GLOBAL PARTNERSHIP *for* EDUCATION

ASA Comparator Analysis

Strategy and Impact Committee
September 26-27, 2017 |Copenhagen
SIC/2017/09 DOC 03

ASA comparators

Comparator	Focus		
	Social Accountability	Regional / National Advocacy	Global Advocacy
African Capacity Building Foundation (ACBF)	X		
German BACKUP Initiative*	X	X	
Ford Foundation	X		
Gates Foundation*			X
Global Campaign for Education (GCE)	X	X	
Global Fund (Friends of the Global Fund)*		X	X
Global Partnership for Social Accountability (GPSA)*	X		
Hewlett Foundation*	X	X	X
The International Health Partnership (IHP+)*	X		
Open Society Foundations (OSF)*	X		
Wellspring*	X		
Transparency and Accountability Initiative	X		
Transparency International (TI)*	X		X
TrustAfrica	X		
Women Deliver: Deliver for Good		X	X

*Interview conducted
Note: some interviews are forthcoming

ASA comparators

Comparator			
	Social Accountability	Regional / National Advocacy	Global Advocacy
Education Cannot Wait*			X
The United Nations Foundation (UNF)*		X	X
Firelight Foundation*	X	X	
Global Fund for Children	X	X	
Disability Rights Fund	X	X	

*Interview conducted
Note: some interviews are forthcoming

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Funding activities and outcomes sought: Hewlett Foundation

Funding activities

Transparency, participation and accountability:

- Create and reinforce norms and standards that enable greater transparency and participation
- Ensure information on resources and service quality can be used by citizens
- Strengthen citizens' ability to speak and act collectively around service delivery challenges
- Build and strengthen channels that provide citizens constructive ways to engage with all levels of government

Evidence-informed policy making:

- Create high quality evidence that policymakers can access, understand and use
- Build relationships, trust and collaboration among those that generate, share and use evidence
- Ensure policymakers are motivated and able to use evidence
- Ensure evidence producers are motivated and able to respond to policy needs

Outcomes sought

Transparency, participation and accountability:

- **Intermediate outcome:**
  - Increase government responsiveness so that public services better meet the needs of citizens
- **Ultimate outcome:**
  - Citizens receive high quality services leading to better outcomes

Evidence-informed policy making:

- **Intermediate outcome:**
  - None listed
- **Ultimate outcomes:**
  - Harness the data revolution for global development
  - Increase the usefulness of impact evaluation
  - Expand the role of southern think tanks in national, regional and global policymaking
  - Strengthen the emerging field of evidence-informed policymaking

Sources: ; The William and Flora Hewlett Foundation, Transparency, Participation & Accountability Grantmaking Strategy, 2015; The William and Flora Hewlett Foundation, Evidence Informed Policy Making for Global Development, 2016. Note categorization of ultimate outcomes is an interpretation and was not explicitly called out in the strategic document.

Funding activities and outcomes sought: GPSA

Funding activities

Citizen feedback and participation:

- Address governance and development problems through social accountability processes that involve citizen feedback and participatory methodologies geared to helping governments and public sector institutions solve these problems

Strengthened civil society:

- Strengthen civil society's capacities for social accountability by:
  - Investing in CSOs' institutional strengthening
  - Facilitating mentoring of small CSOs by well-established CSOs with a track record on social accountability

Outcomes sought

Intermediate outcomes:

- Application of strategic and comprehensive political economy approach to social accountability to GPSA grantee strategies
- Application of strategic and comprehensive political economy approach to social accountability by the Bank's Task Team Leaders and Country Management Units
- Knowledge and learning of the GPSA's approach to social accountability
- Outreach and collaboration with the GPSA's Global Partners

Ultimate outcomes:

- Constructive engagement between actors in civil society and the executive branch of country governments
- Collaboration between CSOs and state accountability institutions

Sources: GPSA, Results Framework, 2015

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Funding activities and outcomes sought: Transparency International

Funding activities

People and partners:

- Work with a range of people to act to confront corruption and demand accountability
- Work with and promote anti-corruption activists and foster strong partnerships
- Defend and support TI activists

Prevention, enforcement and justice:

- Develop, monitor and advocate for key anti-corruption standards and practices
- Apply increased pressure on law enforcement and justice systems to punish crimes of corruption

Strong movement:

- Facilitate needs-based knowledge sharing
- Invest in TI's organizational capacity in a targeted way
- Develop and implement new organizational models to ensure TI's presence and relevance

Outcomes sought

Policy and institutional change:

- **Intermediate outcomes:**
  - Improved enforcement of policies
  - Policy adoption and amendment
  - Better institutional processes
- **Ultimate outcome:**
  - Institutions, governments, political parties and businesses have the mechanisms, policies or laws in place to prevent corruption, sanction corrupt behavior, and promote good governance

Behavior change:

- **Intermediate outcomes:**
  - Increased anti-corruption activism
  - Increased community action to address corruption
  - Increased action to seek redress against corruption
- **Ultimate outcome:**
  - Individuals, communities, civil society organizations and social movements act systematically to promote global good governance and prevent corruption

Sources: Transparency International, Impact Monitoring, 2015; Transparency International Strategy 2020

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Funding activities and outcomes sought: Deliver for Good (Women Deliver)

Funding activities

Mobilize actors and create partnerships:

- Mobilize multi-sector allies to change the global narrative around girls and women
- Support capacity building to mobilize advocates at the global, regional, and country levels
- Assemble a broad-based coalition to align complementary agendas and create sustaining advocacy pressure
- Align with efforts to monitor progress on policies and programming

Evidence and best practices:

- Share evidence on the role that girls and women play in global development progress
- Illustrate the interlinkages between issues so the ripple effects of investments in girls and women become obvious
- Build a base of best practices to inform policy and programming

Outcomes sought

Intermediate outcome:

- None listed

Ultimate outcome:

- **Change the narrative:**
  - Reframe the narrative for girls' and women's empowerment
- **Central role for women and girls:**
  - Enhance the central role for women and girls in SDG implementation

Sources: Women Deliver: Deliver for Good; Women Deliver, Kenya Request for Proposals, 2017; Note categorization of ultimate outcomes is an interpretation and was not explicitly called out in the strategic document.

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GPE's comparative advantage in the landscape

Comparators highlighted a number of opportunities that GPE is well-positioned to consider:

- **Building the capacity of civil society and government systems:** Support the mobilization of civil society, as well as the response of government systems to demand for greater accountability
- **Mobilizing learnings from the country to the global level:** Leverage context specific work to create a bottoms-up approach to global dissemination of results and lessons learned, facilitated by a knowledge platform
- **Developing case studies for 'positive deviants':** Identify 20 countries with active civic actors and select several exemplars to develop case studies for to demonstrate minimum good practice
- **Creating a summary review of work-to-date on how responsive governments are to accountability in education:** There is quite a bit that has been done in the education sector around social accountability, however there is not an easy reference that consolidates what has been learned (there is a systematic review on enhancing community accountability). Since GPE has a relationship with governments, are there things that we could do that would help strengthen governments' ability to respond to citizens
- **Supporting global public goods related to accountability and SDG 4 (measurement)**

A few mentioned areas GPE should deprioritize:

- **Supporting local data collection:** GPE could support local data collection, but it is not the unique value add GPE has
- **Funding specific accountability interventions in a few countries:** A number of organizations spend ~$5M on novel interventions in accountability, but this does not necessarily take advantage of GPE's unique position

GPE can be additive in this space by building capacity and generating learnings and public goods

Sources: Interviews

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Approaches to learning example: GPSA

Description

- GPSA has a **learning partner**, Fundar, who aggregates and curates learnings from GPSA projects onto a Knowledge Platform
- The Knowledge Platform, complemented with offline activities, is the main tool for supporting the **learning, networking and knowledge exchange** of the GPSA's grantees and of other CSOs working on social accountability in the global south
- The platform has **four functional modules**: a knowledge repository, learning activities, a networking space and knowledge exchange forums
- In addition, GPSA conducts **in-Bank learning** through brown bag lunches (BBLs) and brings Task Team Leaders (TTLs) and grantees together 20 times per year to discuss connections

Learnings

- It is valuable to have **both internal and external learning processes** and to be clear about the objectives of both
- It can be beneficial to create **an ecosystem for information and knowledge sharing** instead of static resources

Sources: Interviews; GPSA Knowledge

Approaches to learning example: Hewlett Foundation

Description

- The Hewlett Foundation is in the process of **developing detailed sub-strategies,** which focus on: fiscal transparency, governance channels, service delivery monitoring and **field learning**
- **Each sub-strategy outlines key learning questions** that Hewlett will support as part of their grantmaking. These **questions will be updated each year** based on additional insight from research
- The field learning sub-strategy, which will be published in the coming months, will **outline Hewlett's overall learning priorities and how they aim to share knowledge** across the organizations who support, apply and learn from the transparency, participation and accountability efforts
- Hewlett's sub-strategies are currently being **reviewed and commented on by current grantees and refined by an external evaluator**, Itad, that will support Hewlett's learning process over several years

Learnings

- It is valuable to outline **detailed learning questions and objectives** from inception in order to focus investments, while leaving space to update priorities as new learnings are uncovered
- It is beneficial to garner a **wide range of inputs on a learning approach and learning targets** at inception to ensure the right questions are being asked and the approach is sound

Sources: The William and Flora Hewlett Foundation, Active Citizens and Accountable Governments: Three Approaches to Guide our Grants and Learning, 2017

Approaches to learning example: Wellspring

Description

- Wellspring partners with the African Population and Health Research Center (APHRC), to **research learnings and consolidate knowledge**. APHRC coordinates the entire learning process, including organizing annual meetings of thematic groups and supporting M&E specialists to give individualized assistance to grant recipients
- In addition, Wellspring **collaborates with researchers** at the University of Bristol who carry out traditional academic research on themes related to Wellspring's priority area. Two ethnographers attend gatherings of NGOs on thematic issues and **feed the output of the research back out to local actors**

Learnings

- It can be beneficial to have a **research partner based in the region in which you are trying to affect change** as this can facilitate a tighter link between local researchers and policymakers

Sources: Interviews

Approaches to learning example: The Bill and Melinda Gates Foundation

Description

- The Gates Foundation considers **evaluation to be a collaborative learning tool**, so their approach to both internal and external learning is tied to their evaluation strategy
- The output of evaluations are specifically **used for learning and decision making**, rather than proof of the Gates Foundation's outcomes
- Program teams must have an evaluation plan, and **program officers are responsible for promoting evaluation findings** for internal and external learning
- The program teams have **embedded measurement, learning and evaluation staff** to support the design and use of evaluations

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Learnings

- It is valuable to use evaluation findings to learn from projects and programs in order to **learn, adjust, and decide how to achieve outcomes**

Sources: [The Bill and Melinda Gates Foundation, Evaluation Policy]

Approaches to learning: additional considerations

- **Create a distinct learning strategy:** It is important to create a clear learning strategy in addition to or as part of a monitoring and evaluation strategy from inception in order to truly embed learning into grantmaking processes. A evaluation strategy alone will not facilitate internal and external learning
- **Ensure that learning investments reach beyond leadership:** Learning investments should intentionally reach all targets of the learning strategy, including actors that are actively implementing programs. Learning investments should not only reach directors and other managing actors
- **Invest in horizontal exchange:** It is important to connect strategists and implementers for horizontal learning and exchange
- **Find the balance between evaluation accountability and learning:** Often, evaluation for accountability purposes (especially to funders) crowds out the capacity to truly learn. However, when accountability demands are less stringent, organizations tend to invest less in M&E in order to focus on “getting the job done”

Sources: Interviews

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Approaches to M&E: reflections from interviewees

Evaluation practices vary by level of programming; are more likely to be outsourced than other responsibilities

- Evaluation is tied to the type of programming;
  - At the country-level, a range of standard impact evaluation techniques are used to see if civil society activities have impacted a program
  - At a higher-level, evaluation is more long-term and narrative (e.g. what kinds of policymakers have been connected and what kind of change has been created)
- It is important to disentangle learning partners from evaluation; they serve very different purposes
- It can be useful to have a grant-maker and their program officers conduct M&E while the program itself is coordinated by another entity with the necessary expertise to help direct each of the policy challenges

Key challenges in M&E for advocacy relate to specifying outcomes and attributing results to specific actions

- While some comparators spoke about a commitment to rigorous M&E – in some cases hiring leading think-tanks to conduct randomized controlled trials (RCTs) or parse out contribution vs. attribution, for example – most acknowledged the difficulties conducting effective evaluation
- **Lack of sectoral focus can limit ability explain, monitor, and evaluate** success
- In cases where **behavioral change is ultimately the end goal,** measurement may be deprioritized given the difficulty of doing so and the **potential for misleading results**
  - However, these organizations **can focus at the output level** (e.g. how many times someone talks about education, media hits)
  - They can also **monitor policy changes, but attribution is difficult**
- However, there is an **increased interest in improving evidence** in the field

Sources: Interviews

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Grant parameters and processes: top-line messages

Topic	Key insights from benchmarking

Grant sizes	• In the **UNF's** experience, advocacy generally requires larger grants relative to other types of programming because advocacy is human capital intensive
	• The size of global advocacy grants varies based on objectives and targets, however, generally, a large global advocacy campaign will almost always require more resources than social accountability activities
	• Given that due diligence can be cumbersome and costly, some funders (e.g. **GSPA**) focus on larger grants or multiple years in order to minimize transaction costs
	• Multiple comparators are moving towards larger, longer-term grants to allow for multi-year planning, predictability and relationship building
	  • **UNF** shifted from 12-month grants to 24-month grants to allow for long-term planning
	  • **GPSA** shifted to 3-5 year grants to build a long-term program, rather than providing resources for a pilot

Proposal Selection Process	• Comparators enhance their proposal selection process in four ways: Initial consultations to guide the process, input from experts, a two-step application process and curation
Additional forms of assistance/value addition to grantees beyond financing	• Several groups provide technical assistance, sometimes for preparing the application itself, but also in implementation of activities **(Women Deliver, IHP+)** • Others provide a knowledge sharing or learning service **(ACBF, IHP+)**

Sources: Interviews; African Capacity Building Foundation; Women Deliver, Kenya Request for Proposals, 2017

Grant sizes and timeframes

	Amount per year (USD)	Timeframe	Activities
	~ 90-200K	≤ 5 years	
GPSA	100-200K	3-5 years	• Support social accountability projects across sectors and across issues such as public sector procurement and budget transparency
BACKUP	≤ 119K	≤ 1 year	• Provide funding for governments, CSOs and coalitions in Africa to aid implementation / monitoring of GPE funding
GCE	90-120K	3 years	• Provide funding for national civil society education coalitions to strengthen citizen and civil society participation processes
Women Deliver	200K	1 year	• Support advocacy activities in one country • The grant covers personnel costs, costs for a "sub-grantee" and direct costs for country coalition building and advocacy
UNF	~158K	~2 years	• Build partnerships, grow constituencies, mobilize resources and advocate policy changes to support the UN's work for individual and global progress in global health

Note: Data has been taken from open sources and annualized. These are not necessarily actual ranges reported. UNF data, in particular, is based on a triangulation of different points from a range of different grant sizes and should be interpreted as indicative.
Sources: Interviews; GPSA Call for Proposals; German BACKUP Initiative, Project Mode; Women Deliver, Kenya Request for Proposals, 2017; CSEF National Planning and Operational Guidelines, Annex 9, 2015

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Comparator practices that enhance the selection process

	Description	Added value	Relevance for GPE
Initial consultations to guide the call for proposal	**Stage in process:** Applicant sourcing • A funder **convenes workshops or consults an advisory council** to define priorities and discuss key challenges before issuing a call for proposals • The workshops or advisory council could include global experts, in-country and other stakeholders	• Ensures that **priority areas are not defined solely by donors**, but also by stakeholders and other experts	• GPE could use this approach as a **tool to inform the focus of proposals** without prescribing one
Review by external experts	**Stage in process:** Review and selection • Experts external to the process review applications and **provide feedback on the technical quality** • Experts can be affiliated with foundations, NGOs, multilaterals, academic institutions, etc.	• Allows individuals with **a range of expertise in advocacy, social accountability and grant making to provide input** on the soundness and technical quality of applications • Allows for additional technical input without hiring internal experts	• GPE could use this approach to **leverage a wide range of technical expertise** when selecting grantees without hiring a significant number of in-house technical experts

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Comparator practices that enhance the selection process

	Description	Added value	Relevance for GPE
Two-step application process with feedback	**Stage in process:** Review and selection • Applicants submit either a full proposal or a concept note • **Reviewers or external actors provide feedback** on the initial proposals and discuss with the potential grantees • Applicants may have the opportunity to **revise their proposals** based on feedback • The final decision of grantee winners **takes these revisions into account**	• Allows for **solicitation of feedback from stakeholders** that are not involved in the selection process, such as government officials or peers • **Final proposals will be strengthened** and have a greater chance for success through an iterative process	• Actors with less experience writing proposals, but still well-suited for GPE funding, would have the opportunity **to learn through the process and improve chances of being selected** • Stakeholders from across **the Partnership could be more engaged** in the process
Curate and find applicants through others	**Stage in process**: Applicant sourcing • The **funder finds grantees** through hired consultants or introductions from partners and current grantees	• The funder can **proactively target** those grantees that best align with their priorities	• This approach is **less relevant** for GPE as GPE has historically run more standardized and transparent application process

Selection process example: Global Partnership for Social Accountability (GPSA)

Applicant sourcing	• The GPSA organizes a consultative process with stakeholders, including government, civil society and donors to define the key thematic areas per country that CSO proposals should address • All regional CSOs or networks that are outside of the public or for-profit sector and operating in countries that have "opted in" can apply within their country-specific call for proposals
Application	• CSOs respond to a country-tailored call for proposals • The **application form consists of 3 parts**: Basic information, main application and budget • The **main application** includes information about objectives, collaboration with public sector institutions, approach, partnerships, institutional strengthening, project components, including activities, outputs and (intermediate) outcomes
Review and selection	• **Technical review:** After an eligibility screening, applications are reviewed by a global **"Roster of Experts"** that consists of ~80 experts who provide advice on the technical quality and soundness of a proposal using an evaluation matrix. The secretariat uses the evaluations to rank applications and recommend a list of proposals to the steering committee • **Pre-selection of finalists:** The Steering Committee considers the list of proposals and decides on the allocation of grants • **Commenting & due diligence:** Pre-selected proposals are sent to the governments of participating countries for a 10-day comments period. After this, proposals are made public for a 5-day comments period. Proposals undergo a due diligence assessment • **Final decisions:** The Secretariat considers any comments received, including results of the due diligence assessments and addresses these with potential grantees. The **final decision** is made by a senior manager or director in the Secretariat

Sources: Interviews, GPSA Call for Proposals; GPSA Grantmaking Process

Selection process example: Bill and Melinda Gates Foundation

Applicant sourcing

- The Gates Foundation **identifies a concept that supports their strategic priorities** in consultation with foundation colleagues, researchers, policymakers and other partners. The Gates Foundation then uses a variety of methods to source applicants:
  - **Direct solicitation:** Directly approach a an organization that would be well-suited to perform the work a desired task or achieve a desired outcome
  - **Discussion:** Invite one or more organizations to discuss the concept with Gates and explore their interest and their capacity to undertake the work
  - **Requests for Proposals:** Issue public or private Requests for Proposals when they want to broaden their network

Application

- The Gates Foundation gives applicants guidelines and templates for developing a proposal, a budget, and a results framework and tracker

Review and selection

- **Review:** A program officer reviews submitted materials with internal and, at times, external experts and works with the applicant to integrate recommended changes
- **Due diligence:** A program officer completes due diligence, confirms the applicant organization's tax status, determines how to structure the transaction, and assesses risk, at times with the support of legal and financial analysis teams
- **Final decision:** A foundation executive is the final decision maker

Sources: The Bill and Melinda Gates Foundation

Selection process example: the German BACKUP Initiative

Applicant sourcing	• Applicants know about and contact BACKUP through the Global Campaign for Education (GCE) and the African Network Campaign for Education for All (ANCEFA) because, generally, BACKUP only supports recipients of GPE funding including recipients of the Civil Society Education Fund (CSEF)
Application	• Applicants **complete an application form provided by BACKUP**, which includes information about the connection to GPE processes, an implementation plan, sustainability and knowledge sharing, activities and outputs, crosscutting issues, workplan and budget • **The application process is demand driven**: Applicants decide on the form of assistance that they require from the German BACKUP Initiative and at what point they require the assistance • Applicants are welcome to apply on a rolling bases and do not respond to a specific call for proposals
Review and selection	• **Review:** The technical team at BACKUP education reviews the applications in consultation with LEGs, GPE Secretariat and the German Federal Enterprise for International Cooperation (GIZ) country office. The technical team also consults GCE and ASPBAE on applications to ensure there is no duplication of funding • **Final approval:** The German Federal Ministry for Economic Cooperation and Development (BMZ) makes the final approval

Sources: Interviews; German BACKUP Initiative, Project Mode; German BACKUP Initiative, Guidelines for Application

Selection process example: Hewlett Foundation

Applicant sourcing	• The Hewlett Foundation **works with consultants or consulting firms** to identify grantees or finds new grantees through introductions from current grantees • The majority of their grants are renewal grants
Application	• The application process is not as cumbersome in the traditional manner, but includes more of a relationship-building component
Review and selection	• Hewlett does not have specific criteria that the score proposals against or a public-facing selection process for grantees

Sources: Interviews

Next steps in the comparator analysis

- **The next step of the comparator analysis will be to benchmark comparators in order to inform the operationalization of the ASA Mechanism**
  - The analysis will broadly focus on the following areas:
    - Options for management structures
    - The selection criteria and role of the grant agents
    - Call for proposals
    - Secretariat capacity and resources

Annex

Other key insights from comparator consultations

Working with groups that have already mobilized and generated momentum is an effective place to start

- It is so easy to build on enthusiasm that already exists and easy to get work done when people are excited about it – so structures should build on where there is existing momentum. It's exciting because it gets done quickly, and then it's a virtuous cycle
- The social accountability agenda has to start with what people care about to get them into the habit of observing what governments are doing. Learn from this before moving into areas with less civic engagement

Developing feedback mechanisms is important for information gathering at a local level

- The only way to get significant information about what is and is not working is through people who are already established within a community
- Create ways for local citizens to provide feedback, and demonstrate how this creates value for them

Creating collaborative, rather than extractive relationships, builds two-way relationships in communities

- Develop two-way relationships between communities and CSOs, so that the former are also engaged and not just passive informants
- Say no to cartels: It is important to stay in a collaborative coalition. Coalitions may not be in practice a coalition but a new organization with claims to the space

Transparency is necessary but not sufficient for change

- Hewlett previously did a lot of work on transparency and accountability to improve public provisions. This included analyzing budgets and engaging in dialogue about public sector spending. However, citizens themselves were not engaged and improvements in public services were not tied to the use of increasing the availability of information.

Legitimacy and buy-in is important for removing key obstacles to social accountability work

Sources: Interviews

Challenges to advocacy and social accountability

Representing interests and aligning incentives	• **There is a risk that governments and CSOs become accountable to donors rather than citizens themselves:** Reporting should benefit citizens rather than the donor themselves • **Organizations need to be sensitive to how they engage governments:** Challenging to balance reputation when engaging a range of stakeholders with different incentives • **Coalitions are often not representative of broad interests:** Groups are often comprised of the urban elite, and many have had the same leaders for 20+ years (particularly true in Africa)
Targeting outcomes	• **Making more information available does not necessarily translate into action:** Few people go directly from knowledge to agency, even in citizen led assessments, and at what point information becomes the source of action is not clear • **Getting people to talk about inefficiencies is easier than getting them to talk about abuse of power:** Education is a sector where is a lot of the latter
Coordinating efforts	• **Development aid is often focused on either policy or grassroots action, and does not address both sides together** • **Organizations do not have a coherent approach:** Organizations working in this space have a variety of priorities, and coordinating agendas is challenging

Sources: Interviews