 – Learning Brief

The second session of the CREST's M&E Learning Collective took place on November 10, 2023, with Prof Caitlin Blaser Mapitsa, a seasoned evaluator and academic from the University of the Witwatersrand's School of Governance, facilitating the discussion. Prof Mapitsa, also a CREST alumnus, guided the 38 participants through the session, which centred on the theme "Navigating Methodology in M&E: Sharing Experiences and Practices." Prior to the session, participants were tasked with reading and digesting two articles and four blog posts addressing methodology issues in evaluation.

At the outset, Nozipho Ngwabi from CREST set the stage, outlining the forum's purpose and the motivation behind the Learning Collective. She encouraged participants to seize the opportunity, underlining the forum's role in fostering a learning culture for CREST alumni, students, and staff to stay abreast of developments in the M&E knowledge base.

Prof Mapitsa then delved into the topic, providing insightful perspectives to guide the day's discussion. Key highlights include:

- **Importance of methodology:**
 - Stressed the often-overlooked significance of methodology in evaluations, describing it as holding "the magic of a good evaluation."
 - Emphasized that the shape of an evaluation and its methodology is established at the inception stage, where stakeholders conceptualize the evaluation.
 - Highlighted the need to view methodology beyond mere lists of activities and tools, emphasizing its role as the "glue" that connects philosophy and approach to activities and tools.
- **Role of theory of change:**
 - Highlighted the role of a theory of change in shaping methodology, especially in theory-based evaluations.
- **Methodology as a spectrum:**
 - Discussed the spectrum of approaches to methodology and the importance of being aware of different methodological choices.
 - Addressed the challenges in understanding methodological terminologies and jargons in evaluation documentation.
 - Emphasized that strengths can be found in all methodological approaches, and the key is thoughtful application based on context.
- **Methodology in research vs. evaluation:**
 - Discussed the overlap and differences between research methods and evaluative approaches, noting the need for evaluation to go beyond conventional research.
- **Consideration for constraints:**
 - Acknowledged the importance of considering logistical constraints in evaluation, such as budget and time limitations.
- **Critical reflection:**
 - Raised questions about the difficulty of measuring and reflecting on methods and methodology.
 - Critiqued the oversimplification of methodologies into qualitative or quantitative categories, emphasizing the need for a more nuanced approach in evaluation design.

Prof Mapitsa ended the presentation by inviting participants to share their takeaways, reflections, and questions, fostering an interactive and participatory discussion.

During the discussion session, participants shared their experiences and challenges with methodology in evaluation and research. Some of the concerns raised included the challenge with defining and aligning methodology and methods in evaluations. They also discuss the difficulties in using mixed methods when one method falls through, and the challenges of dealing with terms of reference that may limit or constrain evaluation design and implementation. The participants highlighted the need for open and balanced terms of reference, and the importance of negotiating with clients to ensure a meaningful and useful evaluation design. They also addressed the issue of preconceived ideas and expectations regarding methodology from clients and stakeholders in evaluations, particularly in donor-funded projects.

The conversation extended to the challenges evaluators encounter when handling dissenting voices within evaluation findings and explored nuanced approaches to address this complexity. The prevailing consensus underscored the significance of achieving a delicate equilibrium: presenting data and findings that resonate with the audience yet remaining faithful to the fundamental insights derived from the data. Participants acknowledged the difficulty of articulating criticism in a manner that is both constructive and meaningful. The discussion also highlighted the importance of advocacy and the professional standing of evaluators, underscoring the necessity to scrutinize assumptions and establish a shared understanding of methodology.

The session ended with an invitation for further questions or comments via correspondence and an openness to more fruitful discussion in next year Learning Collective sessions.

Resources for the session:

Articles:

1. Ndlhovu, L., Khumalo, L. & Krakra, J. 2019. [An assessment of methods used in evaluations from the African Evaluation Database](#), in C.B. Mapitsa, P. Tirivanhu & N. Popiwa (eds). *Evaluation landscape in Africa—Context, methods and capacity*. Cape Town: African Sun Media.112-137.
2. Gaotlhobogwe, M., Major, T.E., Koloi-Keaikitse, S. & Chilisa, B. 2018. [Conceptualizing evaluation in African contexts](#). *New Directions for Evaluation*, 2018(159):47-62.

Blogs:

3. Evaluation methodologies by [European Network for Rural Development](#)
4. Understanding Evaluation Methodologies: Methods and Techniques for Assessing Performance and Impact by [EvalCommunity](#)
5. Evaluation Methods by [ATSDR](#)
6. Choose methods and processes by [Better Evaluation](#)