Tracing the Roots of the Modern Monitoring and Evaluation (M&E) Profession: From Early Practices to Modern Professionalism

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Abstracts

ABSTRACT

The origin of M&E as a profession is a topic of debate. Literature suggests that evaluation practice has its roots in Africa and Asia. Egypt reportedly practiced "systematic evaluation of crops" as early as 5000 BC (Morra-Imas & Rist 2009:19), while China had a carefully planned social evaluation system with government staff selection by 2200 BC (Shadish & Luellen 2005:183). The principles of M&E and the actual practices of M&E were developed in Ancient Egypt about 6482 years before the first Portuguese reached the Congo in 1482–83 and about 6652 years before Jan van Riebeeck, the commander of the Dutch East India Company (VOC), landed at the Cape of Good Hope in 1652 (Uwizeyimana 2023:1). Nevertheless, the discussion on the origin of M&E as a modern profession remains unresolved.

Methodology: The paper uses a robust and systematic desk-top literature review to determine the origin of M&E as a profession.

Results: The analysis of available literature suggests that any profession worth its name requires its professionals to acquire a sufficient level and combination of high-level theoretical and practical training to acquire the requisite skills and competency. In the same way, people who are involved in the M&E profession must attain the highest level of theoretical and practical skills to become M&E professionals. M&E is a high-level management profession and is not one of those professions where you can gain technical and functional mastery through on-the-job training and learning sessions (i.e., observation and active engagement in practical work).

Conclusion/- and Recommendations: In the absence of records of a non-Western University which offered M&E qualifications before Western academic institutions provided them, and the fact that the M&E theoretical mastery and M&E qualifications (in addition to practical skills and practices), which are sine qua non-conditions for M&E to be a profession, were first acquired from Western countries' universities and other Western academic institutions, and the fact that most of the known literature (i.e., journal articles, books, etc.) used in teaching and training the first M&E professionals were almost exclusively produced by western academics; then it can be safely concluded that M&E became a profession first in western countries and only became a profession in other parts of the world, including Africa.

Keywords: Monitoring and evaluation, M&E, Origin of M&E, M&E profession.

1. Introduction

Sanderson (2003:12) traces evaluation practices from the 17th-century era of "enlightenment", a time he refers to as "the time for human betterment". Others however such as Mouton, Rabie, de Coning & Cloete (2014:28) who also argue that M&E dates [back] to centuries in terms of historical development around the world, argue that it only became popular in the US in the 1930s following the Great Depression and in the UK in the 1970s. These authors argue modern M&E was introduced in other countries such as Europe, Asia, and Latin America as well as Africa in the later years of the 20th century. A careful analysis of the historical and contemporary literature leaves no doubt that M&E practices originated from ancient African societies. For example, the literature shows that "Systematic evaluation of crops" was first practiced as early as 5000 BC in Egypt (Morra-Imas & Rist 2009:19), and carefully planned social evaluation with government staff selection was first practiced in China since 2200 BC (Shadish & Luellen 2005:183). That is, the basic principles of M&E which focus on measuring the success or failure of a planned government intervention to solve a social problem were initially practiced in Ancient Egypt 500BC. That was about 6482 years before the first colonisers (including but not limited to Mr Diogo Cão, the Portuguese explorers who reached the Congo Kingdoms in (1482–83) and about 6652 years before Mr Johan Petros Anthoniszoon "Jan van Riebeeck" (21 April 1619 – 18 January 1677), the Dutch navigator and colonial administrator of the Dutch East India Company (VOC) landed at the Cape of Good Hope in 1652. However, like everything else, M&E practices have evolved with time and have resulted in what is called the modern M&E profession, which is the focus of this article.

1.1 What do the concept M&E profession, and its associated concepts mean?

The notion of professions can be traced back to the Middle Ages (5th -15th CE, or about 1520). Before trying to find out the origin of the M&E profession, it is important to explain what the concept and its derivative concepts such as professional, and professionalism mean. Several academics have tried to define the concept of profession. They include Basheka & Byamugisha (2015:78) who define the term "profession" as a "vocation founded upon specialised educational training, the purpose of which is to supply disinterested objective counsel and service to others, for a direct and definite compensation, wholly apart from expectation of other business gains". According to Basheka & Byamugisha (2015:78), an occupation becomes a profession when it reaches the following major milestones:

a) an occupation becomes a full-time occupation.

b) the establishment of a training school

c) the establishment of a university school (department).

d) the establishment of a local association.

e) the establishment of a national association.

f) the introduction of codes of professional ethics.

g) the establishment of state licensing laws.

They also include Haga (1974:9) who defines the term profession as:

a) an occupation that provides a service (and sometimes goods) to the public.

b) an occupation that requires long (and specialised) training for its entrants.

c) A profession is an occupation that embraces a code of ethics sworn to be upheld by its practitioners.

d) Professions publish learned journals upgrading their practice knowledge.

e) Professionals form associations to hold professional meetings (and to hold each other accountable).

f) Professions use examinations as barriers to entry into their practice.

g) Professions are occupations in which practitioners wear certain symbolic costumes, e.g., black robes (such as Lawyers), white coats (such as medical doctors), etc.

h) Professions limit their practice to members' licenses.

They also include Luthans (1976:18) and Marutello 1981:247) who listed what they think are the most widely recognised criteria of a profession. Among these criteria are the following:

a) A body of specialised knowledge or techniques applicable to that specific profession.

b) Formal, standardised education, training and experience.

c) A representative organisation/association with the purpose of standardisation.

d) Fees based on services to clients or customers with priority given to service rather than financial return.

e) An ethical code of conduct and broad-based responsibility.

There seems to be an agreement between Luthans' (1976:18), Marutello's (1981:246), and Davison-Shivers and Barrington's (2004) that for M&E to be a profession, it must meet additional specific criteria. For example:

a) For the M&E to emerge or become a profession depends on the M&E work (i.e., practice) becoming systematised.

b) For the M&E to become a profession, it depends on the M&E practitioners and scholars (i.e., people practising M&E) having acquired relevant formal university education and training to equip them with the necessary skills and knowledge to perform the M&E work to satisfactory standards.

c) M&E professionals must adhere to specific codes of conduct (i.e., professional standards) when they perform their work, and the same professional standards must be applied to measure whether M&E work is being performed "to a satisfactory standard".

d) There must be a professional body to set up the M&E standards (i.e., ethical code of conduct) and to enforce these standards among the people who perform M&E work.

Based on the above definitions, it can be argued that the concept "profession" means a paid occupation, especially one that involves systematic, structured, and prolonged training and which requires someone to possess "a formal qualification" (Marutello 1981:246). The formal qualification which is a pre-requisite of one becoming a professional is essentially "the formal outcome (certificate, diploma, [degree] or title) of a formal (regulated and controlled) assessment process which is obtained when a competent body (i.e., examiner, inspector, testing officer, etc…), determines (via practical, written or oral test, inspection, or analytical process) that an individual has achieved predetermined learning outcomes, and therefore such person possesses the necessary competence to do a job in a specific area of work (IGI Global. (n.d.):1). The above discussions explain Barber's (1965:18), Luthans' (1976:18) and Marutello's (1981:247) arguments, the concept profession refers to an occupation that requires specialised education, knowledge, training and embraces a code of ethics sworn to be upheld by its practitioners. Examples of traditional profession include, but are not limited to being a teacher, a lawyer, an engineer, a doctor or nurse, a driver or a pilot etc. (Marutello 1981:246).

Professions are not static. According to Davidson-Shivers and Barrington (2004:1), "the degree to which an occupation is classified as a profession is subjective and evolves over time". A profession emerges when work becomes systematised, and people must acquire relevant education and training to perform the work to a satisfactory standard and must also adhere to specific codes of conduct as they perform that work". However, it is also possible for old professions to disappear and new professions to emerge at different times and spaces in history. As people gain new advanced knowledge due to technological advances, newly called "learned professions" such as medicine and Law are, improved and occupational professions such as nursing, engineering, school teaching, social work, and accountancy also develop, change, or are adapted in line with the social, economic, and technological developments in society (Davison-Shivers and Barrington 2004:1). The following discussion focusses on the concept professional, professionalism, and professional behavior.

1.1.1 Professional

Once an occupation becomes a profession; it becomes the discipline of a professional. The concept of professional refers to a person who is efficient, qualified, competent, and who demonstrates the masterly of the work they are doing (i.e., their profession) (Sinclair 1993:910). "A professional is a member of a profession or any person who works in a specified professional activity. The term also describes the standards of education and training that prepare members of the profession with the particular knowledge and skills necessary to perform their specific role within that profession."

The National School of Governance (2020:51) argues that "the way professionals project themselves demonstrate superior levels of acquired knowledge, skills, and competence as well as exemplary conduct, commitment to the profession and its associated code of ethics and service to the community". According to Team & Vaidya (n.d.) "True professionals have several crucial traits that apply to almost every industry". Among the characteristics of true professionals are the following:

a) High morals and ethics: For example, doctors, lawyers, and public accountants must follow a robust code of professional ethics.

b) Reliability: For example, it is critical for professionals "to return messages quickly and keep your word when you commit". Meeting expectations necessitates having strong communication skills. Always be cautious while making assumptions.

c) Competence and expertise: M&E professionals should be experts in their sector, distinguishing themselves from the competition and amateurs and novices. To do so they must continuously extend their "education by enrolling in classes, attending conferences, and earning relevant professional credentials".

d) Appearance: M&E professionals must always appear presentable, especially when meeting clients. The public is the client of M&E professionals.

e) Accountability: M&E professionals must be always responsible for their conduct. "If there is a mistake, own up to it and try to resolve it. Avoid attempting to blame a co-worker. Instead, accept the need for a compromise when it arises and use the experience to improve" (Team & Vaidya (n.d.).

f) Communication: One of the essential traits of a M&E professional is effective communication. "Communication is listening intently, understanding effectively, and efficiently expressing a message. Professionals have an excellent grasp of language, which they use to communicate ideas" (Team & Vaidya (n.d.). Above all, professionals must demonstrate professionalism.

1.1.2 Professionalism

The concept of professionalism means "The skill, good judgment, and polite behaviour that is expected from a person who is trained to do a job well" (Merrium-Webster, n.d.:1). "Professionalism is a person's abilities, competence, and behaviour in a particular profession". Professionalism demands the exhibition of a high standard of knowledge and expertise, upholds high ethical standards, integrity, trustworthiness, etc. in what they do, say, and how they act and conduct themselves (i.e., in public and private lives).

Source: Team, W. & Vaidya (n.d.:1)

The above discussion is in line with Gildenhuys (1997:117) who argues that professionalism is characterised by the following characteristics: Formal academic education from an acknowledged university or a technical college. A distinctive attitude and intelligence, and proficiency in the subject of the specific professional occupation, public officials must maintain high standards of competency and accountability. Advanced education and training are available for public officials to improve their skills and qualifications. Continuous accumulation of training is provided through short courses, support from professional associations, and scientific publications, in that way, professionals are always informed on what is happening in their fields. Also, official, members of the profession are exposed to the practical application of the information they learned rather than relying only on theoretical information (Gildenhuys 1997:117).

1.1.3 Professional behaviours

In addition to the above five most widely recognised criteria of a profession, Barber (1965) also suggests that a discipline is recognised as profession if it is based on recognised professional behaviours.

The concept "professional behaviour" is defined by Barber (1965:18) in terms of its "essential attributes", such as:

a) a high degree of generalised and systematic knowledge, primary orientation to the community interest rather than to individual self-interest,

b) a high degree of self-control of behaviour through codes of ethics internalised in the process of work socialisation and through voluntary associations organised and operated by the work specialists themselves, and

c) a system of rewards (monetary and honorary) that is primarily a set of symbols of work achievements and thus ends in themselves, not means to some end of individual self-interest".

Thus, professionalism is all about the behaviour and qualities that M&E professionals (i.e., officials, practitioners, experts, scholars, etc.) have and how they conduct themselves in the workplace, regardless of the public or the private sector. As a profession, M&E supports other professions and in turn, receives support from them. All members of a profession have the responsibility to serve the interests and needs of their customers. To achieve this objective, evaluation should be conducted regularly. This makes every other profession dependent on the M&E profession (Basheka & Byamugisha 2015:79).

2. DOES M&E MEET THE MINIMUM CRITERIA FOR BEING CHARACTERISED AS A PROFESSION?

There is sufficient evidence to suggest that M&E meets the minimum requirements described in the definitions of the concept's profession, professional and professional behaviour for it to be considered a profession.

2.1 The full-time job criterion

In terms of becoming a full-time job criterion, there are currently many people fully employed in the public and the private sector to perform M&E functions as their main reason for employment. These people expected the public to be M&E professionals. In addition, M&E units have been established at different levels of government in almost all countries in the world. For example, as already mentioned in the historical development, the US and to a certain extent the UK led all other countries in terms of M&E professionalisation. These countries' scientists led the prosses of M&E theory, the methods and techniques as well as the books and articles used to teach the M&E profession. In addition, Basheka & Byamugisha (2015:76) argues that the professionalisation of evaluation has progressed to different levels across European countries" with Sweden, the Netherlands, Great Britain, Germany, Denmark, Norway, France, and Finland currently topping the list". Recent rankings further point to impressive developments of the field in other countries such as Switzerland, Japan, Spain, Italy, Israel, and Africa" (Basheka & Byamugisha 2015:76).

2.2 The establishment of a training school or a university school (department) criterion

In terms of the establishment of a training school or a university school (department) criterion, many universities in the world now offer undergraduate and postgraduate curricula which enable graduates to earn diplomas and degrees in the M&E discipline. According to EvalComminity (2023f:1), "There are many universities that offer monitoring evaluation courses for their students. In USA, these include "Berkeley, Cornell University, Georgetown University, Iowa State University, George Washington University, North Carolina State University, Ohio State University, University of Maryland, University of Michigan and more" (EvalCommunity 2023a:1). African academic institutions that have a strong reputation for providing quality education and training in this field include, but not limited to the University of Pretoria and University of Cape Town, and the University of Johannesburg (South Africa), The Open University of Tanzania, Jimma University (Ethiopia) (EvalCommunity 2023c:1),

Other countries include the University of Melbourne (Australia) (EvalCommunity 2023d:1). In Canada they include Carleton University, École nationale d'administration publique (ENAP), Université du Québec à Montréal (UQAM), Université Laval, University of Alberta, University of the Fraser Valley, University of Ottawa, University of Saskatchewan, University of Victoria, University of Waterloo, and the Canadian Evaluation Society, and Ryerson University (Canada) (EvalCommunity 2023d:1).

Among the many European universities are the University of Antwerp (Belgium), the University of Southern Denmark(Denmark), Saarland University (UdS) in cooperation with University of Applied Sciences School/Department (Germany), Panteion University (Greece), Lyon University (France), University of Rennes (France), University of Catania and University of Genoa (Italie), National School of Political Studies and Public Administration (Romania), Universidad Internacional de Andalucía (UNIA) and Universidad Complutense Madrid (UCM) (Spain), University of Gothenburg (Sweden), University of Bern (Switzerland) (EvalCommunity 2023b:1).

Asia and Middle Eastern universities include Mofet Research Institute, Tel Aviv University, and Ben Gurion University of the Negev (Israel) (EvalCommunity 2023d:1). However, in addition to formal academic institutions, there also exist multiple valuable resources for Monitoring & Evaluation (M&E) education, made available by universities which offer many free resources and opportunities for M&E learning and practice. According to EvalCommunity (2023e:1), the websites for Monitoring & Evaluation (M&E) include but are not limited to the following:

a) Western Michigan University's Evaluation Centre. The website includes webpages for an Evaluation Café with free webinars recorded for viewing (webcasts), and its well-received Evaluation Checklists on over twenty-five topics related to M&E.

b) Oregon State University's Program Evaluation Capacity Building Webinar Series. In addition to freely viewable webinars on program ECB, this online resource from OSU includes accompanying PowerPoint slides.

c) Wageningen University's Managing for Impact Portal. Focusing on Participatory Planning, Monitoring, and Evaluation (PPME), this portal provides an overview of what is happening worldwide in PPME (Public Policy M&E) and managing for impact, with links to a variety of resources, tools, and methods.

d) Claremont Evaluation Centre. In addition to publications and free online training in International Development Evaluation, this website also offers a well-received webinar series on the discipline and profession of evaluation.

e) International Program for Development Evaluation Training (IPDET). A collaborative effort between the Independent Evaluation Group of the World Bank and the Faculty of Public Affairs at Carleton University, IPDET's website has a Resource Centre with speaker presentations, publications, and other links useful for M&E training (EvalCommunity 2023e:1).

With the above and other credible academic institutions across the globe which are not listed here, it should be possible for people to get the relevant quality education at the appropriate level required for them to join the M&E profession (or at least contribute to making it a profession).

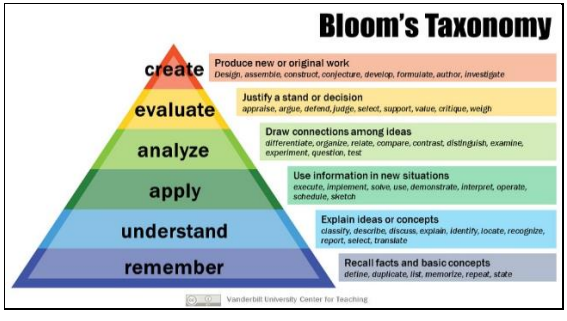
2.3 Acquiring relevant education to become an M&E professional

Unlike current professionals who are required to go through long and extensive training and acquire formal qualifications from recognised universities, ancient professionals transferred the practical skills and knowledge of their trade or profession (including the taboos, and beliefs, from the older generation to the younger generations, without the theoretical skills. the question "Is taboo in the African context is the same as a theory in the Western context. It also means that many occupations became professions before Western education. Therefore, while the researcher has not found a record of graduation ceremonies in ancient history where the people involved in M&E practices in ancient Egypt or China, it is likely that those who were gifted in keeping the records in the kings' courts were also responsible for passing their knowledge to other people so that there are always enough skilled people to serve the kings.

Therefore, modern M&E as a profession differs from ancient M&E as a profession because Modern M&E practice requires a high level of university studies. At least a master's degree from a university count as a minimum requirement to be able to conduct credible systematic evaluation which requires the application of high-level cognitive thinking. Modern M&E practices involve a high level of mastery of the theoretical knowledge- that assists in explaining why things happen the way they do, while traditional professions require the mastery of the know-how, as opposed to the mastery of the know-why. A theory is "a supposition or a system of ideas intended to explain something, especially one based on general principles independent of the thing to be explained", "a set of principles on which the practice of an activity is based." an idea used to account for or explain a situation or justify a course of action." Modern M&E professionalisation requires a combination of both theoretical knowledge and practical knowledge while ancient professionalisation was based on practical practices, practical training under the experienced tutor, and possibly a set of traditional rules and taboos which could serve as the theory of that time.

According to Sinclair (1993:910), Gildenhuys (1997:117), and The National School of Governance (2020) any profession worth its name, requires its professionals to acquire a sufficient level and combination of a high level of theoretical and practical training to acquire the requisite skills and competency in in the profession. In the same way, for the people who are involved in the M&E profession to become M&E professionals, they must acquire the highest level of theoretical and practical skills. It is almost impossible to acquire the technical and practical mastery of the M&E profession through on-the-job training and learning sessions (i.e., observation and active engagement in the practical work). Its theoretical mastery is only acquired from universities, other appropriate academic institutions, and books. Because evaluation (evaluation, which is about judgments about the value of material and methods for given purposes) is a high-order management profession (Cloete 2016), it requires higher cognitive levels. That is why evaluation (i.e., justify a stand or decision, which simply means to appraise, argue, defend, judge, select, support, formulate, author, investigate) is ranked higher (second highest) on Bloom's Taxonomy. Armstrong (2010:1) depicts Bloom, Englehart, Furst, Hill, and Krathwohl's (1956) framework for categorizing educational goals (commonly referred to as Bloom's Taxonomy) as follows:

Picture 1: Bloom et. al.'s Taxonomy



Source: Armstrong (2010:1)

According to Uwizeyimana (2020:5) to understand the education, training, and skills requirements of an M&E professional, one must understand why "evaluation is placed at number five (second highest) just under "create" which is the highest cognitive skill on the Bloom et al., (1956) six "cognitive domains" (Bloom et al., 1956) in Picture 1 above. To evaluate is to "choose, estimate, judge, defend, criticise, justify" (Huitt, 2011:1-2). The ability to remember and describe (verbally or in a written form) the situation or the phenomenon that has happened does not make the person doing so an evaluator (Uwizeyimana 2020:5). Only "the ability to explain the meaning of what happened to the management, the stakeholders, and the beneficiaries, etc. and then to explain "why" what happened, happened the way it did, and then to draw an evidence-based conclusions and fact-based recommendations about how the evaluand can be improved in the future is what "distinguishes competent evaluators from false or incompetent ones" (Uwizeyimana 2020:5).

2.4 Establishing local associations and international professional associations

The discussion above has shown that one of the sine qua non conditions for a profession to be recognised as such is the establishment of a local/national and international professional association. The notion of professions can be traced back to the Middle Ages (5th -15th CE, or about 1520). Mitchell (2023:1) traces something like professionals and professional associations in Medieval Europe (i.e., from the late 5th to the late 15th centuries). "An example of a guild during the Medieval Europe would be the Guild of Blacksmiths (Mitchell 2023:1), which was "an organization of craftsmen who practiced the trade of blacksmithing (i.e., "working with metal to create a variety of tools, weapons, and other products") (Mitchell 2023:1). Like any other association of professionals, "the primary purpose of guilds was to protect the interests of their members, who were craftsmen and merchants who practiced a specific trade" (Mitchell 2023:1). Furthermore, in addition to protecting the interests of its members, the Guilds also "set standards for the quality and safety of their products and ensured that their members were able to compete effectively in the marketplace" (Mitchell 2023:1). Understandably, "Guilds as they existed in Medieval Europe no longer exist in the same form today" (Mitchell 2023:1). However, there exist many modern organizations, such as trade unions, association of medical practitioners, association of M&E practitioners such as the American Evaluation Association (AEA), etc. "that have similar functions or can trace their roots back to the guilds of the past" (Mitchell 2023:1).

It is important to note that the membership in the guild was based on the product being manufactured or traded, and not on the service being rendered. Thus, the profession of the past was based on craftsmanship (i.e., synonym of crafts, skills, workmanship, ability, The Thesaurus for the name craftsmanship includes skills, artistry, workmanship, expertise, technique, ability, dexterity, craft).

The problem is that ancient professionals such as those in the Middle Ages (5th -15th CE) where the concept of profession can be traced did not have to attend universities and professional schools. In the context of Africa, experts in each profession (e.g., metalwork, medical practitioners, etc….) used their indigenous pieces of knowledge to train their offspring without going to universities, because as is the case in Europe, universities as we know them today did

not exist at that time. In addition, rather than forming professional associations such as those being by professionals today, there were well-known families or members of specific families who specialise in a particular occupation and could pass their knowledge and skills to their family members only. The well-known English adage "like father like son" or “like mother like daughter” alludes to the practice of keeping the trade in the family and passing it from one generation to the other.

However, in terms of the establishment of a local association and the establishment of a national association, a review of literature on the professional associations in the M&E sector done by Basheka & Byamugisha (2015:76) shows that “In 2011, the International Organization for Cooperation in Evaluation (IOCE) identified 117 evaluation associations, 96 of which were national organisations located in 78 different countries”. The number of evaluation associations stood at 145 in 2013 (Basheka & Byamugisha 2015:76). In Africa, the oldest evaluation association in Africa was established in 1997 in Ghana” (Basheka & Byamugisha 2015:76), and the African Evaluation association was established in 1999 with the heyday period of intense professional associations reported between 2000 and 2004” (Basheka & Byamugisha 2015:76). Furthermore, unlike the American Evaluation Association (AEA) which was established out of the willingness of American evaluation professionals, to professionalise evaluation (Mouton et al. 2014:36); it is argued that “domestic and global forces played a role in the growth of professional associations in Africa (Basheka & Byamugisha 2015:76). Other authors, such as Mofolo, Mkuyane & Skade (2014:5) argue “evaluation has been on the increase also in Africa; a trend that is likely to continue “especially with increased recognition of the utility of evaluation to good governance” by local politicians. So, it seems, according to Basheka & Byamugisha (2015:77) that the lack of political recognition of the importance of monitoring and evaluation to good governance and perhaps the history of lack of good governance altogether in Africa was the reason why monitoring and evaluation did not take its roots in Africa.

According to Basheka & Byamugisha (2015:77), “the emergence of many new regional and national organisations globally illustrated the growing worldwide recognition of the importance of evaluation”. “By 1995 there existed only five regional and/or national evaluation organisations in the world but by 2000 there were more than 30”. This represents “a 500% increase in a 5-year period” between 2000 and 2005 (Basheka & Byamugisha 2015:77). Surprisingly, “Much of this growth was occurring in developing countries, particularly in Africa” (Basheka & Byamugisha 2015:77).

In addition, a review of the growth of global professional associations established in the M&E sector done by Amisi, Fish, Moloto & Masvaure (2021) suggests that:

“The number of formalised evaluation societies/associations, known as Voluntary Organizations for Professional Evaluation (VOPEs), has grown. The International Organization for Cooperation on Evaluation’s (IOCE) database boasts 120 national VOPEs. Globally, 32000 individuals are registered with evaluation associations. In addition to the national associations, the M&E sector has also seen the emergence of regional bodies which represent groups of national VOPEs, and these include the African Evaluation Association (AfrEA) and the European Evaluation Society (EES). According to the IOCE, 19 VOPEs are categorised as regional. Global bodies such as the International Development Evaluation Association (IDEAS)

and the international umbrella body for associations, the IOCE, have also been established in the global M&E ecosystem" (Amisi, et. al. 2021:14).

According to Amisi, et. al. (2021:15) "A few of the VOPEs on the continent have developed evaluation standards. The UEA officially launched the Uganda Evaluation Standards in November 2013". In addition, Amisi, et. al. (2021:14) argue that:

"in 2016, the Latin American and Caribbean Network of Monitoring, Evaluation and Systematization (ReLAC) developed evaluation standards for Latin America and the Caribbean. The aim was to provide sound and contextually relevant guidance for high-quality evaluations, professional training and practice, the facilitation of communication amongst all involved, the advancement of learning and knowledge, and the promotion of an evaluation and socially responsible culture (Rodríguez-Bilella et al., 2016). The ANZEA evaluator competencies for Aotearoa New Zealand were completed in 2011 with the aim of promoting quality evaluation practice (Aotearoa New Zealand Evaluation Association, 2011), and the Australasian Evaluation Society (AES) published its evaluators' professional learning competencies in 2013".

On the African continent, Amisi, et. al. (2021:14) state that "in 2012 the UEA developed evaluation standards for Uganda. The standards were to guide the design, conduct, management, and dissemination of information for key national evaluations. In 2015, the South African Monitoring and Evaluation Association (SAMEA) and the Department of Planning, Monitoring and Evaluation (DPME) participated in a study to explore the professionalisation path for South Africa. In 2020, SAMEA published a final draft competencies framework for evaluators in South Africa".

Furthermore, as a profession, according to Basheka & Byamugisha (2015:75) "over 30 national evaluation associations under the umbrella body – the African Evaluation Association (AFREA) are in existence" in Africa. Amisi, et. al. (2021:14) argues, "An important step in the professionalisation debate on the African continent is the development of evaluation standards by AfrEA for evaluations conducted in Africa. The 2020 draft document provides a set of principles that apply to professionals dealing with evaluation in Africa – irrespective of where in the world professionals are based. The guidelines are a step closer to defining evaluation practice in Africa, as they reflect the demand for evaluation that is 'Made in Africa" (see also Cloete 2016).

However, in terms of professional associations, and professionalisation of the M&E profession, "there is hardly any other M&E Association which is comparable to the American Evaluation Association (AMEA) in terms of "membership, geographical coverage and financial muscles in terms of funding" (Basheka & Byamugisha 2015:76). As Basheka & Byamugisha (2015:76) puts it "The American Evaluation Association (AMEA) … remains the most dominant evaluation society in the world with a membership that has grown from just over 3000 members in 2001 to approximately 7000 by mid-2015". The website of the American Evaluation (http://www.eval.org/joinaea) still reflects the same number of memberships at the time of writing this article in April 2023.

In addition, in terms of geographical coverage, the AMEA "has members in every one of the 50 states of the US and more than 80 countries" across the globe (AMEA 2023:1). The dominance of the AMEA is also exemplified by the sheer size and attendance of its congresses. For example, as Basheka & Byamugisha (2015:76) continue to argue, "In October 2005, the AEA together with its counterpart, the Canadian Evaluation Society (CES), held a joint meeting in Toronto where about 2500 evaluation practitioners and academic professional convened in four days and held more than 525 concurrent sessions dealing with evaluation themes and issues". In 2015 the AMEA conference which took place in Chicago (US) had record attendance with more than 5,000 participants onsite and online (Basheka & Byamugisha 2015:76). The more than 5000 participants is the highest number of international participants in AMEA history. The 2015 AMEA conference was one of the most inclusive, inspiring, and multi-cultural AMEA conferences on record. The sheer size of this conference and its global coverage helped create a truly Global Evaluation Community" (AMEA 2017:5). The most recent pre-Covid-19 annual conference of the AMEA held in Minneapolis, Minnesota, attracted "more than 3,500 evaluation professionals … more than 200 speakers and hosted 800 sessions, with 150 posters, and 60 professional development workshops" (AMEA 2019:1).

2.5 Establishing codes of professional ethics for the M&E profession

In terms of the introduction of codes of professional ethics and the establishment of state licensing laws Biden (2023:1) states that the Top 5 Ethical Considerations in Monitoring and Evaluation: include the following:

a) Maintain independence of judgement.

b) Privacy, Confidentiality, and Data Protection.

c) Voluntary Participation and Informed Consent.

d) Full transparency and full disclosure.

e) Minimise Harm (see Biden 2023:1).

According to Stufflebeam and Coryn (2014:6), monitoring and evaluation is now a profession. If the M&E meets the minimum criteria for it to be considered a profession, where does it come from?

3. THE ORIGIN OF MODERN PUBLIC POLICY, AND PROGRAMME M&E PROFESSION

In other to find out the origin of M&E as a profession, the following paragraphs analyses the different states of its development and the role-players in the different stages as well as the contributions made by different scholars and governments.

3.1 The stages of M&E development towards modern M&E profession

M&E is not a new profession. In the olden days, a child (son or a daughter) of a naturally gifted craftsman could learn the rules and practice of the father's craft or trade and become as good as

the father or even better without going through the education system outside the family system. Even today, to learn the practice and acquire the skills and expertise of cooking a traditional African cuisine, you must seek the tutorage of an elder African person who has inherited such skills from the elders (i.e., ancestors) before him/her in the family. In traditional/Ancient African societies, a son of a Blacksmiths could learn from the father how to make things out of metal, and a child of a gifted woodworker, could learn the family trade by observing, practicing, and working with the family members gifted with a particular skill and become like or even better skilled than the teacher. This is how fathers, mothers, and other family members used to pass their skills or gifts in their occupation to their offspring. Children learned by doing, while working with their parents to heat the iron and steel and soften it enough so that they can bend, fold, and shape it using tools to make other objects. This process was fundamentally changed when organised mass education system based on Western education was introduced in many countries. The current so-called modern systematic M&E has gone through many stages of development and refinement. Stufflebeam, Madaus & Kellaghan (2000) divides the process that resulted in the birth of modern systematised programme evaluation into seven development periods, spanning from 1900 to 2000. These phases of modern M&E profession development are summarised in the following Table 1.

Table 1: Phases of modern M&E profession development

ERA	**Progress made towards systematic professional evaluation**
1792 to 1900	The age of reform
1900-1930	The age of efficiency and testing
1930-1945	The Tylerian period
1946-1957	The age of innocence
1958-1972	The age of development
1973-1983	The age of professionalisation
1983-2000	The age of expansion, integration and adaptation
2000 – to date	The age of contextualisation and adaptation of M&E

Source: Table adapted by the author.

The above Table shows the following development stages of M&E as a profession and the nature of development that took place during each era.

Stage 1: The age of the reform period (1792-1900s)

In 1792, the first documented formal use of evaluation took place, when William Farish (1759–1837) a British scientist who was a professor of Chemistry and Natural Philosophy at the University of Cambridge is known to have been the first to utilise the quantitative mark to assess students' performance (Hoskins 1968 in Stufflebeam et al. 2000). The quantitative developed by William Farish permitted the objective ranking of examinees, the averaging, as well as aggregating scores. Furthermore, the quantitative mark was historically important to the development of programme evaluation as a discipline for two reasons. Firstly, it was the initial step in the development of psychometrics; and secondly, its questions were designed to measure factual, technical competence in subject areas that gradually replaced assessing rhetorical-style questions (Bengwi 2017:144).

However, while British academics seem to have kickstarted the process of modern systematic M&E practices, it is the American scientists and academics who carried forward the process that resulted in what is currently known as modern M&E practices, profession, and field of study.

The earliest method of formal evaluation in the US occurred in 1815 when the US Army developed a system of policies for "uniformity of manufacturers' ordinance" (Smith 1987 in Bengwi 2017:136 & Rossie, et al. 2004).

These policies set standardised production processes that helped ensure conformity of materials, production techniques, inspection, and product specification for all suppliers of arms to the military.

Printed tests of various subjects were used to assess students' achievement in the Boston education system. This event was an important milestone in evaluation history because it was the starting point of a very long tradition of using pupil test scores as a principal source to systematically evaluate the effectiveness (i.e., the success or failure) of school education or instructional programmes (Bengwi 2017:90). From 1887 to 1898, an American educational reformer named Joseph Rice (in Colwell 1998) conducted a similar assessment, by carrying out a comparative study on spelling instruction across several school districts in the US. He was concerned about methods of teaching spelling, as US students' spelling proficiency was not on par with the spelling proficiency of other developed countries at that time. Notably, Joseph Rice (in Colwell 1998) was able to use systematic evaluation methods to determine that there was no relationship between time devoted to spelling and competence (Rice in Colwell 1998). Rice reported his findings in an article entitled 'The Futility of the Spelling Grind', published in the 1987 edition of The Forum (Colwell 1998). Rice's evaluation method has been recognised as the first formal educational evaluation programme in the US (Stufflebeam et al. 2000). According to Worthen, Sanders, and Fitzpatrick (1997), tests developed for the Boston public school system were described as objectively referenced. Importantly, these tests were used to make inferences about the ineffectiveness of the district's education system. During this period, educators regarded measurement and evaluation as synonyms; the latter thought was regarded as students' test performance and subsequent grading (Worthen, et. al. 1997).

Stage 2: The age of efficiency and testing period (1900-1930)

The age of efficiency and the testing period saw the work of Frederick Winslow Taylor (March 20, 1856 – March 21, 1915) an American mechanical engineer on scientific management becoming an influential administrator in education programme evaluation (Biddle & Ellana 1964). Taylor's 'scientific management' was based on observation, measurement, analysis, and most importantly, efficiency (Bengwi 2017:122).

Stage 3: The Tylerian period (1930-1945)

Ralph W. Tyler, who is considered the father of educational evaluation, was an American educator who worked in the field of assessment and evaluation and made considerable contributions to evaluation. Ralph W. Tyler conducted an eight-year-long study from 1932-1940, which systematically assessed the outcomes of programmes in 15 progressive and 15 traditional high schools. His study found that instructional objectives could be clarified by stating them in

behavioural terms, and those objectives could serve as the basis for evaluating the effectiveness of instruction (Tyler in Stufflebeam et al. 2000). Ralph Tyler states that "Each objective must be defined in terms which clarify the kind of behaviour which the course should help to develop" (Ralph Tyler cited in Stufflebeam et al. 2000). Hence Stufflebeam et al. (2000) conclude that Tylerian evaluation involves internal comparisons of objective-based outcomes. Importantly, Ralph Tyler's evaluation method did not involve costly, disruptive comparisons between experimental and control groups, as were utilized in Rice's comparative studies. According to Worthen et al. (1997), Tyler's work formed the basis of criterion-referenced testing.

Stage 4: The Age of Innocence period (1946-1957)

Starting in the mid-1940s, Americans had a mental shift from World War II and the Great Depression of the 1930s. According to Bengwi (2017:143), society experienced a period of great growth in the 1940s. Subsequently, educational offerings, personnel, and facilities were expanded and upgraded. Due to this national optimism and positive change in the socio-economic conditions of the citizens and the states, there was little interest in how national funds were spent on education. As such, this evaluation period was labelled 'the age of innocence'. In the early 1950s during the age of innocence period, Tyler's view and method of evaluation were rapidly adopted by governments. It is during this period that Bloom, Engelhart, Furst, Hill, and Krathwohl (1956) also advanced objective-based testing in their book Taxonomy of Educational Objectives (Bengwi 2017:133). Bloom et al.'s (1956) contribution to the debate of systematic evaluation by highlighting various types of learning outcomes within the cognitive domain (i.e., Remember, Understand, Apply, Analyse, Evaluate, and Create (or synthesise)) is still valid today. The main argument in Bloom et al. (1956) Taxonomy is that learning objectives could be classified according to the type of learner behaviour to create specific hierarchical relationships among the various types of outcomes.

Stage 5: The age of development (1958-1972)

In 1957, the Soviet Union's successful launch of the Sputnik I space shuttle sparked a national crisis in the US. As a result, legislation was passed to improve instruction in areas that were considered crucial to national defence and security. In 1958, the US Congress promulgated the National Defence Education legislation which poured millions of dollars into new curriculum development projects and provided for new educational programmes in mathematics, sciences, and foreign languages (Bengwi 2017:90). Evaluations were funded to measure the success of the new curricula.

In the early 1960s, criterion-referenced testing proved to be another factor in the development of evaluation. Until then, most tests, referred to as norm-referenced tests, were designed to discern between students' performance. In contrast, a criterion-referenced test was intended to measure individual performance in terms of established criteria. It discerns how well an individual can perform a particular behaviour or set of behaviours, irrespective of how well others perform (Bengwi 2017: 134).

According to Hogan (2007:6), The passage of the Elementary and Secondary Education Act (ESEA) of 1965 in the US signalled the birth of the modern programme evaluation era and

included evaluation requirements. According to Ferguson (2004), the legislation was intended to supplement academic resources for low-income scholars who needed extra support in the early grades. As such, educators were required to evaluate their efforts. Senator Robert Kennedy (20 November 1925 -06 June 1968) sponsored the legislation, as he wanted to ensure that federal money would help disadvantaged students in new ways and not according to exhausted practices (Weiss 1998).

In addition, the 1960s proved to be a watershed time for the impact of sociology in policy making and the professionalisation of M&E in the United Kingdom and the United States (Sanderson 2003:12). Following the rapid growth in public expenditure on social welfare and increasing demand for knowledge on how to effectively address social problems resulting from the WWII (1939-1945), the national governments in these countries took steps to expend the role of social science research in advancing policy and executive agency decisions (Sanderson 2003:12). For example, in 1965 the United Kingdom established the Social Science Research Council (SSRC) to expend social science research, and in the same year (1965), the United State followed suite by issuing an executive order requiring all federal agencies to develop measures of cost-effectiveness and to integrate the "sound logic, firm data, and systematic thinking" into their decision-making processes (Institute for Research on Poverty 2002:24).

Stage 6: The age of professionalisation (1973-1983)

During the 1970s, evaluation emerged as a profession. Several international journals such as Educational Evaluation and Policy Analysis (EEPA) established in 1979 and published by SAGE Publications on behalf of the American Educational Research Association, Studies in Educational Evaluation (est. 1975), Evaluation Review (first published in 1977 by SAGE Publications), New Directions for Programme Evaluation (first published in 1986), and Evaluation and Programme Planning (first published in 1974) were published (Stufflebeam et al. 2000). Today, there are over a dozen of journals of evaluation and related subjects (Mouton et al. 2014:36). Furthermore, universities began to recognise the importance of evaluation by offering courses in evaluation methodology. Among them were the University of Illinois (US), Stanford University (US), Boston College (US), University of Minnesota (US), and Western Michigan University (US) (Stufflebeam et al. 2000).

The above confirms Basheka & Byamugisha's (2015:77) argument that "the international status of M&E research remains theoretically and methodologically influenced by the American tradition". It also confirms their argument that the United States (US) is globally "regarded as the motherland of the M&E field in terms of its trends, number of authors and their academic and professional influence, degree of professionalisation, focus of academic programmes, legislation and institutionalisation of evaluation, development of models and approaches for evaluation, evaluation capacity building initiatives, evaluation standards and guiding principles, number and attendees of evaluation conferences and workshops, publications and their impact factor, guides and evaluation handbooks" (Basheka & Byamugisha 2015).

Stage 7: The age of expansion and integration (1983-2000)

Literature suggests that the US and the UK have been the dominant countries in terms of research, funding, and practices of monitoring and evaluation. For example, in 1965, "funding

was being appropriated towards graduate training programmes in educational research and evaluation" (Mouton et al. 2014:33). However, in early 1983, evaluation struggled in the US under the Reagan administration. Cutbacks in funding for evaluation took place. Because there was an increased emphasis on governments to implement cost-cutting measures; funding for new social initiatives was cut drastically (Weiss 1998). However, by the early 1990s, evaluation had rebounded in line with the economic recovery experienced during that period. Because of increased funding, the M&E field expanded and became more integrated. In addition, more professional associations were also developed, along with evaluation standards. For example, in 1993, President Clinton signed the Government Performance and Results Act (1993) into law with a promise to measure progress and to hold federal agencies accountable for their results" (Heinrich 2007:24). In addition, in 1994 the Joint Committee on Standards for Educational Evaluation developed criteria for personnel evaluation (Mouton et al. 2014:36).

State 8: The age of contextualisation, refinement, and adaptation (2000 – to date)

During the period after the year 2000, many scholars from across the developing country world started questioning the one-size-fits-all based on Western evaluation approaches which have been imposed by the Western countries on developing countries. The main argument is that "a one-size-fits-all policy programme evaluation approach, based on the Western evaluation model, is not appropriate in culturally and developmentally different environments" (Uwizeyimana 2021:101). The main demand is that Western approaches which promote Western views without any consideration of indigenous values, cultures, and socio-economic contexts were totally wrong and unacceptable to non-Western people. Authors such as Robson & Reid (2001) demanded that the issues of ethnicity and traditional values of Indigenous people be considered in the New Zealand government's official statistics. Ofir & Kumar (2013) demonstrated why evaluation in developing countries need different from Western approaches to evaluation. Porter & Goldman (2013) highlighted the growing demand for monitoring and evaluation in Africa while Gaotlhobogwe, Major, Koloi-Keaikitse & Chilisa (2018) initiated the debate about the conceptualisation of evaluation in the African contexts. Cloete (2016) responded to earlier scholars by proposing a draft model for developing an Africa-rooted programme evaluation approach, while Uwizeyimana (2021:101) questioned the need and feasibility of a separate Africa-rooted programme evaluation approach" in a globalised world and multi-culture and continent.

4. CONCLUSION

The objective of this article was to trace the origin of public policy M&E as a profession. A careful analysis of the definitions and characteristics of a profession shows that M&E professionals must possess the highest standard of formal education, training, and experience so that they can provide their professional service (and sometimes goods) to the public and the states. Blom taxonomy suggests a master's degree as the minimum qualification for a person to be a sufficiently qualified evaluator. In addition, while the M&E practice is not currently limited to professional members who hold M&E licenses, the M&E association can still get the best

skilled M&E people through rigorous examinations provided by academic institutions where they get their qualifications. The requirement for an M&E qualification from a reputable academic institution can be used as a barrier and a licence to entry into the M&E practice. Such examinations must focus on whether the prospectus candidate has mastered the necessary specialised knowledge or techniques applicable to the M&E profession. Hence there is currently no or an oath of office for M&E professionals (practitioners, scholars, etc.), it is the responsibility of both local and international associations and professional associations to ensure that M&E professionals abide by the highest code of ethics while practising their profession. To ensure that the best services are always provided, M&E professionals must keep learning so that they can remain ahead of new developments in the disciplines and professions. They could do so by enrolling for further professional education at the institutions approved academic and professional institutions or by gaining new knowledge and insights through accredited professional journals published by their counterparts in the discipline or profession.

Most importantly, all M&E professionals must belong to a professional association, and attend professional meetings to keep up to date with new developments in the discipline, but also for the purpose of holding each other accountable and the standardisation of the services or goods they provide to society and the state.

The above discussion shows that M&E practitioners have access to credible universities and there are many resources where they can acquire the highest relevant education from appropriate education and training institutions before being considered professionals. Many universities across the world are providing undergraduate and postgraduate degrees (including Honours and honours equivalent, and Masters and PhD degrees) in the M&E discipline. The fact that number of schools and universities teaching courses in M&E or offering certificates, diplomas and degrees in M&E is growing across the world, and the fact that M&E professional associations have been and are continuing to be established everywhere in the world, as well as the fact that the codes of ethics and legislative framework to govern the M&E professionals and practitioners are being introduced in local laws everywhere proves that M&E is a profession and that M&E practitioners are professionals.

In conclusion, the US and UK governments, academics, and scientists played the leading role in the different stages of development of the M&E profession since the Guild time in the Middle Ages (5th -15th CE, or about 1520). In addition, western professional bodies such as the AMEA and Western academic institutions played a leading role in developing and providing the theoretical foundation and M&E qualifications, all of which are sine-qua-non conditions for M&E to become a profession. Finally, the US and the UK led the process of development, establishment, and institutionalisation of what is currently known as M&E as a profession. Based on these findings, it can be safely concluded that the M&E profession as we know it today originated in the US.

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