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Final Report

**Global Partnership for Education (GPE) Secretariat**

**Mid Term Review of Education Out Loud**

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## List of Abbreviations

ACEA	Arab Campaign for Education for All
ANCEFA	African Network Campaign for Education for All
ASA	Advocacy and Social Accountability
ASPBAE	Asia South Pacific Association for Basic and Adult Education
CLADE	Latin American Campaign for the Right to Education
CSEF	Civil Society Education Fund
CSO	Civil Society Organisation
EOL	Education Out Loud
FGD	Focus Group Discussion
GA	Grant Agent
GCE	Global Campaign for Education
GPE	Global Partnership for Education
KII	Key Informant Interview
ISP	Independent Selection Panel
LEG	Local Education Group
MEL	Monitoring Evaluation and Learning
M&E	Monitoring and Evaluation
MTR	Mid-Term Review
NEC	National Education Coalition
OC	Operational Component
OECD-DAC	Organisation of Economic Cooperation and Development – Development Assistance Committee
RC	Regional Coalition

RMU	Regional Management Unit
RQ	Review Question
SDG	Sustainable Development Goal
SIC	Strategy and Impact Committee
TAP	Technical Advisory Panel
ToC	Theory of Change
ToR	Terms of Reference

## Executive Summary

### 1. Background

Education Out Loud (EOL) is GPE’s social accountability and advocacy program, which was approved by the GPE Board of Directors in April 2019 and is currently slated to run until 2024, with an overall funding envelope of U\$55.5 million. EOL builds on Global Partnership for Education (GPE) support to civil society advocacy through the Civil Society Education Fund (CSEF) from 2009 till 2019. EOL is managed by the grant agent (GA) Oxfam IBIS, which has a decentralized structure comprising a global management unit (GMU) based in Copenhagen, Denmark, and four regional management units (RMUs) based in Africa (Ghana and Uganda), Asia (Nepal), and Latin America (Mexico).

EOL’s overall goal is to enhance civil society advocacy capacity and engagement with the education sector to further GPE’s 2020 Strategy – and more recently, the GPE 2025 Strategy – goals and help to ensure transparency and increased effectiveness in education policy and implementation processes. EOL has three overall objectives, with corresponding Operational Components (OCs): to strengthen national civil society engagement in gender-responsive education planning, policy dialogue, and monitoring (OC1 with national education coalitions); to strengthen civil society roles in promoting the transparency and accountability of national education sector policy and implementation (OC2, with national civil society organizations); and to create a stronger global, regional, and transnational enabling environment for civil society advocacy and transparency efforts in education (OC3 with transnational and regional civil society organizations and coalitions).

### 2. Purpose and objectives of Mid Term Review

The purpose of this Mid Term Review (MTR) is to assess the relevance, efficiency, effectiveness, unintended effects, and potential for sustainability of GPE’s support to EOL’s grantees across all three OCs. The MTR has two objectives: to enable the GPE Board and Secretariat to assess whether EOL is on track to deliver on its intended objective of civil society participation in education advocacy and inclusive sector dialogue; and to provide evidence for making decisions on the scope and nature of GPE’s future support for national and international civil society organizations.

### 3. Methodology

The review team adopted a mixed method design based on two principal data collection approaches. A document review and series of key informant interviews and small focus group discussions addressed the review questions through in-depth *qualitative* inquiry. A broadly representative sample of 19 grantees was identified for an in-depth document review, and a total of 65 people were interviewed across the key stakeholder groups. An online survey of all funded EOL grantees (94) produced a 90.4 percent response rate and provided both *quantitative* and *qualitative* information. Data was gathered through the three different methods in a staged process so that the findings of one kind of approach could help shape the questions of another type of approach. Initial findings were discussed with key stakeholders prior to the delivery of the draft and final reports to sense-check findings and co-create recommendations.

## 4. Findings: Relevance

### EQ 1.1. Relevance of operationalization of EOL design to objectives

The operationalization of the EOL design and approach is based on lessons learned and documented good practice and is relevant to the needs of its grantees and achievement of EOL objectives.

EOL has a sound design that has drawn upon lessons learned from previous evaluations and correlates strongly with documented good practice of donor support to civil society. EOL selection and approval processes, and capacity building support, are relevant to supporting civil society organizations contribution to the EOL program objectives of policy dialogue, promoting transparency and accountability and creating a stronger enabling environment. Grantees highlighted EOL's support for civil society advocacy; its emphasis on enabling the voice of the marginalized; its approach to learning and capacity building; and the support offered through the Year Zero process to refine and improve their program proposals, as most relevant to supporting them achieve their objectives. However, some sound, innovative proposals in response to the OC2 Call were unsuccessful due to selection criteria associated with the size of the grant, and many OC1 grantees reported that the grant period was too short for them to fulfill their advocacy-related objectives.

### EQ 1.2. Relevance of EOL to GPE 2021-25 strategy and operational model

EOL's focus on civil society engagement in policy dialogue is relevant to the emphasis of the GPE 2025 strategy and new operating model on system transformation and inclusive sector dialogue. However, opportunities for civil society participation in the model are not yet systematically well-defined nor broadly understood in GPE Secretariat.

EOL's focus on strengthening the capacity of civil society to engage in policy dialogue and promote social accountability aligns well with the ultimate objectives of the GPE 2025 strategy and operating model on country ownership, system transformation, and inclusive sector policy dialogue. However, the new country-level operating model is still in a pilot stage and preliminary documentation identifies only a few formalized mechanisms to ensure the participation of civil society in the Partnership Compact process. Civil society participation in local education fora such as local education groups (LEGs) in the different stages of GPE country processes such as the Compact will be critical. The longstanding presence of many National Education Coalitions (NECs) in some LEGs may potentially offer them an advantage in the new model but not all EOL grantees are currently participating in LEGs, and some stakeholders query the effectiveness of some of the NECs that are present.

The new operating model emphasizes the need for alignment with the educational priority/ies prioritized during Partnership Compact process. This could have implications for the composition of the grantee portfolio such as, for example, for the transnational work undertaken by OC3 grantees. Some stakeholders emphasized that the role of EOL is to contribute to the overall GPE goals of system transformation and equitable, inclusive and resilient education systems, rather than to align itself exclusively to the educational priorities of GPE country processes.

GPE Secretariat country teams have a key role in facilitating the participation of EOL as a strategic resource in the new operating model. However, the review found a variable level of interest and/or understanding among teams of the contribution that civil society organizations can make at country level. The importance of the enabling role of Secretariat country teams is particularly relevant in the increasing number of developing partner countries with restricted civic space and/or where government partners have limited understanding or ownership of the concept of civil society having a role to play in policy making and implementation. Some EOL grantees expressed interest in GPE country teams playing a more pro-active role in facilitating access for civil society in policy-making fora. The majority of GPE Secretariat stakeholders interviewed requested more targeted, context-specific information on EOL and the work of grantees in order to facilitate these linkages.

### EQ 1.3. Incorporation of gender equality, equity and inclusion in EOL.

Gender equality, equity and inclusion embedded in EOL policies and practices.

EOL approach to gender equity and social inclusion draws upon the strong institutional policies of Oxfam IBIS as grant agent and incorporates a gender-aware and inclusive approach in different aspects of the program design such as proposal development, results and monitoring frameworks, and capacity building. While the vast majority of grantees report that EOL has helped them incorporate gender equity and social inclusion in their practices, there is a marked regional variation in the extent to which these concepts are mainstreamed in grantee programs. Some stakeholders suggest that EOL could be more proactive in building greater understanding and ownership of the concepts by grantees through more formalized policies.

## 5. Findings: Efficiency

### EQ 2.1. EOL policies ensure stewardship of resources and successful partnering.

High level of grantee satisfaction with the efficiency of EOL grant administration and approach to learning though there has been some delay in the implementation of the program. Need for stakeholders to collaboratively clarify roles with regards to learning and seek synergy at regional and global levels.

The cost base of EOL falls within documented parameters for multi-donor fund support for civil society in relation to the ratios between program management, program support and grants. The choice of Oxfam IBIS as a grant agent with global reach, skilled staff and a legacy of trust with Southern civil society can also be seen as a value for money consideration.

There is a high level of grantee satisfaction with the transparency and utility of the grant application and approval processes, and with the support offered by the Grant Agent to complete the process. The two-stage grant application process for OC2 and OC3 was positively regarded by grantees, although the demands of the concept notes were time consuming and demanding for some, particularly in the case of alliances. A number of grantees commented that the grant approval process, though transparent and fair, was rather extenuated. The Year Zero process was

seen by OC1 grantees in particular as a distinctive, valued feature of EOL and an important investment in the quality of the final proposal.

A combination of factors in the grant administration process – the unexpected number of OC1 proposals that required further support from the GA; the unexpectedly high number of applications to the OC2 Call for Proposals; and the lengthy grant approval process – have contributed to some operational delays and a lack of synchronization in the implementation of the program. This, in turn, may be a contributory factor to the lack of anticipated synergy between the different operational components and among grantees across each component.

EOL has offered excellent at-distance monitoring support to grantees through Regional Management Units (RMUs) and has recently approved a simplified system of reporting, which grantees had previously found to be time consuming and burdensome. However, the GA continues to invest considerable effort to produce a series of very detailed reports at global level and the utility of such reports might be questioned. The EOL approach to learning (e.g., the development of learning plans for each grantee and the quality of capacity building provided) is also valued by grantees. However, EOL now needs to broaden its approach from being demand-led, grantee-focused to include a more strategic, pro-active approach to knowledge generation and dissemination.

There is evidence that an ongoing lack of coordination between Regional Coalitions and the Grant Agent’s Regional Management Units on learning and capacity building in EOL may lead to duplication of effort and overload of learning initiatives for grantees. There is a risk that this concern may be replicated at a global level where the Grant Agent’s Global Management Unit, the Global Campaign for Education, and the KIX program are all involved in global knowledge creation and dissemination relevant to EOL. It will be important for these actors to seek synergy and avoid duplication of effort as EOL begins to generate more knowledge for dissemination, and as the new operating model with its emphasis on evidence-based policy dialogue, becomes established.

### EQ 2.2. Adaptive management in the design and implementation of EOL.

Adaptive management is mainstreamed in EOL policies and processes and has contributed to most grantees remaining on-track to achieve their objectives despite the disruption of the Covid-19 pandemic.

Nearly all OC1 grantees have adapted work plans and budgets during the evaluation period as a result of the Covid 19 pandemic (OC2 and OC3 grantees have only recently begun implementation). Adaptive management is thoroughly embedded in EOL policies and processes. It is incorporated in the process of proposal development; included in the capacity building in Year Zero; is part of the reporting format for grantees; and underpinned by budgetary flexibility. The delegated authority at the regional level of EOL to approve changes in work plans and budgets has been a major contributory factor to most OC1 grantees’ activities remaining on track. An unanticipated outcome of the ability of grantees to adapt work plans and transfer funds has been increased investment in knowledge products or processes, e.g., in research or the development of a strategic plan or advocacy plan. The GA has also demonstrated an ability to

adapt in a timely fashion to unanticipated challenges in the roll out of the program such as the unanticipated need to provide additional support in proposal development to national education coalitions. However, the early demands of implementation may have inhibited opportunities to reflect more strategically on key issues and plan for future potential adaptation.

## 6. Findings: Effectiveness

### EQ 3.1. EOL achievement of objectives.

OC1 relatively on track towards intended results but room for improvement in outcome reporting, and in the incorporation of a gender and inclusion perspective in program design and objectives.

While it is too early to assess progress of OC2 and OC3 to their objectives, Objective 1 remains relatively on track towards its intended results. In terms of results, NECs are becoming more inclusive of marginalized groups, though some groups – discriminated ethnic, caste, migrant, religious and LGBT communities – remain under-represented or absent; grantees are very satisfied with EOL capacity building, though the level of satisfaction varies among providers; NECs are largely on track with their contribution to policy changes; and the initiation of learning collaboratives is still at an early stage and some regions have yet to move forward. However, some caution should be exercised with regard to this definition of success, and there is room for improvement in grantee outcome reporting. Some outcome statements are more akin to output statements; reporting is frequently to quantitative indicators; there is limited evidence at this stage of beneficiary perceptions of the quality of activities conducted; and the evidence base for reported contributions to policy changes is very variable, as not all grantees report systematically on policy changes.

While grantees report that EOL has helped them incorporate gender equity and inclusion in their work, progress has been strongest in the representation of women’s and girls’ organizations and some marginalized groups in the coalitions. The degree to which gender and social inclusion is mainstreamed in grantees’ program objectives and implementation is variable across the regions, and there is a need for grantees to be supported to deepen and broaden their understanding and application of these concepts in their program design and implementation.

## 7. Findings: Sustainability

### EQ 4.1. Financial and organizational sustainability.

EOL capacity building support contributes to organizational sustainability of grantees but a significant number of OC1 coalitions remain financially dependent on EOL.

OC1 grantees in particular, confirm that EOL helps to support their organizational sustainability as its capacity development support in e.g., proposal development and project cycle management, will make their organizations more able to apply for and obtain funding from other sources. However, a significant number of OC1 coalitions remain largely financially dependent on EOL after several years of GPE grant funding (in some instances, more than 5-10 years of GPE funding), and the opportunities for grant funding of civil society advocacy in the sector are

limited. OC2 and OC3 grantees have a diverse funding base and are not financially dependent on EOL. Grantees across OCs identify fundraising and communications as a priority area for capacity building support.

#### EQ 4.2. Contribution of EOL design to sustainable results.

While grantees often work in an increasingly difficult operating environment, they identify EOL support to access government-led policy fora and engage in collaborative, evidence-based dialogue as a key enabling factor in contributing to long-term change in the education sector.

Although it is too early to confirm what design features of EOL are likely to contribute to grantees achieving long-term change in the education sector, grantees identified a number of enabling factors and obstacles. Among the obstacles cited in an increasingly difficult operating environment were a shrinking civic space for public debate and lack of government recognition for the contribution civil society can make to policy dialogue. However, grantees also identified a number of enabling factors associated more generally with the EOL design. These included EOL support to grantees to access policy fora and have a collaborative policy dialogue with government; to strengthen their organizational capacity as civil society advocates; to conduct policy-related research as an evidence base to promote social accountability; and to develop a diverse and inclusive membership that strengthens their credibility as voices of civil society.

## 8. Recommendations

### Relevance

- *Recommendation 1: In the event of EOL being extended, GPE to consider some design changes to ensure that its funding modalities target and support CSOs and coalitions that have the credibility and competencies to make an impact within the GPE 2025 operating model. This could include a more differentiated grant funding to enable it to support a wider range of CSOs to advocate for and monitor inclusive education, and the provision of three-to-four-year grants across all OCs.*
- *Recommendation 2: In the event of EOL being extended, the GA to retain, reconfigure and rename the Year Zero process and reconsider its competitive element. The principal focus should be to provide an opportunity for grantees to learn and innovate to enrich their proposed approach and generate synergies across the portfolio.*
- *Recommendation 3: GA to develop regional learning plans to strengthen grantees' capacities in line with opportunities to contribute to system transformation and the Compact process e.g., monitoring education financing and government performance in the sector. This could involve initial assessments of the capacities of NECs to contribute effectively to the Compact process and other relevant policy fora and supported by learning partners; facilitated by peer learning, drawing on grantees with a strong track record in this areas; and by knowledge sharing relevant research.*
- *Recommendation 4: GPE EOL Team and GA to devise a plan to raise the profile and level of understanding of EOL among GPE country teams in order to facilitate opportunities for CSO engagement in the Partnership Compact and other relevant fora. This might include producing tailor-made communications on EOL for country teams; developing a guidance note on the opportunities for civil society to play a role in the GPE 2025 operating model; and clarification of GPE Secretariat responsibilities to support country partners in accessing EOL as a strategic resource in GPE.*
- *Recommendation 5: The GA to develop an EOL gender and social inclusion policy that helps improve understanding and mainstreaming of such themes in project activities and use it to broaden and deepen the understanding and application of the concept by grantees across the portfolio. This work could be supported by regional learning partners and peer learning drawing on grantees with a strong track record in this area.*

### Efficiency

- *Recommendation 6: In the event of EOL being extended, GPE/GA to review the efficiency and utility of some key grant management processes - for example, better synchronization of Call from Proposals to facilitate synergies between OCs; reduction in time from Call for Proposal to grant approval (simplified concept note and approval process); and a revised communications framework to produce more tailored communications to share distilled learning and stories of change in EOL.*

- *Recommendation 7: GPE/GA to facilitate synergy and avoid duplication of effort among key stakeholders in knowledge sharing by reviewing:*
  - *Roles and current status of GCE, KIX and EOL at a global level in knowledge creation and dissemination in the context of the new operational model;*
  - *Roles and working practices of RMUs and RCs to ensure learning and capacity development is planned and coordinated efficiently at regional level;*
  - *GA working practices to ensure that its support to learning and knowledge sharing across the program is efficiently coordinated e.g., by developing a joint workplan for GMU and RMUs; reviewing issues and lessons emerging from grantee reports; sharing and discussing issues emerging from the matrix meetings; and providing opportunities to discuss with other stakeholders more strategic issues such as how EOL should approach global learning and maximize synergies with GCE and KIX.*

### Effectiveness

- *Recommendation 8: The GA to consider how best it can support grantees to report on change at outcome level, for example, through use of learning partners. This may include the use of mixed indicators; introduction of methods to establish a plausible contribution to reported changes; use of purposive case studies; and of appropriate tools such as Network Effectiveness Frameworks to assess, monitor and support the representativeness and accountability of the coalitions it supports.*
- *Recommendation 9: GPE Secretariat and GA to review how synergies between OCs can be facilitated in EOL planning and implementation processes in the current period and in any future extension.*

# 1. Introduction

## 1.1. Background

This section sets the context for the Global Partnership for Education (GPE) Secretariat’s Mid-Term Review (MTR) of Education Out Loud (EOL), a GPE mechanism to support civil society engagement and advocacy in the education sector. The section briefly describes the role of EOL within GPE; details the objectives of EOL and introduces its management by the Grant Agent (GA) Oxfam IBIS; and outlines the size, composition, and distribution of the grant portfolio.

GPE is the only global partnership and fund dedicated entirely to helping children in lower-income countries get a quality education. GPE mobilizes partners and funds to help partner countries transform education systems and deliver quality learning to more girls and boys, especially those marginalized by poverty, gender, disability, or displacement. GPE’s overall vision is a quality education for every child, as envisioned by UN Sustainability Goal 4: “to ensure inclusive and equitable quality education and promote lifelong learning opportunities for all.”

The overall goal of the 2025 GPE Strategic Plan is to accelerate access, learning outcomes, and gender quality through equitable, inclusive and resilient education systems fit for the 21<sup>st</sup> century.<sup>1</sup> The 2025 Strategic Plan has three objectives at country level: a) to strengthen gender responsive planning and policy development; b) mobilize coordinated action and financing to enable transformative change and; c) strengthen capacity, adapt and learn to implement and drive results at scale. These country objectives are supported by a global, enabling objective to mobilize global and national partners and resources for sustainable results. GPE is currently piloting a new operational model to deliver the country-level objectives of the 2025 Strategic Plan. EOL, along with the GPE Knowledge and Innovation Exchange (KIX), features in this new operating model as a “strategic capability.”

EOL builds on GPE support to civil society advocacy since 2009 through the Civil Society Education fund (CSEF). EOL (initially titled Advocacy and Social Accountability (ASA) but later rebranded as Education Out Loud) was introduced conceptually in GPE’s Financing and Funding Framework in 2017 and the EOL program was approved by the GPE Board of Directors in April 2019, with an overall funding envelope of U\$55.5 million. EOL’s overall goal was to enhance civil society capacity to further GPE’s 2020 Strategy goals in learning, equity, and stronger systems, by improving its engagement and advocacy in the education sector. The expectation is that this, in turn, will help to ensure transparency and increased effectiveness in national education policy and implementation processes. EOL has three overall objectives:<sup>2</sup>

- **Objective 1:** Strengthen national civil society engagement in gender-responsive education planning, policy dialogue, and monitoring;<sup>3</sup>

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<sup>1</sup> Global Partnership for Education, “GPE 2025 Strategic Plan (2021-2025),” April 2021.

<sup>2</sup> Global Partnership for Education, “Education Out Loud Summary of Results Framework.”

<sup>3</sup> The Proposal for a Costed Extension to OC1, September 2021, has a slightly revised objective: “*Strengthen national civil society engagement in gender responsive education planning, policy development and monitoring*”.

- **Objective 2:** Strengthen civil society roles in promoting the transparency and accountability of national education sector policy and implementation; and
- **Objective 3:** Create a stronger global, regional, and transnational enabling environment for civil society advocacy and transparency efforts in education.

EOL is comprised of three operational components (OCs) that correspond to the three overall objectives, each with a different grantee profile. This MTR will focus on all three components: OC1 with national education coalitions (NECs); OC2 with national civil society organizations (CSOs); and OC3 with transnational civil society alliances.

During the period under review, EOL has issued two Restricted Calls for Proposals under OC1, one Open Call under OC2, and two Open Calls under OC3. It supports a total of 94 grantees,<sup>4</sup> administratively organized in four geographical regions, in addition to the Global Campaign for Education (GCE) and three Regional Coalitions (RCs). The implementation of EOL grants across all three components is scheduled to continue until 2024 under the current phase.<sup>5</sup> Further details of the Calls and the grantee portfolio are provided in Section 4.1.

EOL is managed by the grant agent (GA) Oxfam IBIS which has a decentralized structure comprising a global management unit (GMU) based in Copenhagen, Denmark, and four regional management units (RMUs) based in Africa (Ghana and Uganda), Asia (Nepal), and Latin America (Mexico).

A Rapid Review of the progress of OC1 was conducted in July 2021 and will serve as a secondary source to help inform this mid-term review.

## 1.2. Purpose and scope of review

The purpose of this MTR is to assess the relevance, efficiency, effectiveness, unintended effects, and potential for sustainability of GPE's support to EOL's grantees across all three OCs. The MTR has two objectives:

- To enable the GPE Board and Secretariat to assess whether EOL is on track to deliver on its intended objective of civil society participation in education advocacy and inclusive sector dialogue, and
- To provide evidence for making decisions on the scope and nature of GPE's future support for relevant national and international civil society organizations.

The scope of the review is EOL in its entirety, including OC1, OC2 and OC3, as well as the key stakeholders including the GPE Secretariat, the EOL GA, and EOL grantees. The review covers the period from EOL's conception as ASA in the Design Blueprint (June 2018) until December 2021. GPE's former funding mechanism for civil society advocacy, the CSEF, is not within the scope of the MTR although CSEF documentation has been included in the document review.

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<sup>4</sup> This includes full grants to 61 NECs, 10 OC2 full grantees, 9 OC3 full grantees, the GCE, 3 RCs, and 10 YZ grantees for OC2 and OC3.

<sup>5</sup> Global Partnership for Education, "Terms of Reference for Mid Term Review of Education Out Loud."

The primary intended users of this review are the GPE Board - to enable it to assess whether EOL is on track to deliver its intended objectives, and to provide evidence for its decision-making on the scope and nature of GPE's future support for civil society – as well as the GPE Secretariat and the GA, as the bodies responsible for the implementation of EOL, so that they might inform adaptations in EOL for the remainder of the current funding period i.e., 2022/24, and in any future extension.

## 2. Methodology and analysis

This section summarizes the methodology used during the review, the full details of which are provided in the Inception Report. This includes the Review Matrix; data collection methods and analysis; approach to sampling; and the limitations of our approach.

### 2.1. Data collection and analysis

#### Review matrix

During the Inception Phase the team developed a preliminary Review Matrix based on the 10 review questions (RQs) listed in the Terms of Reference (ToR) under the OECD/DAC evaluation criteria. The Review Matrix identified the relevant analytical approaches, methods, and data sources for each of the RQs and associated sub-questions. The Matrix was revised and finalized following discussions with the colleagues from the Results and Performance team of the GPE Secretariat.<sup>6</sup> This report is structured around the OECD/DAC criteria and the relevant RQs and sub-questions are referenced throughout.

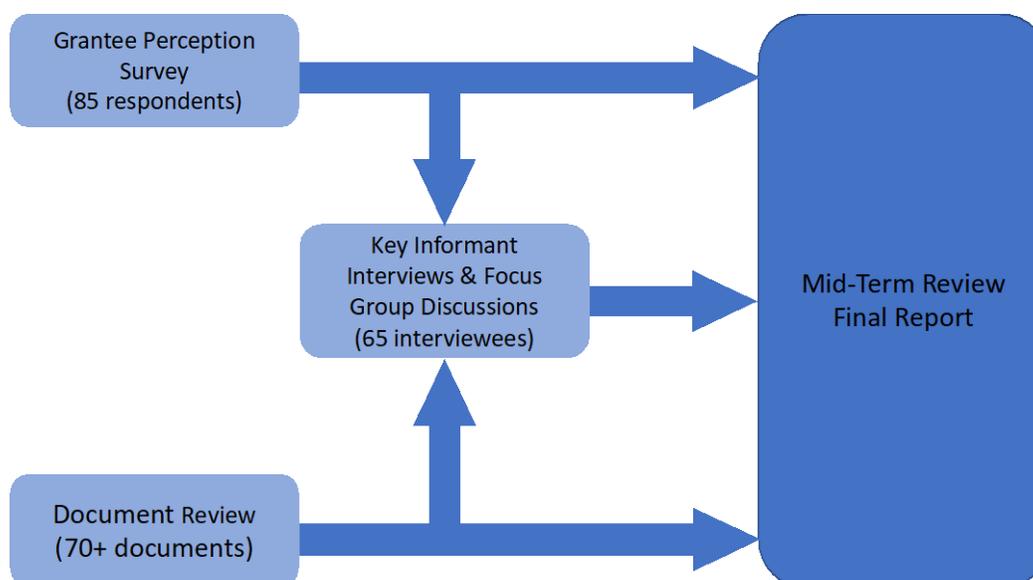
#### A phased approach to data collection

The review team adopted a phased approach to data collection and analysis, using a mixed method design based on two principal data collection approaches:

- A document review and series of KIIs and FGDs that addressed the review questions through in-depth *qualitative* inquiry; and
- An online survey of grantees across the operational components which produced *quantitative* and *qualitative* results.

Data was gathered through three different methods, in a staged process as illustrated below:

Figure 1: Data collection approach



<sup>6</sup> See Annex 1 for the final MTR Matrix.

The sequencing of data collection approaches enabled the findings of one kind of approach to help shape the questions for another kind of approach. For example, a thorough review of secondary documentary data and of the survey results enabled the team to identify any gaps in the evidence base and any issues that require further investigation through key informant interviews and focus group discussions. Since all data gathering tools were developed in line with the Review Matrix, the team was able to systematically triangulate information across different data gathering methodologies prior to the development of its analysis and findings. A preliminary set of initial findings and possible recommendations were presented to and discussed by key stakeholders in a workshop held on March 4<sup>th</sup>, 2022. Feedback from the workshop helped to refine the analysis and conclusions of the draft report.

### **Approach to sampling**

For the purposes of the document review, key informant interviews and focus group discussions, the review identified a sample 19 grantees across the three OCs (approximately 20 percent of the total grantee population of 94). This sample of 19 grantees was comprised of: 11 out of 54 grantees in OC1; four out of 20 grantees in OC2; and four out of 20 grantees in OC3.<sup>7</sup> This enabled at least one OC2 grantee to be sampled in each region and one OC3 grantee to be sampled in West Africa, East Africa and Asia, and from the Global Unit. In relation to OC1, the sample included four grantees in West Africa, three each in East Africa and Asia, and one in Latin America/Caribbean. The aim was to avoid an overlap of countries among grantees so that the sample covered 19 countries and not to overlap with the countries sampled in the Rapid Review of OC1. The team used three criteria for a purposeful and representative sample of grantees that was broadly representative of:

- *Geography*: The geographic spread of the grantee portfolio across the four regions since the Rapid Review of OC1, for example, highlighted the diversity of NECs across the different regions.
- *Civil society context*: The different operating contexts for civil society to engage in education sector planning, policy dialogue and monitoring. The review used the CIVICUS Monitor civic space categories<sup>8</sup> open, narrowed, obstructed; repressed or closed.
- *Organizational capacity*: The different levels of capacity of national and regional coalitions. The mid-term review used whether grantees had undergone Year Zero or moved directly to submit a full proposal as a proxy indicator of the organizational capacity of national coalitions.

Using these three criteria, the review identified a representative sample of grantees which was discussed with the GPE Secretariat and subsequently amended while maintaining its overall representativity in terms of the sampling.

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<sup>7</sup> See Annex 3 for the distribution of grantees in the sample according to these criteria. RCs and GCE are separately contracted as part of OC1 to play the role of learning partner for the NECs. In addition, there is an agreement with GCE in OC3 as consortium lead with the RCs to play an advocacy role. GCE is included in the sample under OC3 due to the importance of its role within GPE and EOL.

<sup>8</sup> For detailed methodology see <https://www.civicus.org/documents/civicus-monitor-methodology-paper.pdf>

## Document review

A systematic document review of supporting GPE and EOL documents and other relevant literature was conducted immediately after the approval of the Inception Report, though additional documents from key respondents included in the sample were also subsequently consulted. The early sequencing of the document review helped to identify gaps in data, knowledge, and reporting to be informed – if feasible – by key informant interviews and focus group discussions. It also provided an initial indication of the evaluability of the program, based on the secondary data and documentation readily available.<sup>9</sup> Data gathered from the document review was systematically gathered in line with the Review Matrix and triangulated with data derived from other data sources.

The review included relevant documents at different operational levels, ranging from the GPE 2025 Strategy to the project documentation of sampled grantees. At a later stage, the team also conducted a limited review of relevant grey literature to enable the team to assess EOL performance in relation to documented good practice in donor support to civil society in relation to two key performance dimensions included in the Review Matrix.<sup>10</sup> A full list of documents reviewed can be found in Annex 4.

## Survey of grantees

The Review Team administered an online survey in the four working languages of EOL – English, Spanish, French, and Portuguese – to the entire grantee population of Education Out Loud to gather their perceptions of the implementation and management of EOL thus far. The unit of analysis was the primary recipient of the EOL grant financing, including the NECs in OC1 (not the organizational members of the coalition), the national civil society organizations or lead organizations in OC2, and the lead transnational organizations in OC3. Each grantee was requested to complete only one survey questionnaire so as not to bias the results towards larger grantees, though grantees were encouraged to discuss the questionnaire within their internal team before completing the survey questionnaire. The survey was also written in such a way so as to target all OCs (i.e., one single survey questionnaire template across all OCs) and use closed and open questions to generate both primary quantitative and qualitative data. The survey was open for three weeks during late November and early December 2021.

There is a population total of 94 individual EOL full and year zero grantees: 54 in OC1, 20 in OC2, and 20 in OC3. There was a total of 85 independent responses to the grantee survey, a response rate of 90.4 percent of all EOL grantees.<sup>11</sup> Of the 85 responses, 52 respondents identified as OC1 grantees (96.3 percent of all OC1 grantees), 18 as OC2 grantees (90 percent of all OC2 grantees), and 15 as OC3 grantees (75 percent of all OC3 grantees), as illustrated in Figure 2 below.

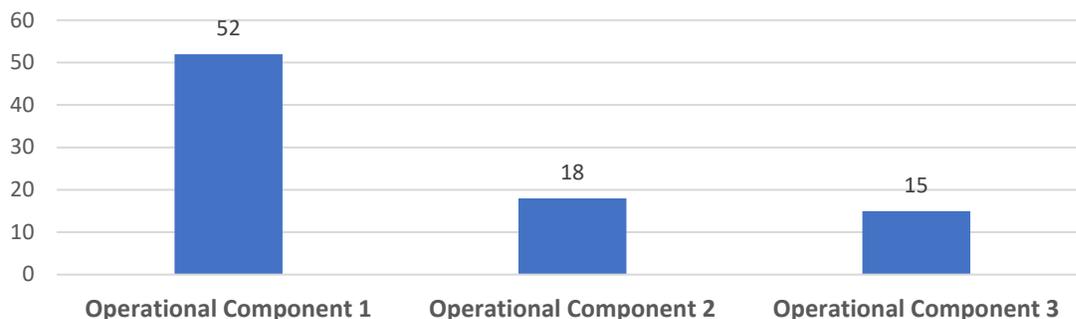
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<sup>9</sup>See Section 2.2. for a brief evaluability assessment identifying which questions could be partly or not addressed, and why, due to the quality or availability of data.

<sup>10</sup> See Section 4.2.

<sup>11</sup> It should be noted that for almost all questions in the survey, the response number was slightly below 85 as grantees had the opportunity to skip or not answer a question. Therefore, some respondent totals in data presented in the report do not equal 85 but are the total respondent numbers for that particular question.

**Figure 2: Total number of grantee perception survey respondents per OC**



### Key informant interviews and focus group discussions

The Review Team conducted key informant interviews (KIIs) and focus group discussions (FGDs) with relevant stakeholders to capture information across all RQs and provide evidence for the review. A range of categories of stakeholders were interviewed to ensure that different stakeholder perceptions were captured to inform to the review findings. The Review Team used a short, semi-structured interview guide based on the questions of the Review Matrix and adjusted for different stakeholder groups (guides presented in Annex 9). Detailed notes were taken by the interviewer so that findings could later be triangulated with other data sources. Stakeholders were interviewed in their language of preference, informed of the confidentiality of the interview, and provided oral consent to the interview. A total of 65 persons were consulted in total, as illustrated in Table 1 below.

**Table 1: Stakeholders for Key Informant Interviews and Focus Group Discussions**

Stakeholder Group	Stakeholder	Number of KIIs/FGDs
GPE Secretariat	EOL Team	3 KIIs (3 interviewees)
	Other Secretariat Staff (including CTLs, Global Advocacy Team, etc.)	6 KIIs and 1 FGD (9 interviewees)
Grant Agent	Global Management Unit Team	6 KIIs (6 interviewees)
	Regional Management Unit Leads	1 FGD (4 interviewees)
	Virtual Teams	1 FGD (4 interviewees)
Sample of Grantees	OC1 national education coalitions	8 KIIs and 2 FGDs (11 interviewees)
	OC2 national civil society organizations	4 FGDs (10 interviewees)
	OC2 unsuccessful grantees	1 KII (1 interviewee)
	OC3 transnational civil society alliances	4 KIIs (4 interviewees)
	OC3 unsuccessful grantees	1 KII (1 interviewee)

Other relevant stakeholders	Global Coalition for Education	2 KIIs (2 interviewees)
	Regional Coalitions	2 KIIs and 2 FGDs (8 interviewees)
	Learning Partners	1 KII (1 interviewee)
	Independent Selection Panel Member	1 KII (1 interviewee)
<b>Total Number</b>		<b>46 KIIs and FGDs (65 interviewees)</b>

## 2.2. Limitations of approach

The MTR acknowledges some limitations with regards to data collection and the findings presented in this report. The language of the report has been nuanced, where relevant, to acknowledge the extent to which findings and conclusions are limited by the availability of data. Specific limitations include the following:

**Cost efficiency:** The MTR’s inception report included an adjusted definition of the OECD-DAC criterion of efficiency as ‘The extent to which EOL policies and procedures delivers results in an economic and timely way, ensures adequate stewardship of resources, and facilitates successful partnering.’<sup>12</sup> The MTR was asked to provide some analysis of the cost-efficiency of EOL where possible. A cost-benefit analysis of EOL’s grant management would require a detailed and robust financial assessment which is beyond the scope of the MTR. However, a simple breakdown of the cost base of EOL is included in Section 4.1. along with certain Value for Money considerations.

**Coalition members’ perspectives:** The MTR was asked to include beneficiary and coalition members perspectives in its findings. Where possible, the MTR has requested data from the sampled grantees regarding beneficiary-level feedback and, in the case of NECs, coalition members. However, this type of data has not been systematically collected by EOL and was not readily available for review by the MTR.<sup>13</sup> If beneficiary perspectives are to be required in the future, grantees will need to be advised that this kind of data needs to be gathered and reported on. As of March 2022, there are early indications that this type of data will be available in the future for OC1 from the external project evaluations commissioned by NECs.

**OC2 and OC3 effectiveness:** Since OC2 and OC3 grantees are in the very early stages of implementation, there is limited data to assess the extent to which Objectives 2 and 3 have been achieved, particularly with regards to longer-term outcomes relating to policy advocacy, influencing, and monitoring. This limitation has been acknowledged in discussions between the MTR and the GPE Secretariat and the GA. However, where possible, the MTR has drawn upon the most recent reports of OC2 and OC3 sample grantees to illustrate some early progress towards their own objectives and the OC2 and OC3 outcomes of the Global Results Framework. It should be understood that this is not a systematic representation of progress across these

<sup>12</sup> MTR Inception Report, p. 11.

<sup>13</sup> The GA notes that such perspectives are included in several external evaluations commissioned by OC1 grantees which have only recently become available.

OCs, but it offers an illustration at grantee level of what progress might look like for Objectives 2 and 3 moving forward.

Virtual data collection due to Covid-19: Due to the COVID-19 pandemic, the MTR has been limited to virtual activities and data collection. There have not been any field visits, face-to-face interaction, or in-person data collection to inform the evidence base of this report. Despite these limitations, data collection has been extensive and participatory. The MTR conducted all KIIs and FGDs virtually (including using Zoom, Teams, and WhatsApp) and disseminated an online questionnaire to all EOL grantees. However, the absence of field visits may have limited the extent to which some stakeholders, such as coalition members and beneficiary groups, have been able to feed into the MTR findings, and lessened the opportunity to build rapport and engagement with stakeholders during data collection.

## 3. Findings: Relevance

### 3.1. Relevance to learning and best practice

This section will examine the extent to which the design and approach of each operational element draws upon learning and best practice, internally and externally (RQ 1.1.1.). It will assess the extent to which the design of EOL has drawn upon the lessons of internal research and previous evaluations and complies with documented good practice in relation to donor support to civil society.

#### *Key findings*

- *The design of EOL draws explicitly on past learning, expert advice and comparator research.*
- *EOL complies with good practice in donor support to civil society in most key areas.*
- *The mix of funding windows and approach to multi-year funding are two areas that good practice indicates that EOL might consider.*

#### **Contribution of key learning to design of EOL**

The MTR confirms the conclusion of the Rapid Review of EOL's Operational Component 1, that the EOL design was solidly based on lessons learned from CSEF evaluations and international best practice.<sup>14</sup> The MTR found a clear, documented process in the design of EOL of drawing on past learning from CSEF evaluations, expert advice, an analysis of comparator funds, and a consultation process including civil society coalitions.

A year-long process of consultation, research and meetings with a Technical Advisory Panel (TAP) fed into the design of EOL. In October 2017, the GPE Secretariat produced a summary of lessons learned from the first two phases of CSEF from 2009-2015.<sup>15</sup> The Secretariat conducted an extensive consultation exercise with key stakeholders, predominantly civil society organizations.<sup>16</sup> Key findings of the exercise included the importance of an iterative process of learning and adaptation over a multi-year period, and of embedding learning and capacity building into grant activities. A comparator analysis of 20 funds supporting social accountability/advocacy initiatives was also conducted<sup>17</sup> that highlighted two comparator practices that have been key in the design of EOL, i.e., the use independent external experts to review grant applications, and the adoption of a two-stage grant application process.

The findings of both these exercises were presented to the Strategy and Impact Committee (SIC) meetings in September and October 2017 which subsequently recommended a number of design principles to the GPE Board. The original EOL program document itemizes these guiding principles of the Committee and states that they have been addressed by several of the design features of EOL, though these are not specified.<sup>18</sup> A Technical Advisory Panel of civil society specialists was also formed in early 2018 to offer informed insight into the operational design of

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<sup>14</sup> The Rapid Review of EOL's Operational Component 1, August 2021, p.16.

<sup>15</sup> Several of these lessons are still pertinent to EOL and will be referred to subsequently in this report.

<sup>16</sup> <https://www.globalpartnership.org/library>

<sup>17</sup> <https://www.globalpartnership.org/library>

<sup>18</sup> See ASA Design Blueprint, June 2018, Annex 4.

ASA. Lastly, the EOL program document cites the final evaluation of the third CSEF program (2016-2018) as particularly relevant to the design of EOL, and details specifically how key recommendations have been incorporated into the EOL design,<sup>19</sup> as illustrated below.

**Box 1: Learning incorporated from recommendations of final evaluation of CSEF III, 2018**

- Require grantees to develop their own ToC relating to the overall EOL TOC.
- Include gender and social inclusion as criterion in the assessment of proposals.
- Review and update the ToC assumptions throughout EOL implementation.
- Recognize the importance of capacity building in citizen engagement and the qualitative nature of advocacy outcomes.
- Assess the capacity of Regional Secretariats in relation to their objectives.
- Ensure support to CSOs in fragile and conflict-affected states is properly represented in grants portfolio.
- Retain the national-regional-global architecture of CSEF.
- Establish a clear separation of responsibilities of key stakeholders.
- Build grantee capacity in proposal development.
- Facilitate cross-regional learning and sharing among grantees.
- Strengthen grantees' research capacity according to learning plans.
- Promote participation of civil society in formal planning and policy fora such as LEGs.

**Relevance of EOL vis-a-vis good practice in donor support to civil society**

The MTR conducted a limited literature review<sup>20</sup> of documented good practice in donor support to civil society, focusing on two key performance dimensions: the relevance of the operationalization of the design and approach of EOL to achieving its objectives, and the efficiency of grant management policies and procedures.<sup>21</sup> The following draws upon two principal sources of lessons learned on donor support to civil society. The first is a study conducted by INTRAC on behalf of the Ministry of Foreign Affairs (MFA) Denmark of 35 multi-donor funds to support civil society, the findings of which were subsequently summarized as a Guidance Note to Danish Missions.<sup>22</sup> The Guidance Note identified seven critical success factors for support to civil society through multi-donor funds.<sup>23</sup> Box 2 briefly assesses how the operationalization of the design of EOL compares to these critical success factors.

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<sup>19</sup> Advocacy and Social Accountability (ASA): Portfolio Application, March 2019, pp11,12.

<sup>20</sup> See Bibliography for documents consulted.

<sup>21</sup> Inception Report p.15.

<sup>22</sup> "Study on Support to Civil Society through Multi-Donor Funds", INTRAC, January 2013.

<sup>23</sup> "Multi-donor funds in support of Civil Society: A Guidance Note for Danish Missions", MFA Denmark, 2013.

## Box 2: Critical success factors for support to civil society (Guidance Note to Danish Missions)

<p><b>1. Alignment and harmonization:</b> Purpose and operation of the fund is aligned with the strategies and values of the donors.</p>
<p><b>EOL:</b> Focus on civil society engagement in policy dialogue, social accountability and enabling environment is aligned with the emphasis of GPE 2025 strategy and operational model on ownership, system transformation, sector policy dialogue and country-level decision-making. (Section 3.2.)</p>
<p><b>2. Design: context and consultation and transition.</b> Design of fund based on consultation with civil society; a dynamic analysis of context including the situation of the most vulnerable and marginalized; and has a scenario plan re its future and the sustainability of the work supported.</p>
<p><b>EOL:</b> Design involved extensive consultation, including civil society, and comparator analyses. (Section 3.1.) No scenario plan in the event of EOL not being refinanced.</p>
<p><b>3. Clarity and participation of donor governance.</b> Governance and management roles are clearly defined, and civil society is sufficiently represented in governance structures.</p>
<p><b>EOL:</b> Civil society represented in EOL governance but are also EOL grantees which some perceive as potential conflict of interest and underpinning ongoing tensions with GA regarding roles. (Section 4.2.)</p>
<p><b>4. The right kind of leadership.</b> Grant agency has the leadership, skilled staff and decision-making authority to respond flexibly and effectively to civil society and donors' needs.</p>
<p><b>EOL:</b> Oxfam IBIS has staff with the relevant competencies, a decentralized structure, track record of working with civil society in the South (Section 4.1.), and has mainstreamed and demonstrated adaptive management to respond to grantee and donor needs. (Section 4.3.)</p>
<p><b>5. Appropriate, transparent funding.</b> Funding modalities are appropriate for the civil society target groups and grant administration procedures are conducted transparently and fairly.</p>
<p><b>EOL:</b> Grantees affirm funding modalities are clear and easy to use but they may be a barrier to entry to some CSOs. (Section 4.1.)</p>
<p><b>Adding value through capacity development.</b> Fund invests in its own 'added value' i.e., provides appropriate capacity development, and distils and shares learning within and beyond the fund.</p>
<p><b>EOL:</b> Grantees affirm that capacity building support offered by GA has been relevant and supported the achievement of their objectives. (Section 5.1.)</p>
<p><b>6. Accountability and learning.</b> M&amp;E framework provides plausible evidence of the effectiveness of the fund achieving change while reporting on the processes that contribute to these changes. Facilitates learning among internal stakeholders and shares learning within the sector.</p>
<p><b>EOL:</b> Room to improve the evidence base of EOL outcome reporting. Need for greater stakeholder coordination in facilitating knowledge sharing within and beyond EOL. (Section 5.1)</p>

The other main reference with regards to good practice in donor support to civil society is OECD/DAC lessons on partnering with civil society,<sup>24</sup> distilled from DAC peer reviews. The following briefly summarizes the operationalization of the design of EOL, which corresponds to documented good practice from the DAC Peer Reviews in relation to the two performance dimensions below.

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<sup>24</sup> OECD/DAC "Partnering with Civil Society: 12 Lessons from DAC peer reviews". 2012

## Relevance of the operationalization of the design of EOL to achieving its objectives (RQ1.1.1)

*OECD/DAC Lesson 7: Match funding mechanisms with the purpose:*

*Donors should have a mix of funding mechanisms that are tailored to suit CSO partners, strengthen ownership and match policy objectives. Multi-year funding facilitates planning, implementation, knowledge gathering and sharing, and policy dialogue. Core funding, when CSOs have the capacity to manage resources efficiently, can strengthen CSO ownership and flexibility. Calls for Proposals should have clear guidelines, allow sufficient time for CSOs to submit proposals, and allow joint proposals by CSOs.*

EOL's OCs explicitly reflect its three advocacy-related objectives in relation to civil society engagement in planning, policy dialogue and monitoring; promotion of transparency and accountability; and the creation of a stronger regional and transnational enabling environment. Calls for Proposals have been well managed and, in OC 3, tailored to joint proposals. Multi-year funding, however, is an issue that has consistently emerged from OC1 grantees, i.e., the limitations of two-year grants for advocacy projects, especially through coalitions<sup>25</sup>.

Considerable attention was given in the design stage as to how EOL could support the organizational and financial sustainability of grantees though work remains to be done as to how this can best be operationalized (see Section 6.1). Grantees confirm that funding modalities are appropriate and grant administration procedures are transparent and fair (see below and 4.1).

*OECD/DAC Lesson 4: Choose partners to meet objectives*

*Choosing partners to meet objectives can be challenging for donors. They may have to find new civil society partners while longstanding partners may see their partnerships transformed. The form of cooperation should follow function. Strategic objectives rather than donor funding mechanisms should drive and determine the choice of partners.*

EOL, for the first time in GPE support for civil society advocacy, has opened its funding mechanisms to a wider range of CSOs in support of its objectives, while preserving its historical relationship with NECs through Restricted Calls for OC1. However, if strategic objectives are to drive the choice of EOL partners (and not vice versa), the challenge facing EOL is to ensure its funding mechanisms support civil society coalitions and CSOs that represent and facilitate the voice of marginalized groups and can generate research-based evidence for civil society advocacy. This resonates with the steer in the early design of EOL that "... *new and experimental platforms for evidence-based advocacy and strategic civic mobilization are needed.*"<sup>26</sup> Current EOL funding windows may offer some limitations in this regard. The GA reports, for example, that the majority of OC2 applicants presented concept notes with budgets

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<sup>25</sup> The original intention was to fund NECs for three years, but this was revised due to budgetary considerations arising from the transition from CSEF to EOL.

<sup>26</sup> TAP memo, 27<sup>th</sup> March 2018

close to the ceiling and, although many contained interesting and novel approaches, they were rejected since applicants had no demonstrated capacity to manage a grant of that size.<sup>27</sup>

*OECD/DAC Lesson 6: Respect independence while giving direction*

*Donors should recognize that CSOs are development actors in their own right and support CSO defined objectives when these are demand driven and locally owned. A mix of funding modalities is required to take into account the diversity of CSO roles and capacities. It should be clear beforehand whether a CSO is expected to align with partner government priorities or fill gaps in these priorities.*

An important feature of EOL is that grantees design their own proposal objectives and results frameworks. A key issue for EOL will be to what extent the GPE 2025 operational model will enable it to continue to support system transformation efforts beyond those prioritized in Partnership Compacts, and beyond GPE-focused dialogue mechanisms such as the LEGs (see Section 3.3.).

### **The efficiency of grant management policies and procedures (RQ2.1.1)**

*OECD/DAC Lesson 8: Minimize transaction costs*

*Donor procedures should be strategic, streamlined, and flexible. Transaction costs can be reduced by multi-year or core funding to partners with a good track record; having a programmatic rather than project focus; adapting reporting requirements to size of grant and risk level associated with the CSO; using the systems of CSOs with demonstrated capacity for monitoring and reporting, and internal or external financial audit.*

KII and survey data confirms that grantees consider EOL processes relevant and easy to use but also that grantees find the transaction costs of EOL reporting requirements unreasonably time consuming (the EOL system of grantee reporting has since been simplified.) Grantees appreciate that they can allocate up to 25 percent of an EOL grant to core or administrative costs.

### **Relevance to local partners and grantees (RQ1.1.2)**

This sub-section assesses to what extent the implementation of the design and approach of EOL has been relevant to grantees in their engagement in policy dialogue and advocacy (RQ1.1.2) drawing, in particular, on the evidence of the grantee survey and KIIs with grantees.

*Key findings*

- *Grantees confirm that EOL design and approach is relevant to achieving their objectives*
- *Features of EOL design relevant to grantees include its support to civil society advocacy; emphasis on the voice of the marginalized; approach to learning and capacity development; and the concept of Year Zero*
- *Short-term i.e., two year, grants are not seen as relevant to advocacy programs by OC1 grantees*

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<sup>27</sup> Email correspondence 23/02/22

Survey data confirms that the overwhelming majority of grantees perceive EOL’s financing as relevant because it helps grantees deliver on their own objectives in their contexts. Over 83 percent of grantee respondents either strongly agreed or agreed that EOL’s financial support was relevant to their objectives of engaging in policy planning, dialogue, monitoring, and civil society advocacy.<sup>28</sup> This corresponds with the finding of the Rapid Review of EOL OC1 that the strategic design of EOL was very relevant to NECs in GPE partner countries. The areas which scored less highly were compliance and fundraising and communications, mainly because a significant percentage had not received support in these areas.

Survey and KII data highlight four design features of EOL that are particularly relevant to grantee objectives and one identified feature where the relevance of its design could be enhanced for OC1 grantees.

**i) Support to civil society advocacy within the GPE operating model**

The opportunity to influence government through the GPE 2025 operating model was highlighted as especially relevant by a few grantees, especially in Eastern and Southern Africa, by providing them with the leverage and legitimacy to engage with government stakeholders and participate in local education groups (LEGs).<sup>29</sup> EOL support for grantees’ national level programming, in line with the country focus of the new operating model, was also identified as a reason for its relevance to local context and the individual needs of grantees.<sup>30</sup>

**ii) Enabling the voice of the marginalized**

A number of grantees in the survey and KIIs commented that the emphasis of EOL on enabling the voice of civil society, particularly the most marginalized, was particularly relevant to them. Grantees’ suggestions on how EOL could be more relevant to marginalized groups included ensuring that the affected people themselves are strongly engaged in the project and given the opportunity to speak for themselves; direct support to organizations run by marginalized people or that work for the benefit of marginalized people, including youth; and focusing on experimental and out of the box strategies to deliver opportunities to those left behind.

**iii) The EOL approach to learning and capacity building**

EOL’s approach to and support for learning and capacity development of grantees was frequently cited by survey respondents as one of the most relevant aspects of EOL support to grantees achieving their objectives.<sup>31</sup> Approximately 70-80 percent of respondents agreed or strongly agreed that EOL capacity development support in gender and inclusion, compliance, advocacy, technical skills and governance, had been relevant to their organization’s needs. Most of the remainder had not received support in these areas. However, only 60 percent agreed/strongly agreed with regard to fundraising and communications, since this was the area where grantees reported having received the least support.

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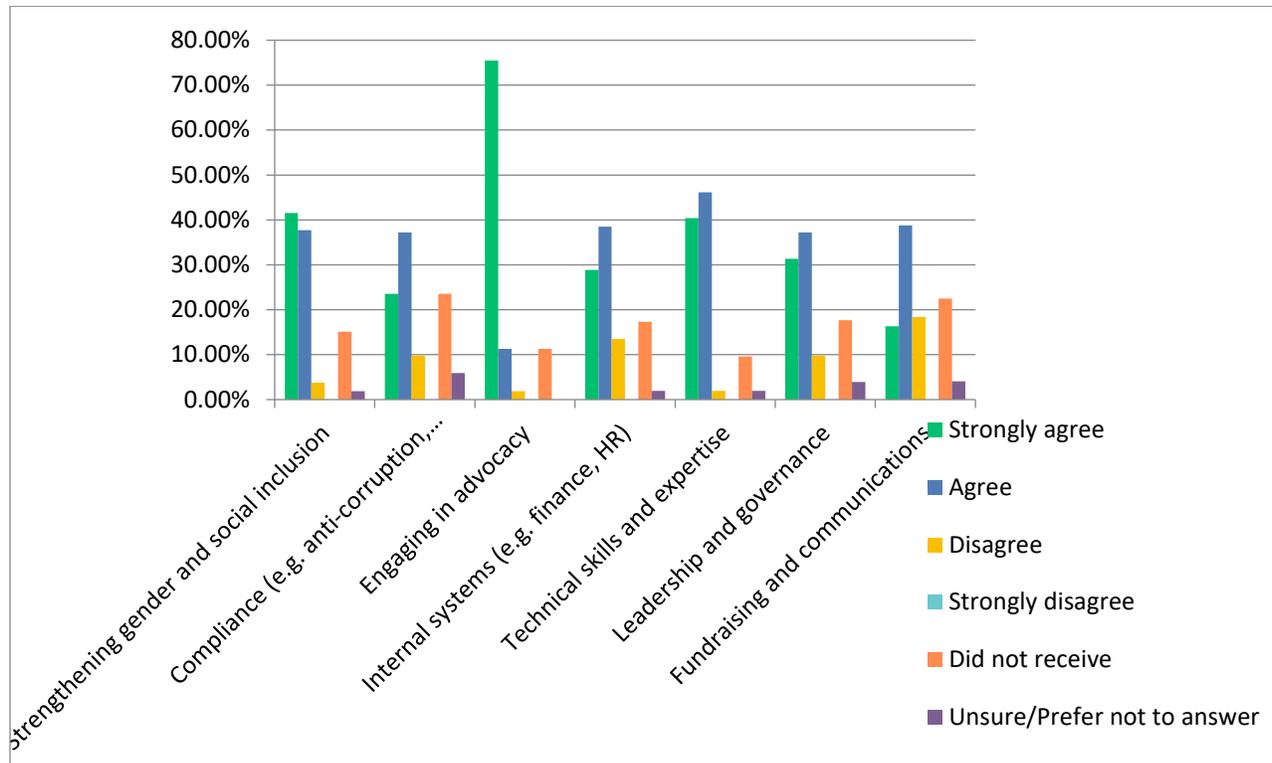
<sup>28</sup> Q10 of survey; KIIs 15, 19, 21,25

<sup>29</sup> KIIs 20, 21

<sup>30</sup> KII 10.

<sup>31</sup> Q 13 of grantee survey

**Table 2: EOL surveyed grantee responses as to whether ‘EOL capacity building support has been relevant to my organization’s needs’**



**iv) Year Zero concept**

The Year Zero concept, whereby grantees are awarded a modest grant to enable them to enhance the quality of their proposal prior to implementation, was cited by grantees interviewed as relevant to helping their organization achieve its objectives<sup>32</sup>. A number of grantees across OCs commented that EOL was distinctive as a donor in providing this opportunity and support to shortlisted applicants, and that frontloading this investment would likely contribute to avoiding difficulties during implementation.<sup>33</sup>

The grant agent introduced an innovation to the design of Year Zero for OC2 and OC3 that was not foreseen in the original ASA program document by deciding to shortlist twice as many applicants for the process than would have their proposal approved. Only nineteen of the 39 OC2 and OC3 grantees that underwent the Year Zero process had their full proposal approved, although the GA acknowledges that a sizeable majority of unsuccessful proposals were of good enough quality to warrant approval (reasons for this are discussed in detail in Section 4.1, on grant application administration).<sup>34</sup> This competitive element to the process was introduced by

<sup>32</sup> KIIs 4,13,14,17,18,23. However, only two survey respondents referred to the Year Zero process as one of the most relevant aspects of EOL to their organizational needs.

<sup>33</sup> KIIs 4,18,13

<sup>34</sup> Interview with GA, 19/10/21

the GA to incentivize quality proposals but the appropriateness of such an intensive Year Zero process was questioned by some grantees. An OC3 grantee pointed out that preparing a proposal is a big time-investment for a consortium application, and that it would be better for EOL to support all shortlisted organizations to develop a good quality full proposal.<sup>35</sup>

#### V) Duration and size of grant

OC1 grantees, in particular, raised the issue of the adequacy of short-term funding and highlighted the need for a longer grant period for an advocacy-based program.<sup>36</sup> Most OC1 grantees received a two-year grant for 2020-21, followed by a two-year extension for 2022-23. Several grantees highlighted how the uncertainty around grant renewal affected the planning and implementation of activities. Grantees across all OCs concurred that grants should be for three years or four years. Several OC1 grantees also queried the size of the grant in comparison to OC2 and OC3 grants.

### 3.2. Relevance to GPE 2025 strategy

This sub-section assesses to what extent EOL efforts are aligned with the priority areas articulated in GPE's new strategy, GPE 2025, and its new operating model (RQ1.2). It should be acknowledged that the design and significant portion of the operationalization of EOL predates the new strategy, so this assessment is more forward looking. The evidence gathered will also address the extent to which the new operational model will uphold or undermine Assumption 4 of the EOL theory of change (RQ 3.1.2).<sup>37</sup> These findings draw upon relevant GPE Secretariat documentation currently available, as well as KIIs with the GPE Secretariat, GA, and some grantees and learning partners. The sub-section will outline how civil society features in the GPE 2025 strategy and new operational model; identify some potential entry points for EOL within the model; and review some key factors relevant to EOL fulfilling its potential within the new model.

#### *Key findings*

- *Civil society, including but not limited to NECs, is a key stakeholder in the new GPE 2025 strategy and operating model, in continuation of the previous GPE 2020 strategy.*
- *Opportunities for civil society to participate in the new model and Compact process not yet well-defined, although the longstanding presence of NECs in LEGs should offer them an advantage.*
- *Grantees confirm government commitment to civil society participation in LEGs varies, depending in part on the strength of the LEG, the maturity of participating civil society, and the level of mutual trust between members of the LEG.*
- *A key question is whether EOL will continue to contribute to the overall GPE goal of system transformation or align itself exclusively with the priority/ies established by the Compact process.*

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<sup>35</sup> KIIs 5,8

<sup>36</sup> KIIs 14,16,24,26,27

<sup>37</sup> Assumption 4: "GPE's partnership approach can help strengthen the responsiveness of the education sector to citizen needs by creating the conditions for civil society to work productively with GPE country partners, including Local Education Groups (LEGs)."

- *Grantee involvement in budget monitoring was identified as an opportunity for EOL to increase its relevance to GPE country processes.*
- *Secretariat Country Teams are responsible for facilitating EOL as a strategic resource at country level but there is variable interest/understanding of EOL's potential contribution to system transformation at country level.*

Civil society does not feature prominently in the GPE 2025 strategy and is referred to only under the enabling objective to mobilize global and national partners and resources for sustainable results.<sup>38</sup> It features more prominently in the summary of the new operational model in the strategy<sup>39</sup> as a 'strategic capability' to strengthen country-level dialogue in GPE partner countries, for example, by advocating for more and better global financing for education and cross-sectoral collaboration to reinforce country capacity.<sup>40</sup>

The new strategy and operating model emphasize ownership, system transformation, sector policy dialogue and country-level decision-making.<sup>41</sup> In general terms, EOL's focus on strengthening the capacity of country-level stakeholders such as NECs and CSOs to engage in inclusive sector dialogue is well-aligned to the GPE 2025 strategy and operating model. EOL is sometimes referred to as 'an additional tool in our belt' for the GPE Secretariat to work with a broader, more inclusive group of stakeholders such as CSOs to support and reinforce GPE's global, regional, and national advocacy efforts.<sup>42</sup> Although the new operational model is still in a pilot phase, the potential role of civil society in the model is described in more detail in recently issued GPE guidelines<sup>43</sup> under the three stages of the critical pathway of the country-level Partnership Compacts in the new model – preparing, establishing, and implementing.

- *Preparing:* The new model anticipates that civil society will participate in the preparation phase of the Partnership Compact process through the LEGs. One opportunity would be for an EOL grantee to be part of the task group convened by the government to analyze the four enabling factors as part of this process; e.g., EOL grantee reports and publications are cited as possible sources of evidence in the dialogue on sector coordination<sup>44</sup>, and/or on the dialogue on public expenditure in education where there is a clear role for EOL to contribute evidence on, for example, equitable access - in particular in relation to marginalized groups. The Compact Review Checklist's request that *"the process to prepare this proposal has been both government-led and inclusive of civil society and teacher organizations."*<sup>45</sup> The draft Guidelines on enabling factor analysis also suggest that, if the LEG is deficient in terms of its inclusivity, *"arrangements can be made to ensure that the*

<sup>38</sup> "GPE 2025 Strategic Plan", p 21

<sup>39</sup> "GPE 2025 Strategic Plan", pp 25,26

<sup>40</sup> GPE Secretariat. Nov-Dec 2020. "Meeting of the Board of Directors: GPE 2025 Operating Model Framework." Pp. 29-30.

<sup>41</sup> GPE Secretariat. November 2021. "Draft Guide for Enabling Factors Analysis for GPE System Transformation Grants."

<sup>42</sup> KII 36, 37, 43.

<sup>43</sup> GPE Secretariat. October 2021. "Partnership Compact Development Guidelines."

<sup>44</sup> GPE Secretariat. November 2021. "Draft Guide for Enabling Factors Analysis for GPE System Transformation Grants." p 16

<sup>45</sup> GPE Secretariat. October 2021. "Partnership Compact Development Guidelines." Pp. 20.

*enabling factors analysis represents the perspectives of all key stakeholders, including civil society organizations”.*<sup>46</sup>

- *Establishing:* EOL grantees in the LEG could have a role in reviewing the draft Compact, although the emphasis in this stage is on collaboration on delivery rather than influence, i.e., *“The Partnership Compact should identify how different stakeholders align interests, resources and capabilities behind a priority reform...”*.<sup>47</sup>
- *Implementing:* The LEG has an important role in monitoring and tracking progress in the implementation of the Compact. EOL is specifically identified in the Guidelines<sup>48</sup> as a supportive mechanism or strategic resource in this stage. One of the primary intentions of the Compact is to *“establish mutual accountability at country-level”*<sup>49</sup> which EOL grantees are well-positioned to support. Some GPE Secretariat staff highlighted a role for EOL grantees in monitoring government performance in the new model and requested that EOL prioritize the capacity building of grantees in monitoring the domestic financing of the education sector and implementation of government commitments.<sup>50</sup>

The following are some factors that stakeholders identified as being key to EOL fulfilling its potential within the new operational model and GPE’s overall strategy.

### **EOL and Local Education Groups**

GPE envisages that EOL grantees are well-positioned to play a part in generating knowledge and evidence to inform policy dialogue; in contributing to more inclusive sector coordination; and in strengthening monitoring, learning, and adaption in the new model.<sup>51</sup> The primary mechanism by which EOL has aligned to date with the GPE operating model has been by supporting NECs, present in the majority of GPE partner countries,<sup>52</sup> to participate effectively in LEGs and other local policy fora. The LEGs will continue to have a pivotal role in the new operating model; however, not all NECs participate in LEG meetings. Twenty two percent of EOL-supported NECs did not participate in a LEG meeting during 2020 according to GA reporting (see Table 3 below). The reasons for this can be varied, e.g., the lack of a functioning LEG as well as the pandemic restrictions in 2020/21 but are often unclear due to the limited data available. They might include government resistance to civil society participation or a preference by some governments to include only CSOs that are more amenable to government priorities instead of those CSOs that monitor and play a challenge function.<sup>53</sup> For a few stakeholders, it remains a

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<sup>46</sup> GPE Secretariat. November 2021. “Draft Guide for Enabling Factors Analysis for GPE System Transformation Grants.” pp 4,5

<sup>47</sup> GPE Secretariat. October 2021. “Partnership Compact Development Guidelines.” P.5.

<sup>48</sup> GPE Secretariat. October 2021. “Partnership Compact Development Guidelines.” P.17.

<sup>49</sup> GPE Secretariat. October 2021. “Partnership Compact Development Guidelines.” Pp. 2.

<sup>50</sup> KII 40, 41

<sup>51</sup> GPE Secretariat. November 2021. “Sector Coordination and Civil Society Engagement: Meeting with civil society organizations and foundations.”

<sup>52</sup> Oxfam IBIS. August 2021. “EOL OC1: Proposal for a Costed Extension 2022-23.” Pp. 3.

<sup>53</sup> KII 10

question as to whether the new model will lead to more inclusive LEGs that enable the open participation of CSOs.<sup>54</sup>

**Table 3: Participation of EOL-supported NECs in local education group meetings in 2020, by region<sup>55</sup>**

Participation in at least one LEG meeting	West and Central Africa	Horn, East and Southern Africa	Latin American and the Caribbean	Asia Pacific	Total
Number of EOL supported NECs in the Region	18	16	4	16	54
Yes, the NEC did participate in LEG meetings in year 2020	15	13	1	12	41
No, the NEC did not participate in LEG meetings in year 2020	2	3	3	4	12
N.D.	1	0	0	0	1

The relevance of EOL to the new operating model assumes that all EOL grantees have the capacity and flexibility to respond to and engage with the system transformation goals identified in the country Compact. More specifically, the extent to which EOL grantees will successfully align with the new model at the country level is influenced in part on the strength of the LEG; the maturity of participating CSOs; and the level of mutual trust.<sup>56</sup> Some global stakeholders, with more of an external perspective on EOL, questioned whether some EOL-supported NECs have the most ‘added value’ in LEGs compared to other non-EOL supported CSOs, and described some NECs as having a “safe seat”, being “just there”, and having a “sense of entitlement” which breeds a “sense of complacency.”<sup>57</sup>

### **Role of civil society outside of the Partnership Compact**

As the Partnership Compact reinforces decision-making at the country level, it is suggested that country-based EOL grantees at country-level may potentially have greater influence.<sup>58</sup> However, the logic of the development of a Partnership Compact in the new model is one of focus and prioritization. This has a number of potential implications for EOL. First, how many EOL grantees will share the focus of the Compact priority and have the competencies to participate effectively in the LEG? Second, it remains an open question to what extent the new model will encourage broader civil society representation in LEGs, e.g., OC2 grantees that previously have not participated. Third, it has not yet been articulated what role EOL-supported CSOs outside LEGs might play to complement the priorities of the Partnership Compact and to further GPE 2025 Strategy objectives more broadly. Some stakeholders are of the opinion that

<sup>54</sup> KIIs 31, 35.

<sup>55</sup> Oxfam IBIS. May 2021. “Systematization of EOL-OC1-NEC related information.” Source: Information from NECs compiled by EOL-RMUs in January 2021.

<sup>56</sup> KIIs 38, 41

<sup>57</sup> KIIs 1,2,37,41

<sup>58</sup> KII 37, 43, 45

EOL grantees should not focus too heavily on GPE country-level processes<sup>59</sup> and that the key question is not “How can EOL contribute to the GPE 2025 operating model?” but at a higher strategic level, “How can EOL support the new model to achieve the overall GPE objective of delivering quality, inclusive education?”

A few stakeholders remarked that there is little reference to civil society advocacy outside of the LEGs, which is particularly important for OC3 grantees working at the regional and transnational levels. A few stakeholders inside and outside of the GPE Secretariat also expressed concern about the relevance of OC3 grantees operating at a high-level.<sup>60</sup> There is a potential for OC3 to produce significant results at the international and regional levels and to be relevant to the GPE Secretariat’s own global and regional advocacy. However, a question for the GPE Secretariat moving forward is how to identify alternative pathways to enable CSO voices to be heard in the LEGs or other relevant country and regional-level fora.<sup>61</sup>

### **The pivotal role of GPE Secretariat country teams**

GPE Secretariat country teams have a pivotal role in facilitating GPE “strategic capabilities” EOL and KIX at country level. In the new model, this is likely to be even more important in those contexts with shrinking civic space and less inclusive sector dialogue. However, the review found that GPE country teams had different levels of understanding of and commitment to the role of civil society in the new model.

The majority of GPE Secretariat staff interviewed – all of whom had EOL grantees in partner countries they support – were very aware of the relevance of the objectives of EOL to the new operating model and appreciated the contribution that civil society engagement can play in inclusive sector dialogue. Country Team members cited how CSOs can play an important role in the new model, for example, by questioning government priorities; monitoring sector implementation; and advocating on behalf of marginalized communities.<sup>62</sup> However, a small number of GPE Secretariat staff were not able to describe how EOL supports CSOs and NECs at country-level; what organizations are supported by EOL in the GPE partner countries they were responsible; and were not aware of the new EOL operational components OC2 and OC3 in supporting national and transnational CSOs. As one respondent stated, “*I don’t know what they do ... I don’t feel qualified to say because I don’t understand how EOL works.*”<sup>63</sup>

There is significant variation in the extent to which some Secretariat country team members have a full understanding of EOL and its potential to support the new operating model at country-level. This may be in part due to limited communication and detailed knowledge of the program. Some global and regional respondents, including some GA stakeholders, highlighted the limited communication with Secretariat staff who work with developing partner countries that receive EOL support<sup>64</sup> as “*there is a lack of shared understanding of more specifics of what EOL specifically wants to achieve in different countries...Whether the grant agent works in its*

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<sup>59</sup> KII 43, Initial Findings Workshop, 08/03/22

<sup>60</sup> KII 6, 35, 36, 43

<sup>61</sup> KII 30, 35

<sup>62</sup> KII 40

<sup>63</sup> KII 38

<sup>64</sup> KII 36, 39, 40

*own way, running its own programs without connecting with the Secretariat. I have no idea about what EOL [has] exactly been doing, how it supports or connects with other work.”<sup>65</sup>* Others saw this communication gap as arising from the organizational layers between the GPE Secretariat and EOL grantees; one commented that the three-step process between the GPE Secretariat, GMU, and RMU made it hard to communicate with and involve grantees from the countryside.<sup>66</sup>

There are also some differences in opinion regarding the role of GPE country teams in relation to EOL. Some country team members described their role as primarily focused on supporting GPE country-level grant processes such as the speed and efficiency of government grant applications and the function of LEGs, and remarked that civil society or EOL was not part of their normal daily work.<sup>67</sup> Others were more personally engaged in civil society efforts and acknowledged that there is a varying level of buy-in in the GPE Secretariat on the perceived relevance of civil society in LEGs.<sup>68</sup> One GPE Secretariat respondent, for example, questioned whether the role of Country Team Leads is to find opportunities to maximize results in the new model or to stay in the background facilitating grant processes. *“That will determine how EOL and KIX get used at country level... but there is a mutually reinforcing process as Country Team Leads are too hesitant and developing partners then don’t see those opportunities [for civil society participation].”<sup>69</sup>*

Grantee involvement in budget monitoring was identified as an opportunity for EOL to increase its relevance to the operating model. Some GPE Secretariat staff noted that the performance monitoring of GPE staff in strengthening CSO engagement in the new operating model could be made more explicit and measurable.<sup>70</sup>

### **Stakeholder awareness of role of EOL in new operating model and GPE Strategy**

The above illustrates that consultation among GPE Secretariat and EOL stakeholders on the role of civil society in the new model is still at an early stage. The Rapid Review of OC1 in 2021 recommended that the GPE Secretariat conduct a series of workshops and establish a feedback loop with EOL stakeholders and grantees to bring them on board with the new operating model, and the role of CSOs in GPE country-level strategies. It is encouraging that such initiatives have begun, including meetings with the GMU. A webinar has been held for an RC, to be followed by a series of regional webinars organized by the GA and the GPE Secretariat for grantees in March 2022 on the implications of the new model for EOL.<sup>71</sup>

Many regional and national level stakeholders requested that a more proactive and inclusive approach to this roll-out be taken to include contact with other GPE Secretariat staff, including country team members. A few respondents felt there had been limited consultation between GPE country teams and EOL GA staff and grantees, particularly in instances where EOL grantees

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<sup>65</sup> KII 39

<sup>66</sup> KII 38

<sup>67</sup> KII 38, 41, 42, 43

<sup>68</sup> KII 37, 39, 43

<sup>69</sup> KII 37

<sup>70</sup> KII 37, 42

<sup>71</sup> KII 30

are operating in shrinking civic spaces.<sup>72</sup> Additionally, some regional GA stakeholders felt uninformed about the new operating model and the Secretariat’s approach – not knowing who the Country Team Leads are and having no contact with them – and some grantees expressed a desire for more direct communication with GPE Secretariat staff on how the new operating model may affect their country-level advocacy, though initial engagement has begun to take place in early 2022.<sup>73</sup>

### **The communications profile of EOL**

GPE country team members differed on the amount of EOL-related information they would like to receive to enable them to connect EOL more closely to GPE country-level work. All country team members appreciated the flexibility, responsiveness, and contextual knowledge of the GPE EOL team in response to any issues raised.<sup>74</sup> A few GPE Secretariat stakeholders felt that the information they receive regarding EOL is sufficient and requested that no mechanisms be created until the new operating model was more established.<sup>75</sup> However, many other country team members requested that more contextualized, country-specific information be shared with them regarding EOL grantees instead of large presentations; greater engagement early on in the EOL granting process; and more clarity on the role of GCE and the RCs.<sup>76</sup> Similarly, some GPE Secretariat stakeholders requested that EOL-grant level data be more readily available to inform their work and decision-making; suggestions included Country Team Lead (CTL) review of country-specific EOL grantee bi-annual reports<sup>77</sup>; sharing EOL information on the GPE Secretariat intranet as a ‘one-stop shop’;<sup>78</sup> and ‘short, sharp updates’ that do not generate new heavy processes.<sup>79</sup>

### **3.3. Gender equity and social inclusion in policies**

In line with the principle on gender equality and inclusion in the GPE evaluation policy,<sup>80</sup> this sub-section assesses the extent to which EOL has clear policy guidance on how gender equality, equity, and social inclusion should be incorporated in its programming and working practices (RQ1.3.1), as well as providing an example of good practice of where such guidance has been successfully implemented within EOL (RQ1.3.2). It should be noted that this sub-section is complemented by distinct from Section 5.2 (below) on effectiveness and progress towards gender and social inclusion outcomes of grantees (RQ3.1.3), as this section focuses on the extent to which policies and practices are in place to support gender and social inclusion considerations (i.e., the institutionalization of an enabling environment) in EOL more broadly.

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<sup>72</sup> KIIs 5, 26, 32, 35, 43

<sup>73</sup> KII 25, 29, 32

<sup>74</sup> KIIs 36, 38, 39, 40, 41

<sup>75</sup> KII 38

<sup>76</sup> KII 36, 39, 40, 41

<sup>77</sup> KII 40

<sup>78</sup> KII 36

<sup>79</sup> KIIs 38, 39

<sup>80</sup> GPE. 2021. GPE Evaluation Policy, p. 8.

### Key findings

- *Gender equity and inclusion are embedded in EOL practices, although EOL does not have its own standalone policy frameworks on these principles.*
- *Vast majority of grantees confirm that EOL has helped them incorporate gender equity and inclusion policies and practices in their organizations.*

The design of EOL emphasized gender and social inclusion in the program, drawing in part from the strengths of CSEF.<sup>81</sup> A design principle of EOL is that “[EOL] should seek to strengthen the equity and inclusion in education, ensuring that the voices of the most marginalized groups are represented in the policy dialogue and that policies are responsive to their needs.”<sup>82</sup>

EOL does not have a stand-alone policy on gender and social inclusion but draws upon Oxfam policy frameworks. Gender justice is one of the four primary change systems in the Oxfam Global Strategic Framework, and Oxfam IBIS leads the global Oxfam Community of Practice and Influence (ECPI) to promote ‘a holistic approach to education as a prerequisite for economic, social, political and gender equality’ in support of SDG4 and SDG5. ECPI’s approach to gender transformative education directly relates to Oxfam IBIS’s efforts as a grant agent for EOL.<sup>83</sup> A few GA stakeholders suggested that EOL’s own gender and social inclusion policies could be clearer and more proactive to build greater ownership within the program.<sup>84</sup> Nonetheless, there is evidence of the principle of gender and social inclusion being embedded throughout EOL as a program. For example:

- *Proposal development:* One of the criteria for EOL grant applicants is the extent to which the proposed program “demonstrates a developed understanding of gender (gender relations and gender disparities) and incorporate gender concerns in strategies and implementation of activities.”<sup>85</sup>
- *Results and monitoring frameworks:* EOL provides clear guidance to OC1 grantees on how to measure inclusion and equity, though this is not apparent in the objectives and outcomes of OC2 and OC3. The prioritization of gender and social inclusion is most visible in Objective 1, which has recently been amended to state that EOL seeks to “strengthen national civil society engagement in gender-responsive education planning, policy development and monitoring.”<sup>86</sup> Outcome 1.1 of the Global Results Framework refers to the extent to which NECs are more inclusive, particularly for marginalized and local groups. In this respect, EOLs approach to gender equity and social inclusion policies goes beyond a

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<sup>81</sup> GPE. 2018. ASA/EOL Design Blueprint, p. 60.

<sup>82</sup> GPE. 2018. ASA/EOL Design Blueprint, p. 64.

<sup>83</sup> Oxfam. 2021. ECPI Change Pathways: Education and Gender Justice, p. 2.

<sup>84</sup> KII 31, 35

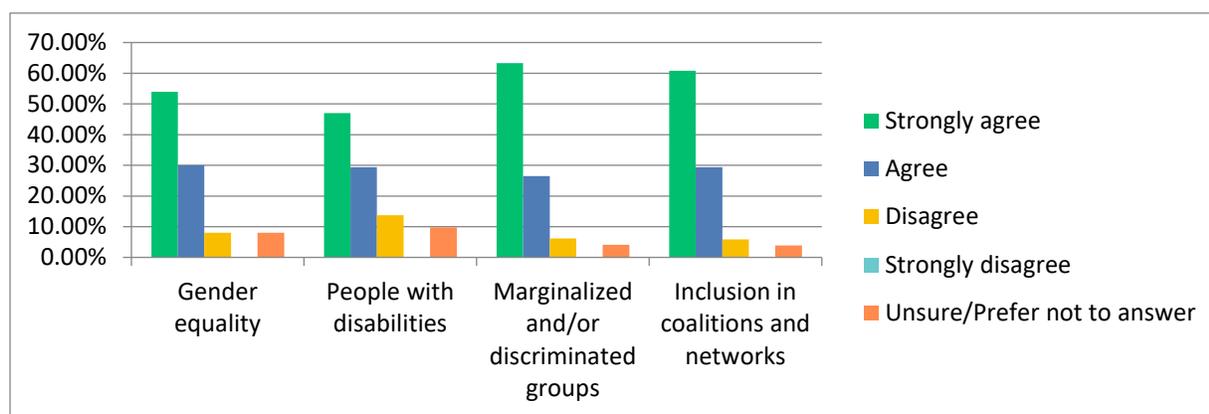
<sup>85</sup> Oxfam IBIS. 2019. ASA/EOL Portfolio Application, p. 121.

<sup>86</sup> Oxfam IBIS. 2021. EOL OC1: Proposal for a Costed Extension 2022-23, p. 22.

gender-blind or gender-aware understanding to a more mature understanding of what is gender and social inclusion.<sup>87</sup>

- *Capacity building and financial support:* Over 80 percent of surveyed EOL grantees agreed or strongly agreed that EOL support has helped their organizations incorporate equality and equity in their work with regard to gender; the inclusion of people with disabilities; marginalized and/or discriminated groups; and inclusion in the coalitions themselves. A small minority disagreed with regard to the inclusion of people with disabilities (see Table 4 below). Similarly, all respondents agreed that EOL financial support has been relevant their organization's program objectives regarding gender and social inclusion.<sup>88</sup>

**Table 4: EOL surveyed grantees’ responses as to whether “EOL support has helped my organization incorporate equality and equity in our work”**



One example of how a gender equity and social inclusion approach has been included in EOL is provided by the short case study below.

**Box 3: Girls Not Brides: Ending child marriage and improving girls access and retention in education**

OC3 grantee Girls, Not Brides (GNB) aims to strengthen the capacity of transnational civil society alliances working on education and child marriage in West Africa and internationally. Its focus is to strengthen collective advocacy for the implementation of laws, policies and programs which improve girls’ access and retention in quality education and contribute to ending child marriage. The project highlights the deep linkages between child marriage and girls’ inequitable access to education, specifically in West Africa, and uses a gender-transformative approach to how the different norms, roles and relations for girls and boys affects education equity. GNB members jointly prepared advocacy messages to disseminate in the African Union’s African Girls Summit in November 2021.

<sup>87</sup> Gender analyses often consider whether a program has been gender blind, gender-sensitive, or gender-specific. Please see an example here:

[https://www.who.int/gender/mainstreaming/GMH\\_Participant\\_GenderAssessmentScale.pdf](https://www.who.int/gender/mainstreaming/GMH_Participant_GenderAssessmentScale.pdf)

<sup>88</sup> All respondents to Q10 of the survey.

## 4. Findings: Efficiency

This section will review the overall efficiency of the implementation of EOL in relation to its grant management administration; governance arrangements; and approach to adaptive management.

### 4.1. Grant management and administration

This sub-section assesses the efficiency of EOL policies and processes in ensuring the adequate stewardship of resources, and in facilitating successful partnering (RQ 2.1.) It will review the overall efficiency of EOL grant management and administration (RQ 2.1.1) in relation to its grant application and selection processes; the Year Zero process; its approach to monitoring and reporting; and to learning and capacity development.

#### *Key findings*

- *Very high level of grantee satisfaction with the efficiency of EOL grant administration, and the support offered to them.*
- *A combination of factors has contributed to delays in implementation and to the lack of anticipated synergy between OCs.*
- *Year Zero process was valued by grantees although the OC1 grantee experience focused on strengthening proposals while the OC2/3 grantee experiences involved more background research relevant to proposal development.*
- *Recent reforms to grantee reporting requirements will increase efficiency and utility of EOL reporting but more support could be offered to improve quality of grantee reports.*
- *Demand-led approach to learning valued by grantees but need for better coordination and a move to a more pro-active approach.*

#### **Grant application and selection**

During the period under review, EOL has issued two Restricted Calls for OC1, one open Call for OC2 and two open Calls for OC3<sup>89</sup>. Following the Call for OC1.1 proposals in August 2019<sup>90</sup>, grants were awarded to 54 NECs for the 2020/21 calendar years, the Global Campaign for Education (GCE) and three Regional Coalitions (RCs) for the period April 2020 to March 2022. As an indication of the efficacy of the due diligence assessments, the grant applications of two NECs and one RC failed to proceed.<sup>91</sup> In September 2021, 61 NECs (including seven new applicants nominated by the GPE Secretariat) were invited through a second Restricted Call to submit new proposals for grant funding for period January 2022 to December 2023. The two OC1 Calls resulted in two changes to the original EOL design:

- a) 27 of the 54 OC1.1. NEC proposals were considered to be of insufficient quality to move directly to implementation. These NECs were required to undergo a Year Zero process (normally around six months) so that the quality of their proposals could be improved.

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<sup>89</sup>Key data on the EOL grant application and selection processes can be found in Annex 7

<sup>90</sup> The first of the two Restricted Calls for OC1.

<sup>91</sup> Ghana NEC was reinstated in 2021 once these concerns were addressed. Liberia NEC was discontinued as a result of fraud, rather than the due diligence assessment.

- b) In recognition of the different levels of capacity among NECs to implement full proposals the GA introduced the possibility of different levels of grant funding for NECs under the OC1.2. Call, i.e., full funding, partial funding, core cost funding, and no funding. Pending due diligence assessments, this has resulted to date in the following allocation: full funding (31), partial funding (23), core costs (6), no funding (1). The GA reports that RMUs and Regional Independent Selection Panels (RISPs) appreciated having these options although administering differentiated funding requires additional work.<sup>92</sup>

An Open Call for OC2 applications was issued in April 2020 and two OC3 Calls were issued in June 2019 and July 2020. All Calls were advertised through the internet and international educational alliances. Due to the very high number of responses to the OC2 Call, the GA, in consultation with the GPE Secretariat, adapted its approach and, instead of issuing a second Call as planned, conducted two shortlisting processes in August 2020 and March 2021. The processes followed for the Calls for OC2 and OC3 differed from that for OC1 in two respects: all applicants had to submit a detailed concept note before being shortlisted for proposal development, and all shortlisted applicants were required to undergo a Year Zero Process.

Survey and KII data indicate a high-level of satisfaction among grantees with the transparency and utility of the grant application and approval processes. Approximately 90 percent of grantees surveyed agreed or strongly agreed that grant application process was clearly communicated and easy to use. The GA established an online grant application portal from the first Call, and all relevant templates and documents have been available in English, French, Spanish and Portuguese. A key factor in the level of satisfaction with the grant application process has been the efforts of the RMUs to ensure the process was clear and well understood by applicants, for example, through introductory webinars and dialogue.<sup>93</sup>

However, a number of grantees commented on delays to proposal approval. The period from the submission of proposal to final approval is comparatively extended, averaging approximately 10-12 weeks across all three OCs. While grant approval is an iterative, exhaustive assessment process, a number of grantees commented on the stress and uncertainty associated with delays in proposal approval.<sup>94</sup> A contributory factor to this is that the GA did not set and communicate a general service standard for the time required for grant approval.

OC2 and OC3 grantees were generally positive about the two-stage process to proposal approval. However, some OC2 and OC3 grantees interviewed commented that requirements of the concept note were time-consuming and relatively demanding, e.g., *“the concept note is more like a proposal and not supposed to be so time consuming”*<sup>95</sup> and the *“application felt like writing a thesis”*<sup>96</sup>, though acknowledging that they learned a lot in the process.<sup>97</sup> OC3 grantees who applied as members of new coalitions found the process even more challenging. They cited the transactional costs of coordinating with new partners and levelling up their levels of

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<sup>92</sup> Email correspondence 23/02/2022

<sup>93</sup> KIIs 4,5, 12, 13, 15,16,18, 25,27

<sup>94</sup> KII 4,13,18

<sup>95</sup> KII 5

<sup>96</sup> KII 15

<sup>97</sup> KIIs 16,18,23.

understanding to achieve consensus on the application. In one case, this resulted in some partners withdrawing from the coalition and having to be replaced.<sup>98</sup>

On reviewing OC2 and OC3 concepts notes, although it was apparent that there would be funding available for 20 successful proposals across both OCs, the GA chose to shortlist 40 for the YZ process. In the case of the OC2 Call there were 461 applications, of which only 10 progressed to an approved proposal. This ratio of application to approval is 1:46 which is high, but not unusual, for an Open Call.<sup>99</sup> In addition to being time-consuming for the GA, the development of a concept note is a big investment of time for a CSO and this “strike rate” means that a significant number of applicants will have been disappointed. Positively, the high number of OC2 applicants may be an indicator of the level of interest among CSOs in EOL as a program. Nonetheless, care should be taken in future Calls to ensure that CSOs are not required to invest heavily in developing a concept note when the likelihood of having a full proposal approved is low.

A combination of factors in the grant administration process – the unexpected number of OC1 proposals that required further support from the GA; the unexpected number of applications to the OC2 Call for Proposals; and the lengthy process of grant approval – have contributed to delays and a lack of synchronization in the implementation of the program. This, in turn, may be a contributory factor to the lack of anticipated synergy between the different operational components (see Section 7, Conclusions).

### **The Year Zero process**

The majority of grantees surveyed viewed the Year Zero process as a positive innovation that was clearly communicated and easy to use<sup>100</sup>. As previously noted, the GA placed the focus of Year Zero for OC1.1 on supporting grantees whose proposals had been initially weak. OC1 grantees reported that they were well supported by RMU to strengthen their proposals and develop a learning plan for the project period.<sup>101</sup> Nonetheless, as the Rapid Review of OC1 noted<sup>102</sup>, this narrower focus on technical support for proposal development represented a departure from the original design intention that the Year Zero process would enable grantees to undertake activities such as *“an assessment of the environment for their work, including the governmental regulatory environment, political economy and wider civic ecosystem...[and] build relationships with key partners and allies to enhance probability of success.”*<sup>103</sup>

The Year Zero process was less intensive for OC2 and OC3 grantees. OC2 and OC3 grantees were provided with introductory sessions on GPE and EOL during Year Zero but were left more to their own devices to do background preparation and develop the full proposal.<sup>104</sup> OC2 and OC3 grantees tended to use Year Zero to do research relevant to their proposals e.g. context or

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<sup>98</sup> KII 16

<sup>99</sup> “Study on Support to Civil Society through Multi -Donor Funds”, 2014, p.38.

<sup>100</sup> The MTR findings on Year Zero are consistent with a recent study commissioned by the GA, “Internal synthesis study of EOL Year Zero”, February 2022.

<sup>101</sup> KIIs 4,13,14,15,16,17,18, 26

<sup>102</sup> Rapid Review of OC1, Conclusion 7

<sup>103</sup> ASA Blueprint, p. 24.

<sup>104</sup> KII 5

stakeholder analyses, networking and mapping out national policy frameworks.<sup>105</sup> OC3 grantees and some new coalitions highlighted that Year Zero was an important opportunity to establish working relationships with partners they had not previously worked with in developing their proposal.<sup>106</sup>

### **Monitoring and reporting**

The decentralized structure of EOL was designed to enable close monitoring of EOL programs by RMUs. However, due to the COVID-19 pandemic, only a few Rmu monitoring visits have been made (mostly in the HESA region). Rmu monitoring of and support to grantees has been maintained during the evaluation period through regular communications and a detailed, tightly scheduled system of reporting. While grantees rate highly the quality of support received from RMUs, many were critical of the reporting expectations of EOL. The Rapid Review of OC1 recently concluded that the current system of EOL reporting was resource intensive and time-consuming.<sup>107</sup> This conclusion was echoed in MTR grantee KIIs, one of whom described quarterly reporting as *“time-consuming, tedious and affecting implementation.”*<sup>108</sup>

Simplified reporting was the issue most frequently cited by survey respondents as a EOL process whose efficiency could be improved.<sup>109</sup> A number of grantees requested that the reporting cycle be reduced to biannual reporting, with simplified reporting formats,<sup>110</sup> others found the reporting deadlines too tight since they were reliant on collating information supplied from members.<sup>111</sup> These concerns have largely been addressed by the recent approval of a simplified system of reporting for grantees<sup>112</sup> that no longer requires a quarterly narrative report (Part A) and simplifies the grantee six monthly narrative report. The simplification of grantee reporting requirements will help to improve the efficiency and utility of EOL reporting but this could be further improved if the GA were to ‘front load’ its investment in reporting to improve the quality of grantee results frameworks and narrative reporting (See Section 7.3).

In addition to the frequency of reporting, the quality of grantee reporting should also be considered. EOL reporting to GPE Secretariat currently involves several layers of time-consuming compilation. Currently grantee reports are summarized by the RMUs, which the GMU subsequently draws upon to compile an Annual Report in April and two Technical Progress Reports (TPRs) in March and September, and a Progress Report in January and July each year for a public consumption, although who the target audience is, is not clear.

The considerable effort invested by GMU to provide qualitative insight into the program, e.g., through its systematized reports, is a reflection of the limitations of grantee reporting. The MTR noted in both grantee and global results frameworks that many outcome statements are at a low level within the grantee’s sphere of influence, e.g., “civil society networks established” with

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<sup>105</sup> KII 12,13,15,17

<sup>106</sup> KIIs 4,13,14

<sup>107</sup> Rapid Review of OC1, Conclusion 9

<sup>108</sup> KIIs 13,20, 21.

<sup>109</sup> Q21 “How can EOL’s processes be improved to be more efficient for your organisation?”

<sup>110</sup> KIIs 16,20, 22

<sup>111</sup> KII22,26

<sup>112</sup> Note of CG meeting, 17 January 2022

outcome indicators that are purely quantitative, e.g., “number of training modules developed.” While the use of quantitative indicators enables the GA to provide quantitative data on progress to target in its reporting to the GPE Secretariat, it provides little insight into the quality or effectiveness of the activities reported e.g., participants satisfaction levels with, or application of, the learning from the training or whether these networks are successfully engaging with or monitoring government. Similarly, although the GA requests grantees to provide evidence for their contribution, for example, to reported policy changes, the evidence provided for that contribution is very variable in quality.

The issue of reporting frameworks and choice of indicators for EOL reporting was raised early in the design stage by the Technical Advisory Panel:

*“The issue of what kinds of indicators to use or what reporting frameworks is not just a technical question. It’s a question of how qualitative and quantitative indicators are interpreted and analyzed and how that informs practice. How are results interpreted and what is the story of change? It’s important to design a mechanism to assist in drawing out the stories and lessons and providing a mirror for reflection and learning.”<sup>113</sup>*

## **Learning**

A focus on learning, capacity development and adaptation is at the heart of the design of EOL and it is expected to be mainstreamed into the program. This sub-section will consider how efficiently the EOL approach to learning and capacity development has been implemented. The relevance and effectiveness of EOL’s capacity building efforts with grantees are considered separately in under Sections 3.1 and 5.1. respectively. The different elements of the EOL approach to learning, as summarized in the EOL Learning Agenda, are the development of learning plans; the selection and use of learning partners to help build grantee capacity; and the promotion of learning collaboratives as a means of peer learning (which will be considered as an effectiveness outcome in Section 5.1.)

The first step in the EOL approach to learning at the grantee level has been the learning plan. Almost every grantee has developed a learning plan as part of their proposal which forms the basis of capacity building in the project. RMUs then have the responsibility of identifying cross-cutting learning needs from grantee learning plans to develop regional training plans to be matched with relevant Learning Partners. The GA has identified a total of 46 regional learning partners to support the capacity development of grantees.<sup>114</sup> Learning activities have been primarily targeted at OC1 grantees as OC2 and OC3 are still in the early stages of implementation<sup>115</sup>.

The system described above should provide for the efficient delivery of demand-led capacity building support to grantees. However, the vast majority of learning activities organized by RMUs do not involve the RCs who are supported under OC1 to provide capacity building support to grantees. The GA does not require RCs to submit a list of their planned learning activities which may not be coordinated with those of the RMUs. This is, in part, a governance

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<sup>113</sup> Note of TAP meeting, 26<sup>th</sup> April 2018

<sup>114</sup> List supplied by the GA in an email, 21/02/22

<sup>115</sup> A list of completed or planned learning activities during the evaluation period can be found in Annex 6.

issue which will be explored in Section 4.2. but it is also an efficiency issue. While some stakeholders report progress on being made in relation to RMU/RC coordination,<sup>116</sup> one RC<sup>117</sup> reported NECs being so overwhelmed with trainings that it affected their implementation activities. RCs confirmed in interviews that their role vis-a-vis the RMUs in relation to learning and knowledge sharing needs clarifying if confusion and duplication of effort is to be avoided.<sup>118</sup> The example below illustrates how capacity development support (in this case from the RMU), if not well coordinated, can undermine the effectiveness of grantee participation in trainings.

**Box 4: Resource mobilization in WCA: How a lack of coordination can undermine capacity building**

A Learning Partner conducted a learning and mentorship program on resource mobilization for OC1 Grantees in West and Central Africa from April to November 2021 consisting of online learning and post training mentoring. 10 participants from three NECs in Lusophone countries were invited but only 7 registered.

An anonymous post-delivery evaluation was conducted to test learning retention after each of seven of the nine modules. Participants were allowed to repeat the module and take the test as many times as they wanted till the course material was fully understood. In addition, after each module participants were asked to rate how much it had met their expectations. Participants rated all modules as meeting or exceeding expectations. However, the level of commitment to the course was lower than expected - participant login time was only 53% of the 32 hours available; some did not take the test or participate in the evaluation, and some scored very low marks in the module tests.

Participation in the second phase of mentoring support was even more disappointing. This included support to participants in developing a donor map in their country, drafting a resource mobilization strategy and action plans, and drafting project proposals for specific donors. In most cases, participants failed to produce the expected outputs, despite the program being extended and additional hours being allocated to the program. Time constraints due to an overload of training initiatives and language constraints were cited as two of the factors contributing to a low level of participation and delivery.

While EOL support to learning and capacity development is much valued by grantees, evidence among different stakeholder groups<sup>119</sup> indicates that the current demand-led approach has its limitations and that EOL now needs to develop a more strategic approach to learning. This forms part of the Learning Agenda which anticipates a pro-active approach to knowledge generation and sharing through appropriate platforms.<sup>120</sup> The urgency of the need for stakeholder collaboration in this area will be explored below, in Section 4.2.

**Cost efficiency of EOL**

It is difficult to attempt a comparator analysis of the cost efficiency of multi-donor funds that support civil society due to the diversity of the operating contexts, objectives, target groups,

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<sup>116</sup> FGD 29

<sup>117</sup> KII 5

<sup>118</sup> KII 5,6,7

<sup>119</sup> KIIs 30,32,35,43

<sup>120</sup> "EOL Learning Agenda" pp,5-6.

and most importantly the services or added value that the funds provide to civil society. Nonetheless, the MTR conducted a simple analysis of the cost base of the EOL 2021 budget<sup>121</sup> using the following three categories:

- *Program management*: i.e., the direct costs of the Grant Agent in administering the fund e.g., staff costs, hosting fees etc. EOL also includes a budget line - ‘indirect costs’ - which is a lump sum of 7% of total costs set aside for EOL program management. It is agreed with GPE that any unspent funds will accrue to Oxfam IBIS. MEL costs are also included as a separate budget line.
- *Program support*: i.e., costs of value-adding activities linked to the program, e.g. Learning Partners and capacity building activities.
- *Grants*: i.e., funds transferred directly to grantees to implement the approved proposal. Note that grants to GCE and RCs are accounted for separately in the EOL budget.

The total EOL budget for 2021<sup>122</sup> was U\$17,422,738 of which program management accounts for 13.82 percent; program support 10.74 percent; and grants 74.36 percent (including GCE and RCs’ OC1 and OC3 grants). GCE and RCs account for 14.36 percent of the total grants budget. Program management costs rise to 14.89 percent if financial costs and the costs of Calls and Independent Selection Panels (ISPs) are included. One of the few analyses of the cost base of civil society multi-donor funds<sup>123</sup> found that the parameters of these cost categories ranged between program management (5-12 percent), program support (5-25 percent) and grants (60-85 percent). Using this simple rubric, the cost base of EOL falls within established parameters, although program management is slightly higher (due perhaps to the need to support a high number of relatively low-capacity coalitions in difficult operating environments).

However, from a value for money perspective, there are two other considerations to bear in mind. First, the choice of a GA with historical, intangible assets in terms of global reach, skilled and experienced staff and a legacy of trust with Southern civil society is likely to reduce, for example, start-up costs. Second, the value of the services provided by the Grant Agent is an important factor when considering value for money. Section 3.1 confirms that grantees attribute a very high value to the services and support offered by the GA.

## 4.2. Governance and management roles

This sub-section examines to what extent EOL stakeholder roles and governance arrangements e.g., between GPE, the grant agent (GA), and the Global Campaign for Education (GCE) and Regional Coalitions (RCs), are clearly defined and satisfactorily implemented (RQ2.1.2). The governance and management roles of key stakeholders were delineated in a responsibility, accountability, consultation, information (RACI) matrix<sup>124</sup> in the early stages of EOL. As EOL has evolved, the evidence from the review is that this mapping of roles is incomplete and out of date.

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<sup>121</sup> 2021 was the first year when the EOL annual budget is comparable to projected budgets for 2023 and 2024.

<sup>122</sup> EOL Operational Component 1: Proposal for a costed extension 2022-23”, August 2021, p.28

<sup>123</sup> “Study on Support to Civil Society through Multi-Donor funds”, INTRAC, January 2014, pp 47-51

<sup>124</sup> ASA Portfolio Application, Annex 8

### *Key findings*

- *Governance oversight of EOL satisfactory though absence of KIX in Coordinating Group may represent an opportunity cost*
- *Growing number of stakeholders involved in EOL implementation with potential for evolving roles*
- *Ongoing confusion and lack of coordination between Regional Coalitions and Regional Management Units (RMUs) regarding learning and capacity building*
- *Strategic challenge for EOL is how to maximize synergy between GA, GCE and KIX in relation to knowledge creation and dissemination in relation to the GPE 2025 operational model.*

### **Governance oversight of EOL**

The RACI matrix is incomplete in that it does not include the governance arrangements of EOL, i.e., the bodies responsible for the oversight of EOL in contrast to its day-to-day operations. The highest tier of EOL governance is the Performance, Impact and Learning Committee (PILC), a standing committee of the GPE Board, which is responsible for the oversight of the strategic direction, policies and implementation of EOL. The EOL Team within the GPE Secretariat is responsible for reporting to the PILC on EOL. A Coordinating Group, made up of representatives from the GA and the GPE Secretariat, is responsible for the oversight of program delivery and overall strategic direction of EOL. The GA and EOL global program managers in the GPE Secretariat consult on a regular basis to set the agenda for the Committee.

The review found no evidence that the system described performs unsatisfactorily.<sup>125</sup> Reporting to the GPE Secretariat and PILC is timely and detailed (the frequency and content of reporting has been addressed in Section 3.2.). Relations in the Coordinating Group are constructive and efficient, although it meets only quarterly. Representatives of KIX and EOL do not sit on each other's Coordinating Groups, as originally intended to facilitate synergies, but communicate bilaterally on an ad hoc basis. As discussed below, there may be an opportunity cost associated with the absence of KIX in the group responsible for considering more strategic issues in EOL. A final governance consideration is that GCE/RC representation on GPE governance structures continues to be seen by some stakeholders<sup>126</sup> as a potential conflict of interest, and an inhibitor of open discussion, for example, on the role of GCE/RCs in EOL.

### **Global management of EOL**

As the appointed GA, Oxfam IBIS is responsible for the operational management of EOL which it does through a GMU and four RMUs. The GMU has overall responsibility for the implementation of the program but the RMUs have considerable delegated authority in the assessment of grant applications and proposals; facilitating capacity development support for grantees; monitoring progress to objectives; and overseeing the quality of grantee reporting. As earlier described, this devolved management structure works well from the grantee perspective. The GA currently works with a matrix management approach with specialist

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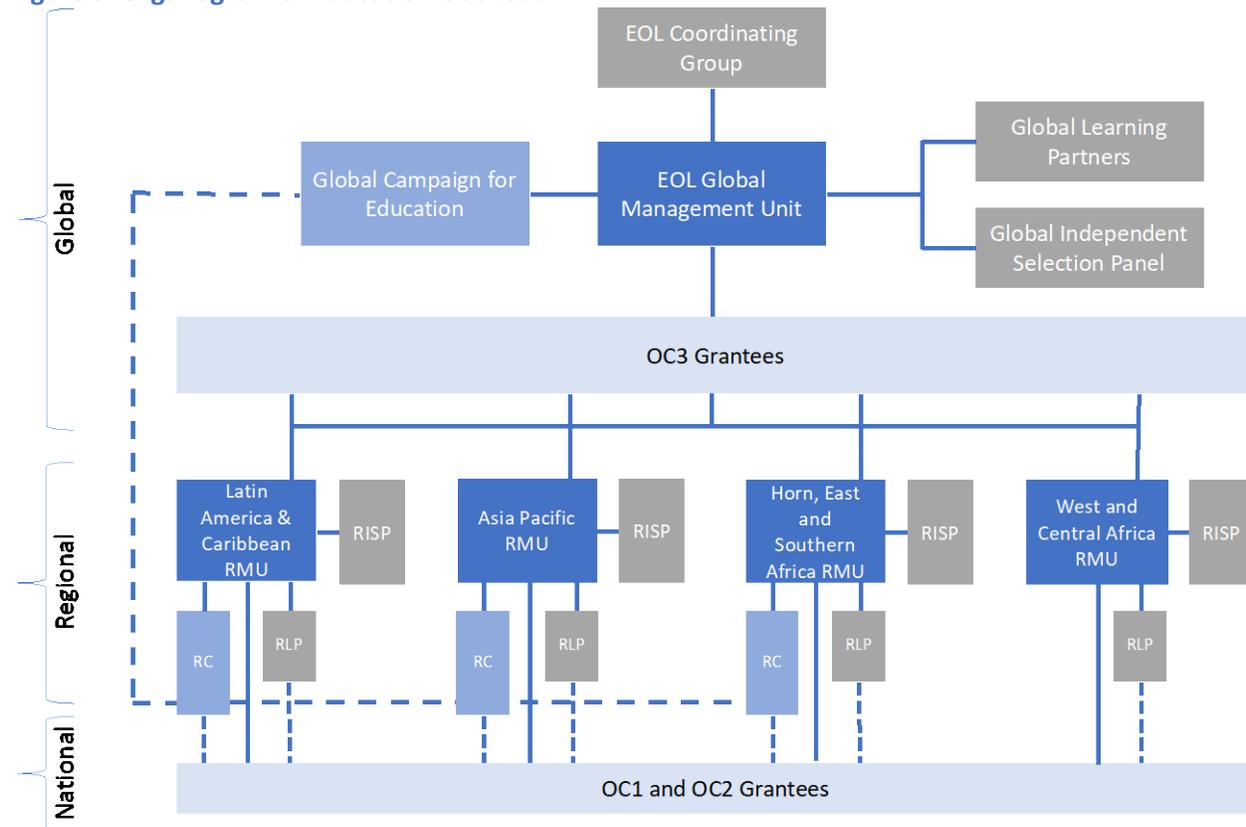
<sup>125</sup> KII 35,44

<sup>126</sup> FGD 29, KII 35

virtual teams at GMU and RMU levels, but some GA interviewees<sup>127</sup> suggested that the GA would perform more effectively as a team with a more collective approach to sharing information and decision-making among team members.

The GA is supported by many other stakeholders in the implementation of the program (as illustrated in Figure 3):

**Figure 3. Organogram of Education Out Loud**



- Four Regional and one Global Independent Selection Panels whose primary role has been to review and score grant applications and proposals.
- 46 current regional learning partners to provide capacity building support to grantees. The GA has also recently selected an initial “first tier” of four global learning partners and seven “second tier” learning partners to support a global learning agenda.
- The GCE and, currently, three RCs that receive funding under OC1 to provide capacity development support to grantees.

Program documents anticipate that the roles of both learning partners and Selection Panels might evolve in 2022/23; for example, it is anticipated that Selection Panels might assume a broader role and advise on the evolution of grant portfolio in EOL and address its Learning Agenda.

<sup>127</sup> KII 32,34

## Regional management of EOL

In this context of multiple stakeholders with evolving roles, the MTR found widespread evidence to confirm the conclusion of the Rapid Review of OC1 that there was “*confusion across stakeholders on expectations, roles and responsibilities*”<sup>128</sup>, in particular about the role of the GA, GCE and RCs in relation to capacity development and learning. The RACI matrix identifies learning partners, GCE and RCs as jointly responsible for capacity development of grantees although, as the Rapid Review points out, the division of labor between these actors is not specified. This is a source of some tension as RMU report some ‘push back’ from RCs, for example, in facilitating learning collaboratives (see Section 5.1.2). While some of this tension can be alleviated by improved working practices, it reveals a more fundamental ambiguity in the role of GCE/RCs in EOL. The original ASA Blueprint<sup>129</sup> envisaged that GCE and RCs would be grant funded as OC1 learning partners to build the capacity of grantees. Some respondents<sup>130</sup> continue to question whether GCE/RCs are EOL grantees supported to conduct their own program of activities or learning partners contracted to provide services in support of NECs. Some RCs clearly see themselves as political actors and part of a global movement over and above service providers.<sup>131</sup> There is a much higher standard of accountability required of regional learning partners in the provision of capacity development support than there is for RCs. One respondent commented that it difficult to assess what the GCE/RC deliverables were for EOL and how effective they were in delivering these<sup>132</sup> since their OC1.1 results frameworks were not well defined (though the OC1.2 GCE/RC results frameworks have since improved).

## Global roles in EOL knowledge sharing

At a global level, both GCE and the GMU recognize that they need to further clarify their respective roles.<sup>133</sup> This has become more urgent in the light of the readiness of both stakeholders to develop a global approach to knowledge sharing on civil society advocacy. Following the selection of its Global Learning Partners, the GA is planning to develop a global learning agenda for EOL and a learning portal on the EOL website to share lessons learned from and among grantees and other stakeholders.<sup>134</sup> At the same time, GCE has recently developed a global knowledge hub on its website in association with its new Knowledge Exchange and Learning (KEL) Strategy. The goal of the new strategy is for “*GCE to become a key institution in generating, managing and sharing knowledge and facilitate the use of knowledge by its members and partners.*”<sup>135</sup> The GCE KEL strategy makes no reference to EOL, while GCE believes that it and the RCs should have been consulted in the selection of the regional and global learning partners.<sup>136</sup> In the meantime, the East Africa RMU has supported the development of a knowledge hub for the region which GCE sees as duplicating its own initiative

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<sup>128</sup> Rapid Review of OC1 p.56

<sup>129</sup> ASA Blueprint, pp. 13-14.

<sup>130</sup> KIIs 5,6, FGDs 28,29

<sup>131</sup> KII 5,6

<sup>132</sup> KII 32.

<sup>133</sup> KIIs 9,10,31,32

<sup>134</sup> Technical Progress Report 1<sup>st</sup> January -30<sup>th</sup> June 2021, p.19

<sup>135</sup> GCE Knowledge, Exchange and Learning Strategy, p.10

<sup>136</sup> KII 9,10

(EOL does not support the RC in Africa). There is clearly a risk of further confusion and duplication if GCE and GMU do not coordinate their efforts in this area. At the same time, there is an opportunity to generate synergy in knowledge creation and sharing; for example, the GCE KEL strategy identifies the foci for thematic learning across the movement, and the new EOL learning agenda will more proactively identify which themes Global Learning Partners will be asked to generate and share knowledge on.

This also raises the question of how EOL and KIX should work together. KIX was established to strengthen demand-drive knowledge sharing among both GPE government and non-governmental stakeholders. It also has a network of four regional hubs and regional learning partners and has a digital platform which consists of its public website, the KIX library of evidence-based resources, and a Peer Learning and Exchange Portal. From the beginning, there has been a clear expectation that EOL will feed into and draw from KIX learning and research to support evidence-based advocacy: *“Oxfam IBIS is committed to look at ways of capitalizing on the learning agenda of KIX, for example by sharing or linking Learning Partners, peer review of learning processes, sharing of learning output and connecting stakeholders across portfolios in Learning Collaboratives.”*<sup>137</sup> This expectation is yet to be fulfilled.

The rolling out of the new GPE operating model adds further urgency to the issue. The concept of the Partnership Compact places more emphasis on evidence-based civil society advocacy. To be effective, EOL will need to ensure that stakeholders coordinate to ensure grantees have access to and use relevant learning and research at national, regional, and global levels.

### 4.3. Adaptive management

This sub-section examines to what extent adaptive management has been built into the design and implementation of EOL and contributed to its efficiency and effectiveness (RQ2.2.). The evidence gathered will also address the extent to which progress to date has upheld the Assumption 8 of the EOL theory of change with regards to the need for the flexible management of EOL grants (RQ3.1.2).<sup>138</sup>

#### *Key findings*

- *Adaptive management embedded in the EOL design and approach*
- *Delegated authority of RMUs key to supporting grantees respond flexibly to Covid 19 pandemic and keep on track*
- *GA been able to adapt to unforeseen developments with regard to portfolio, but a more strategic approach required to anticipate key challenges*
- *Evidence supports Assumption 8 of EOL theory of change*

EOL places special emphasis on the need for an iterative and adaptive approach that is closely linked to its approach to learning. The ASA Portfolio Application commits the GA to ensure that

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<sup>137</sup> ASA Portfolio Application, March 2019, p.36

<sup>138</sup> Assumption 8: “Change is not linear and can be difficult to reconcile with rigid work planning. The management of EOL grants needs to be flexible to allow grantees to improvise and adapt to changes in the operating context, for example, a changing political context”.

all EOL interventions are “responsive to changes in context, emerging results and learning.”<sup>139</sup> This capacity to adapt to change applies to both EOL as a program as a whole and to grantee projects.

There is clear evidence that EOL ensures that an adaptive management approach is embedded in its administration of the grantee portfolio. This is done in a number of ways:

- *Capacity and proposal development:* The GMU and RMUs have organized webinar sessions on adaptive management for nearly all grantees, e.g., 45 of 52 NECs have participated in these sessions.<sup>140</sup> OC2 and OC3 grantees were expected to outline their approach to adaptive management in the section on Learning Approach in the full proposal. Adaptive management was not specifically addressed as part of the Learning Approach of the OC1.1. proposals but integrated into the OC1.2. proposals. Eighty seven percent of grantees surveyed agreed or strongly agreed that EOL grant application and approval process enabled their organization to respond flexibly to changes in context.
- *Monitoring and reporting:* Grantees are encouraged to treat monitoring as a learning process and encouraged to adapt to ensure interventions remain relevant and effective. For example, grantees are asked to identify unexpected outcomes, challenges and how they intend to address these in their narrative reports. Seventy nine percent of grantees surveyed agreed or strongly agreed that EOL monitoring and reporting systems enabled their organization to respond flexibly to changes in context.
- *Budgetary flexibility:* The EOL budget is designed to be flexible and capable of adaptation. For example, global and regional level funds allocated to capacity building and learning are not earmarked and can be used to respond to identified needs. Grantees confirmed that, though budgets for high level objectives could not be changed, they were able to redirect across cost categories, subject to RMU approval. Seventy nine percent of grantees surveyed agreed or strongly agreed that EOL financial management systems enabled their organization to respond flexibly to changes in context.
- *Delegated decision-making:* EOL delegates considerable authority to RMUs that have the flexibility to design their support and advisory role in accordance with local needs and approve changes to grantee plans and budgets. Grantees frequently referred to RMUs as being very flexible, open to consultation, helpful, and quick to respond to requests to changes in work plans and budgets.<sup>141</sup> The delegated authority of RMUs to approve changes to grantees’ workplans and budgets has enabled most grantees to respond agilely to the Covid pandemic; for example, 20 of the 52 NECs revised their projects during January -June 2021.<sup>142</sup>

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<sup>139</sup> ASA Portfolio Application p.71

<sup>140</sup> GMU correspondence 08/02/22

<sup>141</sup> KIIs 14, 15, 16,20,21,25, 26,27

<sup>142</sup> TPR 1<sup>st</sup> January-30th June 2021 p.19

## 4.4. Examples of and lessons from adaptive management

Due to the Covid 19 pandemic, a large number of grantees reported that they had revised their activity plans and budgets, sometimes several times, to adapt to changing operating conditions. OC2 and OC3 grantees have not had to do this since their proposals took the pandemic into account and they are in the early stages of implementation. As indicated in the Rapid Review,<sup>143</sup> this flexibility to adapt to the challenges of working under the restrictions of the pandemic has been a major contributory factor to most OC1 grantees' activities remaining on track. The key change reported as a result of these adaptations was a move to virtual rather than face-to-face communications.<sup>144</sup> Several grantees acknowledged that the ability to transfer funds (from e.g. travel/workshop budgets) to other initiatives had been a "blessing in disguise" enabling them to invest in knowledge products and processes such as research,<sup>145</sup> developing a strategic plan,<sup>146</sup> developing an advocacy plan,<sup>147</sup> and a policy analysis toolkit and manual.<sup>148</sup> Most grantees acknowledged the positive aspect of the change, though not being able to hold face-to-face meetings was thought by some grantees, particularly NECs, to be detrimental to their work with government officials.<sup>149</sup>

At a global level, the GA has demonstrated an ability to adapt in a timely fashion to major unanticipated challenges such as the number of poor-quality OC1 proposals and large numbers of OC2 applications. Technical Progress Reports provide an update on recent adaptations since the previous report, but these do not include more strategic reflections on the evolution of the program (nor details of adaptations at grantee level).

Now that the EOL program is fully operational, there will be a need for the GA to create opportunities for key stakeholders, including GA staff, to analyze and reflect on how it might need to adapt to key trends that may affect the effectiveness of the program in achieving its objectives. This was anticipated in the original design document<sup>150</sup> that commits EOL, as part of its approach to adaptive management, to reflect on its global performance after one year. Among the areas it identified as being appropriate to reflect upon are the Calls for Proposals; learning processes; Year Zero experience; the theory of change and its assumptions; allocation of funds between OCs; and linkages with the KIX and with GPE's operating model. While there have been occasional GMU/RMU discussions on issues such as fragility, the GA has not been able, as anticipated, to reflect more strategically on the key issues listed above, due in part to time pressures associated with the early stages of implementation.

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<sup>143</sup> Rapid Review of OC1, p34

<sup>144</sup> KIIs 12, 13, 15, 17,19,21,24

<sup>145</sup> KIIs 13,17

<sup>146</sup> KII 12

<sup>147</sup> KII 17,

<sup>148</sup> KII 15

<sup>149</sup> KIIs 17,19, 26

<sup>150</sup> Blueprint p. 7.

## 5. Findings: Effectiveness

### 5.1. Progress to objectives

This sub-section assesses the extent to which progress has been made towards achieving the objectives of each of the three operational components of EOL (RQ3.1.1). It will also briefly review the extent to which grants focus on and achieve gender-related objectives (RQ3.1.3). (The incorporation of gender equity and inclusion in EOL policies and procedures has already been reviewed in Section 3.4). It should be noted that each of the OCs is at a different stage of implementation. At the time of writing, OC1 grantees have been implementing for almost two years (in addition to several years of support previously from CSEF). In contrast, ten OC2 and OC3 grantees began implementation in mid-2021; the remaining ten OC2 and OC3 grantees have only begun implementation.

#### *Key findings*

- *OC1 relatively on track with progress to quantitative indicators, particularly in strengthening the capacity of coalitions.*
- *However, progress should be treated with caution - many outcome statements are at a low level and evidence base of reported outcomes needs strengthening.*
- *Different regional approach to learning collaboratives which have been slow off the mark*
- *Stability in representation of women and girls' groups in NECs, but there is a need for more concerted effort in EOL to ensure that NECs adopt gender and social inclusion activities and objectives.*
- *Too early in implementation to assess progress to OC2 and OC3 at portfolio level*
- *Unexpected result of Covid 19 pandemic has been increased investment by NECS in knowledge products and processes*

### 5.2. Progress towards Objective 1

#### **Objective 1: Strengthen national civil society engagement in education planning, policy dialogue and monitoring**

Despite the continuing challenges of COVID-19, Objective 1 remains relatively on track towards its intended results, though there is variation across outcomes and grantees. According to EOL's most recent data at the time of writing this report, 43 (83 percent) of the 52 OC1 projects are estimated by their respective RMUs to be on-track in reaching their results; nine OC1 grantees (17 percent) are estimated not to be on-track in reaching their expected results.<sup>151</sup> It has already been noted (section 4.3.) that the adaptive management approach of RMUs has played a large part in helping grantees keep on-track. This is also worth noting since a significant number of NECs work in fragile and/or conflict affected countries. OC1 is working in more fragile and/or conflict-affected countries than anticipated according to portfolio outcome 1.6.

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<sup>151</sup> Oxfam IBIS. 2021. Technical Progress Report: January 1<sup>st</sup> – June 30th, 2021. Pp. 19.

Thirty-seven percent of OC1 grantees operate in fragile and conflict-affected countries, compared to the target of 26 percent.<sup>152</sup>

### **Outcome 1.1. NECs are more inclusive for marginalized and local groups**

Progress to this outcome, which is measured by the number of NECs that have diversified their base, remains on-track although the composition of the majority of NECs remains relatively unchanged. Twenty-six NECs have experienced small increases in their inclusion index since the start of implementation, which is on-track to the target of at least 30 NECs becoming more inclusive.<sup>153</sup> Eleven NECs remain unchanged and 17 have regressed with small decreases in their index. However, some marginalized groups are better represented than others. Portfolio outcome 1.7. refers to the representation of excluded groups in NECs. EOL recently reported that 26 percent of NECs represent at least seven out of ten marginalized groups (the target is 50 percent of all NECs). The marginalized groups most represented in NECs include women/girls (100 percent of NECs); people with disabilities (98 percent); illiterate youth (93 percent); and people living in poverty (78 percent).<sup>154</sup> However, groups representing discriminated ethnic, caste, migrant, and religious groups as well as LGBT communities remain under-represented or absent in most NECs.

It should be noted that the above metrics refer only to the formal incorporation of marginalized groups in NECs but do not offer an insight into the transparency, accountability, or responsiveness of the coalitions' Secretariats to the needs and priorities of these groups, nor their actual level of engagement and participation. This would require broader outcome and indicator statements and the use, for example, of network effectiveness tools to assess and monitor the organizational 'health' of the coalitions.<sup>155</sup>

### **Outcome 1.2. Strengthen NEC capacity in relation to policy dialogue**

Progress to this outcome is measured by the percentage of NECs that have learning plans and that have received satisfactory capacity support from GCE and RCs. EOL has made good progress to both indicators although there is evidence of some variation in satisfaction levels with capacity support received from different service providers. EOL reports<sup>156</sup> that almost all (98 percent) of OC1 grantees have developed learning plans with their respective RMUs to support their capacity building needs compared to a target of 80 percent and that 95 percent of OC1 grantees were very satisfied/satisfied with the support received from GCE/RCs.

The MTR's grantee perception survey presents a slightly more nuanced picture of OC1 grantees' satisfaction with the capacity building efforts of different stakeholders.<sup>157</sup> Almost 90 percent of OC1 respondents agreed or strongly agreed feeling satisfied with the capacity building support of the RMUs, and about 70% with the support of the GMU and regional learning partners. The

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<sup>152</sup> Oxfam IBIS. 2021. Education Out Loud Operational Component 1: Proposal for a Costed Extension 2022-23. p.10

<sup>153</sup> Oxfam IBIS. 2021. Technical Progress Report: January 1<sup>st</sup> – June 30th, 2021. Pp. 73.

<sup>154</sup> Oxfam IBIS 2021. Education Out Loud Operational Component 1: Proposal for a Costed Extension 2022-23 p. 10.

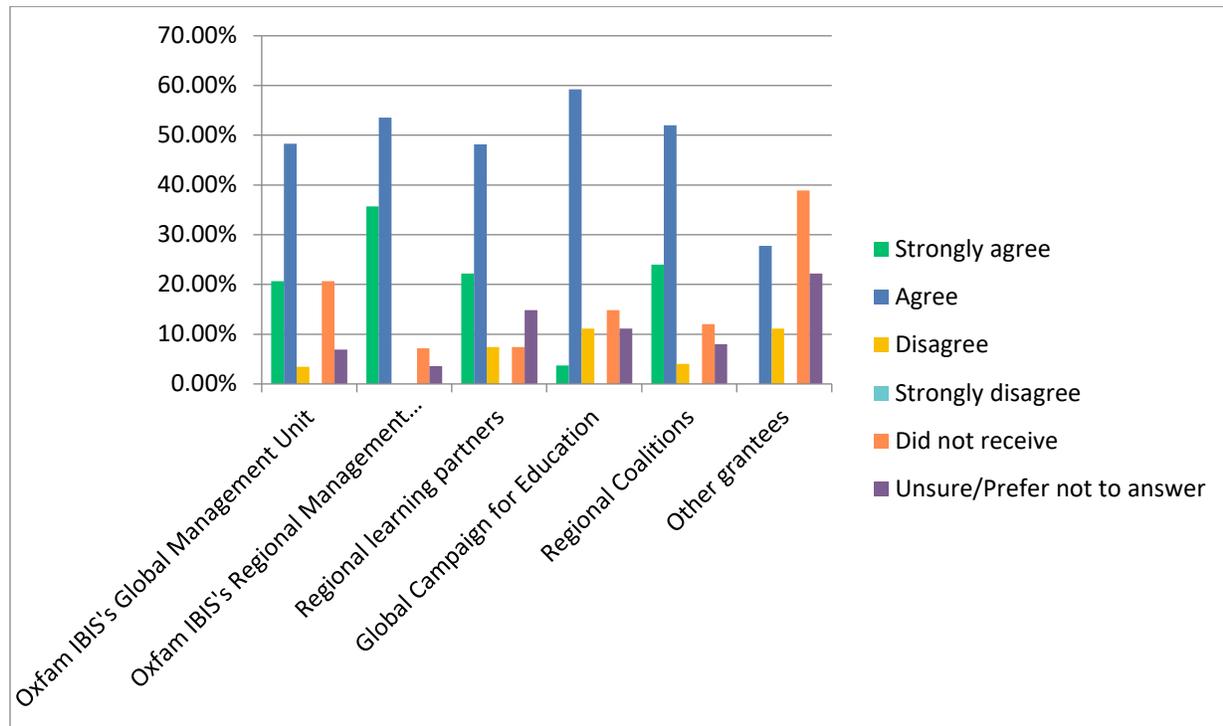
<sup>155</sup> See, for example, the Commonwealth Foundation "Network Effectiveness Framework"  
<https://commonwealthfoundation.com/resource/nef/>

<sup>156</sup> Oxfam IBIS. 2021. Technical Progress Report: January 1<sup>st</sup> – June 30th, 2021. Pp. 75

<sup>157</sup> Q23 of the survey.

high ratings for capacity development support from GMU/RMUs may reflect the “front loading” of internal systems strengthening, e.g., proposal development, project cycle management by the GA, in the early stages of program implementation. In comparison to EOL’s reporting, only 76 percent and 63 percent of OC1 respondents agreed or strongly agreed feeling satisfied with the capacity building support of RCs and GCE, respectively. However, it should be borne in mind that NECs have not received capacity building support from the RC in Africa.

**Table 5: Grantee satisfaction with capacity building support, according to provider**



The majority of survey respondents (more than 70 percent) agreed that the main areas in which capacity building support had strengthened their skills were strategic planning; MEL; adaptive management; gender and social inclusion; and engagement in policy dialogue. It is interesting that survey respondents most frequently cited internal strengthening processes – financial management and monitoring and reporting – as most helpful in supporting their organization to achieve its objectives. The survey indicated that a considerable percentage of respondents<sup>158</sup> have yet to receive capacity building in relation to research capacity, policy dialogue, advocacy, and performance monitoring. It should be anticipated that advocacy-related support will be a growing demand from OC1 grantees. In this context, it is noticeable that only a minority of regional learning partners were identified as having advocacy-related competencies.

<sup>158</sup> Q24: Approximately 50% of respondents agreed/strongly agreed that EOL support had strengthened their skills in these areas.

### **Outcome 1.3. Increased civil society capacity, participation and strategic influence in formal education policy processes.**

EOL reports<sup>159</sup> over 81 percent of NECs are on track to achieving their targets regarding policy influencing (Outcome Indicator 1.3.1), compared to a target of least 60 percent throughout OC1. As of June 30<sup>th</sup>, 2021, EOL reported 61 policy changes influenced by EOL grantees in 26 GPE partner countries. According to coalitions' reporting, 26 countries have had changes in education planning, policy dialogue and monitoring influenced by civil society organizations, compared to a target of 30 countries by the end of the EOL program. (Outcome 1.5)

However, some caution should be exercised regarding the evidence base of these metrics (see Section 4.1.). Changes in education policy are frequently cited in grantee reports, in which the specific contribution of the grantee is less than clear. Although grantees are requested to specify their contribution to the reported change in EOL reporting formats, responses can be quite superficial. One example reported by EOL of NEC policy influence is summarized below.

#### **Box 5: NEC policy influence in Tajikistan**

The NEC in Tajikistan, Alliance of CSOs in Tajikistan for Education (ACTE), was actively involved in the working group that developed the country's most recent Mid-Term Development Program in early 2021. This policy included four recommendations from a study conducted in 2019 by ACTE and the Asia/Pacific RC, ASPBAE, i.e., on infrastructure development to ensure equal access to education; improvement and updating of technologies and teaching methods; development of professional development, training, and re-training of specialists; and strengthening the Educational Management Information System (EMIS).

### **Outcome 1.4. Establishment of learning collaboratives to generate lessons learned to strengthen CSOs.**

RMUs are responsible for initiating and supporting learning collaboratives at regional level. RCs are also involved in facilitating learning collaboratives, though these may or may not be under the aegis of EOL and the GA has no overview of these. What follows, therefore, is an overview of learning collaboratives to date from the GA perspective.

EOL is still in the early stages of establishing functioning learning collaboratives and each RMU has developed its own approach.<sup>160</sup> In total, EOL reported nine learning collaboratives operating in 2021, as well as three more still being established. The extent to which, and how, learning collaboratives have been established varies across the regions. The HESA region is perhaps the most advanced in helping grantees to set up learning collaboratives. The RMU has facilitated two regional meetings with grantees and created an Executive Committee to map and identify learning collaboratives which will be linked to a regional learning platform. Grantees have identified the need for thematic collaboratives to be developed, for example, in Early Childhood Development; Basic Education; Tertiary and Technical Education as well as Gender and Inclusion. The RMU-HESA has also established an online platform - Africa Education

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<sup>159</sup> Oxfam IBIS. 2021. Technical Progress Report: January 1<sup>st</sup> – June 30<sup>th</sup>, 2021. Pp. 80.

<sup>160</sup> This sub-section draws upon data provided the GA, 21/02/22.

and Learning Hub<sup>161</sup> - so that grantees can post blogs and share lessons, success stories and research. It is expected also that learning partners will provide materials on the Learning Hub.

The concept of learning collaboratives has been interpreted somewhat differently in the WCA region where learning partners have been commissioned to lead and develop the content and methodology on behalf of NECs (see the case study in Section 4.1. on the capacity building support provided to grantees by a learning partner on resource mobilization). The RMU-WCA has also supported the establishment of Discussion and Learning Groups based on grantees' own preferences, which are facilitated by either a learning partner or an OC3 grantee.

The RMU-AP reports that a lack of clarity with the RC around their respective roles and responsibilities<sup>162</sup> has held back the establishment of learning collaboratives, though it has asked grantees and RCs to discuss their preference. The RMU-LAC is also in the early stages of setting up learning collaboratives; it has shared a draft ToR with NECs who are expected to suggest possible topics. The RC in Latin America also has shown interest in establishing learning collaboratives, though the focus and organization of these to date is not known.

### 5.3. Progress towards Objectives 2 and 3

It is too early to determine the extent to which progress has been made towards achieving the objectives of OC2 and OC3, since implementation only began in mid-2021 and monitoring data is limited. In the circumstances, the review drew upon the most recent reports of OC2 and OC3 sample grantees to illustrate some early progress towards their own objectives and the OC2 and OC3 outcomes of the Global Results Framework (with the exception of learning collaboratives). This is not a systematic representation of progress across these operational components but offers an illustration at grantee level of what progress might look like.

#### **Outcome 2.1: Research data relevant to policy change or monitoring government performance**

The OC2 project 'Reframing Educational Accountability in Pakistan' (REAP) has invested in the preparatory research<sup>163</sup> necessary to develop the training modules planned to support civil society and government officials in promoting greater social accountability in the education sector in Pakistan. Since the start of the project, REAP:

- Has conducted a Training Needs Assessment (TNA) of CSOs and government officials working in the education departments of the two provinces involved in the project, Punjab and Khyber Pakhtunkhwa;
- Is conducting a study of the extent to which civil society has been involved in the development of education policies and plans to date in the two provinces; and
- Is conducting a quarterly survey to track the public expenditure of the education departments of the two provinces and will also produce an annual report on the expenditure of all provincial governments and federal government on education.

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<sup>161</sup> [www.africaeducationhub.org](http://www.africaeducationhub.org)

<sup>162</sup> See Rapid Review of OC1 p. 51 for a more general, related Conclusion 8.

<sup>163</sup> Outcome indicator 2.1.1.

## **Outcome 2.2.: Strengthened monitoring capacity of civil society and monitoring of government commitments.**

REAP aims to strengthen the capacity of civil society at all levels in two provinces of Pakistan to promote of greater social accountability in the education sector. The OC2 grantee I-SAPS has also engaged with 30 civil society organizations in different districts, which have been formed into eight Civil Society Education Networks (CSEs).<sup>164</sup> The next step will be to begin training modules to build the capacity of the CSEs in data analysis, evidence generation, procedural accountability, policy influencing strategies, financial transparency, and accountability. The development of the training modules will be based on the training needs assessments (TNAs) for both CSOs and government officials, referred to previously. I-SAPS also plans to engage with government officials to prepare the ground for constructive civil society engagement with them in policy dialogue and performance monitoring. I-SAPS reports that an unexpected outcome has been the positive response to date of public representatives at all levels, including the provincial assemblies, towards the formation of the CSEs.

## **Outcome 3.1.: Transnational vertically integrated alliances formed around strategic policy changes**

Progress to this outcome is measured by the number of alliances that have developed an advocacy plan. Two of the three OC3 grantees sampled have developed a learning plan<sup>165</sup> and have, or are in the process of, finalizing a transnational advocacy plan. The exception is Girls Not Brides, which has not yet developed a common alliance advocacy strategy but has brought together coalition members to identify priorities and areas of alignment and collaboration.<sup>166</sup> The Consortium led by the Zimbabwe Network of Early Childhood Actors (ZINECDA) also finalized an advocacy plan in December 2021, which identifies the issues in relation to early childhood development education that it will focus on the three countries involved, along with target groups, type of approach, expected results, time frame and budget. It has also formed a transnational advocacy team to push the ECDE agenda at the level of the Southern Africa Development Community (SADC). A task force to promote the ECDE agenda at SADC level and regional policy spaces was formed at a five-day workshop “ECDE Road to SADC” at which government officials from the three countries also participated.

## **Outcome 3.2. Increased capacity of transnational alliances, particularly in relation to advocacy**

Though still in the early stages of implementation, ZINECDA has sought to create a supportive, vertically integrated environment to promote ECDE at both the regional and national levels through policy dialogue with key government stakeholders. For example, ZINECDA organized an event during the Global Action Week for Education for key ministry officials from Lesotho, Malawi, Zambia, and Zimbabwe to advocate for ECDE policies and the standardization of guidelines across the region. The meeting was also attended by the EOL-supported NEC in Zimbabwe, ECOZI, and coalition members. As a result of that meeting, attendees agreed to

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<sup>164</sup> Outcome indicator 2.2.1

<sup>165</sup> Outcome indicator 3.2.1

<sup>166</sup> Outcome indicator 3.1.1.

establish a technical working group with government representatives, legislators, and CSO representatives to discuss and address ECDE financing at the regional level through the SADC Committee on Education and Training.<sup>167</sup>

### **Outcome 3.3. Changes in education policies at global, regional or national level through alliances**

OC3 grantee Action Aid International is working with partners in Nepal, Senegal, and Zambia in the TaxEd Alliance to increase tax revenue and education budgets in the three countries. TaxED is supporting research in the target countries on the effects of austerity measures on the public sector, especially on education. The aim is to support global level advocacy with evidence on financing and spending globally; to track economic stimulus measures that benefits marginalized groups; and to make recommendations for national level program and budget planning. In Zambia, TaxEd held workshops in July and August 2021 that included a broad number of participants from civil society, government, youth, and international observers from Botswana. The workshops had a significant media impact on the need for tax justice to fill the education financing gap and led to a call from the Director of Planning in the Ministry of Higher Education for Zambia to take taxation issues seriously and to curb tax avoidance as this affects resources available for service delivery and achievement of SDGs.

### **Outcome 3.4.: Strengthened social accountability mechanisms to follow up on global, regional or national commitments**

The OC2 grantee in Liberia, Helping Our People Excel (HOPE), is implementing a project called EDUCATE HER to promote gender equity and equality with regard to national commitments to education in Liberia. One of HOPE's objectives is to strengthen stakeholders' capacity to monitor the implementation of the National Policy on Girls' Education and follow up on national commitments in the policy.<sup>168</sup> This includes leading and conducting joint biannual monitoring, evaluation, accountability, and learning (MEAL) assessment with Ministry of Education and local NGO stakeholders. The most recent MEAL data collection took place in November and December 2021 and included gathering data on factors affecting girls' attendance, retention, and completion; processes to address sexual harassment and violence against students; and access to WASH and latrines. HOPE is also developing social accountability mechanisms for a broader range of stakeholders, including systems for data and report verification. This will be supported by the development an EMIS through planning, delivery, assessment, and ongoing reporting on quarterly data.

## **5.4. Progress on gender-related objectives**

Section 3.3 described how the GA has incorporated an Oxfam IBIS gender-aware approach in its policies and procedures; how grantees have confirmed that EOL support is relevant to their organization's gender and social inclusion goals<sup>169</sup>; and provided the example of Girls, Not Brides incorporating gender equity and inclusion in its project objectives. Section 5.2. has

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<sup>167</sup> Outcome indicator 3.3.1.

<sup>168</sup> Outcome indicator 3.4.1.

<sup>169</sup> Q10 of the grantee perception survey

confirmed that all NECs include representation from women/girl-representative groups. However, gender equity in EOL is not addressed only by the representation of women and/or girls' groups in NECs but is also expected to be integrated into the program objectives of grantees. This section will briefly review the extent to which grants focus on and have achieved gender-related objectives (RQ3.1.3).

There is some evidence for the need for more concerted effort in EOL to ensure that grantees have gender-related objectives. EOL documentation reports a significant variation across grantees and regions regarding the integration of a gender perspective in grantee objectives.<sup>170</sup> Grantees in LAC region are reported to be the strongest in advocating for gender equality and focusing on gender issues, as well as highlighting gender in their activities and communications. The OC1 grantee in Bolivia is one of most active NECs in the region on gender issues and actively promotes, for example, issues including sexual diversity and LGBT+ groups. Foro Dakar in Honduras, along with other civil society groups, in 2021 lobbied parliamentarians, political parties and presidential candidates to ensure the inclusion of a gender and inclusion perspective in the strategic plan for education sector in Honduras. It also held a virtual workshop on the LGBT+ community and the education system in Honduras with more than 100 participants including municipal authorities, youth and students, and on gender-related violence in the education system.

Some grantees in the EOL region Asia/Pacific – for example, in Mongolia, Nepal, Philippines, Vanuatu, Vietnam, and Moldova – are also exploring gender-related issues with regard to their programming but less so with regard to their organizations and governance. Other grantees in the region are less able to move beyond gender-disaggregation for reporting and formal representation in their coalitions, towards a more committed understanding to gender equality.

In the WCA region there has been an increase in the number of female members of governance Boards, but NECs vary in their interest in promoting gender equity more broadly. Those grantees in the region that are led by women – namely Gambia, Burundi, and Mozambique – tend to prioritize gender in their objectives while others – such as the DRC, Sierra Leone, Niger, and Burkina Faso – lack a formal approach to gender. Similarly, while some grantees in the HESA region – particularly Eswatini and Tanzania – have gender strategies and focus on gender issues many grantees struggle to address gender issues beyond formal representation.

## 5.5. Unanticipated results

This sub-section assesses whether there were any positive or negative unanticipated results within EOL during the evaluation period (RQ3.2). As in the Rapid Review of OC1, the most significant unanticipated event since the inception of EOL has been the global COVID-19 pandemic in 2020-2022. This has already been discussed in detail in the Rapid Review and in Section 4.3. so will not be discussed in detail here other than to note that the rapid shift to working virtually provided many grantees with a cost-saving opportunity to invest more substantially in knowledge content and processes.

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<sup>170</sup> Oxfam IBIS. 2021. Internal EOL Document: Systematization Part Two on RMU Perceptions of NECs' Strengths in their National Context and NECs' Past Performance. Pp. 7-9.

The unexpectedly high response rate to the Open Call for OC2 was also an unexpected result for EOL which, as described also in Section 4.3., required the GA to adapt its grant selection and approval processes accordingly and resulted in a longer proposal review and selection process.<sup>171</sup> On the positive side, the volume, diversity and quality of applications received was encouraging and demonstrated what one stakeholder described it, *“a bold, necessary decision to include Open Calls for wider outreach to civil society.”*<sup>172</sup>

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<sup>171</sup> KIIs 28, 32, 35, 43

<sup>172</sup> KII 35

## 6. Findings: Sustainability

### 6.1. Organizational and financial sustainability

This Section will examine to what extent EOL is contributing to the organizational and financial sustainability of grantees and, more broadly, to civil society playing a long-term, transformative role in the education sector (RQ4.1.).

#### *Key findings*

- *Grantees report that EOL strengthens their organizational sustainability as its capacity building efforts increase the likelihood of their obtaining funding from other sources.*
- *Significant number of OC1 grantees remain financially dependent of EOL after many years GPE support.*
- *OC2 and OC3 grantees have diverse funding base and are not dependent on EOL support.*
- *Too early to assess how EOL design will contribute to long-term change, though how it maximizes its potential in the GPE 2025 strategy and operating model will be critical.*

Survey data indicates that most OC1 grantees consider that EOL contributes to their organizational sustainability by strengthening their capacities in key areas that should enable them to secure funding from other sources (though this will need to be confirmed by successful funding applications). On average, approximately 75-80 percent of OC1 respondents agreed or strongly agreed that EOL has helped their organization become more sustainable by strengthening their project cycle management, financial management, governance and strategic planning. Project cycle management, in particular, was identified by OC1 grantees as a key area strengthened by EOL that likely to help secure funding from other sources.<sup>173</sup>

#### **Box 6: An example of EOL organizational strengthening**

*“The grant writing process and the Year Zero Funds was very helpful in building the institutional strength of our organization. Through EOL’s support we have institutionalized key governance policies, procedures and finance and administrative measures to realign our operational and administrative frameworks. We have since hired a senior finance and administrative manager to ensure that our finance management and internal control systems and risk management processes are optimized.”*

(Source: OC2 respondent from grantee survey)

However, the area that responding OC1 grantees scored lowest in terms of support was fundraising and grant application capacity, though 50 percent still agreed or strongly agreed that EOL had supported them in that area. Only 50 percent of OC2 and OC3 respondents agreed or strongly agreed that EOL had helped their organization become more sustainable, as approximately 40 percent had yet to receive any support in these areas or preferred not to answer. Support to fundraising and grant application capacity scored lowest with OC2 and OC3 grantees, with 30 percent of respondents reporting they had not received support in this area and an additional 25 percent choosing not to answer.

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<sup>173</sup> KIIs 5,13,14, 21

Grantee respondents in the survey identified a number of ways in which EOL could better support their organization's sustainability. Most frequently, grantees suggested that increased support to develop their fundraising capacity as a means of improving their sustainability. There were a number of associated suggestions, e.g., support to increase grantee profile by developing a marketing and communications strategy, and/or connecting grantees to other donors. A number of grantees in interview mentioned that an association with the GPE/EOL brand enhances their credibility and likelihood of funding from other sources<sup>174</sup>. Some OC1 grantees suggested that EOL support to broaden the membership of coalitions<sup>175</sup> and strengthen networking would also contribute to their organizational sustainability. A number of OC1 grantees cited longer-term and/or larger grants and EOL support for core costs, including capital costs, as factors – although whether this would strengthen their financial sustainability or increase their financial dependence is an open question.

Survey data reveals a marked disparity in the financial profile of OC1 and OC2, OC3 grantees. OC1 grantees across all RMUs tend to be smaller organizations with a high level of financial dependency on EOL. 83.02% of OC1 grantees have an annual income of less than U\$500,000 and more than half of them (28 grantees) received more than 70% of their income in the last financial year from EOL. The majority of these had been funded by GPE for more than a decade. Further EOL support to build fundraising capacity is a priority for many OC1 grantees but this, on its own, will not guarantee a financially sustainable future given the limited availability of donor funding for civil society in the sector.

Since OC2 and OC3 grantees were selected, in part, on the basis of their capacity to manage a large grant, they tend to be larger organizations (61.1 percent and 87.5 percent, respectively, have an annual income in excess of U\$500,000) and are not dependent on EOL as a source of income since they have a diverse range of funding support (the EOL grant for 83.3 percent and 87.5 percent respectively of OC2 and OC3 grantees is less than 30% of their income).

## 6.2. Sustainable results

This Section will review to what extent the strategic design of EOL help grantees to deliver sustainable results (RQ4.2.)

Most EOL grantees are working in an increasingly difficult operating environment. Section 5.1. described how more than a third of OC1 grantees work in countries defined as fragile or conflict-affected and approximately 90% of EOL grantees work in countries where civic space is closed, obstructed or restricted<sup>176</sup>. At the same time, the GPE 2025 operating model assumes a collaborative approach between government and civil society to improving educational outcomes. In these circumstances, respondents in the grantee survey identified a number of obstacles to achieving long-term change in the education sector. These included:

- A shrinking civic space for public debate and civic engagement;

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<sup>174</sup> KIIs 5,13,14

<sup>175</sup> KIIs 16,17

<sup>176</sup> See <https://monitor.civicus.org/>

- A lack of government recognition of the role civil society that can play in policymaking, and the limited use of data and evidence in policymaking;
- Deteriorating security situations affecting travel and access to target groups;
- The education sector can be a very traditional sector with vested interests that seek to maintain the status quo;
- Volatile, changing political contexts with frequent changes to key personnel in government and ministries contributing to a lack of vision and leadership for the sector; and
- Deteriorating economic conditions and Covid restrictions contributing to budget constraints for the sector.

Despite the difficulties listed above, and the disruption of the COVID-19 pandemic, most grantees are making early progress towards their objectives. Grantees identified a number of enabling factors, many of which converge with design features of EOL, which are likely to help their organization achieve long-term change in the education sector:

- Support to civil society to access government-led policy fora facilitates a collaborative approach to policy dialogue and decision-making;<sup>177</sup>
- Strengthening the technical and organizational capacity of grantees helps to make them more effective advocates for civil society;<sup>178</sup>
- Strengthening coalitions and broader networks with diverse and inclusive membership offer a credible, collective voice to “bridge the citizen/state divide” in education policy dialogue;<sup>179</sup>
- Support for policy-related research can provide civil society with an evidence base with which to advocate for social accountability;<sup>180</sup>
- Support for the better use of data can enhance the ability of civil society to monitor education budgets and implementation and promote transparency and social accountability;<sup>181</sup>
- Longer-term predictable funding and support for adaptive programming enables civil society to adopt a more strategic approach.<sup>182</sup>

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<sup>177</sup> KIIs 15, 16,20,24

<sup>178</sup> KIIs 13, 16, 21, 25, 31

<sup>179</sup> KIIs 14,31

<sup>180</sup> KIIs 15,16,17

<sup>181</sup> KIIs 14

<sup>182</sup> KIIs 13,17,31

## 7. Conclusions and recommendations

### 7.1. Relevance

#### **EQ 1.1. Relevance of operationalization of EOL design to objectives**

EOL has a sound design that draws upon lessons learned from previous evaluations and that correlates with documented good practice in key areas with regard to donor support to civil society. There is evidence that some CSOs with sound proposals were unsuccessful in their applications to EOL Open Calls due to selection criteria associated with the size of grant. A key lesson from DAC Peer Reviews is the need for EOL to ensure that its funding mechanisms are designed to attract and support those CSOs best placed to contribute to its objectives.

Grantees confirm that EOL's capacity building and financial support is very relevant to their needs and the achievement of their objectives in policy dialogue and advocacy for social accountability. Grantees highlighted core grant funding; institutional strengthening; and the quality of support available from RMUs as most relevant to supporting them achieve their objectives, though many OC1 grantees reported that longer-term grant funding would be more relevant to an advocacy-oriented program.

- *Recommendation 1: In the event of EOL being extended, GPE to consider some design changes to ensure that its funding modalities target and support CSOs and coalitions that have the credibility and competencies to make an impact within the GPE 2025 operating model. This could include a more differentiated grant funding to enable it to support a wider range of CSOs to advocate for and monitor inclusive education, and the provision of three-to-four-year grants across all OCs.*

The Year Zero process was seen as a positive, distinctive feature of EOL by all grantees. In the case of OC1, circumstances dictated that the GA focused narrowly on strengthening grantees' proposals rather than enabling them to learn and innovate to improve the relevance of their activities, as originally intended.

- *Recommendation 2: In the event of EOL being extended, the GA to retain, reconfigure and rename the Year Zero process and reconsider its competitive element. The principal focus should be to provide an opportunity for grantees to learn and innovate to enrich their proposed approach and generate synergies across the portfolio.*

#### **EQ 1.2. Relevance of EOL to GPE 2021-25 strategic plan and operational model**

EOL's focus on strengthening the capacity of civil society to engage in policy dialogue and promote social accountability in the education sector aligns with the GPE 2025 strategy goal of system transformation and equitable, inclusive education systems, and to the new operating model with its emphasis on country ownership and inclusive sector dialogue. However, the new model is still in a pilot stage and preliminary documentation identifies only a few formalized mechanisms for civil society to participate in the Compact process. The GA is facilitating regional webinars to raise awareness of grantees of civil society participation in the new model, but this should be complemented by a systematic approach to level up the capacity

of grantees to contribute effectively to the different stages of the Compact process, and to other relevant policy fora.

- *Recommendation 3: GA to develop regional learning plans to strengthen grantees' capacities in line with opportunities to contribute to system transformation and the Compact process e.g., monitoring education financing and government performance in the sector. This could involve initial assessments the capacities of NECs to contribute effectively to the Compact process and other relevant policy fora and supported by learning partners; facilitated by peer learning, drawing on grantees with a strong track record in this areas; and by knowledge sharing relevant research.*

The role of GPE country teams in facilitating EOL grantee participation as a strategic resource at country level in the new model will be critical and has been understated. This enabling role is particularly important in the increasing number of GPE partner countries where civic space is obstructed or restricted. However, the level of awareness and understanding within the GPE Secretariat of the role that civil society has to play in system transformation is variable. A systematic approach to raising the profile of and building support for EOL in the GPE Secretariat will be necessary to ensure that GPE country teams understand and 'buy into' the role that civil society can play in system transformation and the new operational model.

- *Recommendation 4: GPE EOL Team and GA to devise a plan to raise the profile and level of understanding of EOL among GPE country teams in order to facilitate opportunities for CSO engagement in the Partnership Compact and other relevant fora. This might include producing tailor-made communications on EOL for country teams; developing a guidance note on the opportunities for civil society to play a role in the GPE 2025 operating model; and clarification of GPE Secretariat responsibilities to support country partners in accessing EOL as a strategic resource in GPE.*

### **EQ 1.3. Incorporation of gender equality, equity and inclusion in EOL**

EOL's approach to gender equity and social inclusion draws upon the strong institutional policies of Oxfam IBIS as grant agent to incorporate a gender-aware and inclusive approach in different aspects of the program design. While the majority of grantees report that EOL has helped them incorporate gender equity and social inclusion in their work, there is considerable room for improvement in how these concepts are mainstreamed in all aspects of their programming.

- *Recommendation 5: The GA to develop an EOL gender and social inclusion policy and use it to broaden and deepen the understanding and application of the concept by grantees across the portfolio. This work could be supported by regional learning partners and peer learning drawing on grantees with a strong track record in this area.*

## 7.2. Efficiency

### **EQ 2.1. EOL policies and procedures ensure stewardship of resources and successful partnering**

There is a high-level of grantee satisfaction with the transparency and utility of the grant application and approval processes and with the at-distance mentoring and monitoring support offered by RMUs before and after grant approval. However, there have been some delays in the roll out of EOL as a program and there is room to improve the time-efficiency of some grant administration and management processes. For example, the Coordinating Group has recently approved a simplified system of reporting which grantees previously had found time consuming and burdensome. At a global level, the GA continues to invest considerable effort to produce a series of very detailed reports whose utility could be reviewed. As EOL moves into full implementation, and can be expected to report more achievements and generate more knowledge content, it would be appropriate for the GA to consult and review what kind of information should be communicated to whom, for what purpose, and through which channels.

- *Recommendation 6: In the event of EOL being extended, GPE/GA to review the efficiency and utility of some key grant management processes - for example, better synchronization of calls for proposals (CfPs) to facilitate synergies between OCs; reduction in time from CfP to grant approval (simplified concept note and approval process); and a revised communications framework to produce more tailored communications to share distilled learning and stories of change in EOL.*

The EOL approach to on learning and capacity building e.g., through the development of learning plans, is highly valued by grantees. However, there is risk that ongoing confusion regarding the roles of RMUs and RCs in relation to learning and capacity building, may lead to some duplication of effort and an overload of training initiatives. It is important also that the GA builds on its system of matrix management to ensure that the efforts of its staff are well coordinated in support of learning and knowledge-sharing across the program. At a global level, the GMU, GCE and KIX urgently need to strategize around their respective roles in EOL knowledge creation and dissemination in order to achieve synergy and avoid confusion and duplication of effort. This is all the more urgent as EOL begins to generate more knowledge content, and as the new operating model with its emphasis on evidence-based policy dialogue becomes established.

- *Recommendation 7: GPE/GA to facilitate synergy and avoid duplication of effort among key stakeholders in knowledge sharing by reviewing:*
  - *Roles and current status of GCE, KIX and EOL at a global level in knowledge creation and dissemination in the context of the new operational model;*
  - *Roles and working practices of RMUs and RCs to ensure learning and capacity development is planned and coordinated efficiently at regional level;*
  - *GA working practices to ensure that its support to learning and knowledge sharing across the program is efficiently coordinated e.g., by developing a joint workplan for GMU and RMUs; reviewing issues and lessons emerging from grantee reports; sharing and discussing issues emerging from the matrix meetings; and providing*

*opportunities to discuss with other stakeholders more strategic issues such as how EOL should approach global learning and maximize synergies with GCE and KIX.*

## **EQ 2.2. Adaptive management in the design and implementation of EOL**

Evidence from the review supports Assumption 8 of the EOL theory of change i.e., that the management of EOL grants is flexible and allows grantees to improvise and adapt to changes in the operating context. Adaptive management is thoroughly embedded in EOL policies and processes and the delegated authority of RMU has been a major contributory factor to most OC1 grantees' activities remaining on track. The GA has also demonstrated an ability to adapt in a timely fashion to unanticipated challenges in the roll out of the program. Now that the EOL program is fully operational, the GA should create opportunities for key stakeholders to reflect more strategically on how key issues relevant to the achievement of its objectives, e.g., the tenability of the assumptions of the EOL theory of change and how best to leverage the learning and knowledge of EOL in the context of the new operational model (See Recommendation 7).

## **7.3. Effectiveness**

### **EQ 3.1. EOL achievement of objectives**

While it is too early to assess progress of OC2 and OC3 to their objectives, Objective 1 remains relatively on track towards its intended results. However, some caution should be exercised with regard to the limitations of reporting to the level of ambition of outcome statements; the over-reliance on quantitative indicators; and the supporting evidence for policy changes. Quantitative indicators need to be supplemented by qualitative information if the nature and level of results achieved are to be properly understood. For example, Outcome 1.1 remains relatively on track regarding the inclusion of marginalized groups in coalitions but there is no information on the extent to which the NEC is responsive to or representative of these groups. A more ambitious outcome statement would refer to the representativeness and accountability of coalitions to marginalized groups rather than focus exclusively on the numbers of marginalized groups in the coalition.

- *Recommendation 8: The GA to consider how best it can support grantees to report on change at outcome level, for example, through use of learning partners. This may include the use of mixed indicators; introduction of methods to establish a plausible contribution to reported changes; use of purposive case studies; and of appropriate tools such as Network Effectiveness Frameworks to assess, monitor and support the representativeness and accountability of the coalitions it supports.*

The review found little evidence of how synergies across the OCs might be achieved at country or regional levels, though many grantees would like to see stronger links through stronger peer learning, sharing of evidence and research, and the exploration of joint or complementary advocacy agendas. A better synchronization of the grant selection and approval processes across OCs may have helped to provide more opportunity for such synergies which will have increased importance in relation to the GPE 2025 operating model.

- *Recommendation 9: GPE Secretariat and GA to review how synergies between OCs can be facilitated in EOL planning and implementation processes in the current period and in any future extension.*

## 7.4. Sustainability

### **EQ 4.1. Financial and organizational sustainability**

EOL helps to support the organizational sustainability of OC1 grantees in particular through its capacity development support in e.g., proposal development and project cycle management, which will make the organization more able to apply for and obtain funding from other sources. However, a significant number of OC1 coalitions remain largely financially dependent on EOL after several years of GPE grant funding. Given the limited funding available for civil society advocacy in the sector, it is important to be realistic about the likelihood of coalitions becoming financially independent. Capacity development support in resource mobilization, for example, will need to be accompanied by other measures to ensure that grantees are able and motivated to take full advantage of the support offered.

### **EQ 4.2. Contribution of EOL design to sustainable results**

It is too early in the implementation of EOL to confirm what design features are likely to contribute to grantees contributing to long-term change. The implications and opportunities for civil society to exercise a lasting influence within the new GPE operating model are not yet clear. The adaptive management approach of the GA has to date been key to enabling grantees to keep on-track with progress to objectives. Despite an increasingly difficult operating environment in many countries, it is evident that many OC1 coalitions, after years of support from GPE, have access to and credibility in government-led decision-making fora in the education sector. The challenge facing EOL is how well it can support grantees to play an influential role in the GPE 2025 operating model in the absence of an enabling environment.

## Annex 1. Mid-term review matrix

1. RELEVANCE						
	Review question	Sub-question	Indicators/criteria	Data analysis method	Data collection methods	Data sources
1.1.	To what extent has the operationalization of the design and approach of each of the components of EOL been relevant for achieving its principal objectives in partner countries? <sup>183</sup>	1.1.1 To what extent has the operationalization and management of the design and approach of each of the operational components of EOL drawn on learning and best practice, internally and externally, regarding support to civil society advocacy?	<p>The operationalization and in practice management of EOL Operational Component’s design and approach (including but not limited to grant management and capacity building) is relevant based on:</p> <ul style="list-style-type: none"> <li>- Lessons learned from past GPE-supported advocacy programming</li> <li>- Best practice in the sector with regard to donor support to civil society.</li> </ul>	<p>Content analysis using thematic coding</p> <p>Content analysis using thematic coding</p>	<p>Program document review</p> <p>External literature review</p>	<p>Including but not limited to Endline and Midterm Evaluations of CSEF III, EOL biannual reporting, and Rapid Review of OC1</p> <p>OECD/DAC materials, evaluations of multi donor funds for civil society, and other literature</p>

<sup>183</sup> Conclusion-type question for 1.1, to draw from findings: Which features of the strategic design and approach of EOL should be retained if it is funded beyond 2024, and which should be adapted or changed?



1.3.	How does EOL currently incorporate gender equality, equity and inclusion in its policies and practices? <sup>185</sup>	1.3.1. Does EOL have clear policy guidance on how gender equality, equity and the inclusion of marginalized groups should be incorporated in its programming and working practices?	EOL design and program documents provide clear guidance on how gender equality, equity and inclusion can be incorporated in its working practices, e.g., grantee proposals and reporting.	Content analysis using thematic coding	Document review	ASA/EOL Blueprint, GA's Proposal Application and revision documents, GA's processes and procedures, and sample of grant-level documentation
		1.3.2. Are there widespread examples of such guidance being successfully implemented?	Evidence of the incorporation of gender equality, equity and inclusion in working practices and activities.	Content analysis using thematic coding  Descriptive frequency analysis	Document review  Survey	EOL biannual reporting and sample of grant documentation  All current grantees of EOL across OC1, OC2 and OC3
<b>2. EFFICIENCY</b>						
2.1.	To what extent do EOL policies and procedures ensure the adequate stewardship of resources, and facilitate successful partnering? <sup>186</sup>	2.1.1. How clear and efficient are EOL grant management and administration policies and processes i.e., in terms of costs, timeliness, quality of services, in meeting stakeholder needs)?	Extent to which EOL grant administration policies are clear and efficient in terms of: <ul style="list-style-type: none"> <li>- Calls for proposal e.g., Application to proposal ratio</li> <li>- Clarity of guidance</li> <li>- Communication with applicants/grantees</li> <li>- Time from concept note to proposal approval/ implementation</li> <li>- Capacity development support</li> <li>- Due diligence assessment and fiduciary oversight</li> <li>- Perception of quality of service provided</li> </ul> Timeliness and efficiency of key EOL grant administration practices, including: <ul style="list-style-type: none"> <li>- Application to proposal ratio</li> <li>- Cfp/approval/ implementation time</li> </ul> Grantee assessment of grant management efficiency throughout the grant cycle and suggested areas for further improvement.	Content analysis using thematic coding  Content analysis using thematic coding  Descriptive frequency analysis	Document review  KIIs and FGDs  Survey	Grant Agent programmatic documents, including budgetary records by GA  Grant Agent's GMU and RMU, sample of grantees, and GCE and RCs  All current grantees of EOL across OC1, OC2 and OC3

<sup>185</sup> Conclusion-type question for 1.3, to draw from findings: What opportunities exist for strengthening these gender equality, equity, and inclusion efforts?

<sup>186</sup> Conclusion-type question for 2.1, to draw from findings: What aspects of the implementation of the EOL should be continued and which should be adjusted to promote greater efficiency if it is extended?

		2.1.2 To what extent are EOL roles and governance arrangements clearly defined and satisfactorily implemented, i.e., between EOL Coordination Group, GPE Sec, EOL Team, Grant Age's GMU and RMU, GCE and RCs?	<p>Extent to which governance and management relationship are clearly defined and communicated.</p> <p>Extent to which governance and management roles are understood by stakeholders.</p> <p>Extent to which governance and management roles are satisfactorily implemented.</p> <p>Challenges and areas for improvement in this design and implementation.</p>	<p>Content analysis using thematic coding</p> <p>Content analysis using thematic coding</p>	<p>Document review</p> <p>KIIs and FGDs</p>	<p>Blueprint and Proposal Application, including RACI Matrix</p> <p>GPE Secretariat, GA's GMU and RMU, GCE and RCs</p>
		2.1.3. Does evidence from relevant learning on civil society support (see RQ1.1.1.) indicate aspects of EOL implementation where greater efficiency might be achieved?	<p>Identification of:</p> <ul style="list-style-type: none"> <li>- What works well and why in terms of inter-institutional coordination each of the three operational elements</li> <li>- Key challenges and opportunities to enhanced efficiency.</li> </ul>	Content analysis using thematic coding	KIIs and FGDs	GPE Secretariat, GA's GMU and RMU, and local and regional stakeholders
		2.1.4. Which aspects of EOL implementation do stakeholders identify as successful and where do they identify room for improvement, and how?	<p>Identification of:</p> <ul style="list-style-type: none"> <li>- What works well and why in each of the three operational elements</li> <li>- Key challenges and opportunities to enhanced efficiency.</li> </ul>	<p>Content analysis using thematic coding</p> <p>Descriptive frequency analysis</p>	<p>KIIs and FGDs</p> <p>Survey</p>	<p>GPE Secretariat, GA's GMU and RMU, and local and regional stakeholders</p> <p>All current grantees of EOL across OC1, OC2 and OC3</p>
2.2	To what extent has adaptive management been built into the operationalization of the design and implementation of EOL and contributed to its efficiency and effectiveness? <sup>187</sup>	2.3.1. How has adaptive management been incorporated into EOL policies and processes. and communicated to stakeholders?	<p>Extent to which adaptive management principles have been incorporated in EOL policies and guidance.</p> <p>Extent to which key processes e.g., work planning, financial administration etc. are flexible to enable adaptive management.</p> <p>Clear stakeholder understanding of what adaptive management entails, based on how it is approached in GPE Secretariat's original ASA</p>	<p>Content analysis using thematic coding</p> <p>Descriptive frequency analysis</p> <p>Content analysis using thematic coding</p>	<p>Document review</p> <p>Survey</p> <p>KIIs and FGDs</p>	<p>EOL learning products and biannual reporting</p> <p>All current grantees of EOL across OC1, OC2 and OC3</p> <p>EOL national, regional, and global stakeholders</p>

<sup>187</sup> Conclusion-type question for 2.2, to draw from findings: What aspects of adaptive management EOL should be continued, and which should be adjusted to promote greater efficiency?

			Blueprint and any subsequent agreed upon protocols by the GA and GPE Secretariat.			(specifically GA's GMU and RMU)
		2.3.2. How have grantees been supported to adapt to changes in context or need?	Extent to which grantees have been supported on adaptive management.	Content analysis using thematic coding	Document review KIIs and FGDs	EOL, GA and sample of grantee reporting.  EOL national, regional, and global stakeholders (specifically GA's GMU and RMU), and a sample of EOL grantees
		2.3.3. What examples are there of EOL adapting in a timely and flexible fashion to changes in context and needs, especially with respect to the COVID-19 pandemic, and what lessons can be drawn from these?	Identification of what has worked well and why about: <ul style="list-style-type: none"> <li>- How EOL systems and processes have enabled grantees to adapt and respond to unforeseen circumstances.</li> <li>- Key challenges in adaptive implementation i.e., inflexibility of systems, tardy decision-making.</li> <li>- How adaptive management can be better supported.</li> </ul>	Content analysis using thematic coding  Content analysis using thematic coding  Descriptive frequency analysis	Document review  KIIs and FGDs  Survey	EOL, GA and sample of grantee reporting.  GA's GM and RMU, and local stakeholders including a sample of grantees. All current grantees of EOL across OC1, OC2 and OC3
<b>3. EFFECTIVENESS</b>						
3.1.	To what extent is EOL achieving its objectives?	3.1.1. To what extent has progress been made towards achieving the objectives of each operational component?	Extent to which targets of current EOL plan have been met within the expected timeframe in terms of the achieved/mobilized inputs, expected output and outcome indicators for each of the operational component, and the extent to which they have or have not unfolded as planned.  Contribution of reported changes to relevant outcome areas of GPE strategy 2020 and 2021-25.  What has worked well and why in terms of the reported or anticipated contribution of grantee activity on behalf of marginalized groups	Content analysis using thematic coding  Content analysis using thematic coding	Document review  KIIs and FGDs	EOL progress and biannual reports for each operational component  GA's GM and RMU, and local stakeholders including a sample of grantees.
		3.1.2. To what extent does progress to date	Case studies to illustrate the robustness of two (assumption 4 and assumption 8)	Content analysis using thematic coding	Document review	EOL progress reports, MEL-related documents,

		uphold/undermine all the implicit/explicit assumptions of the EOL theory of change, and what are the implications?	implicit/explicit assumptions of theory of change.  Evidence of assumptions being upheld or contradicted  Key challenges and areas for revision of EOL theory of change  The quality of support received by grantees from EOL	Content analysis using thematic coding	KIIs and FGDs	and learning documents  GPE Secretariat EOL Team and GA's GMU and RMU, as well as GCE and RCs
		3.1.3 To what extent do grants focus on gender-related objectives? To what extent are gender-related objectives being achieved?	Evidence of the incorporation of gender equality, equity, and inclusion in grantee-level objectives  Extent to which targets of gender-related objectives at the grantee-level have been achieved	Content analysis using thematic coding  Content analysis using thematic coding	Document review  KIIs and FGDs	EOL biannual reporting and sample of grant documentation  GA's GMU and RMU, and sample of grantees
3.2.	What positive and negative unanticipated results need to be considered by EOL? <sup>188</sup>	3.2.1. How do EOL procedures/systems support/require the reporting of unanticipated events/ results?	Extent to which guidance/ reporting templates incorporate the possibility of unanticipated events/results.	Content analysis using thematic coding	Document review  KIIs and FGDs	EOL progress reports and sample of grant reports  GA, learning partners, and a sample of grantees
		3.2.2 Were there any positive and negative unanticipated results, and what were their consequences?	Incidence of unanticipated results, and their corollaries	Content analysis using thematic coding	Document review  KIIs and FGDs	EOL progress reports and sample of grant reports  GA, learning partners, and a sample of grantees
<b>4. SUSTAINABILITY</b>						
4.1.	How are grantees working to ensure their financial and organizational sustainability, the sustainability of initiatives funded by	4.1.1 Are there any measures in place e.g., by the grant agent and EOL learning partners, to help strengthen grantees' financial and organizational sustainability?	Existence, extent and quality of relevant support and advice provided through EOL e.g., re. fundraising, governance etc.  Extent to which grantees consider the support and training provided through EOL to be relevant their financial and organizational sustainability.	Content analysis using thematic coding  Descriptive frequency analysis	Document review  Survey	Relevant materials of GA and learning partners, e.g., course outlines, training evaluations, and presentations.  All current grantees of EOL across OC1, OC2 and OC3

<sup>188</sup> Conclusion-type question for 3.2, to draw from findings: What unexpected results have implications for EOL policies, procedures and systems, and which ones are these?

	EOL, and civil society more broadly? <sup>189</sup>	4.1.2. What evidence is there of Improved financial and organizational sustainability of EOL grantees since the commencement of EOL?	<p>Changes and extent to which grantees have been co-financed by other actors or are part of pooled funding mechanisms (if data available)</p> <p>Extent to which or likelihood of GPE advocacy efforts leveraging additional resources for grantees at country or global levels, including non-traditional financing e.g., private, or innovative finance.</p> <p>Extent to which EOL has contributed to strengthening the governance and management of grantees.</p>	<p>Content analysis using thematic coding</p> <p>Content analysis using thematic coding</p> <p>Descriptive frequency analysis</p>	<p>Document review</p> <p>KIIs and FGDs</p> <p>Survey</p>	<p>Grantee-level data and learning documents</p> <p>GA’s RMUs, GMU and a sample of grantees</p> <p>All current grantees of EOL across OC1, OC2 and OC3</p>
		4.1.3. What evidence is there that EOL does, or might, contribute to civil society playing a long-term, transformative role in the education sector?	<p>Extent to which civil society, including EOL grantees, has been included in institutional arrangements of the sector to support educational reforms/ transformation.</p> <p>Strengthened CSO networking within the educational sector.</p>	<p>Content analysis using thematic coding</p> <p>Content analysis using thematic coding</p>	<p>Document review</p> <p>KIIs and FGDs</p>	<p>EOL progress reports, including a sample of grantee reports.</p> <p>Local stakeholders, including RMUs, a sample of grantees, and relevant external experts</p>
4.2.	To what extent does the strategic design of EOL help deliver sustainable results, particularly in relation to improved national policies and implementation in favor of marginalized groups’ right to transformative education? <sup>190</sup>	4.2.1. What features of EOL strategic design help grantees to deliver sustainable results?	<p>Stakeholder views on which aspects of EOL design have or are likely to help civil society contribute to long-term change in the sector.</p> <p>Extent to which grantees view EOL having contributed to sustainable results in their country context.</p> <p>What has worked well and why.</p>	<p>Content analysis using thematic coding</p> <p>Descriptive frequency analysis</p>	<p>KIIs and FGDs</p> <p>Survey</p>	<p>GPE Sec, GA, learning partners, GCE, RCs, and a sample of grantees.</p> <p>All current grantees of EOL across OC1, OC2 and OC3</p>

<sup>189</sup> Conclusion-type question for 4.1, to draw from findings: How might the operationalization and management of EOL be adjusted to better support the financial and organizational sustainability of EOL grantees?

<sup>190</sup> Conclusion-type question for 4.2, to draw from findings: How might the strategic design of EOL be adjusted to better support the achievement of sustainable results?

## Annex 2. Workplan

	20/09/21	27/09/21	04/10/21	11/10/21	18/10/21	25/10/21	01/11/21	08/11/21	15/11/21	22/11/21	29/11/21	06/12/21	13/12/21	20/12/21	27/12/21	03/01/22	10/01/22	17/01/22	24/01/22	31/01/22	07/02/22	14/02/22	21/02/22	28/02/22	07/03/22	14/03/22	21/03/22	28/03/22	04/04/22	11/04/22	18/04/22	25/04/22	02/05/22	09/05/22	16/05/22	23/05/22	30/05/22																					
<b>Phase 1: Inception</b>																																																										
Kick off calls with GPE Secretariat and Evaluation Team																																																										
Collection and collation of relevant documents																																																										
Initial Light Touch Desk Review																																																										
Development of overall technical approach and methodology																																																										
Finalization of grantee and informant sampling																																																										
Discussion of sampling with GPE and GA																																																										
Submission of Draft Inception Report to Secretariat - October 22nd, 2021																																																										
Comments on draft inception report from GPE Secretariat and Grant Agent																																																										
Refinement of inception report based on comments																																																										
<b>[Deliverable 1] FINAL Inception Report Submission - November 18th, 2021</b>																																																										
<b>Phase 2: Data Collection, Analysis, and Reporting</b>																																																										
Survey preparation and dissemination																																																										
Finalize survey questionnaire (in English) and send English questionnaire for translation (Spanish, French, and Portuguese)																																																										
Build English survey questionnaire on online portal (Qualtrics or SurveyMonkey) while questionnaire is being translated																																																										
Pilot and Test English survey questionnaire with GPE and EOL GMU while building Spanish, French, and Portuguese questionnaire																																																										
Refine and Finalize all survey questionnaires (in all 4 languages)																																																										
GA communication to grantees about MTR																																																										
Disseminate survey questionnaire to all EOL OC1, OC2, and OC3 grantees (in all 4 languages) for 2 weeks - November 29th, 2021																																																										
Send follow-up reminder to all EOL grantees to participate in survey																																																										
Iterative Document Review																																																										
Scheduling KIIs and FGDs for early 2022																																																										
Initial analysis of survey data																																																										
KIIs and FGDs with informants (3 per day, remote via Teams - about 55-60 in total)																																																										
Data coding and synthesis																																																										
Data analysis and report writing																																																										
<b>Initial Findings Workshop - Week of March 7, 2022</b>																																																										
<b>[Deliverable 2] DRAFT Mid-Term Review Submission - March 18th, 2022</b>																																																										
Comments from GPE Secretariat and GA Received by March 29th, 2022																																																										
Revisions and finalisation of mid-term review																																																										
<b>[Deliverable 3] FINAL Mid-Term Review Report Submission and Presentation to GPE Secretariat - April 8th, 2022</b>																																																										
<b>Presentation to GPE Secretariat PILC on April 26th and 27th, 2022</b>																																																										
1st Learning Event (TBC, May 2022)																																																										
2nd Learning Event (TBC, June 2022)																																																										

## Annex 3. Grantee sampling matrix

Grantee according to region		Country	OC	Civic space	Fragile & conflict affected	YZ(YZ)//FP
<b>West and Central Africa</b>						
1	Coalition pour L'Education pour tous BAFASHEBIGE	Burundi	1	Closed	√	YZ/FP
2	Coordination des ONG et Syndicats pour la défense d'une Education publique de Qualité (COSYDEP)	Senegal	1	Obstructed	-	FP
3	Education for all Campaign Network (EFANet)	Gambia	1	Obstructed	-	YZ/FP
4	Ghana National Education Campaign (GNECC)	Ghana	1	Narrowed	-	YZ/FP
5	Helping our People Excel (HOPE)	Liberia	2	Obstructed	-	FP
6	Girls Not Brides	Transnational	3	-	-	YZ/FP
<b>East and Southern Africa</b>						
7	Civil Society Action Coalition on Education for All (CSACEFA)	Nigeria	1	Repressed	√	YZ/FP
8	Tanzania Education Network/ Mtandao wa Elimu Tanzania (TEN/MET)	Tanzania	1	Repressed	-	FP
9	Movimento de Educação Para Todos (MEPT)	Mozambique	1	Obstructed	√	YZ/FP
10	Civil Society Budget Advocacy Group (CSBAG)	Uganda	2	Repressed	√	YZ
11	Zimbabwe Network for Early Childhood Development Actors	Transnational	3	-	-	FP
<b>Asia and Pacific</b>						
12	Coalition for Education Solomon Islands (COESI)	Solomon Islands	1	Open	√	FP
13	Alliance of CSOs in Tajikistan for Education (ACTE)	Tajikistan	1	Repressed	-	FP
14	NGO Education Partnership (NEP)	Cambodia	1	Repressed	-	FP
15	Action Aid International	Transnational	3	-	-	YZ/FP
16	Institute of Social and Policy Sciences (I-SAPS)	Pakistan	2	Repressed	√	YZ/FP
<b>Latin America/Caribbean</b>						
17	Foro Dakar Honduras (FDH)	Honduras	1	Repressed	-	FP
18	Fundación Privada de Fieles/Centro de Multiservicios Educativos (CEMSE)	Bolivia	2	Obstructed	-	YZ/FP
<b>Global</b>						
19	Global Campaign for Education (GCE)	Transnational	3	-	-	FP

## Annex 4. Documents reviewed

- “Partnering with Civil Society: 12 Lessons from DAC Peer Reviews”, Organisation for Economic Co-operation and Development (OECD), 2012.
- “Support to Civil Society: Emerging Evaluation Lessons”, OECD Evaluation Insight, 2013.
- Hinds, R. Multi-donor support mechanisms for Civil society”, Topic guide. Birmingham, UK: GSDRC, University of Birmingham. 2013.
- “Study on Support to Civil Society through Multi-donor Funds”, Ministry of Foreign Affairs, Denmark. 2014.
- GPE Strategy 2020 and 2025 documentation
- New operational model guidance documentation, including webinars introducing the new operational model to CSO and EOL stakeholders
- CSEF evaluation reports
- ASA Blueprint
- ASA Portfolio proposal and EOL OC1 costed extension proposals
- Program documentation and reporting from sampled EOL grantees (19 grantees)
- Progress reports from the Grant Agent, including technical progress reports and systematization reports

## Annex 5. List of stakeholders consulted

Stakeholder Type	Stakeholder Name
<b>GPE Secretariat</b>	
EOL Team	Sarah Beardmore
	Mohammad Muntasim Tanvir
	Milagros Fernandez Sanchez
Country Teams	Daisuke Kanazawa Lucinda Ramos Tariq Khan Hoa Tran Ringrose Edouard Lamot Alexandra Rocha Nilse Ryman
Other Global Stakeholders	Rudraksh Mitra Victoria Egbetayo
<b>Oxfam IBIS</b>	
Global Management Unit	Lars Udsholt Asenath Berglund Jacob Ikkala Bente Sørensen Thomas Skielboe Imad Sabi
Virtual Team of Regional Management Unit Managers	Richard Olong Cátia Santos Paloma Neumann Sanjay Rana
Virtual Team of Regional MEL Advisors	Ahimbisibwe Nickson Romain Diatta Martha Hernandez Anoj Chhetri
<b>Grantees</b>	
<b>West and Central Africa</b>	
Coalition pour L'Éducation pour tous (BAFASHEBIGE)	Denise Kandondo
Coordination des ONG et Syndicats pour la défense d'une Education publique de Qualité (COSYDEP)	Cheikh Mbow
Education for all Campaign Network (EFANet)	Kebba Omar Jarjusey
Ghana National Education Campaign (GNECC)	Festus Longmatey Isaac Awua-Boateng

	Rexford Abossey
Helping our People Excel (HOPE)	Aicha Cooper
Girls, Not Brides	Hannah Robinson Emma Pearce
<b>East and Southern Africa</b>	
Civil Society Action Coalition on Education For All (CSACEFA)	Odinakachi Ahnonu
Tanzania Education Network/ Mtandao wa Elimu Tanzania (TEN/MET)	Ochola Wayoga
Movimento de Educação Para Todos (MEPT)	Pedro Mario Mazivila
Civil Society Budget Advocacy Group (CSBAG)	Carol Namagembe Julius Mukunde Rubangakene Patrick Wilberforce Onyango
Zimbabwe Network for Early Childhood Development Actors	Naison Bhunhu
<b>Asia and Pacific</b>	
Alliance of CSOs in Tajikistan for Education (ACTE)	Nasibakhon Ghanieva
NGO Education Partnership (NEP)	Bunny Yorth Vera Ushurova
Institute of Social and Policy Sciences (I-SAPS)	Abdullah Alam Ehtisham Adil
Action Aid International	Julie Juma
<b>Latin America/Caribbean</b>	
Foro Dakar Honduras (FDH)	Aminta Navarro
Fundación Privada de Fieles/Centro de Multiservicios Educativos (CEMSE)	Mario Torre Federico Escobar Loza Carmen Carrasco
Global Campaign for Education	Grant Kasowanjete Wolfgang Leumer
<b>Regional Coalitions</b>	
ANCEFA	Solange Akpo
ACEA	Refat Sabbah
ASPBAE	Helen Dabu Bernie Lovegrove Cecilia Soriano Maria
CLADE	Nelsy Lizarazo Laura Giannecchini
<b>Year Zero Only Grantees</b>	
HakiElimu	John Kalage
Girl Child Rights	Nyararai Magudu

<b>Other stakeholders</b>	
<b>Learning Partners</b>	
Next Generation Consultants	Nelson Rading
<b>Independent Selection Panel</b>	
Global Independent Selection Panel	Anita Simon

## Annex 6. List of completed or planned EOL-supported learning collaboratives during the evaluation period

EOL supported Learning collaboratives		
Learning collaborative	Information about the learning collaborative	Activities during the second semester 2021
<i>Learning collaboratives on NEC strengthening (GRFW 1.4.1)</i>		
<p>RMU-WCA reported: EOL Collaborative Learning and training <b>programme on MEAL</b></p> <p>Active from February-September 2021</p>	<p>The participants are francophone and Lusophone NEC grantees under RMU WCA. The learning collaborative has covered Monitoring and Evaluation, Accountability and Learning (MEAL). RMU-WCA developed the Terms of Reference and recruited and funded the learning partner COSPE Onlus to train, mentor and facilitate collaborative peer sharing and learning processes. The learning partner COSPE Onlus on its part, developed the content and methodology in consultation with the RMU, and facilitated the collaborative peer sharing and learning.</p> <p>The learning collaborative has implemented Modular training, mentorship, collaborative peer sharing and learning activities on:</p> <ul style="list-style-type: none"> <li>-the design and role of theory of change in programme design and implementation</li> <li>-linking MEAL frameworks to the theory of change and adaptive management for advocacy interventions</li> <li>-Results - based approach</li> <li>-Generation of project results' evidence</li> </ul>	<p>The learning collaborative continued to facilitate the collaborative peer sharing of knowledge and learning among the NECs, while the learning partner provided feedback and guidance to the participants in their discussions of various topics of interest to them on MEAL during mentorship sessions.</p>
<p>RMU-WCA reported: EOL Collaborative Learning and training <b>programme on Advocacy</b></p> <p>Active from March – December 2021</p>	<p>Francophone and Lusophone NEC grantees under RMU WCA participated in the collaborative which has covered the theme of National Education Coalition policy advocacy and campaigning; community mobilization; and budget analysis. RME-WCA developed the Terms of Reference and recruited and funded the Learning Partner A Ponte to train, mentor and facilitate collaborative peer sharing and learning processes. The learning partner A Ponte on its side developed the content and methodology in consultation with the RMU and facilitated the collaborative peer sharing and learning through the development of a series of initiatives, such as Modular training, mentorship, collaborative peer sharing and learning activities on:</p> <ul style="list-style-type: none"> <li>-Policy Advocacy and influencing skills</li> </ul>	<p>The learning partner (A Ponte) continued to facilitate the collaborative peer sharing and learning of the NECs and provided feedback and guidance to the participants in their discussions of various topics of interest to them on Policy Advocacy; Campaigning; Mobilisation and Budget Analysis during mentorship sessions.</p>

	<ul style="list-style-type: none"> <li>-Policy implementation tracking and</li> <li>-Development of Advocacy Strategies</li> </ul>	
<p>RMU-WCA reported: EOL Collaborative Learning and training <b>programme on Resource Mobilisation</b></p> <p>Active from April – December 2021</p>	<p>The participants are the francophone and Lusophone NEC grantees from the countries in the RMU WCA region. The theme covered is Resource Mobilisation and Sustainability. The collaborative developed Modular training, mentorship, collaborative peer sharing and learning activities on:</p> <ul style="list-style-type: none"> <li>-Conceptual Framework for Resource Mobilization</li> <li>-Understanding of fundraising landscape in the region and globally</li> <li>-Resource Mobilization Planning</li> <li>-Mapping of relevant potential donors and funding sources</li> <li>-Development of Resource Mobilisation and Financial Sustainability Strategy</li> <li>-Project proposal development</li> <li>-Managing Partnership Relationships</li> </ul> <p>RMU WCA developed the Terms of Reference and recruited two (2) Learning Partners to train, mentor and facilitate collaborative peer sharing and learning processes. The two learning partners: NextGen Consulting Solutions &amp; Kalube Consults Limited developed the content and methodology in consultation with the RMU and facilitate the collaborative peer sharing and learning.</p>	<p>The learning partners <i>NextGen Consulting Solutions &amp; Kalube Consults Limited</i> continued to facilitate the knowledge sharing and collaborative learning of the NECs and provided feedback and guidance to the participants in their discussions of various topics of interest to them on Resource Mobilisation and Sustainability during mentorship sessions.</p>
<p>RMU-WCA reported: Collaborative Learning and training <b>programme on Financial Management, Audit and Accountability.</b></p> <p>Active from May 2021 and ended in November 2021</p>	<p>This program was for NECs from the francophone and Lusophone countries, to strengthen them in Financial Management, Audit and Accountability through Modular training, mentorship, collaborative peer sharing and learning activities on:</p> <ul style="list-style-type: none"> <li>- A Project Budget</li> <li>- Request for Funding (Project Proposal)</li> <li>- Tools for Financial Management</li> <li>- Procurement Procedures</li> <li>- Budget Monitoring</li> <li>- Financial Reporting</li> <li>-Procedures for Internal Audit</li> </ul> <p>The RMU developed the ToR and recruited and monitored the Learning partner COSPE Onlus.</p>	<p>The learning partner developed the content and methodology in consultation with the RMU; facilitated the collaborative peer sharing and learning of the NECs; and provided feedback and guidance to the participants in their discussions of various topics of interest to them on Financial Management, Audit and Accountability during both training and mentorship sessions.</p>
<p>RMU-WCA reported: Collaborative Learning and</p>	<p>This program was for NECs from francophone and Lusophone countries under RMU WCA in order to support them with their Governance, Leadership and Organisational Development through a modular</p>	<p>The learning partner Skycom Consult and Training (SCT) Developed the content and methodology in consultation with the RMU; facilitated the collaborative peer sharing</p>

<p><b>training programme on Governance, Leadership and Organisational Development.</b></p> <p>Active from June – December 2021.</p>	<p>training, mentorship, collaborative peer sharing and learning activities on:</p> <ul style="list-style-type: none"> <li>-Governance structures and processes in an organization</li> <li>-Board composition and functions in an organisation</li> <li>-Effective communication in an organisational setting</li> <li>-Effective leadership behaviour</li> <li>-Good governance for effective organisational development</li> <li>-The management of emotions in decision-making.</li> <li>-Productive communication for greater resource mobilization; for the improvement of the working environment.</li> </ul>	<p>and learning of the NECs; and provided feedback and guidance to the participants in their discussions of various topics of interest to them on Governance, Leadership and Organisational Development during training and mentorship sessions.</p>
<p>RMU-HESA reported Learning collaborative: The Horn Eastern and Southern Africa (HESA) Learning Collaborative</p>	<p>The participants and members of this Learning collaborative (that covers 8 learning collaboration thematic areas) are all EOL grantees in the Horn, East and Southern Africa which are coordinated by RMU-HESA. The collaborative focuses on the following thematic areas:</p> <ul style="list-style-type: none"> <li>• Basic Education</li> <li>• Early Childhood Education and Development</li> <li>• Educational Planning and Curriculum</li> <li>• Education Financing</li> <li>• Higher Education and Technical and Vocational Education and Training</li> <li>• Inclusive Education</li> <li>• Peace, Climate Change and Education in Emergencies</li> </ul> <p>The RMU has provided the general guidance and technical support, especially during the development of the operational document and the online knowledge hub.</p>	<p>The RMU intends to identify suitable learning partners to work with the grantees and to produce learning content for the collaborative. This will be done with close supervision and guidance by the RMU. The RMU also intends to develop, gather, and share relevant materials via the collaborative. Learning partners have not been engaged with the Learning collaborative so far but are expected to play a critical role in production of learning materials and moderating learning sessions in the second phase of the EOL project.</p>
<p>RMU LAC reported: Trinational Agenda at Central America</p>	<p>The participants are the NECs from Nicaragua, Honduras, and Guatemala. The topic dealt with is Inclusive education and marginalized groups' access to education. Meetings have been carried out to discuss and approve the final document of the agenda which includes an analysis of the national contexts situation and recommendations on education policy at the three countries and specifically for marginalized groups access, such as: girls and women, indigenous populations, LGBT+, and migrants. The design of a "Mochilas en Movimiento" subregional campaign has been concluded as part of the agenda agreements.</p>	<p>Meetings were held recently to systematize challenges and proposals to expand the scope of the initiative and its continuity in the coming years.</p>

<p>RMU LAC reported:</p> <p>Thematic working groups organized by CLADE</p>	<p>Under CLADE’s coordination, CLADE members, including EOL OC1 NECs started participating at different thematic working groups on topics such as:</p> <ul style="list-style-type: none"> <li>-Strategic communication</li> <li>-Youth engagement</li> <li>-Parliamentary Advocacy</li> <li>-COVID-19 and reopening schools (on stand-by)</li> <li>-Exchange of learnings and lessons learned on EOL’s project implementation</li> </ul> <p>The Strategic Communication Working Group has organized regular meetings and carried out joint thematic campaigns. Meanwhile, the Youth Engagement Working Group has discussed a strategy to amplify the youth engagement in LAC NECs, CLADE and GCE processes, and to foster learning exchange among students and youth representatives from different countries. The Parliamentary Advocacy Working Group has made efforts to develop a mapping of how the parliaments of 18 LAC countries are organized and will invite all CLADE members to complete the exercise next quarter. The members have also created a mapping on legal frameworks and parliamentary procedures in the region, as well as a systematization of good practices on advocacy. The group seeks to establish more interaction with the International Parliamentarian Education Network. This group has also organized a regional webinar to share learning and inspiring experiences about how to engage and influence the legislators regarding the re-opening of schools in LAC.</p>	<p>The Strategic Communication Working Group developed a training and held regular meetings to share experiences.</p> <p>The Parliamentary Advocacy Working Group held regular meetings to organize 3 virtual public dialogues to share experiences of dialogue with parliamentarians and legislative authorities in different LAC countries.</p> <p>The Youth Engagement Working Group held regular meetings to define a strategic plan to amplify the youth engagement in LAC.</p>
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<p>RMU AP reported Project design/cycle and management learning collaborative (OC1) <i>(still under consolidation)</i></p>	<p>All the Project design/cycle management training participants have been invited. Some NECs have been more proactive while others have joined occasionally. The more active NECs have been the NECs from Tajikistan; Cambodia; Bangladesh; Philippines; Moldova; Kyrgyzstan; Nepal, Pakistan; and NECs in the Asia Pacific Region. The learning collaborative is primarily organized to learn, share and discuss different aspects of the project design and management in the NEC context.</p>	<p>Since June 2021, RMU supported and facilitated the participants to come together and conduct learning sharing on different aspects of project management. The future aspiration includes discussion on adaptive management and lessons learned around different aspects of project management for advocacy and social accountability related education programmes. RMU presented the idea during the last few sessions of the project cycle management training. RMU also facilitated the meeting initially and is now encouraging the participants to gradually initiate the facilitation of the learning collaborative meetings on a rotation basis. RC ASPBAE representative joined the first few meetings of the learning collaborative and one of the participants volunteered to review the terms of reference for the learning collaborative. The learning partner that facilitated the training on project cycle management shared the benefit of such engagement and supported that the NEC representative facilitates some of the sessions.</p>
<p><b><i>Up-coming Learning collaboratives on actionable data (GRFW 2.3.1)</i></b></p>		
<p>RMU-LAC reported: Systematization in Bolivia of educational experiences that provide evidence for the development of educational policy proposals.</p>	<p>This learning collaborative is led by OC2-grantee CEMSE-ACLO, and the participants are Institutes of Languages and Cultures, Quechua, Guarani, and Aymara populations which are Indigenous populations in Bolivia and Members of the educational community. The learning collaborative covered the following thematic areas: intra-intercultural and plurilingual education; and depatriarchalizing education.</p>	<p>During this reporting period, the Learning collaborative developed five trainings; and six systematizations of educational experiences which are expected to be documented in the next semester.</p>
<p>RMU-LAC reported: Teachers' meetings for the development of regionalized curricula in Aymara,</p>	<p>The learning collaboration members are the Institutes of Languages and Cultures Guarani, Aymara, and Quechua; teaching staff, members of the educational community and authorities from the education system in Bolivia and deals with Indigenous populations' education situation and</p>	<p>During this reporting period, three Teachers' meetings for the implementation of regionalized Aymara, Quechua, and Guarani curricula.</p>

Quechua, and Guaraní Educational Councils of Indigenous Peoples (CEPOS) Guaraní, Aymara, Quechua	intra-intercultural, plurilingual education; and depatriarchalizing education.	
<b><i>Up-coming Learning collaboratives on advocacy (GRFW 3.5.1)</i></b>		
RMU-HESA reported: The Horn Eastern and Southern Africa (HESA) Learning Collaborative	The collaborative is open to all grantees coordinated under RMU-HESA. The participants are individuals and organizations interested in Early Childhood Education and Education Financing. RMU-HESA has so far coordinated the Learning Collaborative. However, Learning Partners are expected to play a critical role in production of learning materials and in moderating learning sessions in the second phase of the EOL project.	During this reporting period, the Learning Collaborative produced reference materials and studies on Early Childhood Development and education financing which were shared on the RMU-HESA developed knowledge hub. The RMU helped popularizing the collaborative and raising awareness on learning materials posted on the platform. RMU-HESA also conducted a rapid assessment of public sector budget analysis to inform education financing debates.

## Annex 7. Key data on the EOL grant application and selection processes

	OC1 U\$100,000-300.000 2 years		OC2 U\$450,000 -1.2 million 2-3 years		OC3 U\$450,000 -1.2 million 2-3 years	
Call	Restricted	Restricted	Open		OC3.1. Open	OC3.2. Open
Date of issued	14/08/19	15/09/21	April 20		09/12/19	July 20
Deadline date	15/10/19	10/11/21	June 20		31/01/20	Sept 20
Number of Concept notes	N/A	N/A	461		109	172
Date of approval of notes	N/A	N/A	OC2.1 Sept.20	OC2.2 March 21	April 20	Dec 20
Number of approved notes for Year Zero	N/A	N/A	10	10	10	10
Date of beginning of YZ	01/20	No YZ	09/20	March 21	May 20	03/21
Number of full proposals submitted	54	61	10	10	10	9
Number of proposals approved	54	61 Full/ Partial/Core funding	5	5	5 (4+GCE)	5
Date of approval grant	12/19	01/22	05/21	11/21	12/20	09/21
Length of grant agreement	01/20- 12/21	01/22-12/23	06/21- 12/23	02/22 – 08/24	01/21 – 07/23	11/21 - 05/ 24

## Annex 8. Grantee perception survey questionnaire

- Q1. What is the name of your organization? (Please indicate if you are completing the questionnaire on behalf of an alliance/coalition or an individual organization).
- Q2. When was your organization established?
- Q3. When did your organization begin to receive funding from GPE? This includes EOL and CSEF. (If you received funds as a Year Zero candidate, then please indicate the month when you received the first Year Zero grant).
- Q4. What country is your organization based in?
- Q5. What EOL Regional Management Unit do you primarily work with?
- Q6. What component of Education Out Loud do you receive support from?
- Q7. What was your estimated organizational income in the latest financial year in US dollars?
- Q8. What percentage of your estimated organizational income in the latest financial year was from EOL?
- Q9. Who are your organization's primary funders, beyond EOL?
- Q10. EOL financial support is relevant to my organization's program objectives in the following areas.
- Q11. EOL capacity-building support has been relevant to my organization's needs in the following areas.
- Q12. EOL support has helped my organization incorporate equality and equity in its work in the following areas.
- Q13. What aspects of EOL support are the most relevant in supporting your organization in achieving its objectives?
- Q14. What aspects of EOL support are the least relevant in supporting your organization in achieving its objectives?
- Q15. How can the program be improved to be more relevant to your organization?
- Q16. EOL's processes and policies are clearly communicated to my organization.
- Q17. EOL's processes and policies are easy to use for my organization.
- Q18. EOL policies and processes enable my organization to respond flexibly to changes in context.

Q19. What EOL processes are most helpful in supporting your organization achieve its objectives?

Q20. What EOL processes are less helpful in supporting your organization achieve its objectives?

Q21. How can EOL's processes be improved to be more efficient for your organization?

Q22. EOL has provided my organization capacity building support in the following areas.

Q23. My organization is satisfied with the capacity building support provided by the following stakeholders.

Q24. EOL capacity building support has enabled my organization to strengthen its skills and expertise in the following areas.

Q25. My organization has applied the skills supported by EOL capacity building in these areas.

Q26. What could EOL do differently to better enable your organization to achieve its objectives?

Q27. What could EOL do differently to ensure education policies better meet the needs of communities, especially the most marginalized?

Q28. EOL has helped my organization become more sustainable for the future through these support mechanisms.

Q29. What features of EOL have, or are likely to, contributed to long-term change in the education sector in your context?

Q30. What are the main enablers for your organization achieving long-term change in the sector?

Q31. What are the main obstacles for your organization achieving long-term change in the sector?

Q32. Can you please provide a brief, specific example of how your organization is helping to achieve a more inclusive educational system?

Q33. What could EOL do differently to better support your organization's sustainability?

Q34. Overall, how can EOL be improved moving forward?

Q35. Is there anything else about EOL that you would like to share with the external review team?

## Annex 9. Key informant and focus group discussion guides

*Note: This is a guide, not a questionnaire. It indicates the areas to be covered and gives an idea of the order in which the topics will be addressed. The questions will not be asked in this exact format and the Reviewer may change the order and emphasis, as well as amend questions to be more pertinent to the respondent's role and context. The Reviewer is also free to probe for relevant issues which have emerged e.g., in the document review or in discussion, even if these are not on the guide. Specific examples may be requested in the course of the interview. Consent should be obtained before discussions commence.*

### Preamble to all interviews

**Introduce yourself. Include the following points in the introduction:**

- Thank you again for your participation. I expect this interview to take about 1 -1.5 hours. Please let me know if that works well for you. If you'd prefer, we can also schedule a follow-up interview.
- Please feel free to speak freely, as everything is confidential. [*Confirm verbal consent to proceed*]

**Please explicitly ask the participants the following and check their understanding.**

- Do you have any questions for me before we start?

## KII guide: GPE Secretariat

<b>Background</b>
1. Can you please give us a brief overview of your role within GPE, how long you have been in your role, and what your relationship is with EOL?
<b>Relevance (RQ 1.1.2, 1.2.1)</b>
2. What aspects of the design and approach of EOL in your own context do you think are particularly relevant to enable civil society to engage in policy dialogue, advocate for improved services; and increase social accountability within the sector?
3. To what extent, and how, is the work of EOL aligned at national and transnational level with GPE’s new strategy, and its new operational model? What opportunities are there for further alignment?
<b>Efficiency (RQ 2.1.2, 2.2.1, 2.2.2)</b>
4. How clearly are the governance arrangements in EOL defined, e.g., between GPE Secretariat, Grant Agent, GCE and RCs? What works well/less well?
5. To what extent do you think the working relationships between the national and transnational layers of EOL e.g., grantees, Grant Agent, Learning Partners, and RCs, is open and efficient?
6. Which aspects of EOL do you think are implemented well or less well in your own context, and where might its management and implementation be improved?
<b>Effectiveness (RQ 1.1.2.; 2.3.)</b>
7. To what extent does the GPE partnership approach help strengthen the responsiveness of the education sector to citizen needs by enabling civil society to work productively with GPE country partners, including Local Education Groups (LEGs)? What works well, less well?
8. To what extent is the management of EOL grants is sufficiently flexible to allow grantees to improvise and adapt to changes in the operating context? What works well, less well?
<b>Sustainability (RQ 4.2.1)</b>
9. Which features of the design and approach of EOL do you think are likely to help grantees deliver long term change in the education sector?
<b>Closing questions</b>
10. From your perspective, what are some of the key lessons emerging from EOL?

11. Looking forward, do you have any recommendations for the GPE Secretariat or the Grant Agent?
12. Before we close the interview, do you have any questions for me?

## KII guide: Oxfam IBIS EOL Team

<b>Background</b>
1. Can you please give us a brief overview of your role within EOL and how long you have been in your role?
<b>Relevance (RQ 1.1.2; 1.2.1; 1.3.)</b>
2. What aspects of the design and approach of EOL in your own context do you think are particularly relevant to enable civil society to engage in policy dialogue, advocate for improved services; and increase social accountability within the sector?
3. To what extent, and how, is the work of EOL aligned at national and transnational level with GPE’s new strategy, and its new operational model? What opportunities are there for further alignment?
4. How could EOL strengthen its policy guidance and support to incorporate gender equality, equity and inclusion in its policies and practices?
<b>Efficiency (RQ 2.1.1.; 2.1.2.; 2.2.1.)</b>
5. What aspects of the EOL grant administration policies and processes e.g., grantee selection, approval, capacity development, monitoring, and reporting, work well or less well in meeting stakeholder needs?
6. How clearly are the governance arrangements in EOL defined e.g., between GPE Secretariat, Grant Agent, GCE and RCs, and other stakeholders? What works well/less well?
7. To what extent do you think the working relationships between the national and transnational layers of EOL e.g., Grantees, Grant Agent, Learning Partners, RCs, is open and efficient?
8. Which aspects of EOL do you think are implemented well or less well, and where might the management and implementation be improved?
9. Can you provide an example of EOL/grantees adapting flexibly e.g., to the pandemic, and what lessons can be drawn from this?

<b>Effectiveness (RQ 1.1.2.; 2.3.)</b>
10. To what extent does the GPE partnership approach help strengthen the responsiveness of the education sector to citizen needs by enabling civil society to work productively with GPE country partners, including Local Education Groups (LEGs)? What works well, less well?
11. To what extent is the management of EOL grants sufficiently flexible to allow grantees to improvise and adapt to changes in the operating context? What works well, less well?
<b>Sustainability (RQ 4.2.1)</b>
12. Which features of the design and approach of EOL do you think are likely to help deliver long term change in the education sector?
<b>Closing questions</b>
13. From your perspective, what are some of the key lessons emerging from EOL?
14. Looking forward, do you have any recommendations for the GPE Sec. or Board?
15. Before we close the interview, do you have any questions for me?

## KII guide: Sample of grantees

<b>Background</b>
1. Can you please describe the work that you and your organisation do at country level, and how long is your relationship with EOL?
<b>Relevance (RQ 1.1.2.)</b>
2. What aspects of the design and approach of EOL do you think are particularly relevant in your context to enable civil society to engage in policy dialogue, advocate for improved services; and increase social accountability within the sector? What works well, less well and why?
<b>Efficiency (RQ 2.1.1.; 2.3.)</b>
3. What aspects of EOL grant administration policies and processes e.g., grantee selection, approval, capacity development, monitoring, and reporting, have worked well for you, less well for you, and how might they be improved?
4. How have you been supported by EOL to adapt to changes in context and need? What works well, less well in this regard?
5. Can you provide an example of how EOL and/or you have had to adapt flexibly to unanticipated changes? What lessons can be drawn from this?
<b>Effectiveness (RQ 3.1.1.; 3.2.2.)</b>
6. To what extent have you made progress towards your proposal objectives? Can you provide an example of positive engagement in education sector planning, policy dialogue, or advocacy in relation to your objectives?
7. Have any unanticipated events affected your activities and what implications does this have for EOL policies and procedures?
<b>Sustainability (RQ 4.1.1, 4.1.3.; 4.2.1.)</b>
8. To what extent, and how, has EOL helped to strengthen your organization's financial and organizational sustainability? How could it support you more in this area?
9. To what extent, and how, has EOL helped to strengthen your networking more broadly in the sector or civil society e.g., in with GPE in-country partners, and Local Education Groups?
10. What aspects of EOL, if any, are likely to help civil society contribute to long-term change in the education sector?
<b>Closing questions</b>
11. From your perspective, what are some of the key lessons emerging from EOL?
12. Looking forward, do you have any recommendations for the Grant Agent or GPE Secretariat?

13. Before we close the interview, do you have any questions for me?

KII guide: Learning Partners

<b>Background</b>
1. Can you please describe the work of your organisation, your role in the organisation, and your relationship with EOL?
2. Can you please describe the support your organisation has given EOL grantees from June 2018 till the present e.g., in terms of learning processes and/or products? Please specify in which areas e.g., proposal development, project management, adaptive management, gender equity etc.
<b>Relevance (RQ 1.1.2.)</b>
3. What aspects of the design and approach of EOL do you think are particularly relevant to enable civil society to engage in policy dialogue, advocate for improved services; and increase social accountability within the sector? What works well, less well and why?
4. How relevant do you think the Year Zero approach and the support offered to grantees is in enabling them to develop and implement full proposals? What works well, less well and why?
<b>Efficiency (RQ 2.1.1.; 2.1.2.)</b>
5. Which aspects of EOL’s support for capacity development and facilitation of learning works, well, less well and why? How might this be improved?
6. To what extent do you think the working relationships between yourself and EOL are open and efficient? What works well/less well and why? How might this be improved?
<b>Effectiveness</b>
7. To what extent, and how, does the operating context e.g., civic space, affect the services you provide grantees, and their ability to achieve their objectives?
<b>Sustainability (RQ 4.1.1)</b>
8. To what extent, and how, do you think the services you have provided to grantees will contribute to their financial and organizational stability?
<b>Closing questions</b>
9. From your perspective, what are some of the key lessons emerging from EOL?
10. Looking forward, do you have any recommendations for the Grant Agent or GPE Secretariat about how it can help develop the capacities of grantees and facilitate learning?
11. Before we close the interview, do you have any questions for me?

## KII guide: GCE and RCs

<b>Background</b>
1. Can you please give us a brief overview of your role within the [GCE or RC], how long you have been in your role, and how you see your relationship with EOL?
<b>Relevance (RQ 1.1.1; 1.1.2; 1.2.1.)</b>
2. What aspects of the design and approach of EOL do you think are particularly relevant to enable civil society to engage in policy dialogue, advocate for improved services; and increase social accountability within the sector? What works well, less well and why?
3. To what extent and how, do you think the design and approach of EOL draws upon learning and best practice e.g., in relation support to civil society, advocacy in the education sector?
4. To what extent, and how, is the work of EOL aligned at national and transnational level with GPE's new strategy, and its new operational model?
<b>Efficiency (RQ 2.1.1.; 2.1.2.; 2.2.2.)</b>
5. What aspects of EOL grant administration policies and processes e.g., grantee selection, approval, capacity development, monitoring, and reporting, worked well, less well for grantees, and how might they be improved?
6. To what extent are the governance arrangements and working relationships in EOL, e.g., between GPE Secretariat, Grant Agent, GCE and RCs, clearly defined, open and efficient? What works well/less well
7. Which aspects of EOL do you think are implemented well, less well, and where might the management and implementation be improved?
<b>Effectiveness (RQ 1.1.2.; 2.3.)</b>
8. To what extent does the GPE partnership approach help strengthen the responsiveness of the education sector to citizen needs by enabling civil society to work productively with GPE country partners, including Local Education Groups (LEGs)?
9. To what extent is the management of EOL grants is sufficiently flexible to allow grantees to improvise and adapt to changes in the operating context? What works well, less well in this regard?
<b>Sustainability (RQ 4.2.1)</b>

10. Which features of the design and approach of EOL do you think are likely to help deliver long term change in the education sector? What are the factors that might facilitate or impede change?

**Closing questions**

11. From your perspective, what are some of the key lessons emerging from EOL?

12. Looking forward, do you have any recommendations for the Grant Agent, GPE Secretariat or the GPE Board?

13. Before we close the interview, do you have any questions for me?

## Annex 10. Terms of reference



### **Global Partnership for Education (GPE) Secretariat Terms of Reference for: [Mid Term Review of Education Out Loud] [Version September 24, 2021]**

#### **Background**

GPE is a shared commitment to ending the world's learning crisis. It is the only global partnership and fund dedicated entirely to helping children in lower-income countries get a quality education, so they can unlock their potential and contribute to building a better world. GPE mobilizes partners and funds to help 76 partner countries transform their education systems and deliver quality learning to more girls and boys, especially those who are marginalized by poverty, gender, disability, or displacement.

The partnership supports civil society organizations and networks in their efforts to partake in the shaping of education policies and monitoring of related programs, and to hold governments accountable for their duty to fulfill the right to quality education of all children. It previously funded civil society advocacy through the Civil Society Education Fund (CSEF) from 2009 to 2019.

In March 2017, the GPE Board of Directors approved the establishment of a Financing and Funding Framework (FFF) which outlines the purpose, eligibility, and allocation of GPE's grant resources, including through a new Advocacy and Social Accountability (ASA) funding mechanism, which was later branded as [Education Out Loud \(EOL\)](#). At the country level, EOL aims to support (i) effective civil society representation and engagement in national education sector policy dialogue, (ii) beneficiary engagement in monitoring and assessing government performance and expenditures, and (iii) social mobilization to feedback on and voice demand for improved education policy and service delivery, especially for disadvantaged groups. At the global and transnational levels, the EOL funding mechanism will help to improve mutual accountability across the partnership for education development commitments, including in the areas of aid effectiveness, domestic resource mobilization, and education policy. According to the current design, it has grants allocated according to 3 operational components:

- **Operational Component 1 (OC1)**: Strengthen national civil society engagement by supporting national education coalitions (NECs) in education planning, policy dialogue and monitoring. Currently, EOL is funding 52 NECs, 1 GCE and 3 RCs under this component.
- **Operational Component 2 (OC2)**: Strengthen civil society roles in promoting the transparency and accountability of national education sector policy and implementation. Currently, in this component, EOL is supporting 5 national accountability and transparency organizations in 5 countries, with 4-5 more to be selected this year.

- Operational Component 3 (OC3): Create a stronger global and transnational enabling environment for national civil society advocacy and transparency efforts. Currently, EOL is supporting 5 transnational advocacy alliances with activities in 16 countries, with 5-6 more grants to be awarded this year.

### **Rationale and Focus**

On behalf of GPE, [Oxfam IBIS](#) as the grant agent established the EOL management structure and call for proposals processes in 2019, with implementation of grants beginning in January 2020. The current phase of EOL is scheduled to end in 2024. Evidence from the implementation of EOL-financed activities will be required to determine its future course beyond the current grant cycle. This review will assess GPE's support to national and transnational civil society through EOL, up until the time of this formative review.

### **Evaluation Services**

GPE Secretariat is seeking the services of a team of Short-Term Consultants (**STC**) to conduct this formative review.

Evaluation services will include the following:

- (a) Develop an inception report which will include the design of the review.
- (b) Implement this design after approval of the inception report by the GPE Secretariat.
- (c) Write a report which will include literature review, data analysis, findings, and recommendations to answer the review questions detailed below.
- (d) Presentation(s) to GPE governance and management.
- (e) Co-develop and implement (under Secretariat leadership) dissemination plan and 2 learning events to share the review findings.

The role of the GPE Secretariat will be limited to providing access to documents, facilitating communications with stakeholders, reviewing the conceptual and analytical framework and the robustness of data and analysis, and fact checking. Different Secretariat teams will be involved, but the technical review will be conducted by the Results and Performance team of the Secretariat. The review will be shared with the GPE Board and other GPE partners/stakeholders.

### **Purpose and Use, by Audience**

This review will assess the relevance, efficiency, effectiveness, unintended effects, and potential for sustainability of GPE's support to EOL's grantees and provide available evidence of (early) impact and recommendations for improvement. This information will help strengthen how GPE (as a global and country-level partnership and an education fund) approaches, facilitates and ensures the appropriateness of its support to strengthening civil society participation in education advocacy. In particular, the review should enable the GPE Board and Secretariat to assess whether EOL is on track to deliver on its intended objective of civil society participation in education advocacy and inclusive sector dialogue and provide evidence for making decisions on the scope and nature of GPE's future support for civil society.

This review will serve as a key piece of evidence to inform the decision expected in mid-2022 of GPE's Board and Board Committees to allocate additional funding to the current EOL mechanism, including consideration of possible adaptation to or re-design of EOL in future phases, especially as it pertains to GPE's 2025 strategy. It will examine the extent to which each operational component has achieved its objectives and will build on initial findings from a formative rapid review of Operational Component 1 which was undertaken from May to August 2021 to further adapt and extend financing for national

coalitions for the period 2022-2024. Once all current grant activities are completed in 2024, Oxfam IBIS will conduct an independent summative evaluation to assess the impact of EOL during the implementation period from 2019-2024.

## Review Questions

Review questions and related **indicator measures and criteria** will be defined in the inception report, after a review of the program documents.

For each question, it will be required to:

- Explore the **'how and how well', 'why or why not', and 'so what' aspects** to understand the underlying causes, effects, and relative importance of the evidence.
- Explore for each question or theme, the corollaries of the findings in terms of follow-up **actions to be considered by relevant stakeholder groups, including, GPE-Secretariat EOL Team, Oxfam IBIS GMU and RMUs,**
- Provide EOL **portfolio-level** and component level (Operational components 1, 2 and 3) data analysis; and **illustrative examples or case studies** to allow for a contextualized compare/contrast approach; and recommendations on how to strengthen the linkages between OC1, OC2 and OC3.

Tangible recommendations are expected to improve GPE's operations and strategies around civil society support through EOL, for example, in the light of the new GPE operational model and strategic plan. The principles and standards outlined in the [GPE evaluation policy](#) will apply to this evaluation.

### **1. Relevance**

(i) To what extent has EOL been appropriate, in its strategic approach and the design of each of its operational component's vis-a-vis the different aspects of CSO engagement: (a) to allow for an increase in the representation and capacity for engagement of civil society, (b) with respect to the 'voice' of civil society in GPE's partner countries and broader social accountability as part of the sectoral processes.

(ii) Considering that EOL was designed with reference to GPE 2020, to what extent is EOL relevant to the policy goals and objectives of the Global Partnership for Education's GPE 2025 strategic plan related to inclusive sector dialogue, including through the GPE country-level operational model? In what ways are EOL efforts and EOL operational structures with grantees at national as well as transnational levels already aligned with the new landscape articulated in GPE's new strategy? What is missing that, if addressed, could bring implementation efforts into closer alignment with these future directions?

(iii) In what ways are current EOL efforts considering gender equality, equity, and inclusion? How are they embedding these considerations in practice? What opportunities exist for strengthening these efforts?

(iv) Drawing from EOL, which sound features of strategic approach and design should be considered if EOL funding is continued beyond 2024? Which less pertinent features should be adapted or changed?

### **2. Efficiency**

(i) To what extent has EOL planned for and applied the following, to ensure that adequate stewardship of resources and successful partnering be realized: (a) Appropriate grant management, planning and administration principles (i.e., in terms of costs, timeliness, and quality of services and products meeting stakeholder needs); (b) Clarity of roles and governance arrangements between EOL Coordination Group, GPE Secretariat-EOL Team and Grant Agent; and (c) Sound institutional relationship building and management, based on the different layers of the EOL architecture from the national to the global levels?

(ii) Drawing from EOL implementation, which sound parameters, conditions, and expectations for efficient implementation should continue if EOL is extended (in terms of grant management, programmatic implementation, and maximization of the value-added of the relevant actors, e.g. grant agent, grantees, regional coalitions, independent selection panels)? Which less productive ones should be flagged for adjustment?

(iii) To what extent has risk – and adaptive management been built into the design of EOL. How has it been applied to the implementation to contribute to the efficiency and effectiveness of EOL? To what extent has EOL been able to pivot effectively in light of considering changes in context and needs, especially with respect to the COVID-19 pandemic, and ongoing evidence on relevance and effectiveness of the EOL projects?

Please note that under this efficiency dimension, measures/criteria for efficiency will be defined in the inception report, as well as sources of benchmarking to the extent possible/feasible.

### **3. Effectiveness**

(i) To what extent is EOL (on its way to) fulfilling its objectives? Please assess these results taking gender and inclusion (i.e., differential effects on marginalized groups) and human-rights based approaches into consideration.

(ii) Are there unanticipated results for EOL – positive and negative – that need to be considered?

Please note that under this effectiveness dimension, measures/criteria for effectiveness will be defined in the inception report.

### **4. Sustainability**

(i) What actions are being taken by the grantees and supported by the grant agent and EOL learning partners to ensure: (a) the financial and organizational sustainability of the grantees and the initiatives funded by EOL? (b) the sustainability of civil society capacity and results achieved through EOL.

(ii) To what extent is EOL strategic design promoting that EOL results are sustainable, particularly in relation to improved national policies and implementation in favor of marginalized groups' right to transformative education?

### **Data Sources**

The study will be exclusively desk-based with no travel required and should be based on a mix of quantitative and qualitative data. Primary data collection is expected through appropriate tools (e.g. interviews, Focus Group Discussions, surveys, country case studies etc.). Sources of information on effectiveness, efficiency, relevance, and sustainability of GPE's support to NECs may include CSEF related documents. The rapid review of OC1 will also be a source of information for this.

Data sources will include but are not limited to:

- (i) Grant documents and data related to Education Out Loud (i.e., grant applications and program documents, grant progress reports, etc.).
- (ii) GPE documents, guidance, and mechanisms for civil society support, including Board documents and Secretariat documents.
- (i) Surveys or a number of semi-structured stakeholder interviews to be conducted remotely (as deemed necessary by the consultant and Secretariat during the inception phase.
- (ii) Current literature on civil society and education advocacy.
- (iii) Any other sources as appropriate.

For a preliminary list of GPE documents to be consulted, refer to appendix A.

### **Contract Duration, Deliverables, and Timeline**

The present assignment will be carried out from September 2021 to June 2022 for a total of **xx** days of work (most of the work will be completed prior to April 2022, with final revisions and presentations between April and June 2022).

The following products will be delivered:

- (i) An **inception report**, which includes the methodology (including an evaluation matrix with review criteria and specific data sources); instruments for data collection; sample and sampling strategy for the case studies (if any); anticipated challenges/limitations (if any); timelines and responsibilities for the overall evaluation and related report; early literature review; analytical framework (maximum 15 pages, excluding annexes), to be discussed with GPE Secretariat and grant agent staff for fine-tuning. This report will also provide an evaluability assessment, which will specify what questions can and cannot be answered through the evaluation based on existing evidence to date, and what additional data collection would be required to do so satisfactorily.
- (ii) A **slide-show presentation** (draft and final) for the GPE Board and relevant board committees, especially Performance, Impact and Learning Committee (PILC), and the Secretariat and Oxfam IBIS, describing the findings and recommendations.
- (iii) A **review report** (draft and final) edited and designed, which will include: executive summary; introduction (including program description); in-depth literature review; methodology; analysis; findings for review questions (including examples to illustrate the findings); limitations and views on further analyses needed; conclusions and recommendations, specified for each group of EOL stakeholders (maximum 40 pages, excluding annexes).
- (iv) An **operational workshop** to review the early findings of the evaluation.
- (v) Two **dissemination events**, which will take place after the finalization of the review report in collaboration with the GPE Secretariat, to present to GPE stakeholders and practically learn from information derived from the study.

Please note:

- The consultant should ensure that all data are collected per ethical standards and that collected data are organized, secured, and preserved for potential re-analysis in other GPE evaluation efforts. As such, the evaluation's data (with full anonymity preserved) will remain the property of GPE at the conclusion of the evaluation.
- The reports should be written clearly and be impartial and constructive in tone. Each draft should be professionally edited. There should be creative use of tables and high-quality graphics.
- Also, the consultant may be asked to present the findings at the GPE Board of Directors meeting / Performance, Impact, and Learning Committee (PILC) meeting and/or GPE Secretariat Management Team meeting, for up to a half day of work, each. This would take place by phone or via teleconferencing and no traveling will be required.

These deliverables are due following this timeline (with a more detailed timeline to be discussed at the time the contract is finalized).

(i) **Inception report:** November 2021

- a. draft delivered to Secretariat. The GPE Secretariat will provide feedback within 1 week. The consultant will have 1 week to make changes.
- b. final inception report delivered to Secretariat by the end of November.

(ii) **Review report, and related slideshow and presentations:** March- April 2022

- a. Draft report and PPT shared with the Secretariat in early March. The GPE Secretariat and the EOL program managers will provide feedback within two weeks. The consultant will have two weeks to make changes.
- b. An operational and action-focused workshop to review the findings and draft recommendations with the Secretariat's R&P and EOL teams Secretariat and GA representatives in late March.
- c. Final report and PPT slides delivered to Secretariat in early April.
- d. Presentation to PILC

(iii) **Learning events (2), and related slideshow and brief post-learning event summaries:** May-July 2022

- a. final report and slideshow delivered to Secretariat (early April)
- b. two virtual learning events where to discuss findings and their implications (timing to be determined – likely late April and early June).

### **Selection Criteria**

- Advanced degree (Master's degree or above) in education, social sciences, political sciences, or economics
- 10+ years of experience in program evaluation in an international setting, preferably in program management, and in education, desired.
- Experience with, or knowledge of, GPE's principles, including human rights-based approaches and gender perspective and modalities of support at country level
- Knowledge of civil society advocacy, preferably in education.
- Exceptional analytical (quantitative and qualitative) and writing skills.
- Fluency in English required. Fluency in French and Spanish desired.

### **Reporting Relationships**

Anne Guison-Dowdy, GPE Secretariat Results & Performance team, will manage the consultants and provide the overall technical leadership and management. On a day-to-day basis, the GPE operational team will provide ongoing advice and support regarding logistics, documentation, contracting, etc.