



Department of Performance Monitoring and Evaluation

Report on the Assessment of Government Evaluations

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| Evaluation Title: | The South Africa Jobs Fund Formative Evaluation |
| Evaluation Number: | 435 |
| Evaluation Completion Date: | 06 March 2013 |
| Period of Evaluation: | 5 months |
| Submitted: | 31 October 2014 by Wilma Wessels-Ziervogel |
| Approved: | 31 October 2014 by Mike Leslie |

Evaluation Details

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| Evaluation Title: | The South Africa Jobs Fund Formative Evaluation |
| Evaluation Number: | 435 |
| Evaluation Completion Date: | 06 March 2013 |
| Created: | 17 July 2014 by Mike Leslie |
| Submitted: | 31 October 2014 by Wilma Wessels-Ziervogel |
| Approved: | 31 October 2014 by Mike Leslie |
| Period of Evaluation: | 5 months |
| Known Cost: | R 12,000,000.00 |
| Known Cost Type: | Estimate |
| Initiated By: | National Treasury |
| Initiated By Internal: | Yes |
| Undertaken By: | Oxford Policy Management |
| Undertaken By Internal: | No |

Assessors

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|-------------------------|--------------------------------|
| Wilma Wessels-Ziervogel | wilma@southernhemisphere.co.za |
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Assessment Documents

| Document Name: | Document Type: | Added By: | Added On: |
|--|---|-------------------------|-----------------|
| Jobs Fund_FormEval_FinalReport_06Mar2013.pdf | Evaluation report | Mike Leslie | 17 July 2014 |
| Rising to the challenge - OPM Briefing Note September 2013.pdf | Any other relevant documentation pertaining to the evaluation process | Wilma Wessels-Ziervogel | 29 August 2014 |
| Assessment Report at Moderation.pdf | Assessment Report at Moderation | Mike Leslie | 01 October 2014 |

Quality Assessment Summary

The evaluation received an overall score of 3.49 with the planning and design and follow up, use and learning receiving scores above 4.

In terms of planning and design, the construction of the terms of reference was a key strength as well as the alignment to the policy context and the appropriateness of evaluation design. The evaluation was conducted efficiently (4.6) and evidence generated was largely used by one of the two key stakeholders (National Treasury) (3.88).

The score for the evaluation report (2.72) was affected by: 1) the omission of a conclusion that was linked back to the evaluation questions and theory of change and 2) the exclusion of data analysis procedures, limitations and ethical considerations in the methodology. The lack of reporting on evaluation ethics as well as the recommendation that the report should not be made publicly available resulted in low scores for reported evaluation ethics (2.33). The strengths of the report lie in the accessibility of the content (3.67) level of detail provided in the Recommendations (3.31). The level of utilization of the findings (3.88) is also indicative of the relevance and feasibility of recommendations.

The evaluation team comprised international and local experts who were experienced in implementing and evaluating challenge funds. They had both academic and practical credibility. The team was a key asset to the evaluation process, ensuring a rigorous evaluation design (4), good project management (scoring 4 across all phases), and a high level of independence (4.27).

Due to the nature of the information on the implementing agent, this report should not be made publicly accessible.

Quality Assessment Scores

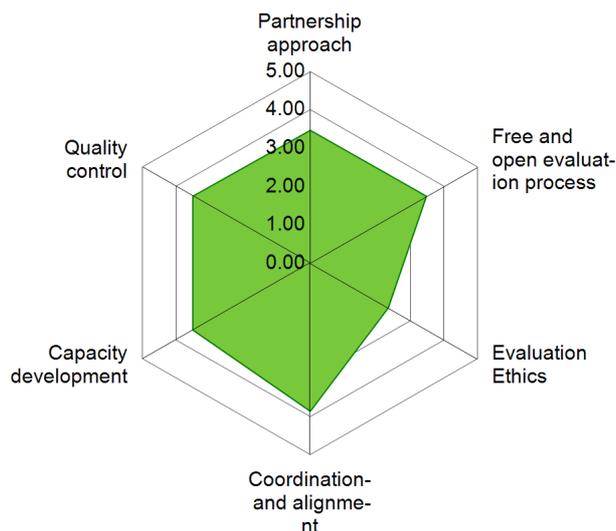
| Phase of Evaluation | Score |
|--------------------------------|-------------|
| 1. Planning & Design | 4.05 |
| 2. Implementation | 3.94 |
| 3. Report | 2.72 |
| 4. Follow-up, use and learning | 4.05 |
| Total | 3.49 |

| Overarching Consideration | Score |
|----------------------------------|-------------|
| Partnership approach | 3.47 |
| Free and open evaluation process | 3.49 |
| Evaluation Ethics | 2.33 |
| Coordination and alignment | 3.87 |
| Capacity development | 3.50 |
| Quality control | 3.49 |
| Total | 3.49 |

Scores: Phases of Evaluation



Scores: Overarching Considerations



| Phase of Evaluation | Area of Evaluation | Score |
|--------------------------------|--|-------------|
| 1. Planning & Design | 1.1. Quality of the TOR | 4.17 |
| 1. Planning & Design | 1.2. Adequacy of resourcing | 3.91 |
| 1. Planning & Design | 1.3. Alignment to policy context and background literature | 4.00 |
| 1. Planning & Design | 1.4. Appropriateness of the evaluation design and methodology | 4.00 |
| 1. Planning & Design | 1.5. Project management (Planning phase) | 4.00 |
| 2. Implementation | 2.1. Evaluation ethics and independence | 4.27 |
| 2. Implementation | 2.2. Participation and M&E skills development | 2.60 |
| 2. Implementation | 2.3. Methodological integrity | 4.32 |
| 2. Implementation | 2.4. Project management (Implementation phase) | 4.00 |
| 3. Report | 3.1. Completeness of reporting structure | 3.04 |
| 3. Report | 3.2. Accessibility of content | 3.67 |
| 3. Report | 3.3. Robustness of findings | 3.23 |
| 3. Report | 3.4. Strength of conclusions | 1.00 |
| 3. Report | 3.5. Suitability of recommendations | 3.31 |
| 3. Report | 3.6. Consideration of reporting risks and ethical implications | 1.23 |
| 3. Report | 3.7. Project management (Reporting phase) | 4.00 |
| 4. Follow-up, use and learning | 4.1. Resource utilisation | 4.60 |
| 4. Follow-up, use and learning | 4.2. Evaluation use | 3.88 |
| Total | Total | 3.49 |

1. Planning & Design

1.1. Quality of the TOR

Standard: 1.1.1. The evaluation was guided by a well-structured and complete TOR or a well-structured and complete internal evaluation proposal

Comment and Analysis: The Evaluation Terms of Reference was clear, succinct and well structured. Information was provided on the background to the Jobs Fund, purpose of the evaluation, key evaluation questions, suggested evaluation methodology and key expected deliverables. Time frames for the implementation of the evaluation, as well as the key skills and experience required by the Service provider however seemed to be omitted.

Rating: 4

Standard: 1.1.2. The purpose of the evaluation stated in the TOR (or an internal evaluation proposal) was clear and explicit

Comment and Analysis: The broader purpose of the formative evaluation is clearly stated as being to inform the management of the Jobs Fund, provide insight into achievements, challenges and opportunities. The evaluation was meant enable accountability for results, and provide an indication of whether the Jobs Fund would realistically be able to produce the planned impacts at a later stage. More specifically, the evaluation was to assess the "extent to which the early elements of the Jobs Fund have been realized as well as the effectiveness, efficiency and relevance of the governance, institutional and operational frameworks set up to date" (ToR). The ToR also articulated what the evaluation was to exclude (i.e. impact and sustainability) and what future evaluations would focus on. This provided a good context for the evaluation.

Rating: 5

Standard: 1.1.3. The evaluation questions in the TOR (or an internal evaluation proposal) were clearly stated and appropriate for addressing the evaluation purpose

Comment and Analysis: The four key evaluation questions were clearly stated and were well aligned to the purpose of the evaluation. Additional information on governance arrangements, operations and funding provided more context to the evaluation questions.

Rating: 5

Standard: 1.1.4. The approach and type of evaluation was suited to the purpose and scope of the evaluation TOR (or an internal evaluation proposal)

Comment and Analysis: There was a good fit between the approach and type of evaluation and the purpose and scope of the evaluation. Having the formative evaluation focus on the institutional, operational and governance structures would help determine their efficiency and relevance and future effectiveness in achieving programme results.

Rating: 4

Standard: 1.1.5. The TOR (or an internal evaluation proposal) identified the intended users of the evaluation and their information needs

Comment and Analysis: The key users were identified in the proposal as being National Treasury and the DBSA. Their roles and information needs were also articulated. Since the two stakeholders have such different roles on the programme it may have been useful to express their needs or interests separately.

Rating: 4

Standard: 1.1.6. Key stakeholders were involved in the scoping of the TOR and choosing the purpose of the evaluation

Comment and Analysis: The National Treasury developed the ToR in consultation with Genesis Analytics (who were also involved in the Jobs Fund). The Implementing Agency (DBSA) were not involved in the development of the ToR, as they were the evaluand. If a participatory/capacity development approach is being promoted within government then evaluands should be involved in the development of ToR.

Rating: 3

1.2. Adequacy of resourcing

Standard: 1.2.1. The evaluation was adequately resourced in terms of time allocated

Comment and Analysis: The time frames for the evaluation were tight and the timing was not optimal since it was over the holiday season. However the focus of the Project Manager, experience of the Research Team and the responsiveness of the National Treasury and DBSA made the time frames feasible.

Rating: 3

Standard: 1.2.2. The evaluation was adequately resourced in terms of original budget

Comment and Analysis: The budget was sufficient. There was a slight extension to the contract (with additional budget allocated) to allow for another workshop to be conducted with the National Treasury.

Rating: 4

Standard: 1.2.3. The evaluation was adequately resourced in terms of staffing and skills sets

Comment and Analysis: The evaluation team, who were comprised of international and local experts, had extensive experience in implementing and evaluating Challenge Funds. This strengthened the evaluation process and credibility of the findings.

Rating: 5

Standard: 1.2.4. Where appropriate, the evaluation planned to incorporate an element of capacity building of partners/staff responsible for the evaluand

Comment and Analysis: Capacity development was not planned as part of the evaluation process, although this did happen.

Rating: 3

1.3. Alignment to policy context and background literature

Standard: 1.3.1. There was evidence that a review of the relevant policy and programme environments had been conducted and used in planning the research

Comment and Analysis: Policy and programme documents (relevant studies, reports and other programme documents) were used to determine how to best answer evaluation questions.

Rating: 4

Standard: 1.3.2. There was evidence of a review of appropriate literature having been conducted and used in planning the research

Comment and Analysis: The evaluation was planned based on previous evaluations conducted of Challenge Funds. The DAC Evaluation Standards and Guidelines were also used to influence evaluation questions and the analysis framework.

Rating: 4

1.4. Appropriateness of the evaluation design and methodology

Standard: 1.4.1. There was explicit reference to the intervention logic or the theory of change of the evaluand in the planning of the evaluation

Comment and Analysis: The theory of change was articulated in the ToR as well as the evaluation report.

Rating: 4

Standard: 1.4.2. Key stakeholders were consulted on the design and methodology of the evaluation

Comment and Analysis: National Treasury worked quite closely with the evaluation service provider to ensure that they were adhering to the information needs. The Implementing Agent however did not have any input into the methodology. Another evaluation was commissioned by the DBSA; this preceded the evaluation conducted by OPM and reportedly overlapped to some degree with the scope of this evaluation. There may have been a missed opportunity to combine evaluation efforts and resources.

Rating: 3

Standard: 1.4.3. The planned methodology was appropriate to the questions being asked

Comment and Analysis: The methods were well suited to the evaluation questions being asked. The research methodology was mostly qualitative in nature, with data being collected through semi-structured interviews with key informants, focus groups with grantees (those who were awarded grants and those who were unsuccessful in their application), document/literature review and monitoring data. Secondary quantitative data was also collected. The method allowed for good triangulation based on data sources (e.g. grantees, DBSA, NT, Experts) and data collection methods. The comparison of this challenge fund to other challenge funds, allowed for benchmarking.

Rating: 4

Standard: 1.4.4. Sampling was appropriate and adequate given focus and purpose of evaluation

Comment and Analysis: The sample was as comprehensive as possible. The inclusion of grantees who have been successful and those rejected applicants was a good addition to the sample, especially given that this evaluation focused more on the institutional effectiveness of the Jobs Fund.

Rating: 5

Standard: 1.4.5. There was a planned process for using the findings of the evaluation

Comment and Analysis: The ToR seemed to be clear on how the findings were to be utilized. The evaluation also fed into the strategic planning of the National Treasury.

Rating: 4

1.5. Project management (Planning phase)

Standard: 1.5.1. The inception phase was used to develop a common agreement on how the evaluation would be implemented

Comment and Analysis: An Inception meeting was held between the evaluation team, the Jobs Fund team, which included the National Treasury and Jobs Fund team. There were no significant changes to the ToR/proposal as National Treasury were quite clear about their expectations.

Rating: 4

2. Implementation

2.1. Evaluation ethics and independence

Standard: 2.1.1. Where data was gathered in contexts where ethical sensitivity is high, appropriate clearance was achieved through an ethics review board; e.g. in evaluation involving minors, institutions where access usually requires ethical or bureaucratic clearance, and situations where assurances of confidentiality was offered to participants

Comment and Analysis: Since the individuals sampled were mostly responsible for managing and implementing the programme and were over the age of 18, there was little risk to respondents. According to the client, the consultant followed the necessary ethical guidelines.

Rating: 3

Standard: 2.1.2. Where external, the evaluation team was able to work freely without significant interference

Comment and Analysis: Although the evaluation findings and recommendations were discussed and debated, the evaluation team were not easily swayed by the feedback provided on the report. They maintained a high degree of independence in this evaluation process. The composition and experience of the evaluation team enabled this.

Rating: 5

Standard: 2.1.3. The evaluation team was impartial and there was no evidence of conflict of interest

Comment and Analysis: Having an highly experienced evaluation team (made up of both international and local consultants) with no particular interests in the evaluation findings contributed to the objectivity of the team.

Rating: 5

2.2. Participation and M&E skills development

Standard: 2.2.1. Key stakeholders were consulted through a formalised mechanism or institutional arrangement

Comment and Analysis: There was no formal structure for engaging key stakeholders. The Programme Manager at the National Treasury was solely responsible for overseeing the evaluation process, and consulted Genesis Analytics and an Economist when required. This consultation happened more informally.

Rating: 2

Standard: 2.2.2. Where appropriate, an element of capacity building of partners responsible for the evaluand was incorporated into the evaluation process

Comment and Analysis: Although capacity development was not planned, the Evaluation Service Provider (OPM) conducted a capacity development workshop with National Treasury to help them think through their challenge fund strategy and implementation. They provided practical tips based on their knowledge of best practice. This was deemed very useful for the Department. In addition to this, there was formal and informal capacity development of two young professionals in the Jobs Fund (one of them being the M&E person). This was done through, for example, a half day workshop on analyzing the Job Fund's M&E system, and informal theoretical discussion on Challenge Funds. The two key international consultants were empowering in their approach of working with these young professionals.

Rating: 4

Standard: 2.2.3. Where appropriate, the evaluation team incorporated an element of skills development amongst the evaluators (e.g. students, interns, recent graduates, etc)

Comment and Analysis: The evaluation team was quite experienced and so the only "capacity development" was a briefing session held by the project manager to familiarize evaluators with the South African, and particularly the Job Fund's, political context.

Rating: 2

Standard: 2.2.4. Peer review of the agreed evaluation design and methodology occurred prior to undertaking data collection

Comment and Analysis: The evaluation team included a key expert/academic in the field. He was responsible for quality assurance and reviewed the evaluation design and methodology.

Rating: 2

2.3. Methodological integrity

Standard: 2.3.1. The methods employed in the process of the evaluation were consistent with those planned

Comment and Analysis: The methods used in the evaluation were consistent with those planned/required in the Terms of Reference. The documents reviewed seemed to exceed the requirements in the ToR (while the ToR required a review of Jobs Fund documents, the evaluation also included a review of other literature).

Rating: 4

Standard: 2.3.2. A pilot of data collection instrumentation occurred prior to undertaking data collection

Comment and Analysis: Data collection instruments were piloted within the evaluation team, and then the first round of interviews was also treated as a pilot. Instruments were adjusted after these piloting processes. Given that the instruments were mostly qualitative, the piloting process was quite rigorous.

Rating: 5

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| Standard: | 2.3.3. Data collection was not compromised by fieldwork-level problems or unplanned diversions from original intentions |
| Comment and Analysis: | Although two interviews that were planned with Senior Management within the DBSA were not conducted, this did not compromise or limit data collection. The evaluators were very clear about their brief, and so ensured that there were no diversions from this. |
| Rating: | 4 |
| Standard: | 2.3.4. Forms of data gathering were appropriate given the scope of evaluation |
| Comment and Analysis: | Forms of data gathering (which included semi-structured interviews, document review and focus groups) were appropriate for the scope of the evaluation and the data sources consulted. |
| Rating: | 4 |
| Standard: | 2.3.5. The data analysis approach and methods were appropriate and sufficient given the purposes of the evaluation |
| Comment and Analysis: | Secondary data analysis of the relevant documents were undertaken for this evaluation, and key informant and focus groups interviews were analysed in addition to this. A data analysis framework (called "process tool") for conducting evaluation of challenge fund's value for money was used to analyse all data. The broad themes were: Fund Design, Research and Marketing, Project Selection and Project Implementation. Sub-themes can be found in the analytic framework attached. |
| Rating: | 4 |
| Standard: | 2.3.6. Key stakeholders were significantly engaged as part of the methodology |
| Comment and Analysis: | Key stakeholders, which included National Treasury, DBSA, Genesis Analytics, members of Investment Committees, other experts and grantees and applicants were interviewed as part of the evaluation process. No key stakeholders were reportedly omitted. |
| Rating: | 4 |
| Standard: | 2.3.7. The methodology included engaging beneficiaries appropriately as a key source of data and information |
| Comment and Analysis: | Beneficiaries (in this case successful and unsuccessful applicants) were included in the data collection process. This was a positive addition, since the evaluation focused mainly on the institutional capacity to manage the programme. The inclusion of both those who have and have not received grants provided a balanced perspective. |
| Rating: | 5 |

2.4. Project management (Implementation phase)

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| Standard: | 2.4.1. The evaluation was conducted without significant shifts to scheduled project milestones and timeframes |
| Comment and Analysis: | There was a slight change to the time frame due to unavailability of interviewees, but on the whole the evaluation was conducted within the scheduled time frames. Given the time constraints of the evaluation, this was well done. |
| Rating: | 4 |

3. Report

3.1. Completeness of reporting structure

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| Standard: | 3.1.1. Executive summary captures key components of the report appropriately |
| Comment and Analysis: | The executive summary was well structured and included all key aspects of the main report. Recommendations were well summarized in a table format. |
| Rating: | 4 |
| Standard: | 3.1.2. The context of the development intervention is explicit and presented as relevant to the evaluation |
| Comment and Analysis: | A brief context was provided in the Introduction and Background section of the report, which provided an overview of the initiation, intention and status of the Jobs Fund. This was followed by an overview the evaluation and how this fits in to the establishment and implementation of the Jobs Fund. Since the evaluation largely focused on institutional, governance and operational structures, having a snapshot of the structure of the Jobs Fund (e.g. diagram/organogram showing role players internal and external to the DBSA) would have made the findings more accessible for someone external to the programme. |
| Rating: | 4 |
| Standard: | 3.1.3. There is a clear rationale for the evaluation questions |
| Comment and Analysis: | The key evaluation questions were categorized into the following focus areas: relevance, governance, operational structures, administrative procedures, monitoring and evaluation. Sub-questions were then developed under each evaluation theme. Evaluation questions focused on the design of the programme (e.g. whether the most relevant sectors were being targeted) and the functionality of implementation structures (e.g. governance, operational, administrative structures, etc.). It was therefore well linked to the purpose of the evaluation, that is to determine whether the early elements (i.e. setting up) of the Jobs Fund had been realized, and understanding the effectiveness, efficiency and relevance of these institutional structures. |
| Rating: | 4 |
| Standard: | 3.1.4. The scope or focus of the evaluation is apparent in the report |
| Comment and Analysis: | The focus of the evaluation was made clear through the Background to the Evaluation, Approach and Methodology, and Evaluation Questions sections. It may however have been useful to capture what was excluded from the scope and why (that is, that outcomes or results are not yet being evaluated as it is too soon to see these realized). |
| Rating: | 4 |

Standard: 3.1.5. A detailed methodology is outlined in the relevant section of the report to the point that a reader can understand the data collection, analysis and interpretation approaches used

Comment and Analysis: The data collection methodology was outlined in the report with a list of interviewees provided in the appendix. The sample size (number of interviews and focus groups - particularly with grantees and applicants) and composition (e.g. where grantees and applicants were from) was however unclear. No information was provided on data analysis and interpretation.

Rating: 2

Standard: 3.1.6. Acknowledgement of limitations of all aspects of the methodology and findings are clearly and succinctly articulated

Comment and Analysis: Limitations were not acknowledged in the report. Upon reflecting on the Jobs Fund Evaluations, stakeholders interviewed indicated that there were no limitations.

Rating: 1

Standard: 3.1.7. Key findings are presented in a clear way; they are made distinct from uncertain or speculative findings; and unused data is not presented in the body of the report

Comment and Analysis: The report was focused, and findings were clearly articulated although they were not always summarized and related back to the evaluation question.

Rating: 3

Standard: 3.1.8. Conclusions and recommendations are clear and succinctly articulated

Comment and Analysis: Conclusions are missing from the report which left the data/findings hanging, particularly for longer sections. This also made the extraction of key findings a challenge. Recommendations are however clear, in some instance succinct and in other instances quite detailed. The specificity of recommendations made them actionable.

Rating: 3

3.2. Accessibility of content

Standard: 3.2.1. The final evaluation report is user-friendly, written in accessible language and its content follows a clear logic

Comment and Analysis: The report is user friendly and written quite accessibly. The content generally followed a good and consistent logic, with data on the SA Jobs Fund being presented first, data on Best Practices then presented, which was followed by recommendations. Including the research questions in the beginning of each section helped to contextualize the section. Having an overview of what is covered under section also made reading a easier - as was done in Section 3.2.2 and 3.2.3 for example. The absence of conclusions however was a challenge in terms of reflecting on the findings in a synthesized way.

Rating: 3

Standard: 3.2.2. Quality of writing and presentation is adequate for publication including: adequate layout and consistent formatting; complete sentences and no widespread grammatical or typographical errors; consistency of style and writing conventions (e.g. tense, perspective (first person, third person); levels of formality; references complete and consistent with cited references in reference list and vice versa; etc.

Comment and Analysis: Writing was of good quality generally, and formatting was consistent. References were however often omitted. For example, on page 6 statistics are reported, without being properly referenced ("the strategy" is mentioned, but without a specific reference); also best practice examples were not referenced. The reference list in the appendix also seems to be limited to programme documents, while the methodology and findings sections suggest that a broader review of literature and policy documents has been undertaken. Diagrams and sources of primary data collection (e.g. focus groups, interviews, etc) were well referenced.

Rating: 3

Standard: 3.2.3. Appropriate conventions are used in presentation of data (e.g. use of appropriate statistical language; reporting of p-values where appropriate; not reporting statistically insignificant findings as significant; clarifying disaggregation categories in constructing percentages; not using quantitative language in reporting qualitative data, etc.)

Comment and Analysis: Appropriate language was used to report data. Since the study was largely qualitative, statistical language was not used.

Rating: 4

Standard: 3.2.4. The use of figures and tables is such that it supports communication and comprehension of results; and data reported in figures and tables are readily discernible and useful to a reader familiar with data presentation conventions

Comment and Analysis: Graphs, figures and tables were used appropriately, and adequately labelled. Where possible, data (e.g. page 15) was presented in tables and text boxes which made the format of the report varied and reading engaging and made data more digestible. The presentation of recommendations in tabular formats also worked well (see page 18 for example).

Rating: 5

3.3. Robustness of findings

Standard: 3.3.1. Data analysis appears to have been well executed

Comment and Analysis: Data analysis seems well executed.

Rating: 4

Standard: 3.3.2. Findings are supported by available evidence

Comment and Analysis: The findings are generally well supported by evidence although there are instances where the evidence for findings are not clear. For example, page 13 of the report states: "This decision created a number of issues and tensions and some duplication of functions that added complexity with little additional benefit". This was not elaborated on or explained. It is sometimes not clear whether the findings are reflective of the evaluators assessment/opinion or the opinion of interviewees. It would have been useful to provide some direct quotes from evaluation participants, provide more detail on the nature of the challenges mentioned (such as examples) and consistently indicate how findings were derived (e.g. expert opinion, interviews conducted, documents reviewed).

Rating: 3

Standard: 3.3.3. The evidence gathered is sufficiently and appropriately analysed to support the argument

Comment and Analysis: Generally evidence is well analyzed to support arguments made in the report. Findings are often presented and then expanded on with examples of the data supporting the argument. Having direct quotes and references would have strengthened the arguments made.

Rating: 3

Standard: 3.3.4. There is appropriate recognition of the possibility of alternative interpretations

Comment and Analysis: The findings often presented a range of possible explanations of an issue. However, the source of evidence (e.g. interviews, documents, expertise of evaluation team) was not always communicated, and so it is not always clear whether results were representing a variety of perceptions or interpretations of the issue.

Rating: 3

Standard: 3.3.5. The report appears free of significant methodological and analytic flaws

Comment and Analysis: There does not seem to be any methodological or analytic flaws in the report. Presenting quotes would have allowed the assessor to verify the accuracy of analysis of the raw data.

Rating: 4

Standard: 3.3.6. Relevant limitations of the evaluation are noted

Comment and Analysis: Limitations were not noted in the report, but interviewees mostly indicated that there were no significant limitations. One interviewee felt that the Memorandum of Agreement was not sufficient as a basis for the evaluation, as this was a pilot process and some of the projections made may were too rigid to be held accountable for.

Rating: 2

3.4. Strength of conclusions

Standard: 3.4.1. Conclusions are derived from evidence

Comment and Analysis: There were no conclusions in the report.

Rating: 1

Standard: 3.4.2. Conclusions take into account relevant empirical and/or analytic work from related research studies and evaluations

Comment and Analysis: There were no conclusions in the report.

Rating: 1

Standard: 3.4.3. Conclusions address the original evaluation purpose and questions

Comment and Analysis: There were no conclusions in the report.

Rating: 1

Standard: 3.4.4. Conclusions are drawn with explicit reference to the intervention logic or theory of change

Comment and Analysis: There were no conclusions in the report.

Rating: 1

3.5. Suitability of recommendations

Standard: 3.5.1. Recommendations are made in consultation with appropriate sectoral partners or experts

Comment and Analysis: The evaluation team was made up of key sectoral experts who made recommendations. Other sectoral partners were not consulted as part of the evaluation process.

Rating: 2

Standard: 3.5.2. Recommendations are shaped following discussions with relevant government officials and other relevant stakeholders

Comment and Analysis: The service provider was responsible for developing recommendations which were based on the issues raised by stakeholders (e.g. National Treasury and the DBSA) during data collection. Inputs on the feasibility of recommendations were also considered during the feedback process.

Rating: 3

Standard: 3.5.3. Recommendations are relevant to the current policy context

Comment and Analysis: The recommendations were deemed relevant to the policy context.

Rating: 4

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| Standard: | 3.5.4. Recommendations are targetted at a specific audience sufficiently - are specific, feasible, affordable and acceptable |
| Comment and Analysis: | The report was recommendations focused (almost half of the report was comprised of recommendations). These recommendations were very detailed and provided excellent direction in terms of improvements to be made. For example, where changes to the role and structures were necessary, specific suggestions were made on what the future structures/roles could look like (see page 24 which provides a detailed terms of reference for Senior and Junior Project managers). Proposed organisational charts, organograms, capacity development priorities are also provided. Where further research or analysis is recommended, clear issues on which to focus on is provided (e.g. see page 41). |
| Rating: | 4 |

3.6. Consideration of reporting risks and ethical implications

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| Standard: | 3.6.1. Peer review of the draft evaluation report occurred prior to finalisation of the evaluation report |
| Comment and Analysis: | The key expert/academic on the evaluation team reviewed the report before it was finalized. However no independent expert was consulted to review the evaluation report. |
| Rating: | 2 |

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| Standard: | 3.6.2. The full report documents procedures intended to ensure confidentiality and to secure informed consent where necessary (in some cases this is not needed - e.g. evaluation synthesis - in which case N/A should be recorded) |
| Comment and Analysis: | Ethical procedures were not documented in the report. |
| Rating: | 1 |

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| Standard: | 3.6.3. There are no risks to participants in disseminating the original report on a public website |
| Comment and Analysis: | National Treasury has indicated that this report should NOT be publicly accessible, as it contains information that is of a sensitive nature, particularly in relation to the performance of DBSA. |
| Rating: | 1 |

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| Standard: | 3.6.4. There are no unfair risks to institutions in disseminating the original report on a public website |
| Comment and Analysis: | National Treasury has indicated that this report should not be publicly accessible, as it contains information that is of a sensitive nature, particularly in relation to the performance of DBSA. |
| Rating: | 1 |

3.7. Project management (Reporting phase)

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| Standard: | 3.7.1. A project closure meeting that reflected on the challenges and strengths of the evaluation process occurred |
| Comment and Analysis: | The evaluation team at OPM conducted a internal review process. |
| Rating: | 4 |

4. Follow-up, use and learning

4.1. Resource utilisation

Standard: 4.1.1. The evaluation was completed within the planned timeframes

Comment and Analysis: The evaluation was completed within the given time frame. This was well done given the tight time frame for this evaluation

Rating: 5

Standard: 4.1.2. The evaluation was completed within the agreed budget

Comment and Analysis: The evaluation was completed within budget, and was perceived as being good value for money given the capacity development received by National Treasury by the Consultants.

Rating: 4

4.2. Evaluation use

Standard: 4.2.1. Results of the evaluation have been presented to all relevant stakeholders

Comment and Analysis: The evaluation results were presented to National Treasury first (the Programme Manager, Genesis Analytics and the Technical Assistance Unit) and then to the DBSA.

Rating: 4

Standard: 4.2.2. A reflective process has been undertaken by the steering committee (if no steering committee exists then by the evaluation management team or the involved department officials) to reflect on what could be done to strengthen future evaluations

Comment and Analysis: Since there was no Steering Committee, the Programme Manager reflected on the evaluation process.

Rating: 3

Standard: 4.2.3. The evaluation study is seen by interviewed stakeholders as having added significant symbolic value to the policy or programme (e.g. raised its profile)

Comment and Analysis: While for one stakeholder the evaluation was deemed useful, for another it was felt that nothing new was raised through the evaluation (but this was mainly due to a parallel evaluation process which had already revealed very similar issues).

Rating: 3

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| Standard: | 4.2.4. The evaluation study is of conceptual value in understanding what has happened and possibly in shaping policy and practice |
| Comment and Analysis: | The evaluation seemed to inform a number of decisions on how the Job Fund should be managed. The recommendations have led to changes in the practice of the National Treasury and the DBSA. |
| Rating: | 4 |
| Standard: | 4.2.5. Development of a draft improvement plan has been started, but not completed, based on the findings and recommendations set out in the evaluation |
| Comment and Analysis: | A schedule of the recommendations made in the evaluation was drafted by the National Treasury (indicating how recommendations should be taken forward). Some of these recommendations have already been implemented. |
| Rating: | 4 |
| Standard: | 4.2.6. The report is publicly available (website or otherwise published document), except where there were legitimate security concerns *Note: only apply if sufficient time has elapsed since completion of the evaluation |
| Comment and Analysis: | The evaluation report is not publicly available due to issues of sensitivity around the institution being evaluated. |
| Rating: | N/A |
| Standard: | 4.2.7. There is clear evidence of instrumental use - that the recommendations of the evaluation were implemented to a significant extent *Note: only apply if sufficient time has elapsed since completion of the evaluation |
| Comment and Analysis: | The recommendations have been implemented to some degree: 1) National Treasury has ensured that funding rounds are more targeted through the new Term Sheet that will be issued to the market (three funding rounds will be targeted- scale up, innovation and agriculture); 2) It was decided that Treasury would take responsibility for evaluation of the Job Fund, and the Implementing Agency will focus on the monitoring aspect; 3) The Investment Committee roles were clarified (they are no longer providing oversight of operations. Recommendations were made on how to change the organisational structure of the DBSA to support the implementation of the Jobs Fund. The DBSA however will no longer be managing the Jobs Fund. |
| Rating: | 5 |
| Standard: | 4.2.8. There is clear evidence that the evaluation has had a positive influence on the evaluand, its stakeholders and beneficiaries over the medium to long term *Note: only apply if sufficient time has elapsed since completion of the evaluation |
| Comment and Analysis: | It is too early to make an assessment of the positive influence, as the fund is being transferred to another implementing agent. It is hoped that this change will have a positive outcome in terms of the programme performance. |
| Rating: | N/A |

References

Oxford Policy Management (OPM). 2013. The South Africa Jobs Fund Formative Evaluation Final Report.

Oxford Policy Management (OPM). Rising to the challenge: Optimising value for money from challenge funds.

List of Interviewees

Najwa Edries, Head of Employment and Social Security PMU, National Treasury. Telephonic interview. 18 August 2014.

ANONYMOUS. Development Bank South Africa. Telephonic interview: 18 August 2014.

David Hoole, Evaluator: Oxford Policy Management. Email interview: 29 August 2014.

Ruth Faragher, Project Manager: Oxford Policy Management. Telephonic interview: 27 August 2014.