



25 YEARS
AND BEYOND

Accurately Measuring Progress since

1993

Twenty-five years ago, a few individuals at the right time and the right place created the perfect conditions for innovation and major change in monitoring and evaluation (M&E). For the first time on the African continent, the idea of an M&E business was born to serve the development sector in South Africa. It took enormous effort to make it happen, particularly while South Africa was undergoing the massive shift from Apartheid to a free democratic society.

Khulisa grew organically – as you’ll read from our history – and evolved over time. The vision required sacrifice, boldness, and the need to adapt to continually changing political and economic environments. However, the end-goal was always clear: to build a sustainable business that measures progress, grounded in diversity, and leaving a legacy for future generations. It also required Khulisa’s leaders to recognize that incubating and supporting others in the M&E space was important for the African continent to provide indigenous M&E services that solves local development problems. M&E services from African professional service providers was possible at the same levels of performance as international firms, who up to this point, were flying in development professionals to lead and undertake all M&E development activities.

Khulisa’s 25 Year Report covers this odyssey, marking the important milestones along the way. It gives an overview of our past footprint, projects and sectors and takes a glimpse into the future. Khulisa continues to grow as it has for 25 years.

This is our remarkable story!

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At a Glance

Khulisa provides Monitoring, Evaluation & Learning (MEL), Research and Data Quality Assurance services to public and private sector partners globally

Khulisa has worked in 49 countries on 229 assignments since 2009

Sector Expertise



Education



Health



Agriculture
& Nutrition



Governance



Information
Technology

72% of assignments include capacity building

72 Evaluations conducted

22 Data Quality Assessments reaching over 6500 sites



76 staff in 5 countries (South Africa, USA, Zambia, Eswatini & Ethiopia)
+4000 consultants on HR database
84 interns from 18 countries since 1995

Services



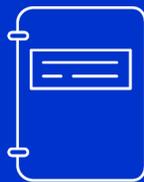
Evaluation & Research

Impact and Outcome Evaluations
Performance Assessments
Process Evaluations
Evaluability Assessments
Formative Research



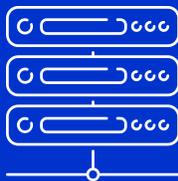
Monitoring Support

Monitoring/Performance Frameworks, Indicators and Plans
Data Quality Audits/Assessments
Standard Operating Procedures Development



Capacity Building

Training and Workshops
M&E Systems Development and Support
Mentoring/Coaching



Information Technology & Data Science

Business Intelligence
Management System Reengineering and Streamlining
Database Design
Dashboard Reporting Systems
Data Science (Python coding, SQL Database/Coding)
Data Visualization (using Tableau and similar tools)



Other Services

Organizational Systems Development
Knowledge Management
Curriculum Design

Looking back on a Quarter of a Century



● **1993**

Jennifer Bisgard and Peter Capozza establish Khulisa Management Services with early assignments in education in South Africa

● **1998**

Mary Pat Selvaggio establishes Khulisa's Health practice. On pg 26 we take a look at how health M&E has evolved since the 90s.

Dr Helene Aiello also joins Khulisa and creates our Human and Social Development division in 2000

● **2005**

Jennifer Bisgard becomes founding Chair of the South African Monitoring and Evaluation Association (SAMEA)



● **1995**

Michael Ogawa joins Khulisa (read more on pg 34) and Khulisa appoints its first intern. This experience leads us to recruit 84 interns from 18 countries over our 25 year history



● **2001**

Khulisa buys a gracious farm house built in 1906, and augments it with a contemporary wing, known today as "the Barn". The earthy, light-filled head office reflects Khulisa's organizational culture



● **2008**

Prof Rukudzo Murapa joins Khulisa as Africa Director after a decade long friendship with Peter Capozza (read more on pg 10)



On 1 October 2018, Khulisa turned 25. These are some of our organizational milestones over our 25 year history



2010

Khulisa celebrates the 2010 FIFA Soccer World Cup with the rest of South Africa and the world



2012

Jennifer Bisgard is elected the Southern African representative to the African Evaluation Association (AfrEA) Board



2014

Khulisa sets up an office in Washington DC and in 2015 appoints Dr Mark Bardini as Senior Vice President of M&E and US Operations (see pg 38)



2015

Khulisa rebrands with a refreshed logo and new website

2013

Jennifer becomes the AfrEA Board General Secretary and represents AfrEA on the International Organization for Cooperation in Evaluation (IOCE) Board from 2013-2016

2018

In October, Khulisa celebrates the official quarter of a century mark, with over 100 clients, partners, colleagues and friends joining in the celebration



2019

Rukudzo and Helene say farewell to Khulisa



Unfolding success story

Peter Capozza, co-founder and Managing Director, remembers Khulisa's early days at the dawn of democracy and the heights to which it has soared

In 1985, I landed in Swaziland (now Eswatini) to undertake a journey within Africa that I could not conceive before leaving the United States. My previous experience with Africa was minimal.

In 1988, while working for USAID/South Africa, I met Jennifer Bisgard and we had our first conversations about creating a firm focused on M&E.

During Khulisa's early years, Michael Ogawa and Mary Pat Selvaggio joined the leadership team, followed by Helene Aiello and Rukudzo Murapa shortly after. It casted the die for a partnership that would last for 25 years.

Over the years, Khulisa hired and developed a cadre of staff, from interns to professionals, forming the foundation of the professional M&E practice that would become Khulisa as we know it today.



Dr Mark Bardini, Khulisa's Senior Vice President of M&E and US Operations with Jennifer Bisgard in Washington DC in 2017

In the early 90s, our work for USAID in Swaziland and Zimbabwe, and our engagement with other donors assisting the Southern African Development Community (SADC), provided hands-on experience of the Southern African community's development demands.

During those years, the goal was for civil society to challenge the inherent problems of Apartheid in both South Africa and in the region.

The development of institutions and people were, therefore, secondary to securing South Africa's independence. Once the regime was defeated, doors were open to change, and the focus shifted to development.

As this change happened, the ground finally became fertile for a development business such as Khulisa to operate within the borders of South Africa.

In October 1993, Khulisa was officially incorporated in South Africa – six months before the country's first independent democratic election. It was a time of absolute euphoria, but there was a lot of hard work to do.

This was the beginning of the Khulisa journey. It emerged from the belief that solutions can be found when, collectively, a group of like-minded people come together and bring technical and management expertise to solve problems.

The Khulisa partnership has grown stronger and stronger over the 25 year period.



The bond between Khulisa directors has grown stronger and stronger over 25 years. Here they are at a year-end function in 2015. From left to right is Peter Capozza, Dr Helene Aiello, Prof Rukudzo Murapa, Jennifer Bisgard, Michael Ogawa and Mary Pat Selvaggio

Much of Khulisa's work in the late 90s and early 2000s focused on supporting the South African Government to identify needs in the education and social sectors. We had strong relationships with leaders and activists who were now taking up prominent roles in government.

Khulisa supported NGOs to transform themselves into organizations that met the development demands of all the people of South Africa.

Civil society organizations who fought underground for decades suddenly were required to establish formal operational systems in line with international development standards. The shift from fighting a war for independence, to fighting disease, poor nutrition and substandard education was challenging for everyone.

Nonetheless, the positive changes that swept across the NGO and public spheres of the new South Africa were significant. There were many extraordinary organizations and people that moved the country forward. Khulisa is grateful to have been part of that change.

After the first decade, the exuberance of independence waned and the reality of fixing the country's social and economic problems became clear. Millions of people required basic social services. In the first ten years after democracy, the new South African government had to completely

refocus and implement new policies and programs to serve the people. They also needed tools and procedures to monitor and evaluate their efforts.

Our work continued in the education and health sectors. We also moved into other sectors, such as child labor, nutrition and agriculture; broadened our reach into regional projects in Southern Africa and the continent; and eventually expanded globally. And that's where we are today.

“We now operate around the world – a global organization working throughout Africa as well as South-East Asia, Central America and the Middle East”

Khulisa's founders and staff over the past 25 years have been local, regional and international and represent the diversity of our firm. Our modest beginnings, our ethos of fairness and collegiality, as well as our diversity, is characteristic of the firm we are today.

Capozza

Pioneering Prof



Prof Rukudzo Murapa joined Khulisa in 2008 as Africa Director. In February 2019, he stepped down to relax, play more golf and enjoy his twilight years. His development wisdom, depth of experience in Africa, and gentle spirit will be sorely missed

Rukudzo and Peter met in 1985. Peter had just moved to Swaziland, starting his new life in Mbabane as a contract worker for the US Government. Rukudzo was instrumental in the embryonic stages of developing the Southern African Development Community (SADC) and establishing the SADC office in Swaziland.

Through their friendship – that has lasted over 30 years – Peter came to understand the region and the broader complexities of the political and social landscape in Southern Africa.

Rukudzo and Peter saw each other periodically over the years and reconnected when Rukudzo joined Khulisa, in what Peter describes as a “natural transition from where they left off in the late-80s”.

They shared the philosophy that development had to be fast-tracked. “To this day, Rukudzo still finds ways in which we can do development faster,” said Peter at his farewell lunch in February 2019.

We asked Rukudzo about his experiences at Khulisa.

Rukudzo played a key role in the formation of SADC. He joined forces again with Khulisa in 2008

Rukudzo, how did your path cross with Khulisa?

Perhaps let me first stand still at the creation of SADC and its motivation. In those years, there was a group of countries from Tanzania downwards, called the "frontline states". It was those States that were facing Apartheid. We had to train South Africans, take them in as exiles and provide support. Then Julius Nyerere (who was President of Tanzania) developed the idea that frontline states should not be merely defensive. Why not make them economic, he asked? It was the birth of SADC.

To kick it off, the nine member countries decided to bring together a team to set up the SADC infrastructure. I was teaching at the University of Zimbabwe at the time, and was nominated to be part of the task team. Each member country had a portfolio such as livestock, tourism, fisheries. Swaziland was selected to run the human resources portfolio, and I was assigned to set up HR structures for the nine countries.

And low and behold, in Swaziland, I met this young man, who played tennis (I was still young enough to play tennis myself then), and Peter and I cultivated a relationship that has lasted to this day.

How did you meet up again?

I left Peter in Swaziland and joined the World Bank, moving to the US and later joining the United Nations. I came back to the region as founding Vice-Chancellor of Africa University in Zimbabwe. After that, I was ready to go back to the States, as I had been nominated for a fellowship at Princeton. But while I was packing, I received this call in the middle of the night from

the Vice Chancellor of the University of Cape Town, saying, "Rukudzo, we understand that you're going back to the States for this fellowship, but we need you here. We have a small college called CIDA City University and we're having some challenges. Give us two years of your time." So, I cancelled my US commitment and stayed here to take on that job.

Now, it was during this time that there were coverage of my appointment. Peter read the story in one of the newspapers, and I received the call. "Rukudzo, are you here?" The last time we knew of each other, Peter was in Swaziland, and I was off to the US. That's how we reconnected.

What stood out for you during your time at Khulisa, personally and professionally?

I chaired the advisory committee of the three year UKAID funded evaluation of the Strengthening African Networks for Governance, Accountability and Transparency (SANGAT) and Twende Mbele.

Another project that stood out was the intercontinental M&E framework we developed for the Partnership for Aflatoxin Control in Africa. It was the first comprehensive, Africa-wide project to control Aflatoxin – a naturally occurring toxin often found in groundnuts. Khulisa assisted in setting up the monitoring framework.

My time at Khulisa has been a tremendous period for me. However, there is one thing that we cannot fight, and that is time. The time has come to get some rest and start relaxing. I'm glad that it has come while I was with Khulisa. Khulisa has been like family to me, like my brothers and sisters, and it will always remain that way.

Visionary leader in African affairs

Prof Murapa holds a PhD in Public Administration, Comparative Politics and Economics from Northern Illinois University. During his directorship at Khulisa, he managed several of our African projects, given his track record in public administration, agriculture and higher education.

Prior to joining Khulisa, Prof Murapa was Executive Dean at CIDA in Johannesburg South Africa. He was the founding Vice Chancellor and CEO of Africa University in Mutari, Zimbabwe. An expert in Peace and Leadership studies, Prof Murapa set up the Institute of Peace, Leadership and Governance (IPLG) at the university.

He also served as the Dean of the Faculty of Social Sciences at the University of Zimbabwe, and Inter-regional advisor to the United Nations Department of Economic and Social Affairs from 1994 to 1998.

In 2008, Prof Murapa was selected for the prestigious Woodrow Wilson Senior Scholar Fellowship. Other awards include two Honorary Doctorate degrees from Hamline University (2000), St. Paul, Minnesota, USA and Kwansai Gakuin University (2004) in Tokyo, Japan. He was awarded the Presidential Medallion by Martin Methodist College (2009) in Pulaski, Tennessee.

Ever the counsellor

This year, much-loved Khulisa Director Dr Helene Aiello, had the arduous task of sifting through 21 years of memories, decluttering wardrobes and packing boxes for her relocation to the United States

When Helene joined Khulisa in 1998 she soon became an integral part of the management and direction of the company. In 2000, she was appointed Director of Human and Social Development. In her 'semi-retirement', Helene is leading Khulisa's US-based Advisory Committee.

Khulisa held a farewell function on 24 January 2019 to celebrate Helene with colleagues, friends and former staff. In an interview, she recalls some of her favorite recollections of her time at Khulisa.

What are your early memories of Khulisa?

I met with Mary Pat and Jen first when I had only been in South Africa for a few days. It was exciting because they were developing and shaping the company. Mary Pat was congenial, explaining what they were doing, and Jen taught me a lot. I later met with Peter. Peter was Peter. He was talking so fast; very business-like and instructive. He was also very funny – always made me laugh. My first memory was, "he'd make a good boss".

When I first joined the team, we were located in Khulisa's former Johannesburg office (across the street from Khulisa's current offices) in very confined quarters. We had a strong internship program. It has been one of my highlights to grow these many young people and building the skills and learning in those early days.

Jen and I worked together on the Sesame Street-supported Takalani Sesame criteria-based project with the South African Broadcasting Corporation.

We needed to write a school classroom observation checklist, and I thought "I can relate to that", but that was probably the only thing I related to in that first year!

We had two interns, one from Sweden and one from Haiti, and they stayed over at my house a couple of nights because we were figuring things out together. We felt our way through parent committee meetings and interviews, reviewing the program. We developed the criteria needed to assess a massive broadcast. It was big decisions, and we took them seriously. I think my first year was probably my hardest year. I remember thinking, 'Why am I feeling so new at everything?' However, it all fell into place.

What were some of your work highlights?

The project that stands out, in that small building, in the beginning, was the Curriculum 2005 evaluation for the Gauteng Institute for Education Development (GIED).

A second project highlight was our work with the American Institutes for Research. The project was called RECLISA (Reduction of Exploitative Child Labor in Southern Africa) from 2005 to 2009. We were a substantial sub-partner in South Africa working to reach children who were at risk of child labor. We started schools in Mpumalanga for drop-out children to bring them back to school.

“What stands out most, is the excellent relationship the directors have had over the years. We are very close. We’ve been together all this time; getting to know each other, seeing each other’s families grow up”

Khulisa was a very stabilizing environment in that respect.

It was also exciting to see how systems and processes such as business development and human resources (HR) became more sophisticated. I admire the heights to which we’ve grown. It’s all formalized now. In the early years, I was responsible for Khulisa’s HR. I took an HR course at UNISA because we didn’t have a full-time HR manager. I spent time counselling and supporting staff. Because of my psychology background, I enjoyed it, and it was good to use those skills, but it was also challenging as it competed with consulting assignments.

What are you taking away with you, as you embark on this new chapter?

My work spread beyond education, into child labor and other child issues, but it’s the people that made it most terrific. I probably had more than 50 interns during my time at Khulisa. Part of the excitement was observing the interns grow. I learnt from everyone. It was such a collegial environment. Khulisa is my second family, so it’s very difficult to leave South Africa. But it’s been a wonderful experience. I will never dissociate myself with Khulisa; it’s part of the fabric of who I am now. And because of that, I’m a better person.



Helene contributed greatly to Khulisa, personally and professionally. Here she is at her farewell lunch in January 2019

Leading Takalane Sesame Impact Evaluation

Dr Helene Aiello completed her undergraduate degree at the University of Arizona and a Master’s degree at the University California, Los Angeles (UCLA). She then went on to complete a PhD in Education Administration from the Virginia Polytechnic Institute and State University.

During her directorship she led evaluations, assessments and curriculum development assignments in education, child labor and agriculture. Specifically, she managed the Impact Evaluation of Takalani Sesame, the South African version of Sesame Street.

Based on the evaluation findings, Takalani Sesame was awarded the prestigious Tokyo Award in 2004.

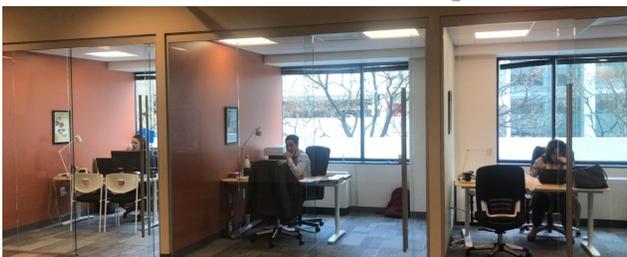
Prior to joining Khulisa in 1998, Dr Aiello was the Director of Guidance and Assessment for Fairfax County Schools in Virginia.

She also conducted research and taught assessment courses as an adjunct professor at George Mason University in Virginia from 1991 to 1998. More recently, Dr Aiello taught Qualitative Research Methods to honors students at the University of Pretoria’s Research Psychology Department.

Where we work

In 2019, we have offices in Johannesburg, South Africa; Washington DC, USA; Lusaka, Zambia; Mbabane, Eswatini and a full-time staff member in Addis Ababa, Ethiopia

Washington DC, USA



Mbabane, Eswatini





“Over the last decade, Khulisa has worked in 49 countries. Ten assignments encompassed all the countries in Africa”

Johannesburg, South Africa

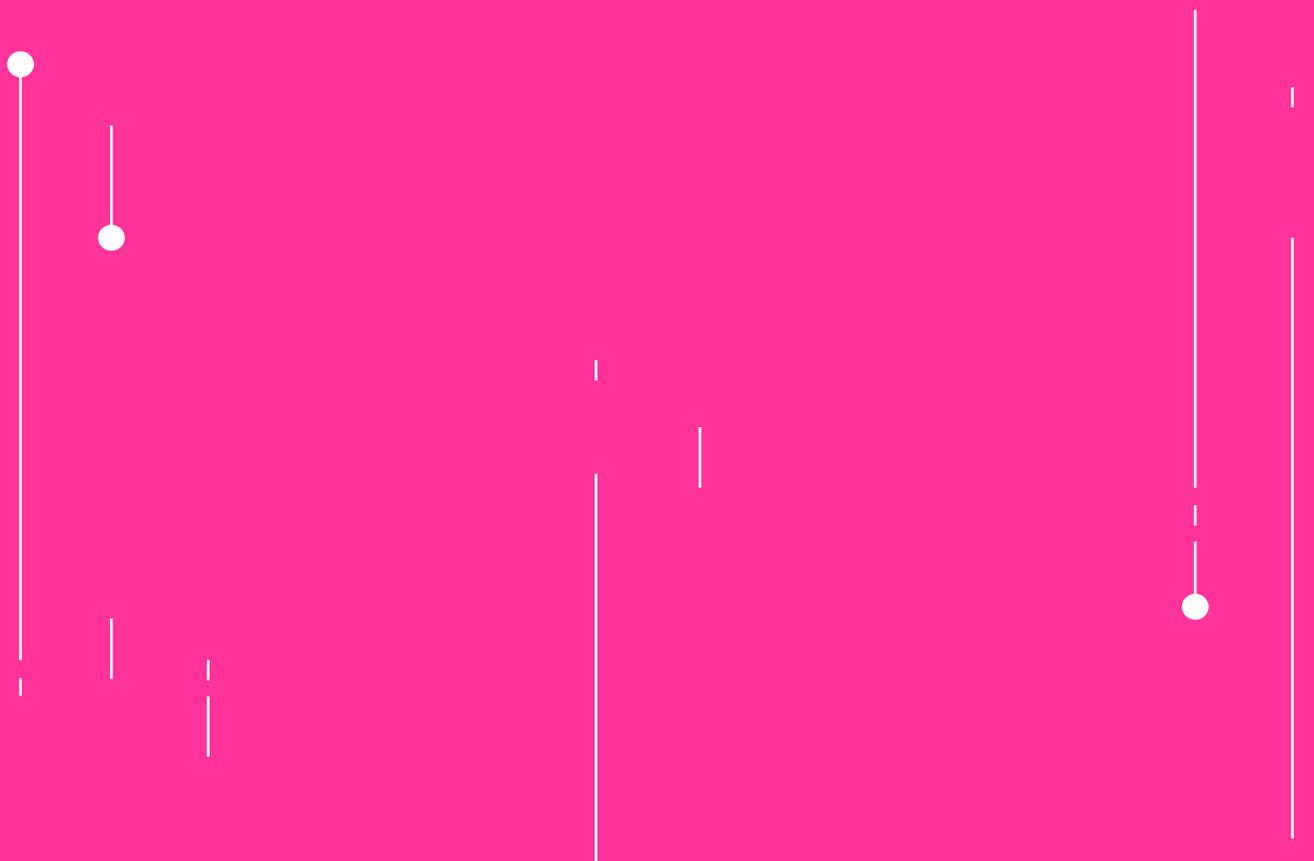


Lusaka, Zambia



Meet our teams

Central to Khulisa is our team. We currently employ 25 full-time staff in South Africa, 3 in the United States, 4 in Zambia, 44 in Eswatini and one full-time staff member in Ethiopia. These faces give life to Khulisa and shaped the past 25 years of our existence!





Johannesburg, South Africa



Washington DC, USA



Lusaka, Zambia



Shiselweni, Eswatini



Manzini, Eswatini



Hhohho, Eswatini



Lubombo, Eswatini

We ♥ Khulisa

Some staff members share what they like most about Khulisa. On the opposite page they recall some of their favourite memories over the years



“Khulisa has a very unique, kind yet high-paced culture. I love working with this talented team of like-minded and diverse people, who have an exceptional work ethic, but also care about each other and making a contribution to others' lives. We do meaningful work and learn something new every single day”

Elena Meiring,
Business Development Manager

“I love the people I work with across the company. I work with some awesome, talented, funny, dedicated staff”

Zanele Nkabinde-Maseko
Travel & Office Coordinator

“Working alongside my colleagues and friends to meet the tight deadlines. Gotta get it done!”

Dylan Daniel
Senior Associate, US



“It is a family away from home for me, a huge part of my life”

Michael Ogawa
Operations Director

“I enjoy the interesting people, clients, and projects that I work with”

Katharine Tjasink
Associate Director,
Human and Social Development





“Some of the holiday parties where people were so relaxed and enjoying the moment. I also like the buzz when projects are thriving”

Helene Aiello
Director

“Making it though the first year and our zip line event!”

Peter Capozza
Managing Director

“The team building we had at Sun City! It was such a great way to get to know my colleagues and interact with the directors in a more informal way. I felt like I was really part of the Khulisa family after that”

Leticia Taimo
Senior Associate, South Africa

“The day we did teambuilding at Acrobranch”

Lynette Byrne
Finance Division Manager

“When we took a trip to Sun City in 2016”

Pretty Nyathi
Housekeeper



“Our Christmas party in the parking lot and our drumming session”

Belinda Prinsloo
Senior Bookkeeper

“The time we finalized all the bookings for UNICEF 4 days early”

Mukhethwa Muneri
Project & Finance Administrator

“My Trip to Haiti where I spent six weeks supporting local hospitals and clinics’ M&E systems. I recruited and trained a team of motivated and enthusiastic young Haitians and we travelled across the country to provide support to clinics”

Kris Eale
Senior Associate, South Africa



25+ Years' Expertise in Education

Khulisa has worked in the education sector since our founding in 1993. We delved into the archives to explore some of our anchor projects over the years

Khulisa's very first assignment in early 1993 was to conduct a formative evaluation for Kagiso Trust of a visual literacy project for illiterate rural adults implemented by Fort Hare University. Jennifer led the team which found that the approach, while interesting, was not having its intended effect.

After the historic 1994 elections, the newly formed post-apartheid government focused on consolidating the race-based and homelands education departments into one Department of Education (DoE).

There comes a time when new small businesses reach a crisis point. Khulisa had reached the end of our tether in 1995 and was teetering on bankruptcy. We saved ourselves by developing an innovative public private partnership (PPP).

The newly formed provincial education departments did not have funds for learners to practice their skills at school and take home (reading material and games in the home is critical for cementing the skills needed to read).

Our PPP, called the Northern Cape Workbook Project, brought together the resources of the public, non-government and private sectors for contributing to the transformation of education

through higher quality, low cost materials to all students in Grades 4, 5 & 6.

The materials were provided in-kind by an education NGO, the Education Support Services Trust, and financial support was provided by a consortium of private companies and foundations in South Africa – Independent Newspapers, Mondi, the Southern Life Foundation, Shell, and the Canadian Fund.

The Joint Education Trust (JET) contributed to the project by becoming the independent evaluator.

In 1995, the PPP was launched at a fabulous event presided over by Sibusiso Bengu, the country's first democratically elected Minister of Education, in Kimberley.

The PPP provided 60,000 workbooks (printed on donated newsprint paper) to learners in more than 2,000 schools.

In those early years, our assignments were with the newly founded Independent Examinations Board and the Management of Schools Training Project (MSTP) and an evaluation of a primary mathematics project in the Limpopo province, implemented by the Joint Education Trust (JET).

“As the South African Department of Education (DoE) transitioned into democracy, the education backlog and the need for effective, inclusive schooling seemed endless. But these overwhelming demands were counterpoised by a tangible optimism, and Khulisa was thrilled to support the DoE”

Education Capacity Building

Over the past 25 years, many of our assessments focused on systems improvement and change management. For example, Khulisa evaluated school training programs for President Mandela’s five-year Kathorus Special Lead Presidential Project (1996 to 1999).

From 1998 to 1999, Michael Ogawa and Helene Aiello were embedded in the Gauteng Department of Education leading teams restructuring critical processes which included: Teacher information and employment (including appointment, conditions of service, payments); SA Schools Act implementation; Curriculum management, Communication; Learning materials selection and procurement. Khulisa also assisted with mapping systems and laying the framework to prioritize IT projects.

In 1999 and 2000, Khulisa worked extensively with the South African Education Labor Relations Council, which is a statutory body made up of teacher unions and the government. For one assignment, we surveyed 25,720 teachers and collected provincial and national level data on the effectiveness of the salary grading system. Taking all this feedback, we developed a model that projected the various financial ramifications of modifying or changing the DoE system.

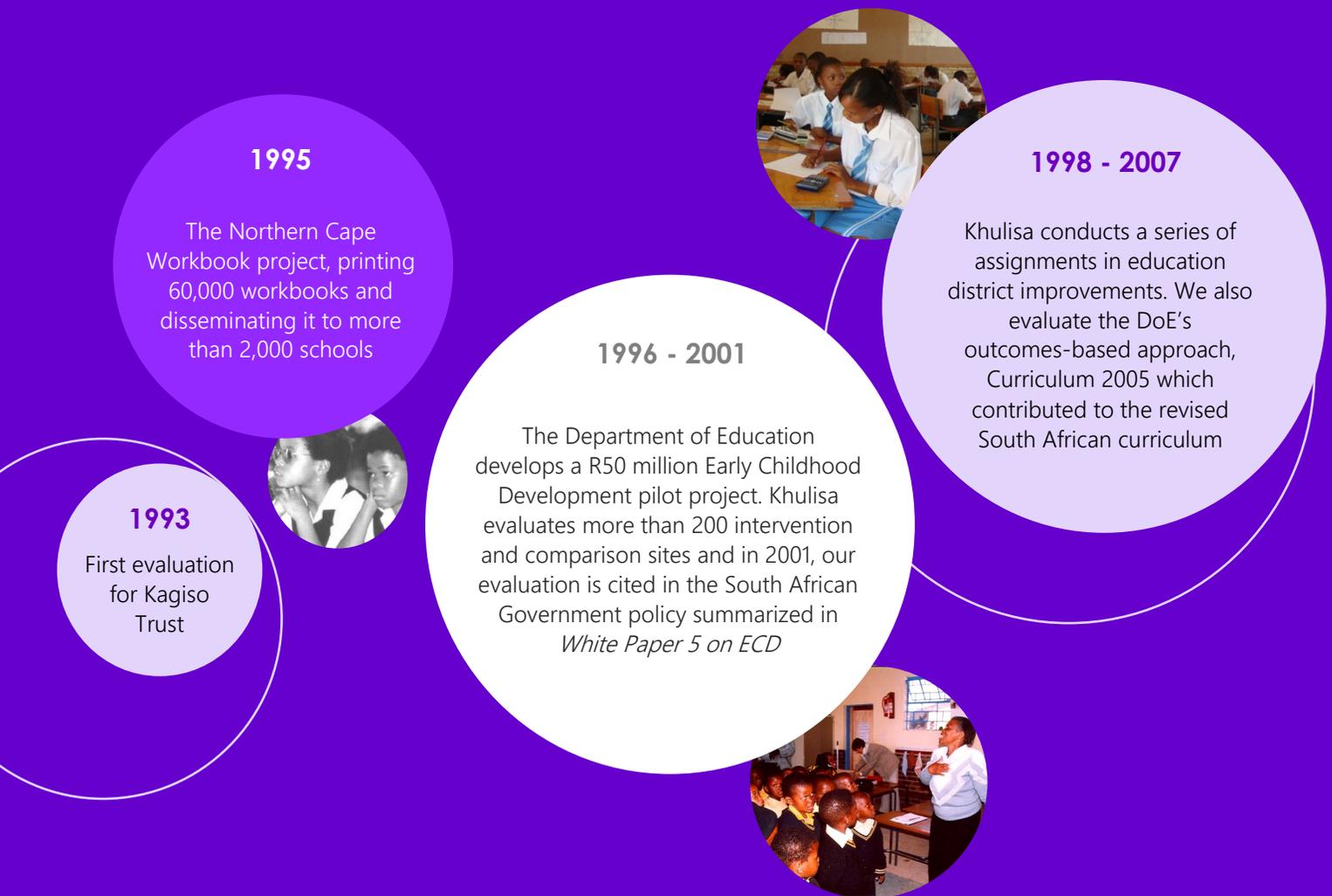
From 2000 to 2005, Khulisa supported the Education, Training and Development Practices Sector Education and Training Authority (ETDP SETA), a statutory body charged with skills development and accreditation in the education sector. Altogether, we completed 14 assignments building systems, processes, conducting research and drafting policies that affected both the private and public education and training sector throughout South Africa.

The education sector was transitioning swiftly. In the early 2000s, the government shifted to the philosophy of Outcomes-Based Education, which was codified as *Curriculum 2005*. Khulisa was commissioned by the Gauteng Institute for Education Development and the Gauteng Department of Education to evaluate this curricular initiative annually for five years. Ultimately, our evaluation results were used for further curricular reform in the development of Curriculum Assessment Policy Statements (referred to as CAPS) that replaced Curriculum 2005.

Education district improvement was another education focus. Khulisa was a major subcontractor under the five year \$10 million dollar District Development Support Project (1998 to 2003) and then under the follow-on Integrated Education Programme (IEP) from 2003-2007. Both programs have created sustained change of policy and practice in the education system.



Above: UNICEF Early Childhood Development Baseline Action Research in 2017



Assessing Quality

By 2010 many of the key structural and policy issues facing South African education had been dealt with and the focus shifted to improving quality.

Khulisa's assignments shifted accordingly towards assessing programs and projects in terms of learning and development. From 2011 to 2016, Khulisa was the evaluation partner of the South African Maths Education and Numeracy Chairs Program (i.e. Maths Chairs). This was a true public-private partnership between industry (the FirstRand Foundation, the Rand Merchant Bank Fund and the Anglo American Chairman's Fund) and South African Government bodies (the Department of Science & Technology and the National Research Foundation).

The Program funded six university professors (called Chairs) focusing on intensively attempting to

improve results by directly working with 10 schools each over five years. Each Chair implemented diverse education models and research to achieve improved learner outcomes in Maths and Numeracy.

In addition to other data collection processes under the Maths Chair evaluation, Khulisa developed and refined a school functionality assessment tool. The tool was based on our experience and literature suggests that school improvement interventions are more likely to succeed when they are implemented in schools with a certain basic level of functionality.

The tool originally started out as a one-day exercise, but over time and numerous evaluations, it evolved into a rapid assessment tool in a one-hour period by an evaluation field researcher, thereby minimizing disruption to teaching and learning practice, as well as school management.

2011 - 2016

Khulisa becomes the evaluation partner for the South African Maths Education and Numeracy Chairs Program

**2000 - 2005**

Khulisa supports skills development and accreditation in the education sector. We complete 14 assignments that influence private & public education and training across South Africa

**2015 - 2018**

Khulisa conducts an Impact Evaluation of the Emergent Literacy (ELIT) project for Grade R in the Western Cape

**2018**

A major Foundation recognizes Khulisa's work in ECD, following on an evaluation for UNICEF in 2016 and our long-standing expertise in the field. We are appointed their Monitoring, Evaluation & Learning partner for all South African programs



It relies mostly on observations, with evaluators rating what they observe against a set of criteria. For corroboration purposes, the tool includes collection of photographs of certain elements of school functionality, such as the state of the school toilets, kitchen, and periphery (outdoor space and school fences, etc.).

In 2011, the tool was administered using MS Excel, and photographs taken separately. Then we moved the tool into Open Data Kit that integrates data and photography. Khulisa presented the tool and its validity at the 9th AfrEA conference in 2019 and subject to a forthcoming African Evaluation Journal article entitled: *Validating an Evaluation School Functionality Tool* (forthcoming 2019). From 2015 to 2018, Khulisa conducted an impact evaluation of the provincial Emergent Literacy (ELIT) project in Grade R under USAID's School Capacity & Innovation Program (SCIP)

commissioned by USAID in partnership with the Western Cape Education Department in South Africa. For this evaluation, Khulisa deployed a quasi-experimental design to establish the impact by testing learners who had received the intervention against those in the previous year. This required developing a new learner assessment tool (in three languages) and seven waves of testing and observation.

Khulisa continued this type of early grade reading assessments assessing over 11,000 learners in Grades 1, 3 and 4 on their oral reading fluency as a baseline in one of South African provinces in 2018. This work is continuing with an evaluation of an DBE and USAID supported initiative designed to improve reading in 2019-2020.



Khulisa Staff at Care for Education Learning Through Play training in 2018

Early Childhood Development

South Africa's new education policy required that all learners have access to ten years of compulsory education through Grade 9 (including Grades 0/R which is the "reception year" equivalent to kindergarten). Historically, ECD has been provided through a variety of school-based and community-based centers.

The DoE developed a R50 million ECD Pilot Project (1996-2000) in all nine provinces to examine the feasibility of providing that compulsory year through community-based sites.

Khulisa was contracted to evaluate the EDC Pilot Project and assist the provinces with monitoring and comparing the quality of services provided at community-based sites (receiving support from the pilot project) with school-based sites (receiving normal DoE support).

During the three-year life of the project, Khulisa collected data annually in more than 200 intervention and comparison sites, including interviewing ECD educators, conducting classroom observations, and assessing learners' emergent literacy skills (age 5 and 6). In early 2001, Khulisa's final report contributed to the South African Government policy summarized in *Education White Paper 5 on Early Childhood Education*.

Khulisa's final report was utilized as the basis for the South African Government policy summarized in Education White Paper 5 on Early Childhood Education

The ECD Pilot Project experience launched a series of assignments with the South African Broadcasting Corporation (SABC), donors, NGOs and ECD Associations who required M&E services.

The next ECD milestone project was from 2002-2004, where Khulisa was commissioned by the DoE to work with all nine provinces to design and implement an ECD monitoring framework and tool for district ECD officials.

This capacity building project brought all stakeholders together to agree on draft indicators, and pilot the form. In those days, Optical Character Recognition (OCR) was cutting edge technology, so the system was built around scanning hard copy forms. Officials spoke about how helpful the form was to provide support to ECD centers and the usefulness of the monitoring skills and systems. Sadly, this system could not be sustained due to issues with the DoE's scanning contract.

Much later, in 2016, Khulisa was commissioned by UNICEF to work with the Department of Basic Education (the name change happened with the DoE was split into two departments: Higher Education and Basic Education) to conduct an ECD evaluation and to resurrect the ECD monitoring framework and tool.

Over the three years, Khulisa worked with the DBE to refine and pre-test the monitoring tool, train officials and load the tool onto an app that allows officials to collect data off-line and upload it when they are in a WiFi area.

Our collective work in ECD was recognized by a major Foundation who appointed Khulisa as their Monitoring, Evaluation and Learning partner for their South African programs in 2018. Supporting this Foundation and their partners ensures we continue to work in ECD.

Automated Data Collection & Assurance

The vast volumes of data we collected in the education sector called for two specific innovations. The first was more automated data collection methods; the second was processes to ensure the verification of the collected data. We were pioneers of these processes in South Africa.

The use of digital data collection can be traced back to 2003, when Khulisa adopted automated data capturing using OCR software. We deployed a software package called TELEform, together with a high-speed scanner for data capturing, and used this technology for numerous school governance and curriculum development projects.

How it lightened the load! OCR allowed us to scan 251,435 pages of survey data on 14 projects. For example, we digitized a 57-page survey for one evaluation, and while evaluating the Gauteng Institute for Curriculum Development, we scanned a 36-page questionnaire (a page count of 33,600 pages).

In keeping with the times, in 2015 we moved from OCR technology to using an app, Open Data Kit (ODK). Read more about ODK on pg 37.

From 2007 to 2010, Khulisa conducted data quality assessments (DQAs) of South Africa's entire education system which included a sample of 2,500 of the 26,000 schools, a sample of districts (9 of 80) and all nine provincial data management systems. As a result, the DBE appointed Khulisa as their official Data Quality Auditor in 2009 which meant our findings reached senior provincial and national officials.

These findings include identifying perverse incentives for falsifying data (such as over-reporting student numbers for the principal to receive a higher salary or more teachers). The audits also found high teacher absenteeism and data storage security issues.

Below: FNB Primary Education Program



From measurement to learning

Mary Pat Selvaggio joined Khulisa at a time when the US Government emphasized sophisticated monitoring systems. Several factors paved the way for the health practice to grow into a specialized and sustainable business unit within Khulisa. She reflects on this journey

Khulisa's first health project was an evaluation of the implementation of HIV life-skills in South African schools in 2001 stemmed from our in-depth understanding of the education sector.

It was at this juncture that our work in health and education converged, which was, in effect, the birth of Khulisa's health practice.

Towards standardising health data monitoring

M&E in the health sector, like other development sectors, followed a clear growth path. From the late-1990s to the early 2000s, funders accelerated requirements for greater accountability of health investments. It became paramount for health programs to develop routine monitoring systems to track progress and targets and report on them accurately.

At first, implementing partners did not have the capacity to do this work themselves. They relied heavily on consultants such as Khulisa to assist them with conceptualizing basic M&E frameworks, indicators, and systems for collecting, holding, and reporting the data.

By the mid-2000s, the US Government and the UN were standardizing health indicators for reporting on health programs, and implementing partners were growing their internal capacities, becoming better equipped to conduct routine monitoring themselves.

It signalled the early stages of maturity in health M&E. Governments stepped away from a vague need for implementing partners to monitor health programmes in an undefined way, towards uniform measurement instruments and criteria

This evolution of health monitoring gave rise to a gradual impetus around assuring data quality.

Many implementing partners now had advanced monitoring systems in place and were routinely reporting on standardized indicators, but the question always remained whether the data they collected and reported on was legitimate and accurate.

Focus on data quality intensifies

This triggered a demand for third-party, independently-verified data quality assessments (DQAs).

Between the mid-2000s and 2015, Khulisa built its expertise in health DQAs and became one of the primary suppliers to the US Government, the Global Fund and other organizations for auditing the quality of routine health data.

Interestingly, data quality assessments followed a similar trajectory to health data monitoring, where the focus shifted from relying on external data audits, to building capacity for internal auditing. In this, partners began to take ownership of the quality of their routine program data.

Instead of outsourcing large-scale data quality surveys to third-party consultants, which are expensive and time-consuming, the focus shifted to developing on-going ways of measuring data quality from the routine incoming information.

Today, data quality assurance is incorporating algorithms built into routine reporting systems for on-going internal data quality checks.

For example, TB screening should show a consistent data range. By using algorithms and data science techniques, outlier data points can be identified.

If a facility usually reports between 50 to 80 people for the service, and suddenly it reports 500, it raises red flags. With such immediate and automatic detections, one can begin to ensure better data quality.

Automation & data science in public health

Both the routine monitoring systems and data quality of public health information have become more automated over time. In the late-90s and early 2000s, they were still very much manually-driven processes, but later evolved into online reporting systems such as the Data Warehouse (see pg 35).

Today, health M&E relies on data science and IT-based approaches to ensure data quality in data tracking and quality.

The South African Department of Health, for example, has developed its expertise to use specific software for routine data reporting. The system makes provision for automated data quality checks, alerting practitioners to inaccurate or inconsistent reporting.

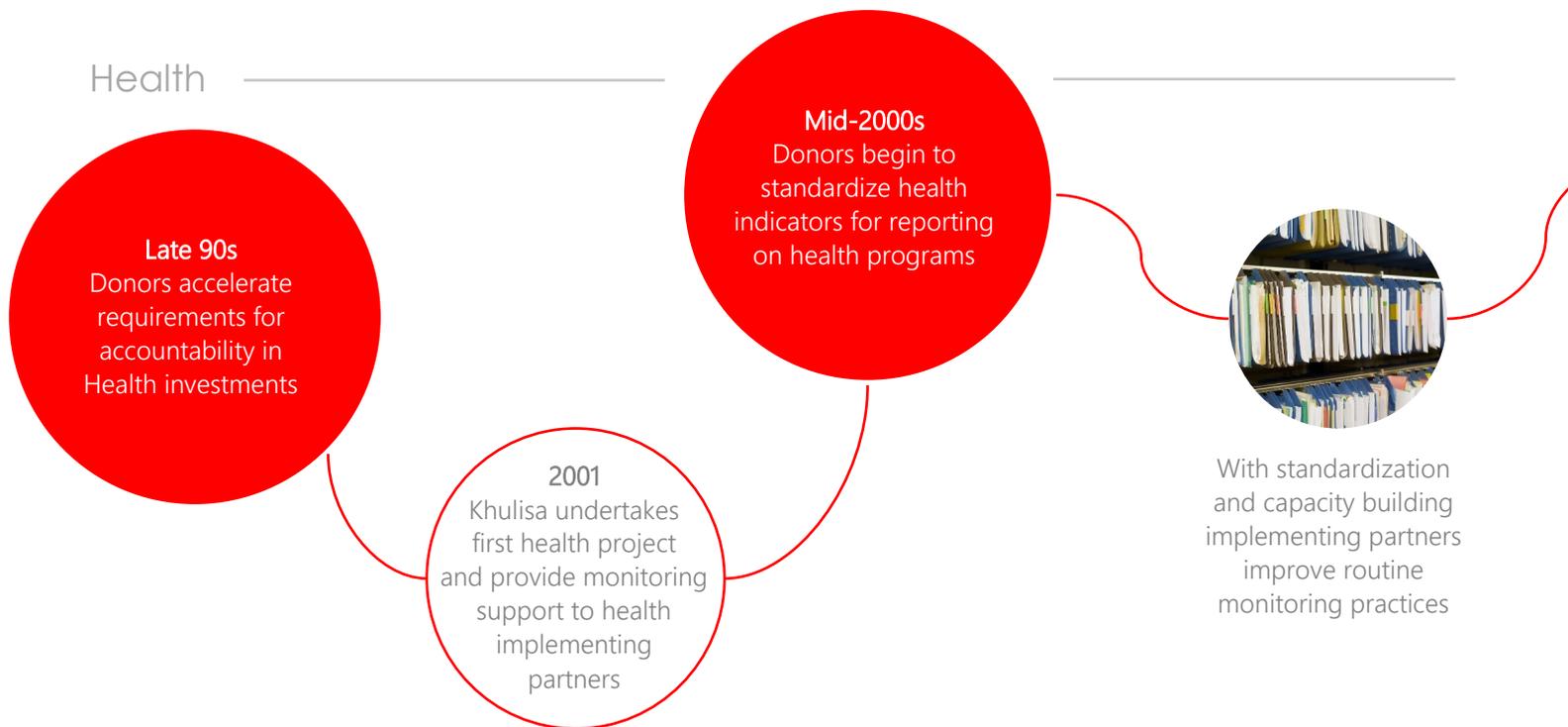
Data science and analytics are revolutionizing health M&E. It's a scarce and highly specialized skill, so it takes time for M&E practitioners to build this expertise. Khulisa is staying on top of the trend by actively looking for data science talent, as well as partnering with external organizations to supplement this skillset.

Health service delivery projects also benefit from machine learning technology. For example, big data can predict which patients are most likely to default on their treatment programs, enabling medical practitioners to respond proactively.

In an overlapping period from 2005-2015, implementers continued to expand and improve their monitoring and data quality capacity and the demand for Khulisa's support gradually diminished. During this period the health practice organically shifted towards evaluations.

Photos taken during the Khulisa Data Quality Assessment for the Ghana AIDS Commission in 2011





From the multitude of DQAs conducted, Khulisa cultivated deep insights into the issues and factors that can affect quality of services as well as data. Out of this data quality orientation emerged an emphasis on evaluating the effectiveness and efficiency of services delivery as well as data quality for research and evaluations.

Currently, Khulisa is developing internal process checks for each step of the evaluation process, ensuring that our evaluation reports are consistently of the highest standards, in and among themselves.

This involves asking whether we met the quality criteria for sampling, data collection and analysis. The outcome is a final product guaranteed to adhere to all the quality checks and balances of an evaluation report.

In health evaluation, this is becoming critical. It helps partners to prepare for evaluations and supports evaluators to think critically about its design and implementation.

Did we learn something new? The shift towards MEL

From the mid-2010s, M&E received a new addition to its acronym – the letter L.

The focus on learning stems from donors' expectation that project partners should not merely collect and report on data, they should also use it for adaptively managing their programs.

Adaptive management has its roots in the engineering discipline from the late-80s and early-90s during a drive towards quality and efficiency.

Like producing a car with the goal of achieving zero defects, so projects must collect various data points to assess whether there are any problems. If the data points to a fault, one must change program implementation to prevent further "defects".

Development practitioners are starting to deploy the same principles to be more effective in implementing donor assistance.

Because we aren't seeing the high flows of development money characterised by the 90s, the pressure is mounting for donor-funded projects to incorporate learning and adaptive management principles for more effectiveness and efficiency.

It's not just learning for academic benefit. It's learning to enhance the management and effectiveness of the delivery of health services and programs

In November 2018, Khulisa was awarded the four-year Scaling Up Nutrition Learning and Evaluation (SUN-LE) project from USAID Zambia. It is Khulisa's first long-term implementation project in the health sector and also the first of its kind to have learning as an integral part of its execution.

SUN-LE will conduct different types of research and evaluations and combine it into insights for the Government of Zambia to improve their nutrition program for children to reduce the country's very high rate of childhood stunting.

With this project, we are taking the knowledge and skills we gained in MEL over Khulisa's 25 year history and applying it into a major implementation project to improve government services and the well-being of young children.

Khulisa's focus shifts to data quality



Manual routine data monitoring moves towards algorithm-based reporting of health data

Mid-2000s-2015
Khulisa becomes a primary supplier of Health Data Quality Assessments (DQAs)

2013
As implementing partners increased internal capacity in data quality assurance, Khulisa's health practice shifts towards evaluations

Data quality for evaluations

Khulisa develop internal process checks for higher standards in evaluation

From evaluation to learning



2018 - 2022
SUN-LE project incorporates learning as key focus

Learning in action

Khulisa's extensive public health expertise has equipped us with a deeper understanding of the integral link between adequate nutrition and improved health outcomes. This, in turn, links to our work in agriculture and food security

The United Nations recognizes the health-nutrition-agriculture nexus in the second sustainable development goal (SDG 2), to "end hunger, achieve food security and improved nutrition, and promote sustainable agriculture."

The multi-country Scaling Up Nutrition (SUN) movement was a precursor to SDG 2. Since 2010, 61 countries have subscribed to the movement, working with civil society, the United Nations, donor, businesses and researchers to bring an end to malnutrition.

The UN's eighth Secretary General, Ban Ki-moon, endorsed SUN's 2016-2020 roadmap with the following message:

"Nutrition is both a maker and a marker of development. Improved nutrition is the platform for progress in health, education, employment, empowerment of women and the reduction of poverty and inequality, and can lay the foundation for peaceful, secure and stable societies"

On 22 December 2010, the Zambian government joined the movement. Almost a decade later, Khulisa secured a four-year contract to provide learning and evaluation services on the SUN project in Zambia.

The Zambian Scaling Up Nutrition Learning and Evaluation (SUN-LE) project will provide a range of research, evaluation and learning services to the Zambian SUN and implementation partners, facilitating learning for improved program management. SUN-LE will also support accountability of the SUN program through tracking outcomes.

Many of Khulisa's earlier projects included sector expertise in nutrition.

For example in 2013, we evaluated two World Food Program (WFP) projects in eSwatini and Mozambique. The eSwatini project supported HIV/AIDS-affected children and students and aimed to improve the nutritional status of school feeding programs through food distribution and micronutrient powders.

We also conducted a nutrition evaluation for the South African Presidency's Department of Planning, Monitoring & Evaluation.

The evaluation identified factors that prevent the scale-up of nutrition interventions. The evaluation mobilised several government departments to design plans on child nutrition that were later presented to Cabinet.



Above: Farmer Voice Radio - Khulisa's largest agriculture implementation project

Agriculture

SDG 2 underscores an inseparable link between agriculture and nutrition. One of Khulisa's first agriculture projects was in 2011 where we provided M&E support for an annual review of the Regional Universities Forum for Capacity Building in Agriculture (RUFORUM), a consortium of 29 agricultural universities in Eastern, Central and Southern Africa.

Our first major agriculture implementation project was the five-year Farmer Voice Radio (FVR) where Khulisa took over as the prime implementer in its fourth year.

The project used accessible technology for knowledge diffusion, working with agriculture extension services and radio stations to improve agricultural information to farmers.

It also used behaviour change communication strategies to convince farmers to change their agricultural practices. FVR implemented its radio-based extension model in Kenya, Uganda, Tanzania and Malawi.

Khulisa developed a Measurement, Learning & Evaluation (MEL) Framework for FVR and conducted an intense process evaluation in target countries.

FVR included a strong capacity building component, which formed a cornerstone of the project's sustainability. Khulisa developed 46 toolkits and 15 supplementary training materials to support project implementation.

Four years after the project ended, we received feedback from Kilimo Media International (KiMI), one of the project partners in Kenya, that the project was continuing with minimum donor support. KiMI confirmed that the radio producers who gained training

and experience in agriculture programming are now respected journalists in the agriculture sector.

Khulisa also conducted several projects for the Global Alliance for Livestock Veterinary Medicine (GALVmed) from 2016 to 2018.

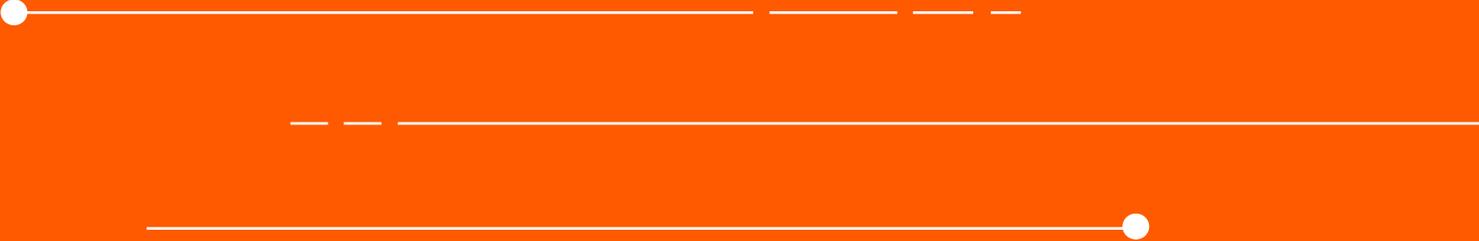
In 2016, we completed two scoping studies, of which the first led to a field study collecting data on household dynamics relating to livestock in Ethiopia, Tanzania and India. We used rapid group and household surveys to collect data from over 2800 male and female livestock-owning farmers. The second scoping study provided examples of businesses in the agri-input sector that are successfully selling their products to large numbers of smallholder farmers in Africa.

In 2017, we conducted another scoping study that produced a proposal to collect quantitative data on vaccinators/sales agents, smallholder farmers and retailers in Uganda. This led to another field study.

Our work with smallholder farmers also includes a diagnostic evaluation of the Government-supported smallholder farmer sector in South Africa. The South African Presidency's Department of Planning, Monitoring & Evaluation (DPME) is using the evaluation findings to inform policy around smallholder farmers.



Democracy & the media



Monitoring, Evaluation & Learning is an invaluable tool in holding governments to account. In this decade, Khulisa successfully branched into the governance space, evaluating several democracy and media projects

In 2012, Khulisa first expanded into the Democracy and Governance sector, working with the civil society movement Corruption Watch – a non-profit that fights and report corruption in South Africa. Khulisa developed Corruption Watch’s Theory of Change and drafted M&E case studies and lessons learnt of similar initiatives in India and Brazil.

Later this decade, we conducted several other governance-related evaluations, including Managing Democratic Elections in Africa (MDEA) Program, the Strengthening African Networks for Governance, Accountability and Transparency (SANGAT II) project and Twende Mbele.

MDEA is a regional elections capacity building project that trains African officials on electoral management principles, implemented by the University of South Africa (UNISA) in partnership with the Independent Electoral Commission.

Khulisa’s USAID-funded election evaluation uncovered interesting findings about the value in creating informal networks for learning between election officials

For example, officials created WhatsApp groups to share questions and advice, including how to deal with media queries.

We also conducted a three-year evaluation of the UKAID funded governance project, SANGAT II, which funded networks to enable peer learning, solve problems jointly and create an enabling environment for government officials.

SANGAT II involved the following networks:

- Collaborative Africa Budget Reform Initiative
- Asset Recovery Inter-Agency Network for Southern Africa (ARINSA)
- Twende Mbele

The Twende Mbele programme, a government-to-government partnership between Uganda, Benin, Ghana and South Africa, was officially launched during the 8th AfrEA International Conference in Uganda. The program promotes national M&E Systems in Government. As the external evaluators, Khulisa observed several Twende Mbele sessions at two AfrEA Conferences in 2017 in Kampala, Uganda and 2019 in Abidjan, Côte D’Ivoire.

Khulisa used an innovative technique called Collaboration Mapping as an evaluation tool, in which stakeholders mapped networks and measured the strength of the connections between institutions.

In the media space, Khulisa evaluated a five-year financial journalism training and media fellowship program in Ghana, Kenya, Nigeria, South Africa, Tanzania and Zambia.

Our methods included training observations, interviews with key stakeholders, baseline and end-line questionnaires, knowledge assessment tests, and program document/data reviews.

We also conducted work in broadcast media, including an evaluation of the three-year “Empowering Local Radio with ICTs” project for UNESCO in 2014. The project aimed to increase the quality of local radio broadcasting by integrating the use of information technology and strengthening local reporting in seven countries.

We evaluated 32 radio stations using a qualitative evaluation approach that incorporated OECD DAC criteria. For reporting, Khulisa has employed a unique evaluation approach – the Meta Story – to provide a birds-eye-view of the project’s performance. This approach was first presented on the Farmer Voice Radio project (see pg 31).

From 2018 to 2019, Khulisa also evaluated a Community Media Fund which supported community radio stations and advocacy groups. Visiting these grantees in Kenya, Nigeria and rural South Africa reminds us that we are all about Khulisa, to grow a person or a community!

Below: The UKAID SANGAT II Advisory Board 2018, UKAID Advisors, Network Representatives and Khulisa team



Innovation

Khulisa's technology expertise has always been one of our key differentiators. At the forefront of this, was Khulisa's Operations Director, Michael Ogawa. He reflects on how technologies have evolved inside (and outside) the organization, since Khulisa's early Lotus days

How has Khulisa's systems and technologies progressed over the last 25 years?

When I joined Khulisa in 1995, we were using Word Perfect 5.1/6.0 and Lotus 1-2-3. We had no computer network nor any server or back-up system, and email and the Internet were still fairly new in South Africa. Some of us had AOL email addresses, but we relied heavily on the fax machine to transmit and receive documents.

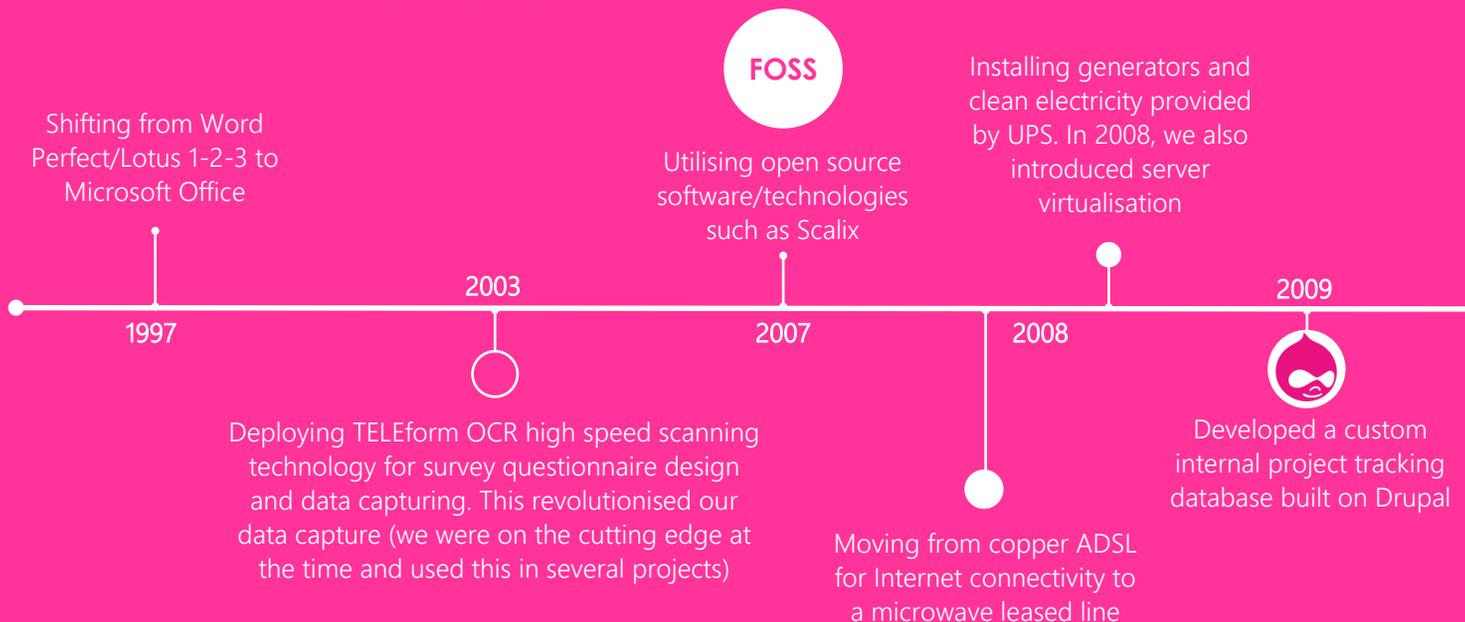
We hired our first IT manager in the late 90s and gradually shifted to a client-server model

One of the first things I introduced to the company was Microsoft Office – it was funny how up to the mid-90s, Word Perfect and Lotus had

the majority of the market share in word processing and spreadsheet software respectively, and like it or not, MS Office has become the *de facto* office software package used around the world. We hired our first IT manager in the late 90s and gradually shifted to a client-server model. By the time we moved to our current office premises, we were fully networked with a fibre optic cable linking our buildings.

After a major robbery in the early 2000s, we decided to convert the cottage on our premises into a fortified server room. From a technology perspective, one of the turning points for the company was winning the contract to develop the PEPFAR/SA Data Warehouse in late 2004. This project brought in a wealth of IT expertise and it helped us shape and improve our internal IT systems.

Khulisa tech evolution



2.5

What stood out for you as some of the most significant projects – in terms of operational infrastructure requirements – and why?

Some of the Gauteng Department of Education projects in the late 90s stand out. We learned how to manage medium-scale survey projects and this experience helped us manage national surveys in the coming years.

A second project that comes to mind was for the Education Relations Labor Council (ELRC) on career pathing and a salary grading system for educators in 1999. This was one of Khulisa’s first nation-wide surveys of educators. We had to manage concurrent fieldwork in all nine provinces.

Then, of course, followed the flagship PEPFAR/SA Data Warehouse project which ran from 2004-2012.

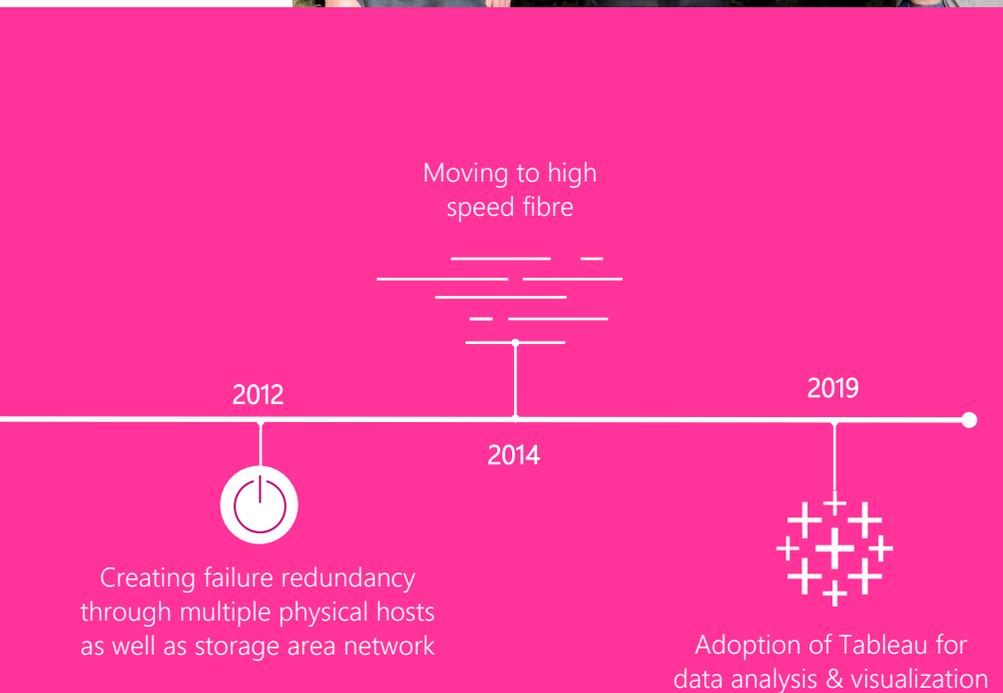
This brought the company to the forefront of developing an open-source, browser-based M&E system with the data stored on a centralised server, housed offsite on a data farm.

At its peak, we had a team of 10-plus developers, analysts, coordinators and testers.

At one point, the development coincided with Eskom’s load shedding and Khulisa had to procure diesel generators to keep the project going 24-7.



Above: Key Data Warehouse staff in 2008
The Data Warehouse project brought Khulisa to the forefront of developing an open-source, browser-based M&E system



The PEPFAR/SA Data Warehouse work led to a significant contract with the Department of Science and Technology (DST) to develop a web-based M&E system for the DST and its entities. Currently, we are doing the Eswatini Client Management Information System project in Eswatini, which builds on our earlier work on data warehousing.

How have we prepared for such large-scale projects and addressed some of the challenges?

At the onset of some of the large projects, it was seat-of-the-pants common sense, good project management skills and a bit of luck.

We have, over the years, developed our administrative, Human Resources and finance systems to align with large, multi-year projects for various local government and NGOs as well as major international donors and foundations. By having established mature systems and processes, we can hit the ground running when new projects start up

For example, for the PEPFAR/SA Data Warehouse project, we sourced a developer through a friend of an interviewee, and he turned out to be a mastermind. Through these project experiences, we built networks of human capital and that has been one of the strengths of Khulisa, as we have bid on larger and more complex projects.

How will technological innovations support M&E in the future. What are some of the trends that you're noticing in the development sector?

Technology and especially the Internet of Things will be key to innovations to support M&E. Smart devices are becoming ubiquitous and affordable and the cost of data is going down.

M&E managers and decision makers want to see "live" data and this is being made possible through cloud-based M&E systems. We see in health systems that it's not good enough to have a desktop computer for a medical practitioner – let them take a tablet or smart device to a patient's bedside. Data visualisation software and the ability to manage and analyse big data will be more and more important for M&E.

A mixture of young and experienced staff is so important – young staff keep us in touch with social media and other innovations. Who would have thought a few years ago that most companies would have Facebook, Twitter, YouTube, LinkedIn and even Instagram accounts?

The ECMS project in Eswatini builds on Khulisa's earlier work in Data Warehousing



2004

The PEPFAR Data Warehouse project brought Khulisa to the forefront of developing an open-source browser-based M&E system, with data stored on a centralised server housed offsite on a data farm. The project ran until 2012 and helped us shape many of our internal IT systems

2006

For the South African Department of Education, Khulisa successfully transformed six years' of disparate datasets from two surveys in all nine provinces into a single, national standardized data scheme for the Education Management Information Systems (EMIS) Directorate

2012

Khulisa moved the South African Department of Science and Technology (DST) from a paper-based reporting system to a web-based system. The initiative included work for all DST-supported science entities such as the South African Space Agency and the Southern African Large Telescope (SALT).

We deployed the web-based portal, Liferay to develop the M&E system, which supported the DST with strategic planning, including the capturing of all relevant planning data, indicators, objectives, outcomes and targets

2013

Khulisa used the Open Data Kit (ODK), a free and open-source set of tools for android devices, to interview farmers in Uganda and Tanzania for the Farmer Voice Radio project. ODK enabled us to do real-time, mobile data collection across geographic boundaries

2014

In 2014, Khulisa developed its own aggregate ODK server, moving away from the reliance of outsourced developers. Since Farmer Voice Radio we have deployed ODK technology on various projects, including to evaluate ECD centres across South Africa for UNICEF in 2017-2018

2015

Since 2012, we have increasingly expanded our in-house data visualization expertise to present our data and evaluation findings in more attractive and creative ways. In 2015, we presented tips and tricks for better #dataviz at SAMEA. We also produced catchy data presentations for several clients

2016

Khulisa developed the interactive website FinFind, a solution for accessing finance under USAID's Financial Sector Program. The platform offers step-by-step finance guidelines and business advice to South African small businesses

2019

We came full circle with the USAID Eswatini Client Management Information System project, building on our work on data warehousing and returning Khulisa to our skills and experience in Health Management Information Systems (HMIS)

Global growth

In 2014, Khulisa expanded globally by opening the US office in Washington DC. At its helm is Dr Mark Bardini, senior vice president of M&E and US Operations. He reflects on some of the highlights and challenges over the past five years

What is the significance of Khulisa having an office in the United States?

It's critical to our long-term growth strategy as an international development company. Being in Washington, gives us access to the key players – US Government agencies, policymakers, partners, NGOs, multilateral and bilateral organizations, and consultants. We can also participate in special events and be constantly updated on current trends in international development.

By having a presence in the US, we've been able to increase our partnerships with other international development-focused organizations, while strengthening relationships with our previous partners and pursue new work with them. Our partnerships and collaborations with organizations have more than quadrupled in Washington and globally since I joined Khulisa.

What projects stand out for you as key highlights since 2014, and why?

We've won several major contracts since I've joined Khulisa. The ones that originated from the US office as an SBA-certified small business are some of the most memorable ones for me.

That would include USAID/Zambia Scaling Up Nutrition Learning and Evaluation (SUN-LE), which is the largest contract ever won by Khulisa as a prime (\$15.9 million).

Also, the two US Department of State Performance Management and Evaluation and Services IDIQ Contracts, which have expanded Khulisa into new and different sectors such as community policing, global security, counter-terrorism & violent extremism, corruption and rule of law. It also pushed us into completely uncharted regional territory in Central Asia and Eastern Europe (Tajikistan and Kyrgyzstan) as well as Latin and South America (Costa Rica, Panama and Belize).

During this period, we also landed our first major assignment in the energy sector. In 2019, we secured a contract on USAID Power Africa (the East Africa Energy Project) as lead MEL Advisor with RTI.

The Eswatini Client Management Information System project, our newest win is a great example of a partnership that the US office helped to grow and facilitate over the past four years with FEI Systems through the USAID TASC 4 Africa IT IDIQ contract. We were able to leverage our experience in Southern Africa and with HMIS to secure the \$12.9 million contract.

What has been the key learnings for you during your directorship of the Khulisa US Office?

My goal has been to pursue as many new contracts as possible, but we had to learn that this isn't always possible. Bringing in our collective experience to pursue new work and focus on small business set-asides that are winnable, has increased our revenues and presence in many different sectors, clients, and countries.

One of the additional lessons learned here, is to carefully select and vet a project team. This includes checking their references and using a wide number of networks to assess their fit and skills for a contract. For example, our office was able to find two subject matter experts for an evaluation of a US Department of State Community Policing Project in Tajikistan and Kyrgyzstan. One was a former US Police Chief and the other expert had significant experience in the two countries as a researcher. Combined, these two experts, working collaboratively with Khulisa, were a perfect fit and the evaluation was highly-praised. The US State Contracting Officer Representative for the evaluation stated that it was:

“The most successful evaluation EUR/ACE (Department of State) has ever commissioned... Khulisa did a great job”

An additional quote was: “Thanks again for the superb work done on the contract for ACE and INL. I hope we will have the opportunity to work with you again. From initial consideration of your proposal through to the finalization of the report, your work was exemplary and among the best I have experienced at State in 12 years of commissioning external evaluations. The team you put together, and your close support of them, were excellent.”

Why are you proud to be part of Khulisa?

I'm proud that we're using our collective expertise, knowledge, and skills to grow Khulisa. This has led us to increase our visibility globally as a highly respected firm and one that is sought after as a valuable and collaborative partner in MEL.

What opportunities lie ahead for the US Office?

There are so many opportunities in the near future! Our current focus is fixed on managing the new projects that we've won well, with the intention of receiving the highest ratings.

Word-of-mouth through our partners and other organizations continues to spread about Khulisa's professionalism, and more organizations are looking to partner with us.

But we also recognize that we cannot be content with our current portfolio and must selectively and strategically pursue new business opportunities together.

Other development firms have grown too quickly and have then failed at managing new projects, which is something that we don't want to imitate. We want to continue our successful growth, but also pay strict attention to managing our new work in a way that promotes Khulisa as a valued client for the US Government and others.

Khulisa fieldwork in Belize for the Department of State Central America Regional Security Initiative evaluation in 2019



Partners.

Throughout the years, Khulisa's linkages with other organizations have been an invaluable business asset. In 2018, we committed to a more formalised, strategic approach to partnerships. Khulisa's Deputy Director M&E and Learning, Margaret Roper, shares the rationale behind this strategy

Khulisa is a relationship-based company and therefore the idea behind partnering with other organizations to complement and enhance our service offering, was a natural one. We're looking for partners that demonstrate the skillsets that will round out our own, allowing us to provide a full spectrum of M&E services, from data collection, quality and use, to learning, training and project management.

Through partnerships one can provide a range of expertise and offer a comprehensive service to clients, without taking on too much, and only doing so with a 'light touch'. It allows us to increase our reach and influence, grow new markets, draw on specialised expertise, share the learning more widely, and expand our value offering to clients.

The partnership initiative also focuses on supporting local entrepreneurship and broadens the development and professionalization of local M&E services in Africa. Five organizations are part of Khulisa's partnership model. Each one brings a specific skillset to the table – from fieldwork and accreditation, to analytics, mentoring and learning.



Decipher Data: Fieldwork & Data Collection

Over the past few years, Khulisa has developed a successful large-scale digital data collection model, led by one of our former employees, Wade Harker. This model has developed into the stand-alone business, Decipher Data, of which Wade is the Managing Director.

As a level-2 Broad-Based Black Economic Empowerment (BBBEE) contributor in South Africa, Decipher Data provides large-scale digital data monitoring services to the South African public and private sector. The collaboration between the two companies allows for an integrated M&E service offering.



World Learning: Accreditation & Evaluation Integration

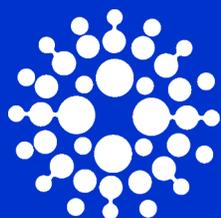
World Learning is a global NGO focusing on international development, education, and exchange programs. It also delivers university-level qualifications in the US. Through the partnership, World Learning will accredit Khulisa's training so that it's internationally recognized, opening a career path for evaluators who want to pursue a Master's or PhD degree in M&E.

Under a license agreement with World Learning, the relationship allows us to offer a theoretical and practical M&E course relevant to Africa. It will provide a more affordable and contextually relevant qualification but upholding the same international research and evaluation norms and standards associated with World Learning.



Cardno: Business Mentorship

Cardno Emerging Markets, USAID is part of Cardno's International Development team, consisting of development assistance offices worldwide, including Washington, DC. The team focuses on public and private sector clients to promote sustainable economic development globally. Khulisa and Cardno have engaged as partners in a formal US Small Business Administration (SBA) All Small Mentor-Protégé Program and identified five areas of working together: new business development; overall business mentorship and strategic planning; providing M&E services; building M&E capacity within Cardno and their clients; and supporting Khulisa's US Office in strengthening our management service delivery as a growing small business.



BroadReach: Analytics & Technology

Since 2003, BroadReach's healthcare teams have worked with governments, donors, implementers and the private sector in over 20 countries to support existing service delivery and improve healthcare in underserved nations.

The benefit of the partnership lies in BroadReach's expertise in predictive data analytics and using real-time data to inform and improve health service delivery. In turn, Khulisa brings capacity building, data quality assurance skills, and M&E expertise to the partnership. The model can be replicated in other development sectors, such as education.



BRIDGE: A focus on Learning

In partnership with the South African Monitoring and Evaluation Association (SAMEA), Khulisa has been working with BRIDGE on managing its education M&E Communities of Practice (CoP) since 2018. The quarterly meetings are positioned as a learning space to share information, resources and knowledge about M&E, and to build M&E capacity in the education sector. Khulisa's role entail the facilitation of the Communities of Practice – bringing our expertise to the sessions to deepen M&E practice, and establish linkages between M&E practice and education interventions.

Monitoring & Evaluation Ambassadors

The term M&E no longer elicits the over-explaining it did in the 90s. Through awareness raising, considerable efforts towards professionalization as well as capacity building, M&E is finally recognized for increasing development effectiveness, learning and accountability. Khulisa contributed extensively to this journey

In 1993, Khulisa's founders had to decide on a company name. There was rapid agreement on the word Khulisa* given the meaning to 'grow', 'raise' or 'foster' a community or a person.

However, the company descriptor was debated with one founder arguing Khulisa *Monitoring and Evaluation Services* should be the name, and the other Khulisa *Management Services*. The latter won, as the founder said "What if this M&E trend is a flash in the pan?"

Jennifer Bisgard recalls how the phrase "Monitoring & Evaluation" was met with blank expressions and deep frowns in the 90s, even among the development community.

In the first two decades of Khulisa's existence, we gave currency to the M&E profession in Africa. We did so through various avenues – from our involvement with professional associations, to our continuous thought leadership and support of Young & Emerging Evaluators.

Participating in the global #evaluation dialogue

The African Evaluation Association was founded in 1999. In 2004, AfrEA held its conference in South Africa. It provided the first opportunity to South African based evaluators to meet and agree that a national M&E Association was essential. Jennifer was asked to lead the Task Team, and was ultimately elected the founding Chair of the new South African Monitoring and Evaluation Association (SAMEA) in 2005. She presided over the first SAMEA Conference in 2007. These were some of the first steps on the path of professionalizing M&E on the continent. Several current and former staff have served on the SAMEA board since.

In 2012, Jennifer was elected the southern African representative on the AfrEA board. Subsequently, she served as its General Secretary. The AfrEA board asked her to represent AfrEA on the Board of the International Organization for Cooperation in Evaluation (IOCE) from 2013 to 2016.

* The etymology of the word 'Khulisa' is from the cluster of Nguni languages (southern African isiXhosa, isiZulu, siSwati and isiNdebele and linked to Kiswahili in East Africa)



Facilitators and participants of Khulisa's inaugural M&E course, 2019

Khulisa partook in several EvalPartners' initiatives to promote Voluntary Organizations for Professional Evaluation (VOPE) in Africa (see textbox for more on EvalPartners).

Globally, evaluation was gaining traction. The United Nations declared 2015 *The Year of Evaluation*. Khulisa participated in the 2015 EvalStory campaign and promoted the EvalYear logo in all our communications – from blogs and reports to corporate brochures and videos.

M&E became the zeitgeist of development. In 2016, another EvalPartners initiative, the Global Parliamentarians Forum for Evaluation (GPFE) launched a campaign to involve parliamentarians in evaluation.

Through the USAID-funded African Strategies for Health (ASH) project, Khulisa partnered with the Pan African Parliament, and produced 3-minute advocacy videos to support the global participation of African Members of Parliament in evaluation. We also edited a special health edition of the African Evaluation Journal (AEJ).

Global & local professionalisation and the development of EvalAgenda 2020

In 2017, we again participated widely at the 8th AfrEA Conference by managing the 19 conference strands and delivering workshops, papers and posters. This time, African Governments were solidly on board. The event was opened by Ugandan Prime Minister Ruhakana Rugunda and an entire strand was dedicated to the role of parliamentarians in evaluation.

Jennifer presented the EvalAgenda 2020 at the event's closing ceremony – the first ever long-term

global vision for evaluation. It was a definite sign of growing maturity in the evaluation community and of M&E worldwide.

“EvalAgenda 2020... the first ever long-term global vision for evaluation. It was a definite sign of growing maturity in the evaluation community and of M&E worldwide”

In South Africa, we continued to carry out this vision and advocate for better data collection, analysis and use by the South African Government, NGOs and the private sector. In April 2017, we presented the outcomes of the AfrEA Conference and the EvalAgenda 2020 at a SAMEA EvalCafé, hosted at the Human Sciences Research Council (HSRC) in Pretoria.

In October 2017, we hosted a Data Café about all things data related at SAMEA's 6th bi-annual conference. At this event, Jennifer was recognised for her commitment to M&E as founding chairperson of SAMEA.

New look, fresh approaches & thought leadership

During the celebration of EvalYear in 2015, Khulisa aptly embarked on a rebranding drive. We upgraded from our former corporate blue logo and organic image to a bright orange, stylised logo and more modern visual identity. We also launched a new website. The rebranding and web redevelopment exercise was supported by a USAID-funded grant from Grant Management Solutions (GMS).



Marlene Ogawa, from Synergos, and former Khulisa colleague Benita Williams won the lucky draw at Khulisa's 25th Birthday Brunch, receiving copies of *Evaluation Failures*

Staying with the times in design, we immersed ourselves in better data visualisation techniques – internally and for clients. To this end, we presented workshops at SAMEA on how to communicate data findings more effectively and conducted several dataviz trainings to South African audiences eager to learn how to present data in catchier, more attractive ways.

In late 2017, we introduced our bite-size **#EvalTuesdayTips** – a weekly dose of helpful hints on evaluation methodologies, data visualisations and evaluation theory. We also publish long-form blogs, for which we occasionally crowd-source contributions from the evaluation community.

Khulisa's approach is appreciative, rather than depreciative and thinks of evaluators as 'critical friends'

In 2018, Jennifer and Mary Pat contributed a chapter to an evaluation book edited by Kylie Hutchinson, *Evaluation Failures: 22 Tales of Mistakes Made & Lessons Learned* (Sage, 2018). The book features a fun cover design and shows how illustrations, cartoons and humour help to make evaluation accessible.

The *Evaluation Failures* concept developed legs. Jennifer presented on the value of embracing failure at MERLTech Jozi in August 2018. At the 9th AfrEA Conference in Cote D'Ivoire in March 2019, she led a panel with three African evaluators to bring home the concept of evaluation failure in an African context. The Evaluation Failures panel resulted in a forthcoming article for the African Development Bank's Evaluation Matters publication.

Khulisa is fostering a 'learning from failure' culture where we encourage clients, partners and staff to reflect on failures and learn from them. We have unique challenges and contexts, and our evaluations should be equally unique and, when appropriate, celebrate the mistakes and subsequent learning.

Khulisa's birthday year in 2018 marked the launch of our M&E training course to support NGOs to do more rigorous internal M&E.

The course helps practitioners to build strong organizational M&E skills and frameworks to promote data-driven decision making, accountability, efficiency and learning.



CareerBuild and Ntataise won the first and second place to Khulisa's M&E Competition that was launched during our 25th Birthday Year. They received free entries into our inaugural M&E course. From left to right is Khulisa's Margaret Roper; CareerBuild's Carole Craggs and Nomava Nkosi; Jennifer Bisgard and Ntataise's Kaley Le Mottee and Sarah McGuigan

It comprises intense practical assignments, covering four modules (an introductory session and three modules on data quality, data analysis and reporting). We are partnering with World Learning to accredit the course (read more on pg 38).

Prior to our birthday brunch on 10 October 2018, Khulisa launched a capacity building competition for Southern African NGOs, in line with the growing need for M&E training. We received 12 strong applications.

CareerBuild, a youth mentoring organization focussed on youth development in South Africa, and Ntataise, an NGO that supports women in disadvantaged rural communities to establish ECD centres, won the first and second place, respectively.

They both received 25 hours of M&E capacity building as well as free attendance to our inaugural M&E course, which commenced in November 2018.

Growing evaluation talent

From the mid-90s to mid-2000s, M&E talent was difficult to find. Khulisa had to hone new skills, develop technical expertise in specialized fields and mentor future leaders to serve the evaluation profession meaningfully.

Khulisa's internship program has been a flagship initiative since 1994. Eighty-four interns have worked for Khulisa from across the globe.

Interns have joined us from such diverse countries as South Africa, Haiti, Mozambique, Cameroon, Kenya, Pakistan, China, Norway, the US and Sweden.

On page 46, some of our interns – now global citizens and esteemed M&E professionals – wrote us a special birthday message when we celebrated our quarter of a century milestone.



EvalPartners shares knowledge on country-led M&E systems and facilitates the strengthening of a global evaluation community. It also identifies good practices and lessons learned about general M&E, and country-specific M&E systems. Since its inception, Khulisa has been a strong supporter of EvalPartners

“In 2018, Khulisa launched a capacity building competition for Southern African NGOs, in line with the growing need for M&E training”



In 2017, Jennifer was recognized for her commitment to M&E as founding Chair of SAMEA. Here she is with SAMEA Board Members Dugan Fraser (left), Fazeela Hoosen (right) and Alyna Wyatt (far right)



In 2019, we continue our work to ensure better data management with a SAMEA workshop on the *Fundamentals of data collection – What I wish I had known at the start!* The presenters are Associate Director Katharine Tjasink (left) and Deputy Director Margaret Roper (right)

On many more!

Celebrating our 25th birthday, we captured a collage of some of our favourite photos and birthday wishes from friends, former colleagues and partners across the world



Helene Aiello, USA
Khulisa Director
Carry on from strength to strength; continue to grow to great heights!

Rukudzo Murapa, South Africa
Khulisa Director
Wishing Khulisa continued growth!



Shelley Chadwick, Aruba
Khulisa Consultant
Congratulations! So sad I was not there to celebrate with you and see everyone, but I am in spirit. Been part of the Khulisa team for 21 years even though it's been on a few continents. Here is to the next 25!!!



Angelo Capozzi, The Netherlands
Entrepreneur

I would like to send you here a personal message of congratulations on your 25 year anniversary of your company. What an awesome accomplishment! You have given so much of yourself to South Africa and to all you work with. You have been leading an authentic life that is an inspiration to us all.



Jennifer Kaahwa Katekaine, Uganda
Independent Consultant

Dear Khulisa family,

I am so happy for you on this auspicious occasion of celebrating 25 years of your exemplary work. Many congratulations!!! I am so proud and humbled to be associated with you. I wish a more than a million years ahead of selfless, quality, service.



Michael Schroll, Switzerland
Senior Performance, Monitoring and Evaluation Advisor at the Global Community Engagement and Resilience Fund (GCERF)

Congratulations!
Khulisa Management Services is a real success story.



Munhamo Chisvo, Zimbabwe
JIMAT
Congratulations on your 25th Anniversary, we know it takes hard work and sacrifices of your team to get this far and you deserve to pose and celebrate!



Maria Grandinson, Italy
Former Intern and Associate
Congratulations on the 25 year milestone! I'm happy to have traveled a small part of the Khulisa journey.

Hillary Miller-Wise, Kenya
Former Associate, Founder & CEO, Tulaa
Incredible! Congratulations, Jennifer and team.



Stéphane Calvin Rosenberg, USA,
originally Haiti
Former Intern
Congratulations Khulisa family! Such an honor to have been there at the beginning.

Ian Goldman, South Africa
CLEAR, University of the Witwatersrand
25 years is a real achievement.

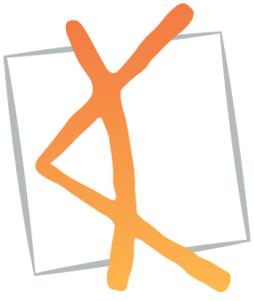


Janice Weber, California, USA
Former employee representing Khulisa in Washington
My hearty congratulations to you all for the tremendous work you have done and for your well-deserved success and tremendous contributions to economic development in the region and elsewhere. Wishing you many, many more years of great work and contributions to the development of healthy, educated populations around the world.



“25 years ago, Peter Capozza and I embarked on the Khulisa adventure. I am thrilled that Khulisa continues to grow and develop based on our fabulous colleagues both past and present. I look forward to the next 25 years!”

Khulisa Management Services Founding Director Jennifer Bisgard



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Accurately Measuring Progress