

## MEETING OF THE BOARD OF DIRECTORS

VIA VIDEOCONFERENCE

BOD/2022/06 DOC 10

FOR DECISION

### KNOWLEDGE AND INNOVATION EXCHANGE: MID-TERM REVIEW AND COSTED EXTENSION

*Please note: In accordance with the GPE Transparency Policy, documents are public only after their appraisal by the relevant governance instance. Governance officials may circulate documents to their constituency for consultation purposes, except for documents of a confidential nature.*

#### Key issues for consideration:

- The Performance, Impact and Learning Committee (PILC) recommends to the Board that the project term for Knowledge and Innovation Exchange (KIX) be extended through June 30, 2027, in order to create synergies with GPE 2025 and allow for uninterrupted implementation throughout the current strategy period. The Committee recommends that the grant agent, the International Development Research Centre, be invited to develop a proposal to be submitted to PILC and the Finance and Risk Committee (FRC) in October 2022 for decision by the Board in December 2022.
- In addition, PILC took into account the evidence set out in the mid-term evaluation. The mid-term evaluation, written inputs from PILC members and related Secretariat responses are available on the [Governance Portal](#) for Board visibility.
- The Finance and Risk Committee (FRC) recommends that the Board confirm the projected availability of funding (up to \$80 million) for the development of a proposal. Taking into account GPE's current financial position, the FRC requested that the final extension proposal be subject to the availability of funds in December 2022.

#### Objective

1. The Board is requested to consider a joint recommendation from the Performance, Impact and Learning Committee (PILC) and the Finance and Risk Committee (FRC) to request a costed proposal from the existing grant agent, while confirming the projected availability of resources to finance the extension of Knowledge and Innovation Exchange (KIX) through June 2027. The costed proposal will be considered by the PILC and FRC in October for decision by the Board in December 2022.

#### Recommended decision

**BOD/2022/06-XX—Knowledge and Innovation Exchange:** The Board of Directors:

1. Approves the extension of the Knowledge and Innovation Exchange through June 30, 2027, based on evidence set out in the mid-term evaluation, and as recommended by the Performance, Impact and Learning Committee.

2. Requests the grant agent, the International Development Research Centre, to develop a proposal for an extension of no more than \$80 million, for consideration by the Performance, Impact, and Learning Committee and the Finance and Risk Committee in October 2022 and recommendation to the Board in December 2022.
3. Confirms the projected availability of funding for the extension, subject to approval of allocation of resources through the Financial Forecast, noting that final approval of the proposal will be subject to availability of funds in December 2022.

## Background and overview

2. In March 2019, the Board approved US\$58.5 million for 2019–2024 ([BOD/2019/03-02](#)), with US\$3.5 million in additional co-financing from the grant agent and implementing partner, the International Development Research Centre (IDRC). In December 2019, the Board approved a further \$12 million to increase the portfolio of global grants ([BOD/2019/12-07](#)), with \$720,000 provided by IDRC. In May 2021, the Board approved an increased allocation of \$3million in targeted funds from the LEGO Foundation ([BOD/2021/05-03](#)), with \$180,000 in additional co-financing provided by IDRC.
3. Based on the roadmap presented to the Board in May 2021 ([BOD/2021/05 DOC 07](#)), an external mid-term evaluation was conducted between November 2021 and March 2022 to assess if KIX is on track to meet its objectives and identify opportunities to improve its impact. The evaluation findings (summary in Annex A), and response from the Secretariat (Annex B) aim to inform the Board's decision on whether to refinance KIX. In addition, a management response from IDRC is available for information on the [Governance Portal](#).
4. Based on the evaluation findings and experience of working with the grant agent, the Secretariat confirms that the current grant agent is able to operationalize the evaluation recommendations and the GPE Secretariat management response. It further recommends that the grant agent be requested to prepare, in consultation with the Secretariat, a costed proposal to extend and refinance Knowledge Innovation Exchange until June 30, 2027, for consideration by the PILC and FRC, and Board decision in December 2022.
5. Use of the additional financing will be triggered by implementation of adaptations recommended in the mid-term review, starting as early as January 2023, with the concrete adaptations, timelines, and costs to be outlined in the proposal from the grant agent. The proposal to finance through mid-2027 would align with the current strategic plan period and allow sufficient time for completion of an additional evaluation of implementation through 2025, implement subsequent redesign of the program in response to subsequent recommendations, and to align with the priorities of the next strategic plan, GPE2030. It would also enable time to complete a competitive Grant Agent selection process, if needed, without disrupting implementation.

**Annex A: Executive Summary of KIX Mid-Term Evaluation; Annex B: GPE Secretariat Management Response.** Additional documents (e.g. full mid-term evaluation and IDRC management response) are available on the [Governance Portal](#).

# Executive Summary

## Knowledge and Innovation Exchange (KIX)

### Mid-Term Evaluation, April 2022

#### Purpose of the Evaluation

In September 2021, the International Development Research Centre (IDRC) and the Global Partnership for Education (GPE) commissioned an external mid-term evaluation of their shared investment in the Knowledge and Innovation Exchange (KIX). The purpose of this evaluation was to assess the extent to which the program is positioned to achieve its intended impact and to identify opportunities for refinement. A final evaluation will be conducted at the conclusion of the KIX program in 2024.

#### The KIX Program

Launched in 2019 by GPE and IDRC, the Knowledge and Innovation Exchange (KIX) is a U\$75M, demand-driven program that aims to strengthen national education systems through evidence-based innovations and knowledge exchange in all 70 GPE partner countries.

#### How KIX Works

KIX uses two primary mechanisms to strengthen education systems by 1) generating knowledge by funding applied research projects in education and 2) mobilizing knowledge through four regional hubs. Each regional hub includes several GPE partner countries and facilitates knowledge exchange across countries via live (webinars, in-person meetings) and static (podcasts, newsletters) resources. Both mechanisms aim to strengthen the capacity of partner countries' education systems.

#### Evaluation Methods

This mid-term evaluation was conducted by the independent firm Delivery Associates (DA). It is an objectives-based evaluation using a mixed methods approach. Lines of investigation included surveys and in-depth interviews with multiple stakeholder groups, and an analysis of internal and external program documents, including program monitoring data. In total, 80 documents were analyzed, 11 global grantees surveyed (out of 12), 46 GPE countries surveyed (out of 70), and 28 interviews conducted, including country participants, global grantees, the KIX implementation team, and GPE and IDRC senior leaders.

Because the KIX program is mid-way through implementation, this evaluation focused on the extent to which the program is operating as expected. DA measured participants' levels of engagement and satisfaction with the program. Therefore, these results may be subject to self-reporting bias.

#### Main Findings

KIX has made significant progress against its implementation objectives. It is valued by its stakeholders and is well positioned for impact. To increase and accelerate its impact, KIX could leverage the strengths of GPE and further target its efforts.

## Program Strengths

The KIX program is valued by, and relevant to, GPE country partners. It has been effective and efficient in delivering its intended results, despite the global COVID-19 pandemic.

### Perceived value and relevance

Country partners find the KIX program valuable and relevant, as demonstrated by both stated preferences and actual engagement data. Most country representatives (95%) indicate that they find KIX activities and resources useful for their work. Participation in different events as well as engagement with static resources—such as podcasts and policy briefs—has steadily increased. Starting in 2019 and throughout the COVID-19 pandemic, 300+ events have focused on building connections with, and strengthening the capacity of, country representatives by engaging over 11K participants. Global research grantees see KIX as a unique opportunity to conduct scaling research and engage with other researchers.

### Alignment with stakeholder priorities

KIX activities are broadly aligned with countries' priorities and with the newly-approved strategies of GPE and IDRC.

The applied research pursued by KIX, as well as knowledge exchange and capacity building activities, are thematically aligned with countries' identified priorities for strengthening their education systems. Adapting education systems to COVID-19 as a topic under both research and knowledge exchange activities was valued by country partners. Country representatives and global grantees also see gender equity and social inclusion as an important aspect of KIX efforts.

KIX advances both GPE and IDRC strategies. It supports GPE by generating evidence on scaling innovations that can improve education systems and building capacity in GPE country partners. KIX also helps amplify the impact of IDRC in the global education policy arena through innovation research and knowledge exchange.

### Effectiveness

KIX activities have been implemented according to plan and contributed to the achievement of its intended immediate outcomes, including capacity-building and increasing awareness of country representatives and local education stakeholders, as well as uptake of knowledge generated through global grants.

KIX has made progress towards its goals in all three lines of activities: knowledge generation, knowledge mobilization, and capacity strengthening. Over 80% of implementation milestones have been reached in the analyzed period, and 47 outcome-level cases have been reported by regional hubs and global grantees. Research uptake has been reported in at least 8 countries.

Due to their engagement with KIX activities, country representatives expressed they have a better understanding of evidence-based solutions to education challenges in their countries and feel more equipped to propose improvements to their education systems. These outcomes are driven in part by high levels of engagement with KIX activities and proximity of participants with national-level policy dialogue and decision-making.

### Efficiency

The program is run efficiently from both a time and money standpoint, achieving all major planned activities for the first two years and making efficient use of its funding. KIX was able to leverage its adaptive management strategy to identify and directly respond to the COVID-19 pandemic's effects, transitioning in-person activities to virtual settings whenever possible, and expanding the scope of activities to include adaptations to COVID-19 as a topic. These efforts were recognized and valued by both country representatives and global grantees.

### Delivery Associates

## Room for Improvement

KIX has opportunities to expand its influence and impact by increasing focus, integration, and clarity.

### Focus

KIX's scope may be too broad and could benefit from a more targeted approach in terms of content, value proposition, and participants. Six thematic areas\* in education encompass several overlapping subjects, and the lack of specificity can affect the demand-driven approach of the program by obscuring countries' needs. A tighter thematic focus would also benefit researchers and hubs in narrowing the scope of their activities and allow for more in-depth content. In terms of value proposition, engagement varies significantly among country partners, both with hub activities and research grants.

Support could be tailored to focus on different needs, goals, and the level of engagement by decision-makers. Finally, the program could make a greater effort to define and target priority stakeholders and champions within each country for engagement with KIX activities to maximize possibilities for research uptake.

### Integration

Linkages between KIX mechanisms, between KIX and the GPE portfolio, and among research grantees are not always well defined and clear for all stakeholders. There is no formal mechanism for KIX efforts to inform how GPE uses its direct-to-government support funds. There are no clearly established links between them to explain how both mechanisms collaborate and how one can strengthen the other. Global grantees have also expressed that there is no structure for knowledge sharing among themselves. Most global grantees interviewed said they had little or no interaction with hubs and 1/4 of surveyed countries were not aware of KIX's global grants projects.

Establishing clear pathways for collaboration between the two mechanisms can accelerate the program's impact and support mechanisms in reinforcing each other. The regional hubs and research grants' unique position within policymaking of each country partner presents an opportunity to better inform how GPE's overall work could be strengthened in transforming education systems.

### Clarity

Interviewed stakeholders reported that most country representatives do not fully understand KIX and all its components. Global grantees also expressed confusion around how all KIX parts work. The lack of a clear, shared narrative can affect how stakeholders perceive the value of the program, as well as what it takes to make it successful. The current Monitoring, Evaluation, and Learning (MEL) system, which tracks the progress towards the program's goals, contains 10+ documents and 40+ indicators. Some grantees have indicated that it is burdensome and, at times, confusing to report on it.

The communication and the Monitoring, Evaluation, and Learning (MEL) strategies could be simpler—and therefore, more effective.

\* The thematic areas are early childhood education, learning assessment systems, gender equality, strengthening data systems, equity and inclusion, and teaching and learning.

## Recommendations

This mid-term evaluation presents six recommendations for implementation which we believe will strengthen KIX and expand its impact.

### 1. Leverage GPE's system transformations work in partner countries

GPE has tremendous leverage to create positive change in focus countries' education systems and is committed to evidence-based policies and system-level change. KIX works in the same spirit and could help inform what those transformations could look like. KIX can become "the intellectual engine of GPE" by informing, advising, and supporting policy and implementation changes through innovation and evidence. The new [Operating Model](#) (specifically, the system transformation and system capacity efforts) provide a great opportunity for creating that leverage. This will allow KIX to expand its influence and help GPE and IDRC achieve their goals in strengthening global education systems.

### 2. Strengthen links between the main components of the program

KIX can clearly define how applied research grants and regional hubs collaborate, so there is a clear path for both applying research learnings and tailoring the research to local needs. This can help inform how each mechanism strengthens the other and ensure that knowledge exchange and capacity-building happen at the system level.

### 3. Provide differentiated support to countries according to engagement levels

There is already demand from highly committed countries to receive support in putting ideas and knowledge into practice, with a focus on adapting innovations to local realities and helping officials overcome implementation challenges. KIX can maximize program impact by providing this additional, tailored support for a select group of highly committed countries. This approach could create success cases that prove the concept, build a clearer path for impact, and create motivation for other countries. Every country could be eligible for this additional support if they reach a participation threshold.

### 4. Identify key roles to participate in the regional hubs

The closer the country participants who engage with regional hubs are to policy and decision-making, the more likely the hub ideas will be adopted. Identifying key characteristics for the role and what is needed for a successful engagement will help to 1) identify who the ideal members of national delegations should be and 2) refine outreach and engagement efforts.

### 5. Simplify communication

KIX has a broad scope (3 objectives, 6 education priorities, and 70 countries targeted) and complex dynamics. Acknowledging this complexity, the communication strategy could be refined to transmit a more straightforward message overall. Telling the story of KIX with a clear, communal narrative will motivate, engage, and build cohesion among different stakeholders so they can successfully navigate the complexity of the program while returning to the shared values and goals. This will reinvigorate them to serve as champions who expand KIX's reach and impact.

## 6. Refine the Monitoring, Evaluation, and Learning (MEL) model

KIX can support a shared narrative around the program’s progress and success by reducing “busy work” and prioritizing a smaller set of meaningful indicators in a collection, reporting, and reflection process for regional hubs and research grantees. This could also lead to more precise and practical evaluations, translating data and insights that better support decision-making and continuous improvement. MEL and communications strategies could be aligned, generating opportunities to elevate achievements, accelerate learning, and generate a shared sense of purpose.

### Conclusion—Looking Back and Looking Ahead

KIX has done a remarkable job of adapting to an unprecedented global crisis and laying a solid foundation for impact. This mid-term evaluation indicates that participants find the program valuable, and their attendance and engagement underscore their perceptions. With a solid following and early momentum, KIX is well positioned for impact. The program’s diverse stakeholders—and ultimately, the communities served by national education systems—could be even better served by further focus, integration, and clarity as outlined in the recommendations above.

## Annex B: GPE Secretariat Management Response to Mid term evaluation of the Knowledge and Innovation Exchange (KIX)

### Overall response to the mid-term evaluation

The GPE Secretariat welcomes the mid-term evaluation of the Knowledge and Innovation Exchange (KIX), conducted between September 2021 and March 2022 by Delivery Associates to assess whether KIX is on track to meet its objectives and identify opportunities to improve its impact. We find the mid-term evaluation to be balanced and fair with helpful recommendations and agree with the principal finding that KIX has made significant progress, is valued by its stakeholders, and is well positioned for impact. We also agree that the International Development Research Centre (IDRC) is a capable grant agent and implementing partner, evidenced by the evaluation finding that the program is run efficiently from both time and money standpoints.

Based on the mid-term evaluation findings and recommendations, we believe the initial investment in KIX is showing promising results. We consider the findings on program performance and the grant agent to be positive and the recommendations for improvements to be useful.

We note that some of the recommendations can be actioned immediately and are funding neutral while bolder adaptations including widened functions for the Hubs and expanded grant modalities would require additional financing and time.

### Response to the recommendations

Recommendation	Management Response
<p><b>1. Leverage GPE's system transformation and system capacity efforts</b></p> <p><i>GPE has tremendous leverage to create positive change in focus countries' education systems and is committed to evidence-based politics and system-level change. KIX works in the same spirit and could help inform what those transformations could look like. KIX can become 'the intellectual engine of GPE' by informing, advising, and supporting policy and implementation changes</i></p>	<p>The Secretariat agrees and considers KIX has significant unrealized potential to support GPE's aim of supporting education system transformation. The features of system transformation resonate strongly with the aims of KIX and its current practice; further adaptations would yield even stronger coherence. The Secretariat will work with the grant agent to help improve links between local education groups and KIX Hubs, explore a wider range of options for Hubs to respond to countries' evidence</p>

Recommendation	Management Response
<p><i>through innovation and evidence. The new Operating Model (specifically, the system transformation and system capacity efforts) provide a great opportunity for creating that leverage. This will allow KIX to expand its influence and help GPE and IDRC achieve their goals in strengthening education systems.</i></p>	<p>needs for system transformation, and consider differentiated modalities for grant making to provide opportunities for governments to co-create research directly related to their system transformation priorities and approaches.</p>
<p><b>2. Provide differentiated support to countries according to engagement levels</b></p> <p><i>There is already demand from highly committed countries to receive support in putting ideas and knowledge in to practice, with a focus on adapting innovation to local realities and helping officials overcome implementation challenges. KIX can maximise program impact by providing this additional, tailored support for a select group of highly committed countries. This approach could create success cases that prove the concept, build a clearer path for impact, and create motivation for other countries. Every country could be eligible for this additional support if they reach a participation threshold.</i></p>	<p>The Secretariat partially agrees. KIX Hubs are unique in the global knowledge ecosystem and Hubs should not only reward those countries that already have strong engagement with further support but also incentivize and support those countries whose engagement is lagging. The Secretariat will work with the grant agent and KIX Hubs to leverage links between KIX country delegations, local education groups and national policy dialogues.</p>

Recommendation	Management Response
<p><b>3. Identify key roles in the education department to engage with KIX efforts</b></p> <p><i>The closer the country participation who engage with regional hubs are to policy and decision-making, the more likely hub ideas will be adopted. Identifying key characteristics, including links with policy dialogue and decision-making, as well as the conditions of success for her/his engagement, can help 1) target who the ideal members of the delegations should be, and 2) refine outreach and engagement efforts.</i></p>	<p>The Secretariat agrees and will work with the grant agent to identify and target key education ministry stakeholders to engage more systematically in KIX.</p>
<p><b>4. Simplify Communication</b></p> <p><i>KIX has a broad scope (3 objectives, 6 education priorities, and 70 target countries) and complex dynamics. Acknowledging this complexity, the communications strategy could be refined to transmit a more straightforward message overall. Telling the story of KIX with a clear, communal narrative will motivate, engage, and build cohesion among different stakeholders so they can successfully navigate the complexity of the program which returning to the shared values and goals. This will reinvigorate them to serve as champions who expand KIX's reach and impact.</i></p>	<p>The Secretariat agrees that strategic communications around KIX, while improved over the past year, will benefit from further work as some stakeholders continue to be unsure how best to engage with KIX, or what the benefit of doing so may be. Augmenting strategic communications around KIX will be a priority of the GPE Secretariat's support to KIX going forward, undertaken jointly with the grant agent. The Secretariat will also build on its broader partner engagement strategies to build greater understanding around KIX and what it has to offer.</p>

Recommendation	Management Response
<p><b>5. Refine the Monitoring, Evaluation and Learning (MEL) model</b></p> <p><i>KIX can support a shared narrative around the program’s progress and success by reducing ‘busy work’ and prioritizing a smaller set of meaningful indicators in a collection, reporting, and reflection process for regional hubs and research grantees. This could also lead to more precise and practical evaluations, translating data and insights that better support decision-making and continuous improvement. MEL and communications strategies could be aligned, generating opportunities to elevate achievements, accelerate learning, and generate a shared sense of purpose.</i></p>	<p>The Secretariat agrees with the recommendation.</p>