

FTI Evaluation Paris Meeting Transcription – 8th December 2009

Stakeholder Consultation Meeting

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The meeting started at about 1315 and ran past 1800, but unfortunately the recording did not begin until after 1435. The first transcribed contribution is by Diane Richler (¶6 below). Prior to that are the informal notes taken by the evaluation team for the part of the meeting that was not recorded.

Session 1 – Evaluation Overview (Anthea Sims Williams)

1. This session provided an overview of the evaluation method and activities (see powerpoint). There were no questions.

Session 2 – Evaluation’s main conclusions and recommendations (Stephen Lister)

2. Stephen Lister outlined the main conclusions and recommendations of the evaluation (see powerpoint) and recommended that interested parties dug deeper and read the detail in the annexes (Volume 2) and the country case studies all of which are available on the evaluation website: <http://www.camb-ed.com/fasttrackinitiative/>.

Robin Horn (WB):

3. Congratulates team – the evaluation shows that they have developed deep understanding and analysis. It is a thoughtful collection of options. This is a critical time for the Partnership.

Kris Panneels (Belgium)

4. This is a timely evaluation and will no doubt be on the agenda for Addis. Congratulations for thorough analysis. It is embarrassing for members of the Partnership that a lot of the weaknesses are our own weaknesses. There has not been enough pressure, monitoring of what members had committed themselves to do. There has been a lack of strong commitment. The original commitment from the donors who set this up has faded away over the years. The good thing about the evaluation’s analysis is that it draws attention to what could be done better in the future, and its recommendations are worthwhile discussing more in detail. The challenge for the donor community is to organize itself better than it has in the past. One issue: we agree that we do not need a new vertical fund, with its own bureaucracy etc. But the evaluation recognizes that you do need capacity at local and global level. FTI needs a dedicated structure and mechanism at central level, to push and make progress. How do we find a way to work together without becoming bureaucratic. There’s a lot of manpower available (multilaterals, bilateral) – we need to link more efficiently together. I am looking forward very much to further reading and discussion on the evaluation.

Dennis Sinyolo (Education International)

5. Thank you for your bold analysis. Question concerning independent evaluation team: how representative was it? Were there people from recipient countries in the team? Also have four points to raise:
 - i) Issue of UPC: it was unfortunate that FTI chose such a narrow focus – ignoring quality. One important aspect to be addressed in the reform of FTI is to broaden the scope outside UPC.
 - ii) Funding: has to be long term and predictable. This is particularly important for recipient countries, to allow planning, hiring of teachers.
 - iii) What happens at country level is often donor driven. This process has excluded civil society and in particular teacher unions. The reform of FTI needs to include the voice of the broader CSO community.
 - iv) Indicative framework: has some reasonable benchmarks but some of them are faulty – complete disaster. For example benchmark on teacher salaries. This has undermined the teaching profession. Pity that the WB has been using the Indicative Framework (IF) to give

advice to Governments. A study by Education International in 2006 found that 5 out of 6 country studies did not give teachers reasonable salaries.

- v) The Indicative Framework has been misunderstood by countries to be prescriptive framework “the gospel truth”. If FTI to be reformed, there is a need for a renewed look at Indicative Framework, involving country stakeholders, and clear communication strategy

Diane Richler:

6. I’m Diane Richler, the President of an organisation called Inclusion International which is an organisation of families of people who have an intellectual disability, so I’m one of the people who’s here representing families of children who by-and-large are not in school.
7. First I would like to thank the FTI for making it possible for us to be here and for taking our concerns into account. I’m really reacting to the statement that was made about the purpose of FTI which was supposed to lead to radical change rather than small incremental changes in terms of the numbers of children in school completing school and receiving quality education, and from our perspective while there has been a huge increase in the number of children in schools since the initiation of the fast-track, we don’t believe that there has been any such change for children with disabilities and there is nothing to suggest that the numbers have changed from what the estimates have been – that only 2-5% of children with disabilities complete primary education in most of the world.
8. In terms of the data gap that's been pointed out we acknowledge that there is very little data on children with disabilities but we just completed a major study on the education of children with disabilities and were really stunned to see how big a problem the lack of registration at birth of children with disabilities [is]. So were realising more and more that children with disabilities aren’t even being counted, they’re not registered anywhere; so whatever the estimates about the number of children with disabilities in school, do not seem to be very accurate and even in the countries that are keeping some track of children with disabilities in school, there seems to be a big discrepancy –even in the last GMR reporting up to 99% of children in school when we know the children with disabilities are still at home.
9. One of the big reasons that children with disabilities in addition to not being counted is that often MoEs have had no responsibility for children with disabilities; either it's been the responsibility of a social welfare ministry or it's been seen to be a responsibility of the voluntary sector. And in fact many donors have, I think inadvertently, have been fostering keeping children with disabilities out of the schooling system by funding the voluntary sector to offer some sort of programme for these children, letting governments off the hook in terms of making MoEs responsible.
10. Many countries have now signed the new convention on the rights of persons with disabilities, certainly all of the multilateral institutions. The UN Family, are responsible for ensuring that that is implemented and we've taken a look to see how EFA can start to take the convention into account and ensure that all of the aspects of EFA and the Dakar Framework are made consistent with the convention and I’d be happy to share that with you. I’d just like to make one further point and that's related to the dilemma between the country level focus and the role of the Secretariat, and at least in so far as promoting the inclusion of children with disabilities in education, our feeling is that a country focus alone will not allow that to happen, there is a huge capacity gap at all levels in terms of how to include children with disabilities in education and we think that the Fast Track secretariat would have a role to play in terms of making TA available and assisting governments in monitoring, in order to make sure that children with disabilities receive an education, are included in the regular system and receive an education of quality. Thank you.

Pauline Rose:

11. Pauline Rose from the GMR. I just want to share with everybody else the congratulations, I think it's an excellent report, really thorough, really important case studies, which give us additional evidence from what has been seen before or has helped support the information we know has been discussed and

some of the issues we know have been problems. As I see it, you've presented in quite a balanced way in your report and evaluations, but you're quite hard-hitting in your conclusions. As I'm understanding it, your overarching conclusion is that fundamental reform is needed, but that doesn't mean we need a new fund, we need to really reform the FTI, work with what we have (that's what I got from the summary so far) so in terms of the fundamental reform of the FTI rather than a new fund. That sounds very sensible proposition building on the evidence you've got.

12. A couple of questions relating to that (I know that some people in the room might have different views as to whether we need a new fund or not and that might be something useful to discuss). One is how you see this fundamental reform as getting some of the big donors on board who may not at the moment be putting money into the FTI and a large part of the FTI is built around the Catalytic Fund as a funding mechanism, and I suppose the US is the obvious example there, so the question was basically around getting other donors engaged in a financing way. I mean most donors are engaged in the dialogue, but in financing, if that is seen as something important in this fundamental reform, maybe that's something that is outside that scope.
13. And the other [question] is, I suppose another issue that's been raised in relation to whether we need a new global fund, is around the branding, and you mentioned that one of the strengths of the FTI as you saw it is helping to put the EFA on the agenda and I was wondering where the evidence for that comes from and how we can help to strengthen the FTI in promoting the EFA agenda beyond those of us who sit in these rooms, to people who work in health, to people who work in other areas. I think that was one of the things that came out of the ODI study, was that we're not doing a very good job in education generally, not necessarily related to the FTI specifically, at promoting why education is important, why we need to be giving it more focus.
14. So those two questions in relation to elaboration of fundamental reform. The other question was around the role of the World Bank and I think we all realise and acknowledge the issue is to do with institutional processes, it's not to do with the World Bank not doing it right, it's to do with how the World Bank operates, what I was wondering in terms of your conclusions that you've got in the paper is that you suggest that the World Bank could still host the FTI, but maybe it needs to be independent, and it needs to not be the implementing agency, and I was wondering if you could explain a bit more what's meant by that and whether that's an attractive approach or suggestion for the World Bank, and whether that's something that the World Bank would be interested in doing, I mean from my understanding there are now lots of these trust funds, the FTI is probably one of the smaller trust funds, but they take up a lot of work for the World Bank, and whether this is something that is possible and feasible or whether there are other approaches that need to be thought through as well?

Kailash Satyarthi:

15. For the Global Campaign for Education and Civil Society. I would like to congratulate and pay special thanks to the evaluation report, the reason being is that GCE has been raising all these concerns right from the beginning. If my friends would recall, earlier on this year...[mumbled]...we found a new strong voice in support of what we had been saying. I come from India where we have been taught and we believed in a sort of reincarnation, so if we have to look for a renewed FTI I would like to use the phrase 'reincarnated' FTI, with a new brand which is more recognisable, more visible in public, but more importantly can attain the political power and support behind it which is lacking and perhaps not properly indicated in this report.
16. The second issue, I would like to support the whole issue of equity and equality, so it is not just the children with disabilities, but the whole gender perspective, marginalised children, child labour. We have just come out with the global task force on child labour and education; we had this meeting this morning and we strongly feel that it has been much more important that the whole issue of hard-to-reach children be addressed at national level and global level by FTI, which perhaps is missing.

17. I would again underline the importance of tapping the highest political support or even the engagement of the finance ministers at least at country level, and the development aid ministers at donor level and this point has not clearly come out of this report.
18. The fourth thing is about the courage of risk taking, and we have been talking about, there has been a lot of discussion I understand right from the beginning and there was what you call a sub-committee or something like that but when it comes to the funding and really putting the money for the fragile states, FTI could have taken some bigger risks, considering there could have been some problems but it could not be ignored. Other things, of course you had mentioned about the fragile states and populated countries, Pakistan and Nigeria you had given the example.
19. Another thing we would like to emphasize on broadening the ownership, if there is a reincarnated FTI then there has to be broader ownership at country level, in the LEGs, where the civil society and private sector should also be considered strongly. But also at global level, that has to be asserted, which is still lacking, I think it has been asserted here, but we have to see it in practice.
20. Then the reorientation of the roles of FTI vis-à-vis the World Bank: this issue has been raised in the past and also coming out in this report explicitly, so that has to be addressed. Then there has to be some sort of [mumbled] running cost for certain things including the coordination and quality of TA including the private sector and the South-South Cooperation that could have been enhancing, or in the future if we have to think in those directions. So I think some of those things which are considered in the future but Lucia if you want to add something then please go ahead.

Lucia Fry:

21. No I think that's it from our side, I've had opportunity to give feedback a couple of times on the evaluation already. I think if there is anything I would emphasize it's around this issue of rebranding/re-launching the FTI and there are some key factors in order for that to be credible and to have legs is for FTI to be seen as independent, is for it to reclaim the ambition which is very elegantly laid out in the evaluation, very clear that it was to be the centrepiece of efforts for achieving at least the MDGs of education if not the whole education agenda, and that it really needs to reclaim that space, not retreat into being a marginal, sideline effort to make up some deficits in a few places.
22. Inclusive governance Kailash has already touched on. I think this issue around the accountability framework is really key, and this has to apply to donors as well as to countries, and I think if we can be more, if donors are more demanding of themselves, in terms of the volume and the quality of the aid that they give, crucially to support systems and the core running costs of education, then they can in turn be more demanding of partner countries in terms of performance. The evaluation is very clear that both M&E of performance is essential. We would support that and we would feel that as I say an equally demanding framework which demands more of donors, and then demands more of countries, especially in terms of results I think, not just in terms of inputs, the results that flow from education investment by both donors and countries.
23. I think actually just a little bit more treatment on the issue of teachers, I would echo a bit of what Dennis [Sinyolo, of Education International] says: it's kind of alluded to in parts that perhaps recurrent costs are not being paid, that it's not helping countries to tackle this core issue of how to get enough teachers to tackle the EFA goals, so I think a little bit more treatment on that would be welcome.
24. But just to finish up with, two exhortations, it's a great report so don't just read the executive summary, and an exhortation, this is a critical moment, an exhortation to anyone who sees themselves as an FTI partner, to really push for a reincarnation as Kailash says, and not a retreat.

Moussy Hughes ,France

25. [in French] Thank you very much. What I took in terms of the questions I thought there was a number of questions, one in terms of incentives and working together, collaborating at different levels, I

thought that was one issue that was posed. A lot of questions on the Indicative Framework, its comprehensiveness, its validity, its legitimacy, I think there's a lot of issues there, I'm not quite sure if people want more recommendations on this or should you be giving people more directions on where to go. There was a number of questions about the recommendation that we don't need a new fund, we just need a better FTI, and I think people are asking a little on the justification there, how did you come to that conclusion, it's more in the report but people felt it wasn't in the executive summary. So there's a lot of issues around that, but also, and Robin's here, but the whole role of the World Bank and the recommendations, what does that really mean in terms of greater independence, people want more clarity in terms of what that means. There were a number of issues that it was felt, Kailash raised the point that the document doesn't deal with the political support and that also links to the question of the financing and where that is all going to come from. So anyways, that's some of the questions I took out of it, but maybe you have a different list.

Stephen Lister

26. I'd be happy to [respond]. A lot of it is stuff that's being fed into the whole discussion, there are a few points where we could comment on what we meant in the report and I'd be happy to do that. I'd ask Mailan on the issue of the Indicative Framework, which keeps coming up; I think it would be useful if she could give us a summary, how we found it operating at country level, because I think there are still misunderstandings about how it's actually being used as opposed to what the initial perspectives may have been in some cases.
27. Just to pick up some of the points people have made: I think the capacity development one was really important, and I think one of the things that got squeezed out [of my presentation] was an acknowledgment that the FTI has made progress at a conceptual level in looking at capacity development. If you look at the initial idea of a capacity gap, if you look at the work that's been done on capacity development guidelines, it's a much more holistic look at institutional and organisational, as well as individual capacity, and a much better way of going forward, but we all know it's something that takes years and years, so that's a perfectly fair point, but that's something where FTI deserve credit for having moved the thinking forward even though the practice takes longer.
28. The point raised by GCE about political support and Ministries of Finance: I really want to emphasize the point about Ministries of Finance because there's things you can and can't do about getting high level political support, but one of the things about the design of FTI that got lost at the beginning was the idea that it really needed to be integrated with the overall plans and budgets of the countries you're dealing with. It became a little bit too much, to put it unkindly, of an education ghetto, where educationalists are talking to each other both at global level and in-country and not talking enough to the people who are dealing with the Ministries of Finance and of course the whole question of budget support, sector budget support, the whole question of recurrent financing, you can't talk about that unless you're dealing with Ministers of Finance, so getting them involved in the partnership is really important.
29. Questions about the role of the World Bank: I think it would be useful to look at it on two different levels. One is the question about being the trustee for funds, I can't argue for what will be the way the World Bank looks at its interests in hosting funds, but we know from looking at different global funds that there are different ways of doing it, and the way the World Bank acts as a trustee for the GFATM has been completely different from the way it has acted for the FTI. Now whether you want to move to a different model is something else, but there are different ways of doing things. I think again the issue of incentives is really important, because from our perspective keeping the World Bank involved in basic education at country level and globally is really important and making sure that the Catalytic Fund or whatever other donors are doing doesn't become a substitute for the Bank being involved; and that's not just a matter of exhortation but that's a matter of looking at what are the incentives that face the governments that ask the Bank to look at this or that, what are the incentives that face the

TTLs who have supervision money for this and not for that, and so on, and that needs to be looked at in detail.

30. I think that is part of the reason why we come to the conclusion that it would be better off trying to fix FTI than to start something new, because when you look at the criticisms of FTI there are so many very simplistic superficial ones, and I'm probably being unkind in caricaturing them, but the idea that if only we took it away from the World Bank it would be great – it wouldn't; if only we got more partners involved in the governance, – well that's an important thing but there are so many things that need to be done simultaneously that the chance of starting a new venture and getting it all right ... It seems to me to be very likely to be the sort of reincarnation, like groundhog day, of repeating the mistakes made in the original FTI rather than learning from them, and I think that's the basic reason why we feel we should build on what's there.
31. Just to mention two other points that are in the report but not headlined, I think the point about out-of-school children is really important, it is something that is in our analysis of data,. We draw attention to [the fact that] the whole question of measuring and counting the number of children not in school is very ; and it is important obviously if you're trying to talk about getting to the last 5% and so on so that's a point that we would support.
32. And then finally on the question of how balanced the evaluation team has been, we would never be satisfied, but we did at least try to make sure that for each of the country studies we had country nationals and consultants involved in that work and we have tried in the extent of the interviews that we've conducted to compensate for the fact that inevitably the members of the evaluation team are not a cross-section of the people involved in the partnership.

Linda English (chair)

33. Time for a couple more comments before we have a coffee break, David and then Desmond, and then Katy, you'll have to speak quickly.

David Gartner

34. [David Gartner, Centre for Universal Education] First, thanks very much for all the terrific work and thinking that's gone on. Second summary point, I think there are many important conclusions and recommendations. I want to highlight two that I think are related and could actually help drive the rest, because while these two things alone wouldn't be sufficient, I think they could be highly leveraged in terms of the transformation, reincarnation, whatever word people choose to settle on. The first would be this question of fully engaging diverse stakeholders on an equal basis, it is not yet happened, we could easily see how it could happen, with the seeds in the FTI, but it could easily happen both at the global level and at the national level including partner countries, civil society from north and south, as equal partners in the oversight of the overall enterprise and in terms of the endorsement process of the proposals, as well as the monitoring going forwards. Why that matters I think is that we've seen from examples from other institutions that that leads to civil society being a much more effective resource mobiliser, it leads to partner countries having much more ownership over the enterprise and it leads to both those groups being much more effective watchdogs for the effectiveness.
35. Which takes me to the second critical element in your findings and conclusions, which is that we need to hold all stakeholders accountable to results in ways which just aren't happening now, and by results I want to echo, we need to go beyond simply access, we need to look at quality in learning outcomes, and the reason why I think these two things go together, is that unless there is some relationship between board seats and the contribution donors make there is less incentive to go to the core point for more contributions by donors. Unless there is a performance basis for ongoing financing for partner countries there is less incentive for partner countries to perform and develop learning outcomes and similar standards should be applied for other stakeholders.

36. So those are the two points I wanted to offer and maybe lastly because there's been some discussion about the global fund in opposition to this I think most of those, I can't say I speak for all, but most of those who have been highlighting the global fund as a way forward are really highlighting a transformation and evolution of the FTI. No-one has ever suggested, or I certainly have not suggested, a start from scratch and what makes me so hopeful about the recommendations that you've put forward and some of the dialogue that's emerged from the Board and some of the stakeholders is that I can see this kind of reincarnation emerging from this process and I hope moving forward that it will.

Desmond Bermingham:

37. Like Kris I feel very chastened by this evaluation because, having been involved with FTI for far more years than I care to admit, it does obviously fall to those of us who were involved in the early stages some of the responsibility for not fixing the things that were wrong. But I would add my commendation to the evaluation team, it's a very robust, evidence-based analysis of what has worked, and what is not working with FTI.

38. I think what it particularly adds to the debate is the country level case studies, and I would encourage people who haven't had time to look at those, go into the case studies in detail because they contain a wealth of evidence of information that's important not just for the education sector but for the broader aid effectiveness agenda on the complex realities of putting those wonderful principles of the Paris Declaration into practice on the ground – it's difficult! These country case studies give us a really rich evidence base of the difficulties of doing them. So well done to the team.

39. Second point is not surprisingly the evaluation has found that some things have worked well and some things have not worked well, but my reading of the evaluation echoes everyone ' today, that a transformation of FTI is needed not, as Stephen put it, fiddling round the edges, and I think that is a major shift in the debate from even 6 months ago, when the FTI evaluation team presented its preliminary report.

40. I would however want to emphasis the very last paragraph of the executive summary, which encourages everybody involved to take the necessary time to make the changes that are required. The report quotes 'hasty design dominated by donors has undermined the credibility of the partnership and resulted in an architecture which has not worked well'. This transformation is not a trivial task, it will take time, it should involve stakeholders in a real way, and it should not be donor dominated. That will run counter to some of the efforts to mobilise resources, but I like the evaluation proposal to use the replenishment as a sort of bridge towards that, it will take time.

41. And then the other point I would make before I pose three questions back to the evaluation team, is my reflection in some of the writing I've been doing for CGD is that we have to recognise that the world has changed very radically since this evaluation was launched even 12months ago. We've had the financial crisis of 2008, the shift of the geopolitical basis from the G8 to the G20, and we've got going on currently the major debate on climate change in Copenhagen. I think somewhere in the evaluation, whether in the report itself or in a covering note, we need to acknowledge those global changes because they will have an impact on whatever we transform the FTI into. Could a transformed FTI be led by a G20 rather than a G8 agenda?

42. And then three questions to pose back to the evaluation team: firstly on aid effectiveness, it does trouble me that one of the unique selling points of FTI was aid effectiveness and yet the conclusion of the report is that it has not had a major impact on aid effectiveness at the country level. I would ask the team to expand a bit more on that and on the particular issue you expand a bit on in other parts of the report – on the constraints the FTI has faced because the World Bank is the main supervising entity. That is an issue that has come up in other sectors and a really important one for us to face front on in thinking about transforming the FTI.

43. My second question to the evaluation team is to summarise some of the responses you've had to the evaluation and in particular the appetite for change amongst the Board members. We are here as a

group of stakeholders saying that transformation is necessary: are you hearing that same willingness from the Board members?

44. And the last point really to pick up on some of the points today on the FTI vs. the global fund debate. My sense in the consultations and discussions I've been having is that we have moved on, as David said from that debate of it being one or the other, and that there is a convergence, towards something that is a major transformation of the FTI and the Catalytic Fund in its current form, and whether we call it a Global Fund with a capital 'g' and a capital 'f' I think is less of the issue, the issue is: is it an effective means of delivering financing to a country that allows it to move forward more rapidly in an education sector? and I think the paper that Stephen circulated to us before this meeting, on a revised Catalytic Fund, is a very exciting exploration of how a transformed Catalytic Fund could work and my encouragement would be to not get bogged down in 'is it a global fund or is it not?'. Thank you.

Coffee break

Linda English

45. Post-coffee break, a couple more questions, comments.

Katy Webley (Save the Children)

46. Just echoing everyone else's appreciation for what is clearly an extremely rigorous evaluation, I have two reactions. One is a general reaction and a question, and one is more specific to fragile states. I'll cover both, since there are many others who want to speak.
47. the very general one, and I think Desmond alluded to it as well, the recommendations are extensive and we've talked about transformation of the FTI, and so my question to the evaluation team is, are these recommendations doable? Are they implementable and on what timescale? And I realise that's asking of the evaluation team to make a subjective response, but you're in the unique position of having drilled deeply into the issues across all levels, so I would be interested in your response to that, given the sense of urgency in terms of progressing in the EFA goals, and in terms of your recommendations, do you feel they address the failures, the gaps you identified across all of the six FTI goals, and leading back perhaps to Pauline's questions, one of the goals was about sustained increases in aid, whereas many of the recommendations are more about the functioning of the FTI and the Catalytic Fund, so do you think that if those recommendations are doable? will they also result in changes across all of the six goals, and reflection on the timeframe.
48. That was my general reaction question. More specifically on fragile states, if I can go into that, which is also the agenda for this particular session, the evaluation recognises in several places the importance of fragile states, countries in need, notes how some have been included in FTI, but many have not, and we also touched on that in your presentation. It's clearly more thoroughly addressed in the annex, Annex H, rather than in the executive summary, which is inevitable, so I just had a reaction in terms of the recommendation that the FTI become a one stop shop, rather than there be a separate funding mechanism. I think in some ways one common decision making process, one place to go would imply that it would be faster, and quicker. My question would be, would it be an incentive, or a disincentive to donors who are increasingly prioritising fragile states? So if for example a donor has made a commitment to disburse a certain amount of money to fragile states, if there is a one-stop-shop pooled fund would that be a disincentive rather than some of the other discussion around a pooled fund or a new fund may have gone, and that's a genuine question.
49. I think also as you touch on if the World Bank was the managing agent, that wouldn't work, and so it comes back to your recommendation that there be alternative supervising entities, and again is that doable, and in what timeframe, because that would have to happen for fragile states.

50. And so my last comment is really many of the recommendations that come out in your executive summary are ones that are required for the overall reform or transformation of the FTI, specifically the Catalytic Fund, but they're also explicitly required for fragile states to ever apply for and receive some of the funding, and so I would probably urge that to be a bit more explicit in the executive summary, rather than, as it is, dealt with comprehensively in the annex. So some of the recommendations for the Catalytic Fund could be specifically related to fragile states, particularly the eligibility allocation criteria, what's the aid mobilisation tool, is it the financing gap, is it out-of-school children, the move from the one-off-entry to the continued process of planning and implementation and the need to look downstream, not just upstream, the progressive framework, the application of that, the ongoing capacity building, and a reference back to the four gaps that the FTI identified and the importance of those in fragile states, the continued predictable long-term financing [which is] particularly an issue for fragile states, and perhaps also I don't think this one is references, the need to flexible M&E framework and how that would work for both donors and countries on that side. So my first question – how implementable and practicable and in what timeframe are these recommendations, and the second one the fact that the fragile states issue is dealt with very comprehensively and perhaps particularly around the recommendations for the Catalytic Fund could draw out how those could help address the problem of fragile states not either applying for or receiving funds.

Ward Heneveld

51. (William and Flora Hewlett Foundation). We have an initiative called Quality Education in Developing Countries. Our preoccupation is that if kids go to school they gotta learn something, so I was happy to hear the unions, representative talking about the importance of that, and it leads me to think that, I had not appreciated until today the problems with the Indicative Framework which leads me to suggest that you might want to consider as a suggestion at least that the Indicative Framework evolve into a results framework, which included learning outcomes, but let the countries themselves figure out how they were going to get there. Whether it's the salary levels for teachers or whatever, let them do those input measures themselves.
52. The second is a general suggestion, I have to admit I only read the executive summary, and I have found the answers to some of the questions today very helpful for broadening my understanding of the executive summary, if there is any others in the room, you might want to use the questions today to use for your editing of the executive summary, because there may be strengthening there to do. Thanks.

Phil Rose

53. Thank you I'm Phil Rose, head of the education policy team in DFID. I'm giving some preliminary reactions from, representing a country that's actually on the FTI Board so I'll try and give some hints as I go along about answering the question about what will the Board make of all this.
54. As you can imagine the board has already had some quite intensive discussions and will continue to do so, including a retreat early in 2010. I think overall it's a really excellent evaluation, as many people have said. I doubt that any of the other global funds and partnerships have had such a thorough critical evaluation. That represents a little bit of a challenge for donors in the sense that we have to compete for funds with all these other global funds and multilateral instruments, and there's a sense that temporarily the nature of the evaluation will make it harder to argue for replenishment, but that is a price worth paying if at the end result we have a transformed instrument of the sort that the evaluation envisages.
55. Just a couple of reflections on the evaluation that may not be so obvious. One is that to an extent the evaluation picks up on a number of strands of work that are actually already under way within FTI in terms of reform. So there is already a major discussion going on with support from consultants on whether we should stick to the remit of UPC or move beyond that, with quite a presumption that we would move beyond that, bearing in mind that there are costs and so on.
56. The issue of Southern voice, the recent governance reforms have considerably strengthened the southern voice on the board. Of course it's too early to make a judgement on how the new board will work yet. It's only met twice but it will be interesting to see how that goes.
57. There's a decision in principle to move to a single fund for FTI rather than a plethora of different bits of pots of money which is confusing for customers and not in line with Paris principles. And there's agreement in principle to strengthen the secretariat. So quite a lot has been kicked off but there's quite a long way to go.
58. I think the one slight disappointment with the evaluation, and this isn't a criticism of the evaluators it's just the nature of the way things are. Is that it doesn't have a lot to say about the impact of the funding. It says that in the perception of governments, funding is the most important product of FTI but it's relatively silent what impact that funding has had. I know that there are attribution reasons for that, but that does limit the usefulness of the evaluation in terms of helping donors deciding whether to invest.
59. Moving on I think clearly, as Desmond said, views now pretty much around the world are converging towards we need a better FTI not a new fund. I think it's fairly obvious that if you tore all this up and started again you would take at least two years to get back to where you started, and you wouldn't, just by deciding to invent a new instrument, eliminate a lot of the problems you have with the existing instrument. But I do think there's a strong case for re-branding. Carol Bellamy has already pointed out that it's odd to have an instrument that doesn't have children or education in the title. That's my personal opinion.
60. So I don't know if we are looking at reincarnation. My memory of Indian religious practice is a little rusty but possibly rebirth is another one. But the word that's in vogue in the Board is transformation. There's a little understandable tendency among donor members of the Board to avoid really radical language, because they've put themselves out quite a bit to persuade their ministers to invest in FTI as it is. So it's quite hard now to go back to ministers and say well actually yes it was pretty awful but please now invest in this new thing. There's a bit of a balancing act of course to be done in reality around that.
61. On the role of the Bank I think I agree with Stephen we have to avoid crude prescriptions of let's get FTI out of the Bank. The Bank plays at least three distinct roles: it houses the Secretariat, it's the trustee for the funds, and it's kind of the default supervising entity. There's already a discussion about loosening the grip of the Bank on the Secretariat with the Bank's encouragement. So we are going to

be taking that forward definitely. The Bank no longer has a monopoly on being supervising entity; we have two or three cases of other supervising entities. I see trend continuing again with the Bank's encouragement. The trustee role, well you can take that out of the Bank. It's not a huge deal I don't think it's a critical factor. In a sense, why take it out? The donors are used to the financial systems internally and they're good at managing trust funds.

62. So overall I'm pretty optimistic about the future and the way forward. A great number of the criticisms that I've had of FTI and colleagues have had of FTI are being addressed. There's no grounds for complacency of course. There's a lot of very hard work to do. But one thing I can say is that the British government is very keen to use the advocacy campaign around the football World Cup as some kind of platform for helping with FTI transformation if we call it that. And will be a major event at the World Cup. Several world leaders have signed up to it and it will out the World Cup education, possibly fund raising or though GCE may disagree about that. And somewhere in the background will be FTI or whatever it's reborn into. So that's a major opportunity and we need to make use of that. We won't have done all the work by then but I think it's a major step along the way. Thank you.

Linda English

63. I will take a couple more questions then we move to the next session then you can add your questions at that point. Will that work? Then we can come back to other questions. Go ahead.

Marc de la Mothe (WFP)

64. My name is Marc La Mothe from the policy planning & strategy division of WFP. I would like to join my colleagues in welcoming the report which is very thorough and looks honestly at the issues. I think it's positive to see that the report calls for an increased role in fragile states and I will join my colleague before who said we need to keep in mind the poor and ultra poor and how they are being excluded from education. How even when they are included in education it is difficult for them to stay in school, complete the primary cycle and learn actually something meaningful at the end of the primary cycle; so these states are the ones where the Education For All goals and the FTI goals are more in jeopardy, they are more prone to the current crisis (food fuel financial crisis). So it's good there is a focus on these states. The inclusion of recipient countries in the allocation of funds is also something that is needed. As WFP we have been involved in a couple of FTI applications with the countries. And I have to say that it was true that it was a bit difficult to see how to prepare the application and what were the criteria. I think there is a push in making that more clear now towards the future. I have to salute the role that the World Bank has played so far. In this sense I would say that it's been really positive and I would ask the evaluation team how they would see forward a role that brings the same clout, coordination and especially the consistency of the policy dialogue within countries that the Bank has brought forward so far. Thank you.
65. Dagmar Fuchs GTZ
66. Thank you my name is Dagmar Fuchs from GTZ in Germany. I would like to make some comments. First of all when we read the evaluation we were very surprised and can only congratulate the team to this very through analysis and the very straightforward recommendations and conclusions drawn.
67. We would advocate very strongly ,as so many did, for a renewed, revised, strengthened, reborn FTI and not for a new fund. In order to do that we wondered sometimes at some parts in the evaluation we found that the language was a little bit too harsh. The language could lead people to the conclusion, oh the problems are too big, they are too much – we have to start afresh or we have to do something else. We wondered if it's not better to transfer the same message in maybe slightly more appreciable language.
68. Anyway when we look to how analyse the report we thought that it's important for the reborn or reincarnated FTI to broaden ownership and strengthen the idea of partnership and have a side of that a very professional management of the Catalytic Fund. This suggestion that comes up in the report is a

very viable and very important one. Not to mix too much the political agenda and the political wishes and visions with the analysis of applications, plans and education sector plans – to really have two streams, which interact of course, but you have a very professional quality, concentrated analysis and management of the Catalytic Fund, and you have a very strong broadly owned wide partnership in the FTI which would mean that you have more people in the partnership. You have a stronger representation of recipient countries of civil society and so on. We think the observation regarding the balance, in managing the Catalytic Fund and in endorsing the education sector plans, between the central and the local partners, these observations are very true from our perspectives. If you put the local education donor group into the driver's chair of endorsing or not, this might be asking too much of them in many countries. Looking at the dimensioning of structures of many organisations in the countries which may lead in certain cases to some sort of de-skilling in this local education groups. And then you have a number of more generalist people or economic trained people who have to decide on the quality of a national education sector plan. This might go wrong sometimes. So a balance between central assessment and local assessment which should be looked into.

69. We think that the capacity development is very important. We've failed somehow ourselves in looking at our capacity gaps as FTI and I was very happy to hear you say that FTI really did the ground work for conceptual further development on the idea of what is capacity development. That it's not a set of one-off interventions, that we have to look at it in a systemic way. And that it would do good ourselves to look at our own capacity-strengthening in the same way.
70. The last comment/question that I would like to pose is regards the future of process. We are here now together. I don't know if there are more moments like this where you exchange the recommendations and conclusions of the evaluation with the broader panel, with the broader group. Will there be more opportunities to give feedback? There is one until 5th January on writing. We will do that. But then how does it continue? What is the possibility of people who are not in the Board (of agencies, groups) who are not in the Board but very interested to contribute to the further decisions and discussions?

Linda English

71. Thank you very much. I would like to hand us over to Stephen and then we will come back and we will have the next presentation and people will have the opportunity to make further comments.

Stephen Lister

72. Thanks Linda. I think a lot of the comments we are getting are very specific about future recipes. I think it would be really helpful if we could get onto the three topics we've laid out. Because I think a lot of stuff will come out.
73. I would like to comment on two things. One is the point that was just made about other opportunities for consultation. Of course the most obvious thing about this gathering here is that once again the partner countries are barely represented. That's a concern that we as a team have expressed about the way that the consultation should be conducted. The way that the process is going to happen going forward is going to be settled by the Board and you will need to check with them what's happening.
74. That relates to my other point, which was the first question after the coffee break, which was about whether this is doable and somebody commented that if we go about it in the usual FTI way it will take decades to get to a conclusion. But there are precedents that we can learn from, and I think one of them is the pressure point that led FTI finally to come up with the FTI framework in 2004. Because then I think there was a realisation that there was a build-up of countries that were being endorsed, a build-up of expectations that couldn't be left unresolved. There was enough pressure on the donors that they had to agree something. There were two big problems with that process. One was that there was only the donors talking about it and the other was, it was a question of what can we agree on, not what will work. So there wasn't the kind of reference to, we put in the evaluation report the fact that there was some very relevant evaluation experience from the sector development programme in

Ethiopia, which if you like was a prototype which already hadn't worked in important ways, clearly wasn't looked at. We do now have it seems, from the Board's reactions, the reactions in this room, we have that kind of will to come up with something different. But the danger is, if it's again done by the donors and without involving other people enough, and if it's done at the level of "well what can we agree on?" rather than "what will work?" then it won't do the trick.

75. I was a little bit worried about the line that Phil Rose was treading between optimism and complacency in saying "well we've sort of done this about that and so on", there are things that have been done but it's not a question of ticking off a set of boxes. It's a question of sitting down and coming up with what is a set of mechanisms that will work. And if one of the consequences is that some of the partners will come and some won't, but the ones who do come will make it really work, then that's something that the FTI needs to consider. Beyond that I think it will be useful if we get down to the nitty-gritty of the other presentations.

Linda English

76. I was going to take a presentation here about the value of the Catalytic Fund. We are just switching the two sessions after the break to give you a break from Stephen.

Session 3 (presentation on the Catalytic Fund – see powerpoints)

Mailan Chiche

77. I will try to keep this as brief as possible. This presentation is aimed to start and move forward and looking at the future as we've already started to do. My presentation I will first come back to what were the findings of the evaluation, as that's the basis for our recommendations ;and most of you have read only the executive summary so I will present a bit more of information on that. But also I encourage you to go and read some of the appendices and annexes that provide a more in-depth analysis and evidence on all those issues.
78. So very quickly because this has already been touched upon. The Catalytic Fund was conceived as a very central cornerstone to reach FTI objectives, in particular the ones on sustained increase in aid, more effective aid and sustainable increase in domestic finance. It has so far provided allocations to 30 countries, the Catalytic Fund itself represents more than 90% of the total disbursement of FTI trust funds and it represents in 2007, 3.5% of total aid commitments to basic education but this is growing quickly. It has evolved quickly over time since its creation in 2003. This has made it both a challenge to evaluate it, as it's a moving target and also to make recommendations that are still relevant. It has evolved from wanting to focus on good performers – on donor orphans, on countries where there is a strong limitation on donor aid but had an education sector plan that was endorsed– to all low income countries. It has evolved from focusing on being catalytic and on donor aid to being more focused on filling a financing gap. It has evolved from providing short term support to being more long term and attempting to provide three year support. It has attempted to more and more focus on providing the most aligned aid modality and providing more incentives for that. And in terms of country allocations it has evolved and used different formulas to decide on country allocations from what was initially called prioritisation formula, which was aimed at ensuring that there was enough money for countries that had made requests, to the famous step-down formula which aimed at ensuring that it was not crowding out donor support but actually being catalytic and therefore did not fill the financing gap but fostered donors to step in and fill the financing gap. To now the proposals of the task team on prioritisation and the work that has been done on the needs and performance index.
79. The Catalytic Fund in practice: I will go over this quickly. If you have questions do not hesitate, otherwise it's all in the report. One of the main strengths of the Catalytic Fund is that it has become the key focus of the FTI. When we came to Burkina Faso, when we asked people how you say FTI in French they said *fonds catalytique*. I thought that said it all. In most case studies it has become the main objective of countries to seek endorsement is to access Catalytic Fund throughout the evaluation

period. In a few countries it has provided a very significant amount of basic education funding. In Rwanda for example it provided in 2007 30% of the education budget. So this is very significant. In some countries it has provided aligned aid modalities and has contributed to moving forward in aid effectiveness. For example in Burkina Faso discussions around the Catalytic Fund have pushed for a move from pooled funding to sector budget support. Again this is in some countries. In some countries it has supported the sector wide approaches and has taken a much broader approach than just UPC or just primary or basic education and has supported other sub sectors like early childhood or the whole sector as a whole. And finally it has provided a channel for some donors to provide support to education at a scale that they could not have done with their own capacity or with their objective to support countries that were not in their own beneficiary countries or core countries.

80. So there are clear strengths in the Catalytic Fund. And in some countries it has in some study countries we have found that it has contributed to accelerating progress towards EFA and bringing more children into school. An example of that is Rwanda if you want to look at the case study.
81. In terms of weaknesses the evaluation finds weaknesses. This is based on analysis of both analysis of global level data and on the case studies. First and main weakness is that it has not had the catalytic effect that it was designed to have. Both the analysis of global level data on aid to education and the country studies show that there has not been a true catalytic effect, at least not at the scale foreseen and when it has taken place in a few countries it has been limited in time, delayed, not clearly additional to previous commitments, or aid has decreased afterwards. So it hasn't had that effect.
82. In terms of allocation again both from the global level analysis, the Catalytic Fund is more focused on low income countries and in particular LDCs than any other bilateral and multi lateral donors in education, which is a positive. But within that when you look its allocations [they] are not correlated strongly enough with the needs - in particular the number of out of school children in countries. Or it has provided relatively more support to countries that already had higher aid allocations for basic education per children. It has failed to provide predictable support both in the short term and in the long term and it has failed to push donors to provide more predictable support. So despite the fact that it has requested 10 year financial frameworks, no long term commitments have been made and in particular the e.g. Rwanda that I was talking about where it provided 30% of the budget in 2007, this was a one year programme. So you imagine the impact of the lack of predictability on the government budget. It has only in a very limited number of cases provided funding for recurrent costs in particular teachers' salaries that was mentioned already. Only in two of our case studies was the Catalytic Fund able to contribute to teachers' salaries.
83. There have been major constraints on the used of aid modalities. This was a question that was raised so maybe I can go more in depth with this. The main constraints that we have identified to using the most aligned aid modalities, because in many countries the modalities used by the Catalytic Fund is not the most aligned present in the education sector in country. For example in Cambodia and in Mali there was sector budget support provided but Catalytic Fund was provided through a project modality. And the reasons for that were mainly constraints linked to the fact that the World Bank was the default supervising entity and had to follow its own procedures and therefore sometimes could not use this most aligned aid modality. Or had an incentive to save time and transaction cost to use the same modality as the existing World Bank modality instead of using a new one. Another constraint which should not be neglected is the fact that local donor groups, and in particular because they are education local donor groups, and ministries of finance have not been involved or very weakly and donors involved in PRSP support or other budget support have not been involved in the discussions so these local donor groups had limited knowledge on aid effectiveness and a limited knowledge of FTI's objectives in terms of aid effectiveness.
84. And another constraint was the fact that that even when there was a possibility for other donors to become supervising entity there are still constraints so that opening the door is not the only solution. There are constraints on the donor side in terms of capacity and willingness to act as a supervising

entity, so just saying that the World Bank is not the default supervising entity does not solve the problem.

85. I will go quickly on the rest. So basically all our proposals aim to focus on the fact that the Catalytic Fund should do things that would not happen in its absence. It should not just be another donor. It should focus on what are the added value that it can bring by being a global fund – in terms of scale, in terms of maybe taking more risk, etc. while minimising the drawbacks of being a vertical approach. But the important thing about everything that I am going to say now is that a strategic approach should be taken and not a piecemeal approach to addressing every issue separately; and a new name is another suggestion.
86. I am going to address issues one by one. So first of all on the issue of raising funds. Which as I said is one of the major weaknesses of the Catalytic Fund in practice. I am going to run quickly through this so I can finish my presentation before Linda shuts me up. So options for discussion of course from our internal team brainstorming, but we've attempted to make them a coherent bunch of options. So more involvement of ministries of finance is crucial, in particular to ensure the credibility of commitments on domestic finance mobilisation. And also on aid effectiveness. And they should be involved not only the department in charge of aid mobilisation but also the budget departments involved at various steps, not only to sign a grant agreement. Stephen has already mentioned the fact that Catalytic Fund support should be conditional on having joint financing commitments which is donors and governments making clear monitorable commitments which they can be accountable for and monitored transparently. Now of course it's not enough to only commit to support education but also the quality of that commitment is important. Is it predictable? What aid modalities, how aligned is it with country processes? So if FTI is to reach its other objective of improving aid effectiveness maybe there is a quality issue there in monitoring finance commitments.
87. Avoiding the displacement of other donors and in particular IDA which has come out in some country studies that there was a risk of displacement. This should be addressed by the fact of monitoring commitments but also by thinking about the fact that the Catalytic Fund could potentially buy down IDA credits to grant level. In order to maintain the World Bank involved which is also really important in terms of capacity of the local donor groups. Because as we all know IDA has a lot of capacity.
88. At global level a lot can be done in terms of monitoring and working with other organisms to monitor funds. In particular domestic funding for education. And there are initiatives that could be joined by the FTI like the International Aid Transparency Initiative and more can be done on that. Long-term funding was also motioned. It's a key issue but it's a tricky one. It's not enough to commit to it. How can we provide long term funding? What's the role of conditionality for example? What's the role of the replenishment process? How can it allow to provide long-term commitments? A lot of that has been done in the health sector or by some donors like the EC or DFID. So a debate should happen. It's not an easy one to solve.
89. And tailoring FTI ambitions to available funding is a key issue because, as I mentioned earlier, scale is a potential added value of the Catalytic Fund, providing support is in a sufficient scale. So if you are going to do that yet want to broaden the number of countries covered and the number of sectors coverage you might end up with a thin layer and no additional value. So the two have to be balanced and simulations run to ensure that scale is not neglected.
90. Aid modalities I will only come back on, well there should be a stronger default requirement on using most aligned aid modalities and even more than that. More aligned aid modalities, even if they are not used in country, and learn from existing studies. In particular the role of sector budget support because this is the modality to support recurrent costs which has been one of the main failures of the Catalytic Fund so far. I will come back to the rest later.
91. On alternative supervising entities as I said earlier – a few proposals to ensure that donors have the incentive to apply as supervising entities; clear rules clarify what is the role of the supervising entity.

Ensuring that HQ provide the capacity to their local offices so they can take it up (thinking about incentives). Involving ministries of finance I mentioned already.

92. Maximising the influence of the FTI through the Catalytic Fund. Ok I will go quickly on this one. But there are many issues on which more can be done to foster the use of country systems for example in supporting country level analysis of the financial system at sector level. Like PER and all these instruments and more can be done to increase the capacity of local donor groups on how and why and to use the country systems and how they work. And how service delivery systems work because this is the reason they are not used. And more cross-country and sector learning I found it really interesting that someone from the Bill and Melinda Gates foundation is here today. When we studied other global funds to come up with this proposal we found that some of them are moving towards FTI, so maybe there are lessons for FTI to share – for example the global fund for AIDS TB and malaria is moving towards similar [country] processes. And similarly there is a lot done in health on aid effectiveness that could be built upon. On allocation this is a really important issue. Given that our findings on the evaluation was that the current allocation mechanism based on the financing gap created a lot of inconsistencies among countries, confusion and was not the most efficient. So Stephen will talk about eligibility and the link with the progressive framework but our recommendation is to move to a transparent allocation formula based on needs, performance and funding needs to ensure that the Catalytic Fund improves the overall aid allocation across country rather than just providing aid to countries that already receive more aid as it is doing currently.
93. The added value of the Catalytic Fund as a global fund is that it could have a more transparent allocation formula that is not political and is not linked to external foreign affairs, interest etc. that's an important move. We also propose, and I know there has been a lot of discussion on this, that advance indications of allocations should be given to countries so that they can start planning and preparing their programmes. We think this is important to support planning and also it would contribute to speeding up the whole disbursement process for the FTI. Nevertheless it should be done carefully, thinking of how to potentially revise the allocations if funding is not getting committed. So to avoid that it gets blocked.
94. I'm almost finished but this is important. Governance-wise as Phil said (he's not here) there has a lot been done already. Proposals and in particular we agree with the proposal that was made by the World Bank at the last Board meeting to have only one fund which would merge the Catalytic Fund the EPDF and the Secretariat trust fund. This would allow more transparency, diminish transaction costs and improve coherence and it's in line with our proposal regarding the progressive framework that Stephen will present later on. Of course it has a lot of implications that need to be thought through. We think that the Catalytic Fund should maintain the country focus and that there should still be the endorsement by the local education group. But we would propose that the assessment of requests to the Catalytic Fund takes place in two steps. The first step based on a very short but standardised project information fiche which would have just key information – aid modality, amount, condition, supervising entity and then...so if this is approved then go on and develop the actual detailed programme. Why do we propose this? As it would allow the FTI and the Board to have a say on the aid modality and be more proactive in pushing on aid modalities and other important issues, whereas now sometimes allocations are decided without having a clear vision on what the aid modality will be. We also support the strong involvement of partner governments. They should present their own requests and not the lead donor and they should sit on the Board on whichever entity will decide on the allocations, which they do not currently. And last point we think there should be an independent and professional panel to review the applications and make recommendations to the Board for funding ;and this should not be the Catalytic Fund committee or the FTI Secretariat, it should be a permanent panel that would provide coherence and that would assess the proposals on a series of well defined criteria and that should replace the external quality review. And provide coherence and professional assessment to these requests.

95. This is my last slide. I will not dwell on this too much because we have a presentation afterwards on the monitoring framework. Just to say it's very important that a clear monitoring framework be defined for the Catalytic Fund based on its objectives to assess predictability, use of country systems, additionality etc and that would be the core of the actual FTI monitoring framework for the whole FTI compact. That's all.

Linda English

96. Thank you very much. There's a lot of food for thought. I'm going to open the floor for comments. Chris you are on my list. I didn't get you the last time.

Desmond Bermingham (CGD)

97. Thanks for the great presentation. I think for me this is one of the most exciting and interesting parts of the whole evaluation report. I think that what the evaluation team are doing is taking us beyond the debate of vertical funds bad horizontal funds good. And doing some hard thinking about how we can use the positive aspects of a global pooling mechanism to promote the aid effectiveness agenda at a country level and demonstrating that with creative thinking that is possible. There are some really interesting ideas coming out from your presentation.
98. Three points I want to highlight: firstly this question of the trustee role and the comparison with the way the World Bank works with the global fund to fight AIDS TB and malaria and GAVI is a really interesting one. The crucial distinction –the evaluation report points to this – is that with both the GAVI and the global fund to fight Aid TB and malaria the Bank is a financial intermediary. It directs money on instruction from the Boards of those partnerships. Sometimes it directs money to its own programmes and those programmes are then bound by the World Bank rules but not always. That is a crucial distinction from current arrangement with the Catalytic Fund where the Bank is the recipient executive fund and the Bank is there for the supervising entity and has to follow its own procedures. The reason that's important is because that unless it's changed to financial intermediary fund the partnership does not have the choice. You have a contract with British Airways and you always have to use British Airways but sometimes it's subcontracted to Lufthansa. No you want to be able to choose whichever airline is going to get you there in the quickest way and the most effective service. And 80% of the time this is likely to be the World Bank but you have that choice.
99. That leads me to the second point; having that choice (Mailan's point) creates incentives for the World Bank and every other development agency that wants to be the implementing agency to deliver the money in line with the principles that you've established are the most aligned modality. At the moment there is no incentive to do that. If you have a monopoly control it's very hard to create an incentive to actually move out of project mode and into sector budget support and more aligned modalities.
100. That leads me to my third point, and this came up strongly at a meeting of the DAC on aid effectiveness last week. It isn't just affecting the education sector, it's affecting all sectors. At the moment the Bank, as one of the major funding agencies, has a problem as far as aid effectiveness is concerned. It doesn't have an instrument equivalent to sector budget support in the way that most bilateral donors have. It has a general budget support instrument and it has an investment operation instrument. But it doesn't have a sector budget support instrument. And that for FTI is a real problem because as Mailan said sector budget support is the obvious instrument to use in supporting a sector plan. so I think those are the points id like to emphasise, and I think the report does pull that out but it would be really good in the discussions it would be a good idea to make use of Robin and his response back. I do remember early discussion with the Bank that there was a strong resistance to moving towards a financial intermediary arrangement. That may have changed and it would be good to know if that is the case.

Robin Horn (World Bank)

101. I agree with Desmond that this is very exciting and promising, the ideas that were presented here and the opportunities to engage on the kinds of changes that can be made and there is a process that's under way right now that we are involved with and hopefully we're not controlling. We don't see ourselves as a monopoly player. To transform the Catalytic Fund into something that is more effective and more flexible.
102. A couple of things on the presentation. I just want to make a correction to Desmond's point in also responding to your presentation. We do now have a mechanism within the Catalytic Fund where the Board decides and instructs the trustee who is the Bank, holder of the Catalytic Funds, to give the funds to another supervising entity (SE) to implement. It took a while to get to it and the Bank worked it out with the Netherlands. It was painful on both parties' sides but we have that mechanism right now. So the Bank is now the equivalent of a financial intermediary where the Board tells the Bank we order or instruct you to give the funds to this supervising entity and then that supervising entity's procedures would be followed and not the Bank's. So I think the justification for the kinds of changes that are proposed in the paper and in the presentation which is to get more flexibility, more funding in the sector, more alignment of funds with the prospects in countries to receive funds and deliver the results, we are fully supportive of.
103. And also I think it is important to make it clear that if the Bank is the supervising entity, the Bank has to follow its own fiduciary and anti-corruption all those measures. We have no choice. So if there's another supervising entity that can deliver funds in a different way and a different way of managing risks, we are definitely all for it and we made this clear at the last couple of Board meetings and we want to fully support the recommendation of this evaluation.
104. One question I do have is on, just for understanding, there's a balance on the one hand on the absolute need for more predictable funding coming to individual countries and making sure that countries as they need to hire teachers and maintain them employed and develop their plans and scale up their programmes. They need to know there's a source of funding that is consistent, predictable and delivered it whatever the arrangement is that's agreed. At the same time that if it's a longer term funding, that is what we all want, there is an issue of disbursement because if it's a commitment for 5, 6 or 10 years that's great, but it means we need to figure out a way in the transformed Catalytic Fund (whatever the new name may be) for the trustee not to hold the funds forever, not to have the funds in a pot that are just disbursed slowly. Because that means that performance on disbursement would be even lower. So we need to figure out some way of managing that, the cash flow, the receipt and disbursement. That's a manageable issue, it's done in other funds so we would support that too. Thank you very much.

Dennis Sinyolo (Education International)

105. Thank you very much and thank you for your presentation which was quite detailed. However I have a few observations and questions. First of all you indicated that actually the allocation of funds would be based on a progressive framework. This is quite fundamental if I understand you correctly. And secondly you mentioned that there would be a two stage assessment and to justify the two stage assessment you indicated that it would give an opportunity to FTI to get involved in the process of developing the proposal or the plan. If that is correct then my worry is that there is danger that we may end up dictating the process ourselves as the FTI rather than the countries themselves. It is important that the priorities of countries be respected. Because sometimes countries end up being confused by donors. One donor comes in today with certain sets of priorities, another one comes in tomorrow, another one tomorrow. There is confusion. And as you may probably know to carry out effective long lasting reform in education you need about 8 to 10 years. I'm talking about a single major reform. So if you are getting a hotchpotch of these programmes 2 or 3 years down the line you get another one you get confusion. It destroys a country's education system. So whatever we are

going to do in the new system it's important to respect country priorities, country programmes. And come in to support them rather than divert and push them in a different direction.

106. My question then is this progressive framework, it is supposed to be a successor to the indicative framework. How will it be developed? Has the team clearly conceptualised what is likely to be the process for coming up with this? If funding is going to be dependent on it, it's a fundamental issue so there must be a clear recommendation on how it will be developed or else we will go back to the same problem we have at the moment? My second question is you talked about the two stage process and the involvement of representatives of recipient countries and at the same time you talked about an independent entity assessing the proposals and the plans. Isn't this a contradiction? Where will for example representatives of governments be involved? Is it in the independent entity? Who will be involved in the two stage process? Can you clearly explain the way you have conceptualised it if you have? I hope you have. What do you picture as what will actually happen in practice?

Linda English

107. I think the issues you raised on the progressive framework are going to be in the next session. We will take those questions with Stephen's presentation. Do you want to respond to any of the specific issues?

Mailan Chiche (Evaluation Team)

108. I will answer specific issues and pass onto Stephen. Just very specific points and correction. First one: the World Bank has an instrument to provide sector budget support and it's very important to say so because there is pressure for the World Bank to move to providing sector budget support. And the risk is that this pressure will lead the World Bank to providing less than good practice (how can I put this?) second-best practice sector budget support. Whereas it has the instrument and it does in Rwanda and in Burkina provide sector budget support but it is not earmarked, it is not traceable in the budget which may not satisfy certain ministries of finance or certain education donors but maybe it's not a good pressure to put on the Bank to provide an earmarked, traceable sector budget support. So that's to clarify.
109. Other small points; on your questions we totally agree with you so it's just a question of clarifying what our proposal or our ideas are. The idea is to maintain the country focus and ensure a stronger voice of partner countries in the financial decisions on the Catalytic Fund. So that's the objective. How to do that? – what we propose is to have partner countries sitting on the entity that will decide on allocation which is not the case currently. They sit on the Board but not on the Catalytic Fund committee. To have them present their own proposal. So how it would work in practice, our proposal would be that a request is developed in country and more incentives should be provided that ministries of finance are involved as well as education. To ensure broader ownership that it's endorsed by the LEG (as currently). That this proposal gets reviewed by the FTI Secretariat to ensure that's in line with the requirements of the FTI and the eligibility process. And then that an independent panel provides an assessment based on a list of criteria to assess the request to see if they correspond to FTI objectives and then that the Board takes the funding decisions. The Board on which partner countries would be sitting. And they would present their own proposal. So it is an independent entity which we feel is much better than having currently a bunch of donors' representatives taking the decision without participation of partner countries and donor representatives not being a permanent body.
110. The two stage assessment is another part of the proposal based on the fact that currently proposals are presented and are...the degree of detail when the requests are assessed by the FTI is not consistent. Our proposal is that a shorter, simplified version with some key details – like which is the supervising entity? Which is the aid modality? – should be presented. But not in order to dictate to the country. But to ensure that FTI can have a better say in ensuring that the proposals also

correspond to its objectives, in terms of better aid effectiveness, more alignment with country processes instead of having the LDG which sometimes does not have much capacity on aid effectiveness issues or has its own incentives. To decide that after the endorsement at country level without much input from FTI or without much discussion without talking about imposing but just discussing what is the aid modality and why? And why is it not the most aligned etc?

Session 4: Scope and focus of the FTI, using the Progressive Framework (see powerpoint)

Stephen Lister

111. I'm going to squeeze in one comment on the Catalytic Fund aspect which I'd like to emphasise, which is that the Catalytic Fund is so important because it involves money; money is what people pay attention to, and what we find is when you look at what gets monitored it's the things that get requested as part of the disbursement processes for the Catalytic Fund where you get monitoring information. That's why we want to hook onto the Catalytic Fund process, the commitments by donors to provide their own complementary funding and to monitor that. It's not something that you can make contractual, but you could then have a basis for pinning donors down for what they were planning to provide in terms of long term complementary funding and asking at each stage in your annual review whether that's happening. It gives you a peg to hang the monitoring from, so linking it to wider donor funding is an important part of the design.
112. Turning to the Progressive Framework approach: it's really about changing the paradigm that the FTI has been operating on. The current paradigm is that you produce a credible plan and then we'll support it. The idea is that somehow there's a threshold: some plans are credible, some are not, and the guidance on what makes a credible plan is there in the FTI framework, it's there in the Indicative Framework as a set of benchmarks, and then you have the appraisal guidelines which in-country donors are meant to follow in judging whether the plan is adequate. You have the EPDF to help you with your planning, and your job is to produce a plan that says how you'll get to UPC in 2015, but you nest that within an overall credible plan for the sector and part of what you do is you try to work out what is the financing gap that needs to be funded in order for this plan to be implemented. The plan is appraised by the in-country donors and their appraisal constitutes a certificate [that the plan] deserves support. I think in the FTI Framework it talks about showing that the plan is a good investment.
113. The first group of people that are supposed to invest in that plan are the in-country donors themselves, and something that is there in the design but not so evident in the implementation is the process of the Joint Annual Review. The endorsement of the plan was not meant to be the end of the story, there was meant to be a follow-up where Joint Annual Reviews would see whether the plan was being implemented effectively and whether donor support was coming forward effectively.
114. Then look at what's happening with FTI in practice. 36 countries have been endorsed by the end of 2008. This has been a very valuable influence on donors to look at countries' own plans, so we wouldn't want to underestimate the importance of that, that it is shifted the spotlight from 'how can we come up with a good project here or there' to 'does this country have a credible plan that we can line up behind?' We see that reflected in various special interests, and I don't use that in a derogatory way, coming along and saying 'ah but why don't endorsed plans say more about HIV/AIDS, why don't they say more about excluded children?' Whatever the things are, it seems that this is an appropriate pressure point; on the other hand it creates a dilemma – are we going to say that no plan should go forward until we get all these things right, or what? When you look at why people go through the endorsement process, especially recently, it's perfectly clear that the only reason a country would do it is if they are interested in getting money from the Catalytic Fund, because it's not seen as a necessary step to get money from anywhere else.

115. The Indicative Framework is less influential than anticipated, and I'm going to dwell on that very briefly. It's partly, we mentioned that some of the guidelines in the Framework are not as statistically robust or as credible as evidence-based policy guidelines as they could be. It was watered down from the Action Plan saying norms, to the FTI Framework saying guidelines and benchmarks, and it states quite clearly that these are meant to be adapted to local circumstances and so on. In practice, you find a variety of things that happen. One of the things that I think shocked some of the people in FTI was the discovery that a third of the plans that were reviewed when 28 plans were looked at in 2007 didn't even mention the Indicative Framework, and this was supposed to be the spine of the whole exercise. When it does get mentioned there were the problems that it's become notorious for: people had arguments about 3.5 times GDP for teachers' salaries, what's the sense in that and so on. But for the most part it hasn't been used as a way of saying "you have to do that". People have realised that you don't have to mimic the figures in the Indicative Framework in order to get your plan endorsed. In some cases it's been very useful to have discussions, [e.g.] can we afford teachers' salaries? and that's a very useful discussion to have. It has been positive in that way, but it hasn't been the kind of firm policy guidance that it was expected to be, and it hasn't been the means of monitoring progress subsequently that it was expected to be.
116. When it comes to financing gaps, one of the things that we have to remember is that in 2002, 2015 was a lot further away than it is now, and therefore the financing gaps were a lot larger and it was also more plausible to deal with then and it was less easy for people like Keith Lewin to say that you've already entered the zone of improbable progress in thinking that you could possibly reach the target in time. But there were issues about, some countries felt that your plan had to demonstrate that you're going to get to UPC by 2015, even if you knew you couldn't. More recently there's more realism in that with people producing plans that say, well actually it's going to take us till [2020] or whatever.
117. Back to the financing gap, the original idea was to look at what additional resources will we need to get to UPC by 2015, but very quickly if you look at the appraisal guidelines it says well actually let's talk about what you need in the next 2-3 years. And you quickly slip into talking about a financing gap that is not by any stretch of the imagination an objective account of the deficit in financing to achieve a certain [target]. It becomes something that's negotiated between the governments and the donors to find what's plausible ("well that's not plausible because we're not going to give you that much money"), so it becomes, it means that the gaps that have been calculated for different countries are completely incomparable with each other. And we have an annex, – Annex K, if you want to go into the gory details of all of this – that shows all the problems with that kind of gap analysis.
118. Issues of the capacity of the donor group we've already talked about. One of, but it's not really a capacity issue, but a political economy issue, when you have the donor group sitting with the government, they're not going to apply some standard which is standard across all countries, even if they knew what that was, even if there was a way for them to measure it, because they're inevitably thinking, "why are we doing this? we're doing this to help this country get access to the Catalytic Fund and if the plan is good enough do we really want to sit around and miss a budget year?" and there are cases where there is pressure on policy and that happens, but there are also cases where it's very clear that the donors have said 'this is good enough, we should give them some money, put it through'. The FTI response to the gap between the paradigm and the action, there's a sort of recognition about the inconsistency in endorsed plans, there's been efforts to strengthen country processes, make it clear what's supposed to happen and who's supposed to do what, partly related to endorsement, more strongly related to the question of how can we get the Catalytic Fund moving efficiently and not end up with long disbursement delays and so on. And the idea of the external quality review was brought in to try to, partly to backstop the local donors, and partly because it was becoming increasingly unwieldy for the HQs donors who were actually making the decisions themselves in the Catalytic Fund meetings, to actually read these documents and come up with

anything sensible, and it's not very credible. I think the point that was made from Germany earlier about separating the policy aspects of the Catalytic Fund from the technical aspects of reviewing what happens and making judgements about credibility of proposals is a really important one. But one of the problems with the external quality review is that your danger is you get an arbitrary group of people giving their opinions about stuff, you don't get the consistent pressure in a certain direction, applying the same criteria, broadly the same criteria to different places, that you could get from a standing panel which is what some of the other global partnerships do.

119. But in spite of the changes that it's made, FTI has passed up the opportunities to move away from the gold standard, and that is when it becomes very clear when it talks about how you deal with fragile states. The challenge of fragile states is very clear, we don't need to dwell on it. The way that FTI has dealt with fragile states is actually quite complex. A number of countries that are fragile states in anyone's definition, have engaged with FTI one way or another, partly because there wasn't any other way of dealing with it, and partly because of particular sponsors, and there are the extreme examples where donors are judging saying 'actually what were judging is not whether this is a gold standard plan, but whether it's good enough to be going on with, to work with,' and you also have countries that are fragile states in some definitions and in some respects, and everyone regards them as mainstream FTI countries like Yemen, Ethiopia and Kenya, which rather demonstrates the problem, of trying to divide countries into a set which are fragile and a set which are not, because there are different dimensions, people move back and forward.
120. Nevertheless, the idea of having a separate track for fragile states has been a very strong one, and with some good reasons. One reason was the idea that you didn't want to dilute your classification of plans and say well it doesn't matter if your plan's not good enough we'll fund anything. But I think an equally strong [reason] is to say, well if we go the main route, then we're going to end up knocking on the door of the Catalytic Fund and we're going to be having the WB as a Supervising Entity and they're not flexible enough in fiduciary terms, in speed or whatever, so we need to find another way of getting money more flexibly to fragile states. And that dilemma still remains. If you talk about making the Catalytic Fund a one stop shop, then you, it has to be a shop that has some much more flexible things in it than the World Bank grocery store at the moment does.
121. So where does the Progressive Framework come in? The task teams looking at the fragile states said, well we can't hold them up to the normal standards of endorsement, we need to recognise that getting to where you want to be is something that takes time, and we need to think about and we need to be able to provide financial support to countries, even the ones that are not even positioned to write a plan, let alone a credible one. And there was some very useful work done to look at the ways in which countries might move along a spectrum from things that are less clear and coherent to things that are more credible, in the 5 dimensions that are there [on the powerpoint: sector planning & coordination; resource mobilisation; service delivery; student flows; stabilisation and fragility reduction.]
122. Now we as the evaluation team are saying we would like the Progressive Framework to be adopted as a new paradigm. We're not saying take this particular document which is exhibit 17 or 18 in the [draft report] and that's it, go with it and that replaces the Indicative Framework. It's not at all, but it is a question of saying, can you come up with something that is more subtle than saying you either pass or fail to get your plan endorsed? can we have a way of saying these are the criteria for which we judge it, these are the ways we decide whether and what kind of finance is available and we're not going to separate countries into two, into sheep and goats, we're going to be more subtle than that. And that's the phrase from the executive summary that, "to base support on a credible commitment to improve, with support that's tailored to the circumstances of a country, and that's renewed according to performance".
123. It's hard to codify something like that, but it's also hard to codify the Indicative Framework and what the evaluation shows is that it wasn't actually successfully codified. So can we go back and look at a

set of criteria which would provide a set of common processes for all the countries, which means that they're all following the same set of processes. It doesn't mean that they all get the same types of funding, but it means you're not sending different countries to different places, and you're not sending countries to one place for their capacity development support, and somewhere else for their Catalytic Fund support. How do you get there? You have to go back and re-write what's in the FTI Framework about how FTI works, but I don't think it's an impossible task. I think a lot of the groundwork with the thinking that's gone into the Progressive Framework is already there, and the thinking that's gone into transition funds and so on. Thank you.

Linda English

124. Thank you very much that was very interesting. We have 45 minutes and we have 1 more presentation so I will take a few minutes for any comments or questions on what Stephen was saying on the progressive framework.

Katy Webley (Save the Children)

125. I think on your last slide you reflected on the feasibility or the ability for these things to happen. I would be interested in a little bit more of that, in the sense that there's a long list of changes that we are asking for and I'm wanted to hear a reality check on whether we see that happening and within what time. I know that may appear impatient or impetuous but if I were a recipient country that's what you would want to know. Are these things likely to happen and will they happen soon? Or else it remains a wish list. Do you believe that these changes will have the ability to catalyze new funding whether from existing donors or new donors? Because in a way this is only worth the wait if it can bring new resourcing in. And perhaps this is something donors could reflect on as well. Much of the work that Desmond has recently written about is about finding new sources of financing and I was interested if you would reflect on that

Dagmar Fuchs (GTZ)

126. We appreciated that the evaluation took up the recommendations of the Task Force on prioritization and looking into eligibility; that means that we find back in the evaluation report and in the recommendations the idea of indicative amounts which are disclosed to the countries beforehand, so that there is a planning for the ESP can be started right from the beginning with a better knowledge of what type of funding could be made available. Plus possibly if their plan is good enough or convincing. So there are various aspects which were developed by that group which we find back in the evaluation and in the conclusions and recommendations, and we think that's a good use of the discussions of the last year which took place in the FTI.

127. We have now the external quality review and I think the move towards a standing panel would be a good one because we see and when you read through the report you find it in various places that there is a lack of accountability and transparency. I think to make this panel more legitimate by including also experts into this panel to have a broad representation of various parts of the world not just from donors but also of recipient countries who can have the experts from everywhere there. And start defining standards which would help transparency and disclose basis for assessing the quality of the application. So it is much clearer to everybody on which base what kind of decision is to be expected. And not just a kind of black box and the decision taking is very much politically

motivated. So to separate these two and to have these professional standing panels working in a very transparent and accountable way, making it clear to everybody, this is how we are working, these are the criteria we are using, and this is the outcome. And if you want to you can also do it at home already before you send in the plans. So I would like to really support this idea.

Ward Heneveld (Hewlett Foundation)

128. I would reiterate everybody else's appreciation for the level of detail and candour that has gone into this evaluation. Something has to happen next to put these changes in place. And my sense is that is probably required a fairly technical job by a group of people working more or less full time to sort through the different pieces to come up with in some cases alternatives and in some cases with recommendations. My question is directed both at the evaluators and FTI. Have you thought about how this next step might happen and if you have what do you think is involved and who ought to be involved?

David Gartner (Center for Universal Education)

129. First thanks again for this contribution. A couple of points really stood out for me; first the real leverage in terms of influencing country practice is the pooled fund not the bilateral. Correct me if I'm wrong. Second that the endorsement process and the Indicative Framework actually don't provide that much leverage or at least in a third of the examples that you've looked at. Third that what you said earlier that what countries are actually monitoring is part of the disbursement process, which leads me to a concluding question that should we be shifting our primary focus to a performance based criteria and disbursement? And if so what would your suggestions be about how to think about such an approach?

Stephen Lister (Evaluation Team)

130. I can take some very small nibbles at some very big issues. The question on whether it would bring more donors in. I don't know the answer to that, but the way we have tried to specify these changes is to minimize the possibility of simply moving money around and ending up with no more money than there is already. So the question about additionality, for example, is that we are talking about criteria for allocation of the Catalytic Fund that are taking explicit account of what aid countries are getting from other places. Not simply saying that you will all get a share depending on how many out of school children you've got, without any reference to what aid you've got already.

131. There's also the issues about can we design it in ways that would actually make it attractive for other donors to become supervising entities. This fund could be an opportunity for a country that thinks it has a good way of doing something in a fragile state to double its money. By saying this is what we are doing; country x is putting in this much, and we would like as much again from the Catalytic Fund to scale up what we are doing. so it does provide opportunities for individual donors to gain in what they're doing. Including the World Bank in that category as well in order to get more for your money.

132. The question of selling it to donors is a separate issue and you do have to balance these issues. Some donors will find it much easier to buy something if looks as if their money is going to some particular purpose. To some extent you can get away with that. If you have a virtual fund and some donors say my money has to go into EPDF not the rest. You can let them have that fig leaf without a cost but if everybody starts doing it then it creates

inflexibility and problems. So it's a balancing act. And similarly, as Mailan was saying, the evidence from studying Sector Budget Support (SBS) is that a lot of harm is done when people try to specify and tightly earmark their funds to particular lines. It works wonderfully in parliament if an MP can stand up and say we are paying for text books but it might really diminish the value of the money and undermine the whole dialogue between the donors and the country if they are spending the whole time talking about how you track the money to text books instead of talking about real things that matter.

133. The next step: I fully agree that it needs sustained technical work by professional people looking at the whole set of issues. I don't know what the Board is planning on that, but I think that's exactly right. I don't think it's something to be farmed out to part time task teams on different aspects. It does need some concentrated effort. The question on moving to performance based contracts, and this is a personal view based partly on the work I did on Budget support. Performance is, if you take the pure forms that are being talked about, is something that if it works, it will work for the good performers; but it doesn't really help you with the people who don't have the quality data to enable you to check performance. Who don't have the funding already to bridge any gaps in finance. So you need to monitor performance. But inevitably you are going to need to monitor performance in terms of inputs and outputs and so on and not just in terms of outcomes and long term effects. And again striking the right balance is important and this might come up in the short session on M&E.

Linda English (FTI Secretariat)

134. I will just make a short response to your question. At the Secretariat we are working on behalf of the Board on a response. There is going to be a special session in mid February around the 11th or the 12th. So we are now working on the strategic response, what are the reforms, what is the background to that. What do we know, what are the alternatives, what are the options and what are the implications of those. So some of the background we are working on the long-term financing. Definitely working on the M&E framework, what does that mean at the global and the country level? Country level processes – what needs to be done to improve that. The whole issue of governance and partnership is a big issue throughout the evaluation. Looking at the voice of partner countries at the global level and partner level. What does that mean for what FTI is doing? What does that mean by this independence of the Secretariat from the World Bank? What are the options for that, what are the implications? And also the role of the World Bank in the partnership. We have a work programme to look at all these different issues. Right now we've started working on it. We are consulting with as many people as we can. We are trying to organise some consultations in the field. We are going to be working with Burkina Faso to organise a regional workshop looking at strategic options and getting feedback from a group there. We've asked the minister, who's on the Board of the FTI, to organise a session with senior people in that region. We will try to also try to meet with some local education groups and work in long distance in video conferencing. We have a consultation strategy for the short term... After the Board meeting we will have to have a very formal consultation strategy to see how we get more input into the various recommendations.

Ward Heneveld (Hewlett Foundation):

135. When you say "we" who's the "we"? The FTI staff? You said we are preparing something for the Board, we are having consultation...

Linda English (FTI Secretariat)

136. The FTI Secretariat is preparing a strategic outline of a response to the evaluation for the Board. We are working with as many partners as possible. We have between now the initial day was the 1st Feb we now have the 8th Feb. We are working towards a deadline of the end of January. We are really cognisant of the point, the point that Desmond made. You don't want to do something hasty and get it wrong again. So we need to think very carefully of how do we do this in a measured way? Taking into consideration (I'm talking about the Secretariat now). How do we prepare a document but at the same time involving as many partners in that process. At the time of the Board meeting in early or mid Feb they will need to think what is the consultation process that we can put in place after that meeting? So we (the Secretariat) will propose a consultation process for the Board to consider after the meeting in Feb.

Dagmar Fuchs (GTZ)

137. Which body will take these decisions?

Linda English (FTI Secretariat)

138. We need to make a decision on the consultation process so that will be a decision that we will propose a process in February for the Board to reflect on.

Lucia Fry (GCE)

139. I think the efforts that the Secretariat is leading on behalf of the Board to consult now on the evaluation and on the business plan going forward are admirable, but it does seem to me there may be a need for more robust, technical work in terms of future design that is not reliant, as FTI has been, on donor dominated task teams where the donors themselves are giving their time voluntarily, are meeting by telephone and so and so forth. So it's either of expanding some capacity within the secretariat or attaching some capacity perhaps independently to the Secretariat. It seems to me that that would be necessary.

Session 5: Monitoring and Evaluating the FTI Compact (see powerpoint)

Manos Antoninis (Evaluation Team)

140. A quick presentation on M&E, how we approach the issue from the evaluation side and a piece of the puzzle for the next few steps in the transformation of FTI. The presentation discusses how the FTI M&E arrangements worked in practice, asks the question whether after all there was a M&E framework in place for the FTI, gives a negative answer for that, and proposes a way forward.

141. So in terms of the M&E arrangements for the FTI, we had a set of very ambitious guiding documents which were inspired by the agenda of managing for development results. So the 2002 Action Plan brought to the surface the issue of the data gap as one of the four gaps that the FTI would try to address, and then the 2004 FTI Framework document expanded this concept further to issues of mutual learning. We tried to look at the issue of FTI monitoring in the evaluation from three sides. First of all what the FTI partnership tried to do on the issue of supply of data, so data on the global level. Then the use of data at the country level, and then tried to lay particular stress on the issue of data use by the FTI partnership itself.

142. In terms of data availability at the global level the FT partnership tried through the Indicative Framework, which we have discussed extensively today, to push some issues forward. Obviously the issue of PCR as an indicator many countries were inspired to focus on was particularly important.

And then through the funds there were direct actions taken to improve the issue of data supply and report on this.

143. With respect to data use at the country level, the main channel of influence was the issue of the appraisal process of the ESPs. It was believed that through this appraisal process and by turning attention to particular weaknesses of these plans and how these could be improved in the future and how these could be a mobilisation of efforts to improve M&E arrangements at the country level. Similarly, one of the objectives of the EPDF tried specifically on these issues, for example the CSR [Country Status Reports] were an obvious way.
144. Data were used by the FTI Partnership as well. Initially they were not direct reports but in the last two years has been the Annual Report as a mechanism of reporting on the results and there have also been arrangements on monitoring the inputs, outputs, results that were seen as relatively limited.
145. So how have we actually assessed these efforts? It's clear if one reads the guiding documents in fact the improvements the FTI partnership were going to bring itself were relatively limited; most of it was encouragement towards individual partners to improve availability of data at a global level. So it's not surprising that, in terms of the big picture, we have found that data availability has not particularly improved, and where it has improved it was not directly linked to the activities of the FTI. Looking at the particular issue of projects funded by the EPDF for example, we found that these were generally fragmented and in terms of the big picture, in terms of data coverage and quality, they were not really coherent. We find that, given the example of the Indicative Framework, that several of the indicators of the Indicative Framework were not systematically monitored, there was not a recognisable improvement, with few exceptions of course, but on the whole the monitoring of the Indicative Framework was not systematic. We also think that there was insufficient advocacy for improving education statistics, something that could have been done given the limits with which the FTI partnership was operating. In terms of data use at the country level we found similarly limited progress, and again even where progress was taking place the role of the FTI was minor. We found that generally financial monitoring reports were much more effective, in terms of taking issues forward, but issues related to the use of education data for improving policies was not particularly strong. And the appraisal process itself we found was light touch, and it had really limited effects, probably because of the fact that the LDGs and LEGs were weak in data use and needed more support.
146. But we would like to focus this discussion more on the data use of the FTI partnership itself. One of the findings of the evaluation was that the reporting by the FTI was relatively weak and that was to a large extent, I think Stephen mentioned before, there are simple reasons and complex reasons to explain that. The simple reasons is that the secretariat is weakly resourced, and that the fact that the quality of reporting, and mixed to some extent the issue of objective reporting vs. advocacy. But most importantly we found that two of the core FTI assumptions, the issue of the compact, and the issue of the Indicative Framework, were not monitoring effectively and therefore could not be evaluated.
147. Coming to the more complex reasons why the agenda didn't move sufficiently well. We pose the question did the FTI after all have a M&E framework? This originated in terms of the reference of the evaluation, the fact that the evaluation team was asked to provide as an output of the evaluation a comprehensive design of the M&E to help frame future M&E efforts and to help guidance for an M&E [impact] assessment at the later stage. So according to the Sourcebook for Global and Regional Partnership Programmes, there is a key statement there "a key enabling condition for effective evaluations is the early establishment of an M&E framework which will have the following characteristics – a clear and coherent set of objectives and strategies, an expected results chain, measurable indicators, and you will have systematic processes for collecting data." Practically such a framework was not in existence, there were coherence of the four objectives, but the strategy, a way

how these objectives could actually be met, that was not clear and that was because of the issues that were described earlier, the fact that the FTI was launched before a proper consensus was reached about how this issue could be taken forward. Now the results chain is implicit to some extent, if you compare it with some of the global partnerships I think it is important to make these results chains explicit for people to be on board and share an understanding of what the partners are trying to achieve. With respect to the indicators, what we said earlier, we didn't have a set of indicators that we could use in order to really say with confidence whether the partnership was successful or not. So, in the absence of this M&E framework, the evaluation team developed, as was mentioned earlier, a logical framework that was looking back and trying to interpret the actions that were taken.

148. But what we now use is an M&E framework that is looking forward and the evaluation team has prepared one; it is a document that has not been shared yet, as a basis for discussion, a logframe that essentially included a set of statements on the goal, the purpose, the outputs and the activities that the FTI partnership could reach consensus on, a set of indicators, targets and the assumptions, like a logical framework. The important thing is that this document, that will probably be an output of the evaluation, is only meant to be a basis for discussion. The whole point of agreeing a logframe is this whole process of actually sitting down and discussing among the partners to make sure it reflects what people believe the partners should achieve. The M&E framework that the evaluation team is proposing is focussing on monitoring the FTI partnership, particularly at the lower level of monitoring of inputs, and processes that the FTI partnership is encouraging or directly implementing. It is not a framework that focuses on monitoring country EFA performance. To some extent, with problems, such frameworks exist, but what the FTI partnership has lacked is a framework for monitoring its own activities, and monitoring the success it has in actually achieving what it sets out to achieve.
149. The indicators that are being proposed are covering all FTI eligible countries, not just countries endorsed by the FTI. In general it focuses on global level M&E, and assumes that it is the Secretariat that would take the responsibility for coordinating and reporting on this. Country level M&E is extremely important, it will be greatly facilitated once there is a much more clear compact at the country level, so people will have a written agreement of what's committed to do, but the framework that is being proposed in the evaluation is actually focussing for the time being at the global level. The indicators that have been proposed are generally feasible, but they will require extra effort in some cases, and that will need to be discussed in some detail.
150. Some in terms of the next steps, we believe that it is extremely important, as part of the transformation, that agreement is reached on what exactly the partnership is trying accomplish. And therefore to close a gap that we have in strategies, whether the activities that are set down are actually going to help accomplish this target, and then to consider much more carefully what are the implications of adopting a framework of this kind, in terms of funding it, in terms of strengthening the Secretariat, in terms of sharing the responsibilities, because some of the responsibilities will have to be shared with other partners. And that is one of the key recommendations: that the new document that will help frame the FTI will not only cover the areas of the 2004 document, but will incorporate the country level process material, the governance issues, and the M&E framework.
151. So in the limited time that is left, I think what could be discussed are issues of your thoughts of the assessments that we have made of the FTI M&E arrangements, your thoughts about the need for FTI M&E framework, your thoughts about what is really required if the FTI partnership is to step up its monitoring activities, and the role you can see of the FTI M&E framework as a basis for evaluation in the future. Thank you very much.

Linda English

152. Manos put some questions on the table. so we will start with Kris and Lucia.

Kris Panneels (Belgian Development Cooperation)

153. A quick response. I'm a bit puzzled. We talk here about monitoring FTI partnership rather than monitoring EFA progress in the countries. My submission would be that if we are serious about working within the framework of national plans and taking that as a basis for our work, then it would seem to me that the distinction between monitoring the partnership and monitoring progress towards EFA in the countries would tend to disappear.
154. I have always been struck by this discussion on the lack of data within the context of this partnership. We have partners here around the table. We have a whole UNESCO department dealing with education. We have the UNESCO Institute for Statistics. The Institute for Education and Planning. We have Unicef with at least 50 if not more education advisors in the field. We have the Bank with its capacity for analysis. They have statistics; they have reports on how budgets are being used in the client countries. We have this enormous work on medium term expenditure plans. Local education groups. We have the plans that form the basis of decision making of endorsed plans. We have this sectoral budget support groups in quite a number of countries and still we are not able to bring this together and have operationally relevant reporting on whether and how we are progressing at the field. I'm a bit puzzled by that.
155. If we had at the central point in the secretariat 2-3 people maximum dedicated to tapping into the resource of the partners. Why should it be difficult to have good, relevant, operational data on progress at the field level? I fail to understand why we as a partnership are not able to use all these resources spread all over the place and bring them together to make it relevant for progress at the country level. I think it should be an easy challenge to take up as a partnership to. I don't know what our consultants think about that. I think that 2 maximum 3 people could do the job. If you look at what information is available at the partnership.

Lucia Fry (GCE)

156. **Lucia Fry (GCE)** – It was a very striking finding of the evaluation that the M&E had been relatively neglected or skewed towards a particular end of the chain. So I think it's much appreciated that this work's been done. I was also a little puzzled by the presentation. I've been doing a bit of thinking about this in respect of our own work recently and I'm coming to understand that M&E serves a number of interrelated purposes; accountability to stakeholders and Board is one purpose, reflection, learning and forward planning is another purpose and finally demonstrating results is another major purpose. And it does seem to me that you need a balance between inputs, processes and outcomes in order to be able to do that. Outcomes maybe a further time horizon in terms of [a monitoring] framework but I think the [monitoring] framework has to allow for the capacity to collect and reflect on the impact of action on outcomes as well as the other dimensions.

Diane Richler (Inclusion International)

157. I think these last two comments were along the lines of my reaction but a couple of other points to make. One is a question about the evaluation that the countries themselves would be doing of the process and their own assessment of how the FTI contribution helped them to achieve their own goals and whether that could be done in a way that would involve civil society and other stakeholders within a country to be able to look at what was happening and to encourage some self reflection. And further looking at the issue of self reflection and group learning I thought that the earlier discussion, much earlier this afternoon, around the possible role of the FTI Secretariat in promoting global forums would be a way of starting to deal with some of these issues where countries experiencing similar kinds of challenges would be able to share experiences and be able to learn from each other. My sense is now that there's not a lot of opportunity for countries to learn one from the other about the impact of some of their activities?

Pauline Rose (GMR)

158. Sorry I had to pop out so sorry if I am repeating what someone else has said but one of the questions was about whether this was needed. I think absolutely yes it's needed and I think it's really important that you are raising it and putting it on the table.
159. I'm slightly confused because you haven't been able to at this stage give us suggestions or identify what some of the indicators are. What precisely are you meaning? I think somebody else said what do you mean about monitoring the partnership rather than monitoring progress towards goals? And I can see that becomes a problem. How can you attribute progress to FTI versus other things that are going on in country? – and that is always one of the difficulties.
160. One question I had is: who it is you are proposing does this, as it's quite fundamental in relation to what you were saying, partly about the FTI Secretariat not having the capacity as it currently stands but also in relation to – there are conflicts of interest. And it's clear that the FTI Secretariat quite rightly would want to show what important things are happening but you would also want some external views as to what is happening with the FTI and I just wondered if you had something specific suggestions on that?
161. Just picking up on the data issue that was raised: working for the GMR we have to deal with the data from UIS that gets it from the government. At the end of the day if it's not available in country it's not available to UIS to Unicef to the GMR or to anyone else. I think there is a lot more effort that could be put into building the capacity of governments to collect good data and to use the data within country which then can be used for these reporting mechanisms. I think there are still a lot of problems. And also with using different types of data. So the GMR has recently started to use household data frequently and there are a lot of innovative things you can do to find out what is happening even where the administrative systems aren't working so well.
162. Couple of other things that relate to my confusion about monitoring the partnership vs. monitoring the progress is whether this in any way relates to the Indicative Framework? And if it doesn't whether here or elsewhere you're suggesting what should happen to the Indicative Framework because we've heard both from yourselves as well as from the floor a lot of criticisms about the Framework. Not just about how it's used but also some of the indicators that were there in the first place. Do you have anything concrete? I didn't notice anything but maybe I missed it.
163. And one final specific point also because it's been raised several times is about the indicator for UPC. It's not a good indicator and I would really strongly recommend that we find a better indicator. We are seeing completion as one of the key. The gross intake rate for the last grade of primary is not a good indicator for all sorts of reasons which I won't go into. This GMR that is coming out we've tried to look at a net cohort completion rate of tracking children through. That has data implications but I think it's a more robust indicator at looking at completion. There might be things that you want to look at in relation to that.

Linda English

164. We have three more people that want to make a comment. I think then we will move over to Manis then close this session.

Keith Lewin (University of Sussex):

165. The data side of these stories is and will remain very important as it creates the images of the problem that the FTI is trying to solve or at least have an impact on. Let me put a little bit of flesh on that. In an unknown country I know for sure that what happens with the EMIS is that they are aware that they don't have returns from a proportion of private schools and also state schools so they make an adjustment. This adjustment is about 20% of the total enrolment. This is without having any conversation about even if they didn't make the adjustment what is the margin of error in the measurement that they are making. I see in the report and elsewhere, of course we are often

confronted with numbers which say the net enrolment rate has moved from 94 to 95%. Well any statistician will probably tell you that it's well within the margin of error of that number. It's not telling you anything with confidence about progress or lack of it. But it creates very important images. It's quite possible and it's indeed true in some parts of the world that the GPI appears to have reached parity when indeed there aren't as many girls in the population as there are boys. Unless you make the adjustment blind to the fact that there is a higher order problem in gender equity which is not simply about enrolment. So there are all these kinds of things and it's quite clear that several of the measures that are being used have an asymptotic problem – they are reaching a limit. The amount they change is very small; they are not very good indicators. It's very important then to persist with this idea.

166. The other point I wanted to make is about the influence of FTI and others have had on EMIS systems. In some countries for sure, those systems have become less useful for decision making, certainly at a district level, because the information is not available. The indicators that are chosen and the measurements that are being made and the publications that are produced are externally orientated. They are specifically directed to the needs of donors rather than the needs to implement a system and monitor whether or not the steps that are being taken are going to change realities on the ground. You have to recognise that and you probably have to separate the idea of EMIS systems as a whole from what you might do in terms of monitoring specific outcomes using light sampling or sentinel sites or a whole range of other techniques that you can use where your ambition is precision rather than coverage and to pursue that idea. But it's so important as it constructs the images that people have of whether there is a problem about gender, there is a problem about enrolment, there is a problem about overage.

Desmond Bermingham (CGD)

167. Three quick points. Firstly Kris's appeal that collecting this data is straightforward. It ought to be but in reality it's not. And actually some of the hardest data to collect you would imagine to be the easiest. It's donor financing past and future in any one country and government expenditure on the education sector. They are really crucial data items that we don't have good data on. I want to get back to Stephen's earlier suggestion about linking collection of data to the Catalytic Fund allocations and commitments is a really good trigger because you then create an incentive to the countries and the donors to send you the data. You make it a requirement. You need hard requirements for that to make that happen.
168. Secondly to pick up on Pauline's point: there is a tension (and I was involved in it myself for the FTI Secretariat) on the one hand is required to promote and advocate for more financing for the FTI and to therefore show what great results its achieving but on the other hand ask it to be an independent monitor and evaluator. I think one way of managing that tension is to strengthen what is already in place which is collaboration between the FTI secretariat the Global Monitoring Report and I would add the OECD DAC, in terms of monitoring on aid effectiveness in the education sector. I think those 3 together could be a very powerful and already are beginning to be a very powerful collaboration on data on M&E. And that's it!

Phil Rose (DFID)

169. There are a couple of no-brainers here. We need a robust performance framework. And it was a shocking revelation from the evaluation that that was so absent. And secondly I completely agree with our Belgian colleague that we need to make maximum use of existing sources of data. I thought Desmond's ideas about additional sources of data were very interesting. It's absolutely critical that we don't create concretise the phenomenon that the evaluators found, that at country level FTI is not seen as just another donor. If we create a parallel new monitoring framework on top of all the other donor monitoring frameworks that's a violation of, never mind Paris and Accra, that's going back 10 years to pre SWAp days. So we don't want that.

170. I think whilst this discussion is really useful and valuable and I think that part of the evaluation will be excellent; we need to be a little bit careful about sequencing here. The evaluation raises a whole number of really fundamental strategic issues. Like what's FTI for? What should it be called? What's the new compact? How much money is it going to raise? How does it work with governments? All of that needs to be tackled first. That's not to say we can't think about the new framework but you can't design it in detail. It's a bit like the analogy you want to completely refurbish your house, there's no point putting in the new kitchen until you put a roof over the kitchen. It's really important that we take things in the right sequencing. We have (as the evaluation has pointed out) a really tiny secretariat compared to the industry standard. Global Fund I believe has 500 people working for it. I think we have 15. So it's a bit of a reality check. So we need our excellent people in the Secretariat to focus on helping the board with the big strategic issues first. And then come onto the M&E framework very quickly after that but after that.

Manos Antoninis (Evaluation Team)

171. I would like to stress that that's the point of what the Evaluation Team is trying to do with the proposed M&E framework, is to get into people's mind the idea that there has to be an M&E framework accompanying any transformation and not make the mistake of forgetting about like last time.
172. The second point is I tried to make clear that we are not really talking about EFA monitoring. We tried to bring into the agenda and the discussion the idea that the FTI needs to do its own basic management monitoring. Which was not being done before. Which is extremely important. Yes there are issues of data quality and monitoring progress towards EFA. But let's start with something a bit less ambitious but extremely important – which would help improve the way that the partnership is run once these basic issues have been settled. What Lucia was saying – this self reflection group learning . The core idea behind that is that the M&E framework of the FTI partnership will help the partners learn about they are trying to achieve. Have on the table clearly put down what they are really trying to do. Or at least how they are trying to do what they are doing.
173. I didn't have time to talk about some of the proposals and still might be explained a bit more what is the status of our work on the M&E Framework at the moment which hasn't been disseminated – which is the reason why some of you are confused because you haven't actually seen it. It would have been much easier if you had in front of you, then you would understand what we are talking about. We do propose in the future that the way the partnership might allocate its resource for M&E, we do propose a particular amount to be set for mutual learning activities. Similarly on Desmond's point, we agree that's another recommendation that part of FTI's resources, in order to address the issue of external monitoring, so there is less conflict of interest to be done to strengthen the collaboration with GMR and DAC. But that to happen with a particular plan.
174. What are the types of data that need to be strengthened? I couldn't agree more with you. It's precisely this types of data that could, with a bit of concerted effort could be sorted out. A final point on Keith's assessing the quality of EMIS processes. We do raise the point in the evaluation that the data quality assessment framework that exists could have been used by the FTI but it would have been a bit unrealistic given the constraints in which It was operating. But if it had more resources that would have been the obvious way to bring more to the surface issues of quality of the processes for collecting data. We would like this dimension to be strengthened. I hope that this discussion can be repeated once the M&E framework is made publicised so you can have a better idea of what we are trying to do.

Stephen Lister (Evaluation Team)

175. Manos raised the question on the different status of different elements of the report. The situation is that the main volume, the executive summary and the volume of annexes have made their tortured way past the Evaluation Oversight Committee and been let loose on the wider world and the Board.
176. There are other volumes, 3 of them; that's not as much as it sounds. There's a volume that includes our statistical appendix and a note on data quality which talks about many of the issues that are raised here. It includes the detailed data and review of aid and expenditure levels for education. It includes the appendix on the Catalytic Fund which we have actually shared with you. We've been given permission to share informally. It includes a similar review of the EPDF. And hopefully those will reach you shortly.
177. There's an appendix which is an appendix on the approach and methods of the evaluation, focusing on the process as well as the methodology. There's an appendix which Manos has been drawing on which is Appendix VI, which looks at M&E – the current M&E requirements, the possibility of future impact evaluation. There's the appendix on the future of the Catalytic Fund which we've shared with you informally and which underlies Mailan's presentation. And finally there's one which demonstrates which bits of the report answered which bit of the high level questions.
178. I cannot say for sure when they will be released by the Evaluation Oversight Committee. But we hope you will look at them carefully and they will answer some of the questions that have come up.
179. I want to say a final word about the M&E framework as I think there's been some understandable confusion about M&E of EFA as a whole and M&E of the partnership. I think one of the mistakes that FTI made was [to say] that "We are all about everything. We are about how EFA and UPC is getting on in the countries that we are supporting so if we get information about how that's doing we will know that we are doing well." That's much too simplistic because even if you had really good information about how the Indicative Framework was going in all the endorsed countries, it wouldn't be a very sound basis for concluding that the FTI itself had made the kind of difference it wanted to. So I am bit worried about Phil's suggestion that we do the strategy and then we think about the indicators. Because part of the strategy is to say, what is it that the FTI is going to make a difference to and how will we tell?
180. One of the questions that was thrown back at us in reviews before the report got out was to say "Is it really relevant in your report that you are talking about aid to education as a whole? Isn't FTI only ever about the endorsed countries." Of course there is a point of view that says that, because that issue was never really resolved. If you read the management response, it clearly takes that the current Board obviously thinks that if aid for basic education is going up that is a relevant indicator for FTI. But it wasn't explicitly set out at the beginning. You need to be saying what are the things that will tell us whether we made a difference? What are the mechanisms by which we think we are going to make a difference? You can't do that as an afterthought. The details of what your precise targets might be and so on you can fill in later, but it's not something to be done separately.

Linda English (FTI Secretariat)

181. Thank you very much. We have gone a little bit over time, but I would just like to thank everybody for coming today and taking the time to read this evaluation and reflect on the findings and join in this conversation today. I really want to thank Stephen and his team for organising this session today. I think the presentations have been very good and the discussions on the Catalytic Fund, on the evaluation, on the progressive framework are really helpful as they allowed us to think a little bit more forward and where we are going from here.

182. I know that the Secretariat we're trying to digest this and work with as many partners as possible and develop a strategic response to the evaluation, as I mentioned, for the Board meeting in February and we are trying to consult with as many people as many groups as possible to get as much input as possible into this work. There is a lot of technical work that needs to be done.
183. Bob has just joined us; he's a little bit late, but there he is. So we are going to continue working on this . I hope we have a lot more opportunities to reflect and to be much more focused in the future. I would just like to take a minute to thank the translation people for doing such a great job today. Thank you all once again. I am going to call session to an end and we will have a lot more to talk about in the future.
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