GPE Request for Expressions of Interest

To Select a Grant Agent to Conduct GPE Country Learning Reviews

Questions & Answers from The Clarification Call Held 03/19/2025

Preliminary note on definitions: In the summary below, "**implementing agency**" refers to the sub-contractor(s) that will work with the grant agent to conduct the Country Learning Review work, under the grant agent's supervision. The grant agent itself could conduct the work, too. Sub-contractors could include both organizations and individual consultants. By "**consortium**," we mean the grant agent and other organizations the grant agent would want to work with on a regular basis to implement the Country Learning Reviews, in a sub-contractor capacity.

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(A) Country sampling

Q- Could you give an indication of which countries are likely to be included in the 8-10 country reviews?

Answer: The list of sampled countries, which will be drawn from the universe of 90+ GPE partner countries, will be developed closely between the grant agent once selected and the GPE Secretariat. The sample will mostly depend on how advanced the countries are in the implementation of their priority reforms and policy actions, as well as their GPE grants, in addition to other sampling criteria.

Q- Are there francophones countries in sub-Saharan [Africa] included in the target countries?

Answer: Likely, yes, based on the composition of the 90+ universe of GPE partner countries. However, the country sample remains to be determined at this stage. The full list of GPE partner countries is available on the GPE website.

Q- How will the sampled countries be selected? Can you provide a general overview of possibilities, for budgeting purposes?

Answer: In addition to countries' degree of advancement in the implementation of their compact activities, a reasonable number of sampling criteria will ensure a good balance between the partner countries selected, to reflect the broader universe of 90+ GPE partner countries. Criteria may include for example region, fragility status, and income level. Sampling criteria will be determined collegially between the grant agent and the GPE Secretariat. However, we expect at least five to be in Africa.

(B) Country Learning Reviews in the context of the GPE strategy and MEL framework

Q- Could you clarify how the Country Learning Reviews (CLRs) are positioned in relation to the Mid-Term Reviews? Is there a formal link between the two processes?

Answer: CLRs will draw greatly from countries' that have undergone their MTRs. A CLR will likely happen after the MTR process wraps up in a sampled country. The CLR in this country would use any data/evidence and reports generated as part of the MTR process, serving as a critical base for the grant agent's independent assessment of the priority reform's progress and results and GPE contributions to these areas.

Q- How do you assess the potential challenge of review fatigue? Conducting a CLR shortly after an MTR may lead to limited engagement, confusion, or reluctance from in-country partners, who may question the need for another review so soon. How do you envision mitigating this risk to ensure meaningful participation and insights?

Answer: Data collection will be minimized to avoid review fatigue. The grant agent should make use of existing secondary data as much as possible, which will come from sampled countries' own monitoring systems and GPE grants, other studies and data systems, and fill any evidence gaps with primary data collection accordingly. The need for primary data collection will be carefully established on a case-by-case basis based on the evidence base already available at the time of each Country Learning Review. To the extent possible, we will endeavor to conduct the CLRs as late as possible after the MTRs, and we would expect the CLR to do more in-depth analysis of the issues.

(C) Eligibility requirement related to conflict of interest

Q- Could you clarify whether an organization that is subcontracted by another organization receiving GPE funding directly (e.g. an organization that is sub-contracted as a Learning Partner by a current grant agent) is eligible to apply for this piece of work?

Q- If an organization has received funding for research or implementation of a KIX grant via another agent (IDRC, UNESCO, UNICEF, etc.) that is GPE work does that disqualify them?

Answer: Any organization engaged in GPE's operational work is not eligible to apply as a grant agent. However, it can be sub-contracted to the grant agent, who will need to ensure that there is not conflict of interest in the work to be conducted by the sub-contractor. For example, the sub-contracted personnel cannot simultaneously be involved in supporting partner countries with capacity building for their priority reforms and also engage in the country learning reviews. The GPE Secretariat will also assess conflict of interest when sub-contractors are proposed for specific work. Please also review the request for expression of interest.

Q- The CLEAR NETWORK (The Centers for Learning on Evaluation and Results (CLEAR)) comprises seven regional centers and two affiliate centers in Asia, America, and Africa. The centers are implementing partners of the Global Evaluation Initiative (GEI) from the World Bank. Is this considered a conflict of interest?

Answer to these 3 questions: As long as these organizations are void of conflict of interest (per the expression of interest and are not-for-profit entities, then they are welcome to apply as a grant agent. We advise you and your team to closely examine the substance of your GPE engagements and whether they may or not constitute a real or perceived conflict of interest for this CLR work. A network itself cannot be considered as a grant agent, as the grant agent must be an established legal entity that is a not-for-profit organization. However, if one of the CLEAR centers is a legal entity, it can apply and also sub-contract with the other network centers.

Q- We are a for-profit organization but we are NOT current GPE accredited grant agent - this means we are eligible?

Answer: Entities eligible to become a grant agent under the current GPE accreditation framework include bilateral organizations, multilateral organizations, and international not-for-profit organizations. For-profit organizations do not quality as a GPE grant agent. However, a for-profit organization can be subcontracted by the selected grant agent.

Q- If we are selected to implement this grant for GPE, will it restrict our ability to bid on future GPE opportunities? Would the preclusion for future work limited to the sampled countries?

Answer: While the organization is implementing the CLR portfolio, it could not bid on other GPE operational work. However, once the portfolio completes, it could bid on other work, but then GPE will determine whether the work is a direct follow-on from the recommendations from the evaluation work and therefore the firm would be disqualified (it would be working on its own recommendations) or whether the work is sufficiently different or removed from the recommendations that came from the CLR work and therefore could quality for the work.

Q- Quelles sont les restrictions pour les agents prestataires en zone francophone ? [Are there any restrictions for [potential] grant agents located in francophone areas?]

Answer: There are no restrictions for applicants based in Francophone countries and all are welcome to apply, as long as they meet the eligibility criteria related to conflict of interest and not-for-profit status.

(D) Eligibility requirement related to being not-for-profit

Q- Are public or private universities categorized as not for profit?

*Answer: The eligibility of a university (public or private) as **an international** not-for-profit organization depends on its legal and operational structure. We encourage you to refer to your university's legal team to determine its legal status more precisely. However, national not-for-profit organizations are not presently eligible to become GPE grant agents.*

(E) Grant agent roles and responsibilities

Q- On p 2 of TOR you mention that the grant agent's role will include providing "fiduciary oversight" could you explain what you mean by that? Does this relate to the fiduciary responsibilities with the GPE Trustee (as explained in Q&A7 on p8, TOR), or would this include further responsibilities?

Answer: Please, refer to the Terms of reference for grant agents (found here) for the fiduciary responsibilities that a grant agent is expected to fulfil. *The term "fiduciary oversight" refers to the grant agent's responsibility to manage and safeguard the funds allocated for the Country Learning Reviews (CLRs). This includes ensuring that the funds are used efficiently and effectively, maintaining proper financial records, and adhering to the agreed-upon budget and financial procedures. The grant agent will also be responsible for overseeing any subcontractors involved in the CLRs to ensure they comply with financial and operational standards.*

This fiduciary oversight relates to the grant agent's fiduciary responsibilities with the GPE Trustee, as outlined in the Financial Procedures Agreement. The grant agent must ensure compliance with the minimum fiduciary standards set by the GPE Board, which includes financial management, procurement, and reporting requirements. Please refer to Appendix 2 of this document for the list of Minimum Fiduciary Standards and illustrative examples. Additionally, the grant agent will provide fiduciary oversight for the entire CLR process, ensuring that all financial transactions are transparent and accountable.

Q- What is the distinction between a grant agent and an implementing partner and how are agency fees applied/applicable to each?

Answer: The grant agent will have a direct contractual agreement and roles/responsibilities vis-à-vis the GPE Trustee and the GPE Secretariat and is responsible for managing the implementing partner(s) (if any; please see the note at the beginning of this Q&A regarding the definition of an implementing partner. An "agency fee" is paid to the grant agent to offset indirect costs.

Q- How does the GA commercial agreement handle taxes?

Answer: *The handling of taxes is not specified in the Financial Procedures Agreement (FPA). It ultimately depends on the legal status of the local country offices of the organization. For traditional GPE grants, some grant agents' organizations have tax-exempt status, which is managed according to their own policies, procedures, and legal status in the country offices.*

(F) Agency fee (e.g. indirect cost recovery)

Q- The solicitation states “Note that an estimation of reasonable direct costs should be included, and an indirect cost recovery fee (agency fee) of up to 7% of the grant amount will be paid by GPE”. The term fee is used, which in many instances is separate from indirect costs. Could GPE please clarify if this use of ‘fee’ is referring to recovery of overhead costs, etc.? Can the costs associated with in-country implementation be separated from the 7% fee?

Answer: *The term of grant agent "agency fee," in this context, refers to indirect cost recovery of the grant agent’s headquarters overhead costs, and it is intended to cover the indirect costs that are not directly attributable to the implementation of the Country Learning Reviews. The grant agent agency fee must not exceed 7% of the deliverables costs and is subject to the grant agent’s own policies and procedures.*

“Attributable costs,” such as those directly associated with the implementation of the Country Learning Reviews, should be detailed in the budget proposal. For example, staff costs that are directly attributable to the deliverables under this work should be considered in the deliverable budget.

Importantly, please note that the grant agent agency fee must be clearly included and detailed in the grant’s proposed budget and must fit within the REOI budget limits - i.e., an applicant’s maximum proposed budget, inclusive of all attributable costs and agency fees, must not exceed US$950,000 as per the REOI.

Q- Are the implementing partners also subject to a 7% cap for their own indirect cost recovery?

Answer: *Implementing partners (i.e., the sub-contractors) may also have indirect cost recovery – if they do, this indirect cost recovery is separate from the grant agent “agency fee” (see above) and it is not subject to a 7% cap. The implementing partner’s cost recovery fee must align with the grant agent's policies and procedures on paying indirect costs to implementing partners, as well as the implementing partner’s own policies and procedures.*

Q- In the FAQ, it states “While the Board has set a maximum limit for these costs at 7 percent, it is important to note that the actual percentage charged is based on individual agreements established between the grant agent and GPE during the accreditation process.” Can applicants propose their indirect cost recovery to be considered/negotiated (even if it exceeds 7%)? Is the 7% cap on indirect costs negotiable?

Answer: *The 7% cap on indirect costs is not negotiable. This cap is a set by the GPE Board of Directors and applies to all grant agents. While the actual percentage charged is based on individual agreements, it cannot exceed the 7% cap.*

(G) Grant agent templates

Q- Could you share your most recent template of grant agreement? Could you share the Financial Procedures Agreement?

Answer: There is no grant agreement template per se, however the prospective grant agent will be required to sign a standard Financial Procedures Agreement with the GPE Trustee. Please find an indicative example of Financial Procedures Agreement here.

Q- Could you share your most recent template of financial report in use for grant agents?

Answer: The financial reporting to the GPE Trustee includes reporting on cash position and projections, investment income from grant funds held by the grant agent, and reporting on disbursed and unused funds.

Templates for these reports are annexed to the Financial Procedures Agreement, an example of which is accessible here.

(H) Accreditation process

Q- How much time and labor does the accreditation process require? Can this time be included in the budget and would this be paid as part of the award?

Answer: The time and labor required for the Institutional Capacity Assessment part of the accreditation process can vary depending on the organization's preparedness and experience with similar assessments. Organizations that have undergone similar evaluations, such as European Union pillar assessments, are likely to find the process more straightforward. The process generally takes about 3 months and involves a desk review of the self-assessment tool and supporting documentation while focusing on the organization's headquarters.

The cost of labor for completing the accreditation process cannot be billed retroactively to the grant itself. However, upon successful accreditation the agency fee is designed to help offset such expenses.

(I) Consortia

Q- Can you explain a little bit more about consortiums?

Answer: In their proposals, applicants are welcome to put forward a consortium to conduct the CLR work (please see the definition of a consortium at the beginning of this Q&A note). Consortia can bring value to complex evaluation work such as CLRs, by collectively demonstrating complementary strengths in varied areas related to the scope of work. Typical pitfalls in consortia include lack of clarity of roles and added value (e.g., technical, thematic, regional expertise, etc.) of each member of the consortium, and inability to coordinate/ensure an equal level of quality across the respective pieces that each subcontractor is in charge of. Risks inherent to consortia should adequately be identified and mitigation strategies in place (i.e. in terms of governance arrangements, coordination, quality assurance, etc.). It is also strongly encouraged to mobilize local experts and in-country partner organizations as much as possible – the applicant can specify that they will sub-contract the work with other organizations/individuals at country level, once the sample of countries is selected, and which criteria will be used for sub-contracting at country level.

Q- Could you confirm if organizations submitting the EOI in a consortium with another organization will still require obtaining Secretariat's approval of the consortium partner before the start of the activities?

Answer: This is correct.

Q- Can profiting organizations or governmental institutions participate in the consortium process?

Answer: Yes, as a subcontractor and not grant agent, and as long as they fit within the grant agent's conflict-of-interest framework and related risks are adequately mitigated.

Q (received separately)- Would it be possible to get a list of the participants who were on the call? We are looking to potentially build a consortium and this would be really useful.

Answer: We are not able to share the list of organizations as not everyone identified their organizations during the clarification call and there was no registration. However, those who would like to share the names of

their organizations and emails are welcome to reach out to the Secretariat to confirm that we have the permission to share their emails and names with all participants.

(J) Proposal expectations - Deadline

Q- We understand that this is a one-stage submission. The deadline is on March 28, leaving organizations with only 8 working days from the day of the clarification session. Would you consider extending the deadline for submission to give organizations more time to develop their responses to the call meeting quality expectations?

Q- Given the late date of this webinar, it would be really beneficial for all - mainly for GPE -- if the deadline for proposals were to be pushed back. The quality of proposals will be higher. Please consider.

Answer to these 2 questions: Yes, this is a one-step submission. The deadline to receive all proposals was extended to March 31, 2025. Of note, the call for proposals was posted on the GPE website on March 3, 2025, and the clarification call (not a launch call) was held on March 18.

(K) Proposal expectations – Technical Proposal

Q- What is the organization's anticipation on the past experience of the applicant non-profit company?

Answer: As per the terms of the REOI, applicants should have strong expertise in providing evaluation-for-learning services, most notably in the education sector, on reform and policy making, and in GPE partner countries. Applicants should also be experts in conducting research using a variety of methods on complex themes such as partnership, systems, and cross-sectoral issues. Lastly, applicants should demonstrate substantive experience in conducting learning work with varied types of partners, especially at the country level.

(L) Proposal expectations – Financial Proposal

Q- Do you expect a budget breakdown by deliverable?

Answer: Yes. The financial proposal should include a calculation approach for and breakdown of the costs for review activities and products (the CLR "deliverables"), necessary to undertake the scope of work. The agency fee can be up to 7% of the total cost of the deliverables.

Q- Do you have a maximum daily rate for grant agent staff working on the project?

Answer: No. The daily rates should be in line with the grant agent's own policies and appropriate benchmarks. The value for money will be assessed by GPE Secretariat based on a comparison of the costs of deliverables from all applicants.

Q- Is there any guidance on the maximum rate by role, and the % of staff costs vs support and admin costs?

Answer for these 2 questions: *There is no maximum daily rate specified for grant agent staff working on the CLR project. The financial proposal should account for deliverables-based costs, and applicants are expected to determine these rates within their own parameters based on the roles required to fulfil the scope of work.*

There is no specific guidance on the maximum rate by role or the percentage of staff costs versus support and admin costs. Applicants are encouraged to ensure value for money, good stewardship of resources and efficiency in their budget proposals.

Q- Can applicants submit a budget with loaded daily labor rates (where personnel overhead and indirect costs are built into the daily rate) and not separated out?

Answer: *The applicants should endeavor to submit a detailed budget with a breakdown of costs by activities and outputs ("deliverables"). Grant agent indirect costs are offset by the agency fee, while with sub-awardees, if any, indirect costs must be within the policies of the grant agent.*

Q- Is there a limitation or preferred level of % budget set aside for subawards?

Answer: *There is no specific limitation or preferred percentage of the budget set aside for subawards. However, it is important to ensure that the budget proposal is efficient and provides good stewardship of resources. The grant agent is expected to manage the budget effectively, including any subawards, to ensure value for money.*

Q- Could you clarify the requirements around external financial audits? Will the audit be commissioned by GPE or should the applicant's budget for an independent audit in their financial proposal?

Answer: *The Financial Procedures Agreement and the fiduciary oversight responsibilities require the grant agent to ensure proper financial management, which includes commissioning annual independent audits. Given this Country Learning Review work is expected to take maximum one year, one audit for the entire duration of the grant is expected. The cost of an external audit is eligible to be included in the grant's budget and applicants are encouraged to budget for an independent audit in their financial proposal.*

Q (received separately) – Is the expectation that the Grant Agent will arrange and pay for travel, per diems, accommodation and venue/refreshment in case of in-person learning events? Or will the budget be made available by GPE under each country's budget?

Answer: The arrangements and budget for in-person country learning events will be the grant agent's responsibility. However, the grant agent could also potentially work country-by-country with country-level stakeholders (e.g., grant agents for System Capacity Grants) to cost-share the events. GPE Secretariat will not provide any further funds. In addition, it is expected that the grant agent will work cost-effectively and hold online events or in-country events that do not involve extensive travel. There may be cross-country learning at GPE-sponsored events (such as country partner constituency meetings), which could also provide the opportunity and platform for holding the learning events.

(M) Proposal expectations – Scoring

Q- Could you share the proposal scoring criteria and weightings?

Answer: Each applicant's technical proposal will account for 70% of their score, and the financial proposal for 30%. Within the technical proposal, each of the technical areas described in the REOI's "Section D - Expression of Interest Timeline and Expectations" bullet points will be given equal weight.

(N) Proposal expectations – Templates

Q- Do you have a template for writing the EOI? Could you share a template for the submission of budgetary information in the EOI?

Answer: No, we don't have a template for writing the EOI. Instead, we recommend that applicants follow the suggestions made in the REOI document for both their technical and financial proposals – see "Section D - Expression of Interest Timeline and Expectations" in terms of the information to be provided.

(O) Language expected for CLR reports

Q- Même pour langage de rédaction [Same thing on the point of language for the reports].

Answer: All reports and slideshows under the Country Learning Review work are expected to be written in English. All reports are also expected to be translated into French. Some of the slideshows, but not all (i.e., when a review focuses on a Francophone country), are expected to be translated into French.

(P) Clarification call held 03/18/25 - expectations

Q- How can we get a link to a recording of the call?

Answer: The full list of questions and answers discussed during the clarification call (i.e., combined in the present document) are being shared here and will also be emailed to all clarification call participants. The recording will not be shared externally but will be kept for future GPE Secretariat audit purposes.