

 DECEMBER 5-6, 2023

MEETING OF THE BOARD OF DIRECTORS

ZANZIBAR, TANZANIA

BOD/2023/12 DOC 11

FOR INFORMATION

ITAP LESSONS LEARNED REPORT

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

Objective

1. This report, the second of its kind, presents the Board with a set of lessons learned from the Independent Technical Advisory Panel (ITAP). The Performance, Impact and Learning Committee will consider the report at its November 15–16 meeting in support of the Board learning session.

Background and overview

2. The ITAP was established in December 2020 to provide an independent assessment of country status against the enabling factors for system transformation. The assessment informs the Board decision on the system transformation grant allocation and is an input to countries in the further development of their partnership compacts.
3. The terms of reference of the ITAP Chair include producing an annual lessons learned report. This is the second report covering the period February 2022 through June 2023.
4. The report includes both positive observations and areas for improvement. Positive observations are around the quality of enabling factor packages, enhancements of the enabling factors guidance, ITAP operations and independence. Areas for attention include varying levels of countries' understanding of key concepts of the operating framework (e.g., enabling factors, gender hardwiring, priority reform), persistent implementation issues of sector plans, and gaps around domestic financing data.
5. It is important to note that the report does not consider the [adaptations to the operating framework](#) agreed in July as the terms of reference for the report were developed over a year ago. Further, as the ITAP Chair notes in the report, not enough time had passed to see any impact of these adaptations on the

work of the ITAP when the report was submitted in August. At the same time, some recommendations in the report have become overtaken by the adaptations, or are less relevant considering where we are in the operating framework cycle.

6. For example, the adaptation on ITAP very significantly reduced the number of countries where an ITAP assessment is required/outstanding:¹ by year-end the number is expected to be down to some five countries and current indications are that a large majority of countries exempted from ITAP will choose to forgo such an assessment. As of late October, 49 country panels have been completed, 6 are underway, and 10 are in the pipeline. Of the 31 countries exempted from the ITAP, 4 have decided to forego an ITAP assessment and 3 have decided to opt in; the remaining 24 countries have not communicated their decision yet. Thus, the recommendations for improving ITAP processes would benefit just a few countries while requiring significant transaction cost within the Secretariat. These will be considered as GPE transits to its next funding cycle.
7. It is also noted that the operationalization of GPE 2025 is well underway. The past fiscal year was marked by a significant acceleration and all but a few countries have now started the enabling factors process, based on existing templates and guidance. The report's recommendations for further enhancements to these elements are therefore well noted but are primarily considered as forward-looking inputs to the ongoing process of adapting and learning, in the context of moving to the GPE 2030 framework, which is already on the horizon.
8. The Secretariat would like to positively recognize the ITAP, and foremost the Chair and Acting Panel Chairs, for their professionalism and responsiveness in particular in the past fiscal year which saw a very significant increase in the number of country panels with many panels overlapping.

Annex A – ITAP Lessons Learned Report

Annex B – Secretariat Reflections on ITAP Recommendations

Annex C – Terms of reference for the ITAP Lessons Learned Report

¹ Countries with a system transformation grant allocation of \$10 million and below, and countries that are only eligible for Multiplier funding, may forgo an ITAP assessment per [BOD/2023/07-01](#).

Annex A – ITAP Lessons Learned Report

**Global Partnership for Education
Independent Technical Advisory Panel (ITAP)**

**Lessons Learned Report
2022 – 2023**

Dr. Desmond Bermingham
Chair, ITAP

October 2023

Acknowledgements

This report was written from July - September 2023. It summarises the key lessons from the experience of the permanent ITAP which completed twenty-eight country panel reviews between February 2022 and June 2023. A full list of the countries (or in some cases provinces/states) is provided in Appendix 1.

In preparing the report, I have drawn on the evidence in the ITAP reports and consulted other members of the ITAP as well as the GPE Secretariat. I was also assisted by fellow panellist and Acting Panel Chair, Susy Ndaruhutse, who provided valuable inputs to drafts of the report.

I would like to thank my fellow panel members for their professionalism and wisdom throughout the ITAP process. It has been a privilege to work with colleagues with such a wealth of experience and commitment.

I would also like to thank Johanna Van Dyke and her colleagues from the GPE Secretariat for their excellent support, guidance, and responsiveness throughout the process.

All views in this report are my own and I take full responsibility for any errors.

Note: The GPE Board decided in July 2023 to make adjustments to the operating framework including the ITAP. The board decided to maintain the ITAP assessment, but make it optional for countries with system transformation grant allocations up to US\$10 million and for countries that are only eligible for a multiplier grant. These decisions were made prior to the preparation of this report and it is too soon to comment on the impact of the changes.

Executive Summary

Methodology: Useful refinements have been made to the methodology especially on gender and human rights, which have strengthened the holistic nature of the panel reports. The guidance has also been simplified and clarified in places. However, there continues to be confusion in some local education groups about the meaning of certain terms and about the one policy priority which is not currently linked closely enough to the identified bottlenecks in the country self-analysis. In addition, important contextual factors that hinder progress but may be external to the education sector (e.g. political instability, conflict, corruption, ineffective aid) are not always easy to reflect in the current structure of the ITAP report.

Independent review: The ITAP has provided a valuable independent review of the sector plans, finances and local education group self-assessments of the enabling factors. The ITAP has disagreed with the country's self-assessment ratings in at least one factor in 18/28 (64.3%) of countries. In around half of the cases, the ITAP downgraded country ratings and in the other half of cases, the ITAP upgraded country ratings.

Consistency and comparability across panel reports: This was at first glance a challenge given that there were over 20 panelists and many different country contexts with several panelists only completing a few panels over the reporting period. However, the Chair and Acting Panel Chairs played a key role bringing their experience of working on several different country contexts. Discussions between panelists often included consideration of realistic considerations given the particularities of the country context (e.g. protracted crisis, environmental disaster, political instability) and trying to 'meet the country where it is' rather than seeking to impose a standard model. The clear structure and framework for the report given by the Secretariat through well-constructed templates has helped to ensure a high level of consistency across reports. The Chair also reviewed all reports and was available to provide guidance to Acting Panel Chairs on difficult issues or the weight to be given to contextual factors.

Quality of enabling factors packages: This has generally been high (i.e. including full documentation of key strategic planning, data, finance and coordination processes as well as supporting evidence for the self-analysis including external documents and reports from other government departments, in particular ministries of finance) and improving over time, although there were a small number of panels that had to request additional documents in order for them to complete their assessment. This improvement is almost certainly linked to the improved guidance and the Secretariat gaining experience in conducting completeness checks and quality assurance. While the ITAP is aware that these processes have often taken longer than expected, this has made the ITAP's role more efficient and effective. The Secretariat regularly supplemented country packages with additional reports where these existed for the country. The most frequent

gaps in the enabling factor packages were documents on domestic finance and reliable information on external financing. There was a general view that the quality of education sector plans had been improving over the long term (10 years+). However, a large number of panels noted the limited data on implementation of plans and the limited use of evidence to inform planning. This issue was even more visible at sub-national levels.

Secretariat support: The Secretariat has provided high-quality support, managing the pipeline efficiently and keeping in regular communication with the Chair, Acting Panel Chairs and panel members. Kick-off meetings with the Secretariat country lead have been valuable and provided broader context to panelists while focusing largely on facts and evidence rather than giving their opinions. When requested, the Secretariat has been prompt to respond to clarification questions from the panel and to provide any additional documents requested. The Secretariat Completeness Check has been a useful reference for panelists, highlighting any gaps or discrepancies in the country package. The practice of providing machine translation of Portuguese and Russian documents has been very helpful. Secretariat comments on draft ITAP reports have been relevant and provide an additional review and check that all key considerations in the guidance have been covered.

Timeliness of process: On average, it has taken 4-5 weeks from the ITAP receipt of the enabling factors package to sending a draft report for the local education group, slightly longer than the 3-week target. The need for translation of the panel report into French, Spanish or Portuguese has generally added to the timeline. The Chair has shared the workload with Acting Panel Chairs which has helped to minimise delays in completing reports, especially when multiple panels were running in parallel.

Independence of ITAP: The Secretariat has been vigilant in ensuring the ITAP remains impartial and is able to provide an independent and external view. Potential conflicts of interest are considered by the Secretariat lead when selecting proposed panel members and panelists are required to complete a conflict-of-interest form which is reviewed by the World Bank's Ethics Officer. During the review period, eight panel members (including the Chair and an Acting Panel Chair) declared a potential conflict of interest relating to recent work conducted by themselves or their organizations and partial recusals were recommended by the Ethics Officer in two cases.

Panel composition: There are currently twenty four panel members following the withdrawal of three members from the original selection. There is a broad range of expertise across the different enabling factors as well as on cross-cutting issues such as gender, human rights and education in conflict and emergencies. Women constitute one third of the current pool of experts meaning that three reviews over the reporting period had no female panelist. Two of the three Acting Panel Chairs were female and they have chaired 35% of the panels covered in this review period. While nearly one third of panels

had no southern panelists, the majority of these panels were not anglophone countries so this may be a reflection of the relatively small pool of panelists from the Global South with language skills in French and/or Portuguese.

Coherence and consistency of the ITAP: This has been assured by the Chairs and Acting Panel Chairs who have maintained oversight across the panels and provided clarity of language across reports, and ensured that the criteria for prioritization were used consistently while taking account of local contexts.

Other issues: (i) The request for the panel to avoid making recommendations has resulted in the ITAP reframing its language as gaps or needs without offering any potential solutions which could be unhelpful for countries. (ii) A weakness identified under the Sector Coordination enabling factor was the lack of inclusion in local education groups of certain stakeholder groups and the focus of local education group meetings in some countries on GPE-related activities rather than on progress in the education sector as a whole. (iii) Some panel members have expressed a concern that the ITAP process is operating in isolation given that there is no contact between the ITAP, the local education group, and the GPE board.

Recommendations

1. Consider further measures to **clarify the language of the guidance** provided to the local education groups on the ITAP and related processes. In particular, ensure that key concepts such as 'enabling factors' and 'gender mainstreaming' are fully and deeply understood. Consider adding other contextual issues (climate change, fragility etc.) to the guidance for consideration.
2. Add tools to the enabling factors package that assist the local education group to consider and reflect on **long term (5 – 10 year) trends** in particular with regards to persistent 'disabling factors' that have prevented progress over time.
3. Strengthen the focus in the enabling factors package on **implementation** by requiring evidence-based reviews of progress against key indicators in previous education sector plans (or a persuasive explanation why this data is not available). Wherever possible, this data should be presented over a long term (5 – 10 year) time frame.
4. Ensure the **policy priority is clearly linked to the bottlenecks** highlighted in the enabling factors.
5. Consider adjusting the ITAP guidance to allow panels to make **non-binding recommendations** which are drawn from the experience of other GPE partner countries and/or experience of panel members.
6. Consider adjusting the ITAP guidance to allow panels to **raise contextual issues** which may lie outside of the enabling factors but are likely to have a significant impact on progress.
7. Consider specific measures to address the frequently occurring **gaps in the data on domestic finances for the education sector**, in particular the lack of public expenditure reviews or equivalent, and the lack of reliable data on spending at the sub-national level.
8. Consider specific measures to address the frequently recurring gaps in the sector coordination analysis, in particular **lack of inclusion of key stakeholders** (parents, teachers, students, local CSOs etc.) in the local education group. These measures might include, among others, promoting the use of the LEG self-evaluation tool.
9. Develop a **research framework** that utilises the extensive knowledge and resources being developed as a part of the ITAP process to identify good practice, long term trends and insights on the key components of transformative change.
10. Provide opportunities for **Chairs and Acting Panel Chairs to meet** quarterly and all panel members to meet once a year to share insights and ensure consistency across panels.

11. **Prioritise women, Global South and experts with French and/or Portuguese language skills** in the next round of recruitment for ITAP members. This will help to fill the gaps in the panel membership identified in this report.
12. Adjust the **expected timeline for producing an ITAP report to 4 weeks** rather than 3 to better manage expectations at country level and up to 5 weeks where translation is required.

Annex – Detailed Analysis and Commentary

Area I: Technical Considerations

ITAP reflections on the assessment approach

Methodology.

A number of refinements were made to the ITAP methodology and guidelines in 2022/23 in response to feedback from local education groups (LEG), the Secretariat's experience from rolling out the operating model in the pilot countries, and the previous Lessons Learned Report prepared in January 2022 by the Co-Chairs of the Provisional ITAP.

The changes included simplified language in order to make the guidance more accessible, especially to non-native English/French speakers; priority considerations bolded in the guidance¹; strengthened language around gender and the right to education; guidance for the Planning section significantly enhanced; requirements for Sector Coordination and Coordinated Finance separated; additional guidance in Data and Evidence to consider root causes and specific barriers for girls and boys; local education groups asked to identify a single priority reform prior to undertaking the enabling factors analysis²; additional bolded guiding considerations in the Data & Evidence and Sector Coordination sections.

These changes were helpful and contributed to the improvement of consistency and the overall quality of the ITAP reports. In particular, the bolded guiding considerations provided a clear focus for the review of the draft reports by the Chair and Acting Panel Chairs and helped to ensure that the key components of the GPE operating framework were addressed in the final reports. Overall, the ITAP found that the changes made the guiding considerations clearer. In particular, the separation of the two components relating to coordination and finance in the Sector Coordination section was found to be helpful. The increased specification of the guidance on gender and human rights was also found to be helpful, especially given that not all panelists are experts in these areas.³ In addition, adding gender analysis to the Data and Evidence section helped panels to think more holistically about gender across the four enabling factors rather than it being mainly or solely considered in the review of the Planning section. This has been important in ensuring panelists take a broad view of gender mainstreaming and also in helping countries to think beyond basic data on gender parity. It was evident that countries are

¹ These are considerations that are always expected to be responded to in the ITAP report (e.g. volume of domestic financing, attention to gender equality, and right to education).

² This is a recent change and has been applied by two countries in the reporting period (Liberia and Uzbekistan) and several more countries since.

³ The ITAP roster includes 6 gender experts and 3 education rights experts.

on a journey with this with some having very comprehensive gender analysis available while others were still focusing largely on gender parity in access and learning.

The panels identified a number of additional fundamental issues that might be considered for inclusion in future iterations of the enabling factors guidance. In particular, most partner countries identified climate change and environmental disasters as critical issues threatening to reverse decades of progress in the education sector. This is likely to increase over time and would merit strong guidance or a requirement to address the issue in the enabling factors materials.

Despite the simplification of the language, there was evidence of continuing confusion about the precise meaning of key terms (even such a fundamental term as 'enabling factors') and there also appeared to be a lack of understanding of the enabling factors prioritization process in many countries which led to inconsistencies in the self-analysis. For example, some countries with relatively strong systems made several of the enabling factors high priority possibly reflecting their ambition to improve further. Whereas other countries with weaker systems were more cautious about listing high priority factors possibly out of a concern that they had limited capacity to take action. It may be worth reviewing the guidance on the priorities and providing more specific criteria to assist partner countries in deciding the prioritization of each enabling factor. There was also some inconsistency in the understanding and definition of the priority education policy priorities. These tended to be worded in very generic terms, often closely matching the Sustainable Development Goal language and did not always reflect the specific national priorities in the education sector plans. It might be helpful to provide specific guidance to countries to ensure that their chosen policy priority is closely linked to the bottlenecks they have identified as part of the enabling factors self-analysis. This will in turn make it easier to see how these bottlenecks are addressed in the partnership compact.

The current range of enabling factors allows the local education group to present the key issues affecting progress in the education sector. They do not appear to be unduly burdensome or difficult for the ITAP to assess in their current form. There may, however, be scope for further clarification of the guidance, including possibly adding diagrammatic illustrations of some of the key concepts, for example to illustrate the flow of data/evidence into monitoring and learning mechanisms to inform strategic planning. I would not recommend reducing the set of considerations or factors as this would risk losing the holistic picture.

There were a number of occasions when the panel felt that the documents provided were either ignoring or addressing only inadequately important contextual factors such as conflict or corruption. These factors are broader than and often external to the education system and therefore are not necessarily covered in the analysis of the enabling factors or the discussion of the partnership compact in the GPE operating model.

Gender and Right to Education.

The strengthened guidance on gender and the right to education has clarified the requirements and helped to ensure that these factors are mainstreamed in panel discussions and assessments. This was particularly useful for panelists who are at different stages in their understanding of these issues. With regards to gender, the panels generally used the gender parity index as a starting point. But this has obvious limitations. Gender needs to be considered in terms of how well both boys and girls are doing in terms of access, learning, dropout, etc. This is often a nuanced picture. For example, there appears to be a trend in many sub-Saharan African countries of the basic education enrolment and completion rates of girls exceeding boys. However, girls remain under-represented in almost all GPE partner countries at the secondary and tertiary levels. This has important policy implications in terms of measures required to increase retention of boys in basic education and also to increase girls' access, retention and achievement in higher levels of education, which should be addressed in the enabling factors package. The gender analysis also needs to consider the social barriers for girls or boys including gendered norms and roles, early marriage, etc. The revised guiding considerations have assisted by explicitly asking the panel to assess whether or not there is a gender analysis but there is probably more that the local education groups could do in this area. The panel discussions often included consideration of intersecting factors such as poverty, marginalization, ethnic group etc. that prevent girls (and in some cases boys) from accessing education, but this was not always fully reflected in the reports due, in part, to the limits of space. On the whole, there was less consideration of gender and other cross-cutting issues in the Sector Coordination and Domestic Financing sections.

With regards to the right to education, the panels considered a country's commitment to international human rights agreements as well as national commitment as evidenced in local laws, acts, policies, etc., and how these are implemented. There were discussions in the panels about the political, social and cultural factors that perpetuate gender inequities and prevent every child from accessing their right to education. The ITAP reviewed these issues in all of their reports. However, there are limits in the extent to which a technical report can make explicit statements about sensitive political issues. Some panelists felt this risked the ITAP being criticized for ignoring key issues and being perceived as simply a 'rubber stamping' process. The ITAP is potentially a powerful platform to raise difficult issues such as poor financial management/corruption and lack of transparency/accountability that need to be addressed at the country level but which the Secretariat or other partners are unable to raise⁴. However, in order to do this effectively the ITAP would require a clear mandate and agreement from all members of

⁴ As one panelist put it: "Politics and the political economy of education funding is always at the heart of domestic finance, and to pretend that it does not exist is absurd."

the GPE partnership as well as access to a broader range of independent evidence such as Universal Periodic Reviews or the World Bank Country Policy and Institutional Assessments. GPE may want to consider the inclusion of these reports as standard in the enabling factors package.

Country self-analysis v. ITAP independent assessment.

The country self-analysis provided a valuable reference point and a rich source of local context to allow the panel to carry out its assessment. The panel noted on several occasions, the willingness of the local education groups to be self-critical and open about the weaknesses and challenges of their education systems. The self-analysis provided the context for the panel review but was not allowed to influence unduly the final assessment. In all cases, the ITAP examined the evidence presented in the self-analysis, and noted where that evidence did not exist or where it contradicted the local education group's assessment. The ITAP did not always accept the local education groups' assessments and disagreed with their prioritization of approximately 20% of enabling factors, choosing either to raise or lower the classification.

The ITAP is asked to assess the status of the enabling factors 'through the lens' of the country policy priorities. As noted above, the country policy priorities were generally broad and generic or, in some cases, focused on a sub-sector such as early childhood education⁵. The Secretariat reported that the discussions on the policy priorities at the country level have been productive and have formed an important part of the compact negotiations to define the focus of GPE support. In practice, the ITAP paid relatively little attention to the policy priorities identified in the self-analysis as they were often too broad to be useful in assessing the gaps in the system. A more focused approach to policy prioritization ensuring the chosen policy priority addresses identified bottlenecks, would add greater value to the analysis of the enabling factors by including measurable targets for progress selected from the education sector plan.

A key component of the theory of change underlying the GPE 2025 Operating Framework is that there are a number of enabling factors which support or impede the transformation of the education system and the achievement of education policy goals. The strength of this approach is that it allows the government, development partners and other stakeholders to target limited resources on the areas where they are likely to have the most impact. However, the weakness of this approach is that it can result in each enabling factor being considered in isolation and prevent the conduct of a holistic assessment. Some local education groups provided an overview at the start of the self-analyses which gave a holistic picture of the challenges and opportunities faced by the sector. However, many countries focused on each enabling factor in isolation from each

⁵ The revised enabling factors analysis template requests countries to identify a single priority reform in the analysis.

other. The ITAP sought to mitigate this risk by ensuring that the panel read as many of the documents relating to all sections as was possible in the time allocated. The panel also reviewed and provided feedback on the draft sections written by other members. However, the constraints of structure and length of the reports meant that there were only limited references to the intersection between the enabling factors and other contextual factors that might affect progress in the sector. This is a significant gap which GPE may want to consider addressing in the next adaptation of the ITAP guidance.

The ITAP has disagreed with country ratings on 31/140 individual enabling factors (22.1% of cases) and in at least one enabling factor in 18/28 (64.3%) of countries. Fifteen of these differences in ratings referred to 5 countries – Liberia, Maldives, Senegal, Tanzania and Uzbekistan – where the ITAP disagreed with the country’s self-analysis in 3/5 enabling factors in each country. In Liberia, the ITAP increased the ratings of 3 enabling factors. In Maldives, Senegal and Tanzania, the ITAP decreased the ratings of 3 enabling factors compared to the country’s self-analysis ratings.⁶ There was an almost even split between the number of times the ITAP’s rating increased and decreased compared to the country’s self-analysis rating. Domestic Finance is the enabling factor that received the highest number of different ratings by the ITAP – 11 times covering nearly 40% of countries, and mostly (8 times) resulting in the ITAP increasing the priority of the rating compared to the country’s self-analysis. In most cases, the ITAP moved ratings up or down one level. In only one case (Lesotho) did the ITAP disagree with the rating by more than one degree – the country had graded one enabling factor (planning) high and the ITAP graded it low. Domestic financing was also the factor that was most commonly assessed by the ITAP as a High Priority (20/28 countries) followed by Data and Evidence (11/28 countries). (Details of ITAP prioritization assessments can be found in Annex 2.)

Partner countries have generally agreed with the ITAP changes. Although in a number of cases, where the ITAP downgraded the rating from high to medium priority, the local education group indicated that, while they accepted the ITAP’s adjustment, they still considered the issue as a high priority and would treat it as such at the country level. In a small number of cases (e.g., Nicaragua, CAR) the local education group provided additional information but this did not result in the ITAP adjusting its rating.

In their review of the draft ITAP report, local education groups have generally responded positively to the gaps and concerns raised by the panel, as well as the progress identified. Some countries (e.g. Nicaragua) seemed to expect the ITAP to provide more detailed recommendations or an action plan for the country to take forward. It was explained that this was beyond the remit of the ITAP. Others (e.g., Comoros Islands, Liberia) understood

⁶ It is noted that Tanzania rated two enabling factors “medium/low” where ITAP rated these “low.”

that they were expected to comment on and suggest changes to the draft report⁷. On the whole, however, most countries accepted that the ITAP report was an independent desk-based report with the assessment based on the evidence provided.

There were concerns expressed by ITAP members that the panel was working somewhat in isolation and did not have a clear understanding of the use of the reports and their impact on compact negotiations at the country level and/or board decisions on award of grants. Whilst cognizant of the needs to avoid imposing additional demands on the time of the members of the local education group and the GPE board, it could be beneficial to all parties to hold an annual call for a discussion of the ITAP process which would be open to country partner representatives and GPE board members as well as ITAP members on a voluntary basis.

Consistency and comparability.

Ensuring consistency, comparability and fairness across country reviews, while at the same time taking account of local country context has been challenging. There is inevitably a degree of judgement required and the Chair / Acting Panel Chairs play an important role as they have the benefit of working across several different countries and varying contexts. The panel discussions frequently included a consideration of what were realistic expectations of a country given the contexts in which it was working. There was an attempt to 'meet the country where it is' rather than setting an ideal standard which would be very difficult / impossible for many countries to meet. This was particularly important in countries which were dealing with serious ongoing conflicts and/or natural disasters. A review of the summary judgements from this period appears to show a level of consistency across countries whilst still taking account of context. The small number of objections or corrections⁸ from the local education groups could be seen as evidence that the ITAP assessments were perceived as fair.

Ensuring consistency across reports was also an important challenge in this phase given the increased number of panelists, some of whom were new to the ITAP and the fact that several panel members participated in only 2 or 3 panels during the year. There was an additional challenge in ensuring consistency between the ITAP Chair and the Acting Panel Chairs who led the panels for just under half of the countries in this review period (13/28 panels - 46.4% of cases).

⁷ This was in spite of consistent guidance from the Secretariat that the LEGs were only requested to correct major factual errors.

⁸ Prior to October 2022, local education groups were invited to review the draft ITAP report and indicate any disagreement with the ITAP rating of the enabling factors and identify any major factual errors that may have affected the ITAP assessment. From October 2022, local education groups have been invited to review the draft report only for any major factual errors.

This challenge was partly addressed through the well-constructed report templates which provided a clear structure and framework for each report and helped to ensure a high level of consistency. In addition, the Chair and the Secretariat ITAP lead maintained an overview of all panels and the Chair reviewed all of the reports. The Acting Panel Chairs also consulted the Chair on a number of occasions to seek guidance on difficult issues or the weight to be given to contextual factors. Overall, consistency of reports and application of the guidelines appears to have been reasonably consistent, although this is an area which will require continuing attention. It may be worth considering scheduling periodic meetings between the Chair and Acting Panel Chairs to compare and share experiences. It would also be worthwhile to reconvene on a less frequent basis all the panelists to consider the question of consistency as well as other trends or lessons from their experience. This would also help to maximize the benefit for the Secretariat and other members of the GPE partnership of the growing pool of expertise and experience in the panelists most of whom (18/22 – not counting the Chair and main Acting Chair) have now completed four or more panels.

Enabling factor packages.

The quality of the enabling factor packages has, on the whole, been high although there was considerable variation and a small number of panels had to request additional information before they could complete their assessments. High quality packages included full documentation of key strategic planning, data, finance and coordination processes as well as supporting evidence for the self-analysis, including external documents and reports from other government departments, in particular finance ministries or their equivalents.

There has been improvement over time in terms of consistency and comprehensiveness of the core and supporting documents both since the first year of the provisional ITAP and during the period covered by this report. The self-analyses have also, on the whole, been reflective and, in some cases, commendably honest and self-critical. This improvement is likely the result of the clearer guidance and the Secretariat gaining experience in conducting their completeness checks and quality assurance. It is understood that these processes often took longer than anticipated but the benefits were evident in the fact that the ITAP in almost all cases felt able to conduct its assessment based largely on the documents provided. The additional external data sources which the panel consulted included World Bank project reports, public expenditure reviews, CPIA ratings, UN and other reports on issues such as transparency, corruption and human rights. External sources were more commonly used in countries which had weak national capacity and/or were affected by conflict or natural emergencies. In addition, the GPE Secretariat supplemented packages with GPE country-level evaluations, 2021 Global Education Summit domestic finance commitments and

UN/Women country gender profiles, where any of these documents existed for a given country.

The most commonly occurring gaps in the enabling factor packages were data on domestic finance expenditure in the form of a medium-term expenditure framework, public expenditure reviews or equivalent, as well as comprehensive data on external financing. Several of the panelists commented on the significant improvement in the quality of the education sector plans over time, which could be ascribed, in part at least, to the engagement with GPE and its members. However, several panels also noted that many of the issues raised in the sector plans had been present for decades. Several panels also noted a shortage of reliable data on implementation of plans in most countries, a lack of timely analysis of data and a scarcity of education sector reviews that were informed by data and evidence. These gaps were even more noticeable at the sub-national level.

At the risk of stating the obvious, the best plans in the world will not bring about system transformation if they are not implemented and monitored. Although the enabling factors guidance allows for this to be addressed in the ITAP reports, this is a widespread and persistent problem which would merit further discussion within the broader GPE Partnership to develop measures to address it. One option might be to include in the enabling factors package tools to enable/require the local education group to assess and report on progress over time against a small number of key indicators (including barriers to access) as part of the Data and Evidence section.

Area 2: ITAP functioning and operations

Operational Support.

The operational support to the ITAP has continued to be very high quality. The ITAP lead in the Secretariat has managed the pipeline extremely efficiently, keeping the Chair, Acting Panel Chairs and panel members informed of country progress in order to manage expectations and demands on time. Overall support from the Secretariat and the World Bank has been effective and sufficient to meet the needs.

The two half day onboarding sessions were well managed and clearly presented. Most panelists reported their satisfaction with the training. Top-up support has also been offered to inexperienced panel members who felt they needed additional explanations. Finally, the Chair and the Secretariat ITAP lead remind panelists in every kickoff meeting about the basic requirements and expectations.

Composition.

The ITAP during this period was initially made up of twenty-seven panelists including the ITAP Chair, with a wide range of experience and expertise in the use of data and evidence; strategic planning; gender analysis; education in conflict and emergencies; human rights and education; sector coordination; and financial analysis. Following the resignation of three panelists in the Spring of 2023 (two men and one woman), there are currently eight women (33%) in the pool of 24 experts. This under-representation of women meant that three reviews had no female panelists due to availability constraints in the required areas of expertise. This is an issue that the Secretariat may want to consider addressing through further targeted recruitment in the next phase of the ITAP. Two of the three Acting Panel Chairs during the reporting period were female and they have chaired a total of ten panels out of the 28 covered in this review period.

With regards to representation from the Global South, 32% of panels (nine panels – Chad, Comoros, Cote d'Ivoire, Ethiopia, Nicaragua, Niger, Senegal, Somaliland and São Tomé e Príncipe) had no southern panelists. It is notable that the majority (7/9) of these were not anglophone countries. This may be a reflection of the relatively small pool of experts from the Global South with French or Portuguese language skills. This may be something to consider in future recruitment rounds.

The Secretariat has provided very effective support to the Chair in forming the panels, providing proposals on first choice and alternates which, as far as possible, reflect a balance of skills, country/regional experience, gender and south/north perspectives. In every case, the final decision on panel composition has been made by the Chair. This is an important factor in ensuring the independence of the panel.

Secretariat inputs.

The Secretariat inputs to the panels have consistently been of a high quality. All ITAP members have welcomed the kickoff meeting with the GPE country team leads as they provide valuable additional detail and context to inform the ITAP assessment. Secretariat staff have been advised to make their presentations factual and avoid giving their own opinions. They have mostly adhered to this advice and the ITAP has not been unduly influenced by non-factual assessments, when they were offered. The Secretariat has provided a number of additional documents either in response to requests from the ITAP or, increasingly, in anticipation of these requests. On the few occasions where a panelist has only been able to attend part of the kickoff meeting or where there have been connectivity issues for a panelist, the Secretariat has recorded the session and shared it with the affected panelist.

The ITAP has found the Secretariat Completeness Check of the enabling factors package to be a useful document which provided a wider context to missing documents, discrepancies in figures/data, and observations/explanations on documents/data that may not be immediately evident to panel members.

The Secretariat comments on draft ITAP reports have been pertinent and provided an extra check to ensure that all bolded guiding considerations have been explicitly addressed. The practice of providing machine translations of Portuguese and Russian documents has been extremely helpful and made reviewing the documents less time-consuming and more efficient.

In addition to the documents mentioned above, the ITAP has found the GPE Country Level Evaluation reports to be a rich source of data and evidence on long-term trends and country-level perspective. Although, the ITAP noted that the value of these evaluations is diminishing as they become increasingly out of date, most of them having been conducted in the period 2018 – 2020.

Panel timelines.

The ITAP has sought to be as flexible as possible and respond to changing circumstances at the country level which may affect the timing of the submission of the enabling factors package for review. This has required the ITAP to adjust its timelines, in particular when the Secretariat has not received adequate responses to requests for documentation from the local education group and/or the quality of documents submitted was not judged of an acceptable quality for the ITAP to review. This has in turn led to delays at the country level to compact negotiations and finalizing arrangements for GPE support. The ITAP has sought to minimize any delay resulting from its review. The table below provides a summary of time taken for the ITAP panel to prepare a draft report for the local education group.

Country	ITAP timeline in weeks ⁹	Country	ITAP timeline in weeks
Rwanda	4.43	Benin	5.00
Senegal	3.71	Bhutan	4.71
Tanzania – Mainland	3.86	Sao Tome and Principe	3.71
Sierra Leone	3.43	Chad	4.00
Zimbabwe	3.71	Cote d'Ivoire	3.86
Tanzania – Zanzibar	3.57	Somalia – Somaliland	5.43
Burkina Faso	4.14	Maldives	4.43
Guyana	9.43	Belize	3.29
Cambodia	4.57	Guinea	5.14
Ethiopia	5.57	Nicaragua	6.00
Lesotho	5.14	Moldova	3.14
Niger	2.71	Uzbekistan	3.29
Somalia – Federal	5.86	Comoros	3.86
Gambia, The	8.00	Liberia	4.29

The typical time taken from the ITAP receipt of the enabling factors package to sending a draft report to the local education group was 4 – 5 weeks. There may be scope to speed up the completion of reports in order to meet the target of three weeks. However, it might also be worth reconsidering the target in order to manage expectations at the country level. In one case (Nicaragua) the ITAP did not feel that it had adequate information to start its assessment and requested further information from the local education group. This was provided and the review was then completed within three weeks. For non-anglophone countries, the need to translate the panel report into French, Spanish or Portuguese, generally adds to the timelines.

Coherency and consistency.

Overall, the scaled-up ITAP has functioned as a coherent unit. The Chair and Acting Panel Chairs have maintained an oversight across the panels and intervened when it was necessary, for example to ensure clarity and conciseness of expression, or to avoid making recommendations that might place an undue burden on the local education group. Chairs, Acting Panel Chairs and, increasingly, panel members have been able to compare across panels as their experience has grown and there were numerous occasions in panel discussions where members cross-referenced other panels in which they had participated. In one or two cases panel members working on the same section

⁹ Time from clearance of the country enabling factors package by the Secretariat to readiness of the draft ITAP report for review by the local education group.

exchanged emails to ensure consistency and inform each other's assessments. This is good practice which could be encouraged and facilitated in other country reviews where the context is comparable. The Chair and Acting Panel Chairs exchanged emails to clarify some points and ensure consistency of approach. Although this was quite limited due to time pressures on all sides. This could be formalized and facilitated by the Secretariat in the next phase of the ITAP, possibly in the form of quarterly calls between the Chair and Acting Panel Chairs with the objective being to ensure consistency and support ongoing lesson learning.

Workload.

The workload on the Chair has increased significantly as a result of the scaled-up ITAP. This has been alleviated by the Acting Panel Chairs who have led eleven out of the twenty-eight panels completed in the period covered by this report plus two panels which were led by the Co-Chair of the Provisional ITAP. This has helped to avoid bottlenecks or delays caused by the Chair's lack of availability and/or engagement with another panel. It has also helped to manage potential conflict of interest for the Chair in two countries where he or his organization had a recent or on-going involvement. The effectiveness of the Secretariat in organizing documents and panel meetings has been a key factor as has the flexibility and responsiveness of the Acting Panel Chairs, in allowing the Chair to perform his functions effectively¹⁰.

Independence.

The independence of the ITAP is fundamental to its purpose of providing an impartial external view on the status of the enabling factors in GPE partner countries. As the Co-Chairs of the Interim ITAP noted in the last Lessons Learned Report, it is essential that the Secretariat avoid any attempt to influence the ITAP. The experience of the past 16 months has been that the Secretariat has been scrupulous in fulfilling this responsibility. This has included, on occasion, reminding the GPE country lead that they were not expected to present their judgements – only the facts. The management of the conflict of interest has been effective and efficient without being inflexible. The Secretariat ITAP lead considers panelists' CVs to identify potential conflicts of interest prior to the initial selection of proposed panel members. Once selected all panel members are required to complete a standard form and declare any additional areas which might lead to a potential conflict. In the period covered by this report, eight panel members (including the Chair and an Acting Panel Chair) declared a potential conflict of interest relating to recent work conducted by themselves or their organizations. These declarations were reviewed by

¹⁰ The recent board decision to make the ITAP optional for a subset of countries is also likely to reduce considerably the workload demands on the Chair and other panel members. Current estimates are that the number of countries for whom the ITAP is compulsory in the next phase will be reduced to approximately twenty countries.

the World Bank Ethics Officer who recommended partial recusals in two cases. The sensitive and thorough handling of this process has greatly enhanced the reputation and trustworthiness of the ITAP.

On the whole, the ITAP process appears to be working well. In addition to the points covered above, there are however a number of areas in which the ITAP process could be further strengthened over the coming months and years.

The panel is asked to avoid making recommendations in its reports. This was in part a response to the experience of some countries at the time of the Provisional ITAP believing that the recommendations were *requirements* which then caused delays in the compact discussions. This request to avoid making recommendations has led, at times, to some rather contorted language in the panel reports referring to 'gaps' and 'needs' without proposing any solutions. While the ITAP is not mandated to make binding recommendations, the ITAP could add value by providing suggestions and recommendations for consideration, based on the experience of other countries and/or the expert knowledge and perspectives of the ITAP panel members. This may be an area to consider in the next iteration of the guidance.

With regards to Sector Coordination, the most frequently noted weakness was the lack of inclusion in the local education groups of key stakeholders such as parents, teachers, students, local CSOs and faith-based organizations, where these were relevant. There was also a tendency in some countries for local education group meetings to be solely or primarily focused on GPE-related activities rather than the wider issues relating to progress in the education sector. The Secretariat has produced a self-assessment tool for local education groups, but it was only used in a small number of countries. A more systematic use of this tool would help to address these weaknesses and could have a transformative effect on the education sector as a whole by increasing the diversity of voices influencing policy and strategy.

A number of panel members have commented that the ITAP process is operating somewhat in isolation. Apart from the local education group comments on the draft ITAP report – which are frequently brief – there is no contact between the ITAP and the two primary audiences for its report: the local education group, and the GPE board. It might be worth considering a low transaction cost approach that allows for some interaction between the ITAP and a selection of local education group members, possibly as part of an annual reflections and development meeting for panelists. Similarly, it might also be worth considering some interaction between the Chair and Acting Panel Chairs with selected members of the GPE board, possibly as part of the discussion of the Annual Lessons Learned report. Both these measures would help to improve the quality and relevance of the ITAP reports by allowing a direct interaction with key constituents. The potential benefits would quickly justify the costs.

Annex 1. List of Countries Completing ITAP Assessments from February 2022–June 2023

1	Rwanda
2	Senegal
3	Tanzania-Mainland
4	Sierra Leone
5	Zimbabwe
6	Tanzania-Zanzibar
7	Burkina Faso
8	Guyana
9	Cambodia
10	Ethiopia
11	Lesotho
12	Niger
13	Federal Government of Somalia
14	Gambia
15	Benin
16	Bhutan
17	São Tomé e Príncipe
18	Chad
19	Cote d'Ivoire
20	Somalia-Somaliland
21	Maldives
22	Belize
23	Guinea
24	Nicaragua
25	Moldova
26	Uzbekistan
27	Comoros
28	Liberia

Annex 2. Summary of ITAP Assessment of Priority Enabling Factors

Country	Data and evidence	Sector Planning	Sector coordination	Domestic financing
Nicaragua	Medium Priority	Medium Priority	Medium & Medium Priority	Medium Priority
Liberia	High Priority	Medium Priority	Medium & Medium Priority	High Priority
Uzbekistan	High Priority	Medium Priority	Medium & High Priority	High Priority
Comoros	High Priority	High Priority	Medium & Medium Priority	High Priority
Guinea	Medium Priority	Medium Priority	Medium & Medium Priority	High Priority
Moldova	Medium Priority	Medium Priority	Medium & Medium Priority	High Priority
Belize	High Priority	Medium Priority	Low & Low Priority	Medium Priority
Somaliland	Medium Priority	High Priority	Medium & Medium Priority	High Priority
Maldives	High Priority	Medium Priority	Medium & Medium Priority	Low Priority
Cote d'Ivoire	Low Priority	Medium Priority	Medium & Medium Priority	High Priority
Chad	Medium Priority	Medium Priority	Low & High Priority	High Priority
STP	Medium Priority	Medium Priority	Medium & Medium Priority	High Priority
Bhutan	Medium Priority	Medium Priority	Medium & Low Priority	Medium Priority
Gambia	High Priority	Medium Priority	Medium & Medium Priority	Medium Priority
Benin	High Priority	Medium Priority	Medium & Medium Priority	Medium Priority
FGS	High Priority	Medium Priority	High & High Priority	High Priority
Niger	Medium Priority	Medium Priority	Low & Medium Priority	High Priority
Lesotho	High Priority	Low Priority	Medium & Medium Priority	High Priority
Ethiopia	High Priority	Medium Priority	Medium & High Priority	High Priority
Cambodia	Medium Priority	Medium Priority	Low & Medium Priority	High Priority
Burkina Faso	Medium Priority	High Priority	Medium & High Priority	High Priority
Guyana	Medium Priority	Medium Priority	Low & Low Priority	Medium Priority
Zanzibar	Medium Priority	Medium Priority	Medium & High Priority	High Priority
Zimbabwe	Low Priority	Medium Priority	Low & Medium Priority	High Priority
Sierra Leone	High Priority	Medium Priority	Low & Medium Priority	High Priority
Tanzania	Medium Priority	High Priority	Low & Low Priority	High Priority
Senegal	Low Priority	Low Priority	Medium & High Priority	Medium Priority
Rwanda	Medium Priority	Medium Priority	Medium & Medium Priority	High Priority

Annex B – Secretariat Reflections on ITAP Recommendations

The Secretariat appreciates the useful observations in the lessons learned report and would like to recognize the ITAP Chair and Acting Panel Chairs for their leadership, and the full ITAP for their professionalism and responsiveness.

Overall, we welcome the recommendations for improvements to the enabling factors process. The ITAP's recommendations along with other inputs, including the findings of the Thematic and Country-Level Evaluation, will be a valuable input to future adaptations. We welcome ITAP's observation that the simplified guidance introduced in February 2023 was helpful and thank the panel members for their agility in adapting to the revised guidance. We also note some inherent tensions between recommending more information to conduct a desk-based review against a standard set of questions, versus the country dialogue and response captured in the partnership compact, and the ongoing need to consider transaction costs. A further tension is the need to support partner countries in accelerating progress in the short to medium term (through a priority reform), while simultaneously strengthening those conditions that will underpin longer-term sustainable systems (the enabling factors). Recommendations from the ITAP will be useful as GPE further learns and adapts the approaches to working with country partners.

Most if not all countries are already far advanced with their enabling factors analysis under the GPE 2025 operating framework. Therefore, opportunities to make further improvements to the process in the current funding period are limited in practice, but lessons will be considered as we transition from one strategy period to the next. Any improvements will be carefully considered to ensure transaction costs are as light as possible and justified.

Below are some reflections on the specific recommendations in the report.

ITAP Recommendations

1. Consider further measures to **clarify the language of the guidance** provided to the local education groups on the ITAP and related processes. In particular, ensure that key concepts such as 'enabling factors' and 'gender mainstreaming' are fully and deeply understood. Consider adding other contextual issues (climate change, fragility etc.) to the guidance for consideration.

Secretariat Reflection:

- Regional and national workshops and other partner events have gone some way in supporting members of the partnership in understanding key concepts. These experiences will support further development of guidance and core communication products in the future. On gender mainstreaming, work is ongoing and a [paper on a partnership approach to gender equality](#) was published in September. It responds to feedback from country and global GPE partners to clarify how the ambition for 'gender hardwiring' set out in GPE 2025 is delivered through the partnership

approach. [The Secretariat also regularly engages with countries on gender hardwiring and the Girls' Education Accelerator when sharing comments on the draft compact and concept notes].

Regarding climate change, an urgent topic for most countries, the screening questionnaire in the enabling factors analysis asks countries whether they have preparedness plans for maintaining the provision of core educational services during crises and adapting the education system to long-term changes like climate change. In addition, the Secretariat has recently developed a [framework of 7 dimensions to consider when planning for climate-smart education systems](#) and is backing up this approach with technical advisory services through a dedicated Strategic Capability.

For a sub-set of countries falling under GPE's FCAS framework, an enabling factor analysis is generally not conducted (although relevant elements of the enabling factors will be considered). Other countries experiencing situations of crisis or fragility could be invited or encouraged to provide additional information by way of context, but this would need to be weighed against the additional transaction costs. The screening tool in the enabling factors guidance was intended to be relatively light, as an input into further dialogue. We would expect the partnership compact and subsequent programming to reflect the specific delivery bottlenecks that might need addressing in such circumstances.

2. Add tools to the enabling factors package that assist the local education group to consider and reflect on **long term (5 – 10 year) trends** in particular with regards to persistent 'disabling factors' that have prevented progress over time.

Secretariat Reflection:

- In the report, ITAP makes this recommendation in the context of addressing widespread challenges with implementing and monitoring of the sector plan. ITAP suggests the possibility of including in the enabling factors package tools to enable/require the local education group to assess and report on progress over time against a small number of key indicators (including barriers to access) as part of the Data and Evidence section.

The observation on long term trends with regards to persistent 'disabling factors' is pertinent, and ideally should be considered as part of country monitoring processes such as the joint sector reviews. National and decentralized monitoring can be supported by the system capacity grant. Country led dialogue when developing the partnership also compact provides an opportunity to identify and address stubborn bottlenecks that are likely to have an impact on delivery of the priority reform in the short to medium term.

From a transactions cost perspective, there are clearly risks to adding tools,

especially when many pre-existing sources and knowledge at the country level may be adequate for responding to this concern. Countries also have access to grant support in order to use relevant diagnostic tools. As such we are unsure whether there is value in adding tools to the enabling factors package, but recognize the need to support ongoing and deeper consideration of the persistent bottlenecks to improved delivery.

3. Strengthen the focus in the enabling factors package on **implementation** by requiring evidence-based reviews of progress against key indicators in previous education sector plans (or a persuasive explanation why this data is not available). Wherever possible, this data should be presented over a long term (5 – 10 year) time frame.

Secretariat Reflection:

- We agree that monitoring and reporting on progress is key. The independent evaluation of GPE 2020 showed the implementation of sector plans was a significant issue. The partnership compact was developed in part to support countries to focus on a strategic priority (consistent with the ESP) and drill down on the bottlenecks to implementation. The compact guidelines suggest that progress is monitored using a limited number of indicators which can allow countries to assess progress along the delivery chain of the intended reform, and course correct where needed. As the ITAP has noted, some partnership compacts are too broad, and there are also limitations in the monitoring section of the compacts. The mid-term review of compacts will provide an opportunity to further strengthen the focus on implementation, including considering the types of indicators for medium- and longer-term monitoring, and how these connect with existing policy cycle monitoring. Guidance for this is under development.

The screening questionnaire in the enabling factors analysis template already requests countries to submit a recent education sector analysis and the latest annual sector implementation reports or joint sector review aide memoires, or equivalent. Where such mechanisms or reports do not exist, ITAP may flag it as a high priority challenge, to be addressed in the partnership compact. We recognize that issues not assessed as a high priority challenge by either the ITAP or the country may not be addressed in the compact. The Secretariat will consider how it can strengthen the focus on implementation, while recognizing that the enabling factors for systems transformation are about ensuring robust frameworks, policies and mechanisms are in place rather than how these are implemented.

4. Ensure the **policy priority is clearly linked to the bottlenecks** highlighted in the enabling factors.

Secretariat Reflection:

- An emerging reflection from the Secretariat's country engagement suggests that it is more useful/feasible to consider implementation bottlenecks with respect to the priority reform. This allows countries to consider bottlenecks pertaining directly to the priority reform, including the enabling factors, but also identify more contextual bottlenecks outside the enabling factors framework (ITAP recommendation 6). Maintaining progress in the enabling factor areas is of course important for supporting and sustaining any reform effort, but the contextual approach is allowing countries to identify and monitor more country specific steppingstones that intersect with the priority reform (for example addressing domestic financing through actions on the teacher payroll, or equitable funding formula).
- The identification of a policy priority (priority reform) is linked to where the country sees potential to drive system transformation. The country is then asked to analyze what the specific bottlenecks are in the respective enabling factors that would impede the successful implementation of the selected priority reform. Enabling factors that are assessed as critically challenging are identified as high priority and the bottlenecks in the related enabling factors are addressed in the partnership compact. At the time of the ITAP review the partnership compact is still under discussion at country level. The GPE 2025 model asks countries to first determine the goal/reform and then consider the bottlenecks in the four enabling factors to support the implementation of the policy priority and narrow them down. In practice though, and as ITAP observes in its report, the policy priority is often quite broad, which makes it more challenging to identify which bottlenecks are most important to resolve. Strengthening prioritization has been identified as an area for further learning and development.

5. Consider adjusting the ITAP guidance to allow panels to make **non-binding recommendations** which are drawn from the experience of other GPE partner countries and/or experience of panel members.

Secretariat Reflection:

- At present, ITAP panels are asked to refrain from making recommendations in their reports and instead frame recommendations as gaps or challenges, leaving it to the country whether and how to address these. There are pros and cons to ITAP making recommendations to countries. One risk is that recommendations, even if explicitly non-binding, can still be perceived as such at country level where the country feels it needs to act on the recommendation in order to receive funding. This undermines country leadership and ownership and complexifies the operating model. Another

risk is that ITAP by the nature of its limited desk-based review may not be in a position to make fully informed recommendations. At the same time, the Secretariat recognizes that countries may benefit from ITAP's expertise.

The Secretariat will discuss how the value of ITAP to countries could be increased as part of its ongoing dialogue on how to increase the usefulness of ITAP reports.

The first phase of the thematic and country-level evaluations will provide an assessment of the current and potential value of the ITAP in GPE support for system transformation in partner countries.

6. Consider adjusting the ITAP guidance to allow panels to **raise contextual issues** which may lie outside of the enabling factors but are likely to have a significant impact on progress.

Secretariat Reflection:

- ITAP's assessment of the enabling factors is expected to be contextualized, so elements of context will naturally come up in its assessments. Also while issues may appear outside the enabling factors, most could likely still be linked to the enabling factors. For example, issues of political interference with data can be flagged under Data & Evidence; accountability issues under Efficiency of Public Expenditure; human rights violations are likely to affect the right to education under the Gender-Responsive Planning enabling factor. The Secretariat will clarify this in the ITAP Guidelines.

7. Consider specific measures to address the frequently occurring **gaps in the data on domestic finances for the education sector**, in particular the lack of public expenditure reviews or equivalent, and the lack of reliable data on spending at the sub-national level.

Secretariat Reflection:

- This is a long-standing and well-known issue that should be flagged through the Data and Evidence enabling factor and the Domestic Finance enabling factor. ITAP can flag it as a significant shortcoming that deserves to be addressed in the partnership compact. The country can then identify the most relevant and sustainable pathway to develop the capacity to produce timely and reliable finance data, as has been seen in recent partnership compacts (e.g., Somalia, Cambodia, Democratic Republic of Congo). It is also important to work with countries to demonstrate how better finance data can improve overall planning and education outcomes. Better data is also a key component of effective MoF engagement and budget advocacy. Accurate completion of the domestic financing matrix (plus the provision of verification) is often the most challenging aspect of completing the enabling factors analysis (it was the same in the previous model), which is why it is important to develop country-specific and feasible approaches to improving this.

There are a number of existing tools that can be deployed to fill gaps in finance data, and which the system capacity grant could fund, including public expenditure reviews (PER) and the national education accounts (NEA) methodology (NEA development was funded by GPE).

Development of a robust financial management information system (FMIS) would also support the production of better data. This could be supported using system capacity grant funds. We have already seen in at least one country that development of FMIS capabilities has been identified as a trigger; this approach may be replicated elsewhere.

Good data is only sustainably produced where there is demand for it. In addition to direct work with national governments and ministries of education, GPE will support civil society organizations through Education Out Loud to advocate for more holistic and reliable financing data.

8. Consider specific measures to address the frequently recurring gaps in the sector coordination analysis, in particular **lack of inclusion of key stakeholders** (parents, teachers, students, local CSOs etc.) in the local education group. These measures might include, among others, promoting the use of the Secretariat's LEG self-evaluation tool.

Secretariat Reflection:

- We appreciate the recommendation and have noted that the enabling factors analysis exercise and partnership compact development process have indeed been instrumental in some countries to encourage local education groups to undertake the self-assessment or other forms of reviews of their coordination mechanisms, as these figure as part of the improvement strategies in their partnership compacts. The Secretariat is ready to support interested countries in introducing the tool for uptake and will also update the related [*Principles towards effective local education groups*](#), which provides guidance for addressing coordination challenges, including but not limited to inclusion and engagement issues, and will provide country examples of good practices.

As a partnership, engagement in dialogue of all partners is critical and the Secretariat continually engages with country partners to actively promote this. At the Secretariat level, we have engaged in regular outreach to teacher organizations during our review of the draft partnership compact to check their participation and inclusion. A series of [technical and advocacy resources](#), and a [partners' portal](#) have been developed to strengthen inclusion and engagement in coordination mechanisms, which both cater for each key category of partners, one by one.

Financial and technical support through [Education Out Loud](#) will also continue to contribute to expanding inclusion of key stakeholders. All GPE processes require an inclusive approach and GPE 2030 will continue this focus.

Based on experience and participant feedback, the Secretariat is also considering creating a series of webinars targeted coordinating agencies to allow exchange of experiences across agencies which take up this role.

9. Develop a **research framework** that utilises the extensive knowledge and resources being developed as a part of the ITAP process to identify good practice, long term trends and insights on the key components of transformative change.

Secretariat Reflection:

- As part of the Board-agreed monitoring, evaluation, and learning work program, a series of thematic and country-level studies are underway and will be implemented over the next three years. As part of their research, they will identify promising practices and assess the extent to which components of GPE's operating model, including the enabling factors analysis and ITAP, contributed to transformative changes in partner countries.

The Secretariat is also developing thematic repositories based on the enabling factors analysis, ITAP reports, partnership compacts and other data and information. The repositories represent a rich knowledge base which already serves different purposes, including meta-learning, extracting country examples, content for external engagements, and distilling trends and lessons, good practices. The information is, for instance, being used to inform regional country partner meetings and to create learning contents for constituency meetings.

10. Provide opportunities for **Chairs and Acting Panel Chairs to meet** quarterly and all panel members to meet once a year to share insights and ensure consistency across panels.

Secretariat Reflection:

- The Secretariat is pleased to facilitate these virtual meetings. Discussions with the ITAP Chair are underway.

11. **Prioritise women, Global South and experts with French and/or Portuguese language skills** in the next round of recruitment for ITAP members. This will help to fill the gaps in the panel membership identified in this report.

Secretariat Reflection:

- The Secretariat agrees that the next round of recruitment, under GPE 2030, should continue to improve balance in these areas. Regarding French panels, the Secretariat has begun to machine translate the enabling factors package so that all ITAP members can serve on these panels in principle and rotation of members is enhanced.

12. Adjust the **expected timeline for producing an ITAP report to 4 weeks** rather than 3 to better manage expectations at country level and up to 5 weeks where translation is

required.

Secretariat Reflection:

- Four weeks is indeed more realistic and any reduction in the ITAP timeline will be modest to safeguard quality. The most time-consuming phase in the enabling factors process is in the lead-up to the ITAP phase with countries collecting required documents to inform and support the enabling factors analysis. For the next funding period, the Secretariat is considering developing a portal. Here, the Secretariat will store data for each country partner, for their use in assessing progress on the enabling factors in order to meet the objectives of the mid-term review, and also to support the overall monitoring of GPE's results.

Annex C – Terms of reference for the ITAP Lessons Learned Report

Terms of Reference ITAP Report February 2022 – June 2023

Background and Objective

One feature of the GPE 2025 Operating Framework is the Independent Technical Advisory Panel (ITAP), which provides an assessment of country status against the four enabling factors. The ITAP assessment feeds into country dialogue on system transformation and bottlenecks and informs the development of a partnership compact of the country around a priority reform to catalyze transformation. The assessment also informs Board decision-making on GPE grant financing of the reform prioritized in the compact.

The ITAP was piloted from June 2021 through June 2022. A lessons learned report informed the design of the permanent ITAP, for which the [terms of reference](#) were approved by the Board in March 2022. The terms of reference call for an annual lessons-learned report, including reflections on the functioning of the ITAP, its independence and compliance with conflict-of-interest procedures, and the approach to assessment of the enabling factors. The report is shared with the Board and its committees, as appropriate.

The report is part of the GPE learning framework on the GPE 2025 operating model and is expected to contribute to GPE's commitment to learn and adapt throughout this strategic planning cycle.

Given that the lessons learned report of the provisional ITAP covered the period June 2021 through January 2022 and aiming at reports covering the fiscal year going forward, this first report of the permanent ITAP will cover both the period February 2022 through June 2022 under the provisional ITAP and the period July 2022 through June 2023 under the permanent ITAP

Guiding Questions

Area 1: Technical Considerations

ITAP reflections on the assessment approach

- **Methodology.** Have the refinements to the methodology – including clarifying certain language and highlighting those guiding considerations that should always be covered in the ITAP's assessments¹ – improved the consistency and

¹ These refinements refer to those first reflected in the July 2022 ITAP Guidelines - which are not reflected in the Guide

quality of the ITAP assessment reports? If so, how?

Given time, data source, and other limitations of the ITAP approach, should the methodology be simplified to focus on a limited set of (components and) guiding considerations, or would it be better to keep a broad selection available?

- **Gender and Right to Education.** Is the methodology for these areas clear and applicable? Have these areas been mainstreamed in panel discussions and assessments?
- **Country self-assessment v. ITAP independent assessment.** ITAP has noted the usefulness of the country analysis in supporting a contextualized assessment by the ITAP. Does ITAP see any risk in the country analysis unduly influencing the ITAP assessment? If so, how can it be mitigated?

ITAP is asked to assess enabling factors through the lens of the country policy priority identified in the country self-assessment and in the context of system transformation. To what extent has this lens been consistently applied and has it been helpful to or impaired the assessment of bottlenecks to systems transformation?

To what extent have country self-assessments and ITAP assessments been successful in producing a holistic assessment.

To what extent have country analyses and ITAP assessments aligned/differed in terms of both challenges identified and ratings assigned? How have country partners reacted to ITAP reports?

- **Consistency and comparability.** Considering both the contextualized approach and the principle of fairness, to what extent have panels considered and assigned similar ratings in countries with similar challenges?

How has ITAP viewed the need for and ensured consistency across reports, considering that “guiding considerations” are mostly optional, that the pool of experts is bigger, and considering that panels are not solely led by the ITAP Chair?

- **Enabling factor packages.** What has been the overall quality of enabling factor packages, including supporting documents as well as the country analyses? Is the overall quality improving over time? Have packages been comparable? To what extent has ITAP felt the need to consult external data sources? Which have these

for Enabling Factors Analysis as not substantive. Prior to these refinements, light revisions to the Guide for Enabling Factors Analysis were issued in November 2021, and which could also be discussed by ITAP in this report. More substantive revisions to the methodology will be forthcoming in the fall of 2022 but these will only impact countries in Cohort 5 and beyond and may not affect this report.

frequently included and to what extent have they substantially impacted the ITAP assessment?

Area 2: ITAP functioning and operations

- **Operational Support.** Have ITAP members been adequately onboarded with a good understanding of expectations? Has overall Secretariat/WBG support been sufficient.
- **Composition.** Is the pool of expertise sufficient in terms of technical representation and diversity? Have country panels met expectations in terms of composition, e.g. country/regional expertise, gender balance, global south representation, expertise in fragile and conflict affected states as applicable? Has Secretariat support in identifying ITAP members to serve on specific country panels been adequate, efficient, and appropriate?
- **Secretariat inputs.** Have the kick-off meetings been consistent in terms of the level of information provided by the Secretariat? To what extent have “Other Documents” provided by the Secretariat to complement enabling factor packages been helpful to the ITAP? Have these documents been appropriate? What has been the value add of the Secretariat Completeness Check in the package and is there any risk of undue influence on the ITAP assessment? How useful and appropriate have Secretariat comments on draft ITAP reports been?
- **Panel timelines.** Panels are assigned shortly before the enabling factors package is ready for ITAP review. Has this approach been successful/well received by the ITAP? Have panels been able to maintain timelines?
- **Coherency and consistency.** Has the scaled-up ITAP been able to function as a coherent unit. How has the ITAP Chair been able to provide leadership/oversight given panels are not necessarily chaired by the ITAP Chair. Have panels operated largely in silos or have there been opportunities for ITAP members to connect between panels? How have Acting Panel Chairs collaborated to foster greater consistency between assessments?
- **Workload.** What impact has the scaled-up ITAP had on the role of the Chair? Has the Acting Panel Chair approach been efficient in managing workflow? Are there any transaction costs that can be reduced and/or efficiencies gained?
- **Independence.** What are ITAP’s reflections on its continued ability to serve in an independent and impartial manner and on the approach to management of conflict of interest? Has Secretariat support been appropriate?
- Are there other observations on what has worked well or what could be improved?

ITAP observations and recommendations

- Based on the ITAP reports and discussion of Area 1 and 2, are there recommendations that the ITAP would like to share?

Report Structure

The report is expected to be around 15 pages, including a 1–2–page executive summary, and should contain key observations and recommendations. It is recommended to include practical examples and cases illustrating panel experiences, rather than discussing any perceived trends in countries' progress, which are captured in the annual GPE Results Report.

Approach/Staffing

The report is included in the TOR of the ITAP Chair, with the provision of 20 days to support this task. The Chair may engage other ITAP members in providing inputs to the report.

Timeline

Activity	Date
Chair shares draft report with Secretariat for comment	August 15, 2023
Secretariat provides comments	August 30, 2023
Chair submits final report to Secretariat	September 15, 2023
Report is shared with Performance, Impact and Learning Committee	October 1, 2023
Secretariat shares report with the Board	November/ December 2023