Terms of Reference for the Independent Steering Committee
for the Evaluation of the Global Partnership for Education

September 6, 2013

1. INTRODUCTION

1.1 In line with international best practice, the Board of the Global Partnership for Education (GPE) agreed to the appointment of an Independent Steering Committee (ISC) to provide advice on evaluation approaches and practices at all levels and guide and direct the overall design and implementation of the forthcoming evaluation of the GPE (BOD/2011/11-DOC05).

1.2 This document sets out the terms of reference for the Independent Steering Committee. The ISC will play an intermediary role between the Board of the GPE and the team contracted to undertake the evaluation. It will have responsibility for ensuring the quality, integrity and timeliness of the evaluation and preserving the independence of the Evaluation itself.

2. APPOINTMENT, COMPOSITION AND GOVERNANCE OF THE INDEPENDENT STEERING COMMITTEE

2.1 The ISC will be appointed by the Board of the GPE in consultation with the GPE Secretariat. Members of the ISC will be contracted as independent consultants and paid from the evaluation budget. They will receive administrative and financial support from the M&E team of the GPE Secretariat, with the understanding that the independence of the ISC and the Evaluation Contractors will be preserved in all interactions with the Secretariat.

2.2 The ISC will be comprised of at least six individuals with expertise in the areas of international educational development, aid architecture and aid effectiveness, and
evaluation practices of international development programs. Proposed members will be selected to reflect a diversity of institutional experience, and varied geographical and methodological expertise.

2.3 **Appointment of Chair.** After its appointment, the ISC will appoint a chair selected by consensus. The Chair’s tasks shall include all direct communication with the Evaluation Contractor, the Board of Directors, and the GPE Secretariat on behalf of the committee; circulation of documents for appraisal and comment by the ISC; organization and chairing of ISC meetings; organization and chairing of meetings with the Evaluation Contractor and participation in meetings with stakeholders. The Chair will be consulted by the GPE Secretariat before invoices for payment and reimbursement from the Evaluation Contractor and ISC members are approved.

2.4 **Decision-making.** No substantive decisions shall be taken by the Chair without advice and consent of the full ISC. When ISC decisions cannot be made by consensus, they will be arrived at by majority vote, with the Chair holding an additional vote in the case of a tie.

2.5 **Reporting.** The ISC will be an independent body reporting to the Board of the GPE. It will provide quarterly updates to the GPE Secretariat and the Board of GPE on the progress of the evaluation. The ISC will also provide additional information when required by the evaluation process or when requested by the Board of GPE.

2.6 **Logistics, Costs and Administrative Arrangements.** The GPE Secretariat shall be responsible for establishing the contracts for the steering committee members, and will handle reimbursements for travel and other costs, based on an agreed budget and estimated level of effort. The M&E Team will also provide logistical support to the ISC. However, as noted above, the ISC shall operate independently and at arm’s length from the M&E Team and the GPE Board which shall not interfere with the content and direction of the evaluation itself once the Evaluation Concept Note is approved by the Board.

3. **OVERARCHING ROLES AND RESPONSIBILITIES OF THE INDEPENDENT STEERING COMMITTEE**

3.1 The overarching role of the Independent Steering Committee is to:

- Provide advice and guidance to the GPE Board about the overall design and process for implementing the GPE Evaluation.
- Act as the primary oversight body in relation to the implementation of the
evaluation, ensuring timeliness of all deliverables and adherence to the TOR.

- Ensure the overall quality of the evaluation design and the implementation of the evaluation, including theoretical and methodological integrity, the appropriateness of the evidence selected; the accuracy and warrant for its findings; and the framing of findings and recommendations in a constructive and objective manner.
- Ensure the independence of the evaluation process.
- Act as an independent monitor of input from stakeholders at key junctures in the evaluation process: in particular, in consultations with stakeholders at the design phase; in consultations with stakeholders after the completion of draft country studies; and in the consultations with stakeholders that will occur at the completion of the draft evaluation synthesis.
- Provide quarterly updates and information on progress to the GPE Board of Directors and the GPE Secretariat.
- Release the final evaluation synthesis to the Board of Directors.
- Make initial recommendations to the GPE Board of Directors about the dissemination and use of the evaluation report.

3.2 NB. While the ISC will have the authority to request revisions in the evaluation synthesis report and the sub-studies in the evaluation, such revisions shall only be requested based on an objective assessment of the accuracy and validity of the findings and the constructive presentation of the report’s final recommendations. The Evaluation Team must be ensured the right to finalize its recommendations without interference. In the event of any outstanding disagreements on validity or tone of the findings and recommendations, these may be captured in a note from the ISC included as an appendix to the final Evaluation Synthesis Report prepared by the Evaluation Contractors.

4. **DETAILED DUTIES AND TASKS ASSIGNED TO THE STEERING COMMITTEE BY EVALUATION PHASE**

4.1 **Phase I (Pre-evaluation design and start-up)**

- Develop a draft Concept Note for consultation with the Board and other stakeholders. The Note will summarize key objectives, principals, methodological issues, scope, costs and a high level timeline for deliverables.
- Based on the Concept Note approved by the Board of Directors, write the Terms of Reference, the Request for Expression of Interest, and the Request
for Proposals that will be used in the competitive bidding process for the selection of the Evaluation Contractor.

- Work with the GPE Secretariat to ensure that the requests are widely circulated and to respond to expressions of interest by providing additional information.
- Lead the shortlisting of bidding firms and the ultimate selection of an evaluation contractor based on rigorous and objective vetting of the proposals submitted in response to the RFP. The final recommendation should be based on a face-to-face meeting with a shortlist of potential contractors.

NB. The GPE Secretariat shall be responsible for preparing the final contract with the Evaluation Contractor, and the timely provision of financial reimbursements as they are due. The GPE Board will mandate the selection of the Evaluation Contractors and GPE Secretariat will hold legal documents related to the execution of the evaluation.

4.2 Phase II (Inception)

- Provide written feedback to the Evaluation Contractor on an initial inception report/evaluation design ensuring that it meets the highest standards for rigor.
- Act as an objective observer in consultations seeking input from stakeholders, the Board, the Secretariat, and GPE partners into the evaluation design, ensuring that the evaluation design is widely understood and endorsed by members of the partnership.
- Oversee finalization of the evaluation design and work plan by the Evaluation Contractor, including through a face-to-face meeting with the Evaluation Contractor.
- Comment on the selection of case studies and other evaluation sub-components, including the preparation of a framework for the selection and implementation of country case studies.
- Ensure that a clear timeline with precise deliverables is in place to ensure appropriate implementation of the evaluation.
4.3 Phase III (Implementation)

- Mandate and review quarterly progress reports from the Evaluation Contractor.
- Review and comment in writing on intermediate deliverables and drafts according to the timeline established in the final evaluation design.
- Prepare quarterly reports on the progress of the evaluation for the GPE Board and Secretariat.
- Provide additional information when required by the evaluation process or when requested by the Board of GPE.
- Organize and attend a quarterly meeting with the Evaluation Contractors during the course of the Evaluation (may be face to face or using distance communications).

4.4 Phase IV (Completion)

- Provide a full written review and comment on the drafts of the deliverables provided by the Evaluation Contractor (including the country case studies and other sub-studies for the Evaluation). The goal of these reviews is to ensure that each component study has adequately answered the evaluation questions; provides sufficient evidence to warrant its findings; and presents findings and recommendations in a constructive mode conducive to organizational learning.
- Act as the objective observer of consultations with stakeholders at the national level when country level studies are presented to local education partners, for validation and comment.
- Act as an independent observer at the presentation of the draft Evaluation Synthesis document to the GPE Board for validation and comment.
- Make suggestions to the Evaluation Contractor for revision and organization of its findings into a final synthesis of the evaluation to be presented to the Board.
- Review and comment on the findings and recommendations of the final synthesis report.
- Work with the Evaluation Contractor to ensure a final draft is ready for translation in time for the November 2016 GPE Board of Directors meeting.
• Recommend the release of the final report and provide a final report to the Board of Directors on the integrity and quality of the evaluation, including any limitations.

5. BUDGET AND SCOPE OF WORK FOR STEERING COMMITTEE MEMBERS

A full work plan and budget for the steering committee will be developed alongside the final Terms of Reference for the Evaluation. It will include all costs related to the hiring of the Steering Committee members, and their travel. Estimated total costs are around $337,000. This cost is in line with expenses of Evaluation Oversight Committees used in other evaluations of global partnerships.1

1 For example, the evaluation of the Climate Investment Funds included the costs of an Evaluation Oversight Committee and a Technical reference group with a combined budget of $350,000.
## Estimated Costs of the Independent Steering Committee

<table>
<thead>
<tr>
<th>Evaluation Phase</th>
<th>Deliverables</th>
<th>Total Days and other Resources</th>
<th>Total Days</th>
<th>Other Costs</th>
</tr>
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<tbody>
<tr>
<td><strong>Phase I</strong></td>
<td><strong>Pre-evaluation start up</strong></td>
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<td></td>
<td>Concept note for Board of Directors and Terms of Reference for the ISC,</td>
<td>5 days Up to an additional 15 days for lead drafters = 30 + 15 days = 45</td>
<td>45</td>
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<td></td>
<td>Preparation of the Terms of Reference and RFP for the Evaluation Contractor, including online and in person consultations and presentation to the GPE Board.</td>
<td>Up to 15 days for the lead drafters and 2 days for review by 6 team members = 15 + 12 days = 27</td>
<td>27</td>
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<td></td>
<td>Selection of shortlist of contractors preparing proposals and selection of final Evaluation Contractor</td>
<td>5 days for all members; 12 days chair = 25 + 12 days = 37</td>
<td>37</td>
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<td></td>
<td>Travel and accommodation costs for initial team meeting in DC; for Chair to make presentation to the GPE board in November 2013; and for face-to-face selection of short listed contractors, ISC meeting in DC with possible distance connection to contractors.</td>
<td>$20,000</td>
<td>$20,000</td>
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<tr>
<td><strong>Phase II</strong></td>
<td><strong>Inception</strong></td>
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<td></td>
<td>Briefing of the selected evaluation Contractor; Review of Evaluation Design/Inception Report; Participation in the stakeholder consultation on Design and Theory of Change</td>
<td>15 days chair 5 days other team members = 25 + 15 days = 40</td>
<td>40</td>
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<td></td>
<td>Travel and logistical costs for ISC members participating in inception meeting with the Evaluation Consultants</td>
<td>$25,000</td>
<td>$25,000</td>
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<tr>
<td><strong>Phase III</strong></td>
<td><strong>Implementation</strong></td>
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<td></td>
<td>Review and comment on interim deliverables and ensure their timely submission; prepare quarterly reports on progress to the Board; attend quarterly meetings (virtual) with the Evaluation subcontractor</td>
<td>50 days for the chair 10 days for each steering committee member = 100 days</td>
<td>100</td>
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<td></td>
<td>Travel to board meetings for chair</td>
<td>$10,000</td>
<td>$10,000</td>
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<tr>
<td><strong>Phase IV</strong></td>
<td><strong>Completion</strong></td>
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<td></td>
<td>Comment on all final drafts of deliverables and final synthesis report (in teams of 2). Advise on final dissemination of the report</td>
<td>40 days for the chair 10 days for 5 team members = 90 days</td>
<td>90</td>
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<td>Observation of the presentation of country level studies to local education groups (1 team members)</td>
<td>3 days for 1 team member in 7 countries = 21 days</td>
<td>21</td>
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<tr>
<td></td>
<td>Observation of meeting for input from global level partners</td>
<td>1 day for 6 team members 6 days for Chair = 12 days</td>
<td>12</td>
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<td>Travel for Presentation of draft country studies and for final report to the Board and for facilitation meetings</td>
<td>1 team member to each of 7 countries @ $5,000/trip Chair to final presentation @ $5,000</td>
<td>$40,000</td>
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<td><strong>Total</strong></td>
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<td>372 days @ $650/day</td>
<td>$241,800</td>
<td>$95,000</td>
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<td><strong>GRAND Total</strong></td>
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<td>$336,800</td>
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ANNEX 2

Resumes of Proposed Members of the Independent Steering Committee

1. Birger Fredriksen ........................................................................................................13
2. Rasmus Heltberg........................................................................................................17
3. Karen Mundy ..............................................................................................................22
4. Moses Oketch ............................................................................................................28
5. Pauline Rose .............................................................................................................34
6. Liesbet Steer .............................................................................................................37
Curricula vita for Birger Fredriksen

Date of birth: December 21, 1942

Nationality: Norwegian

Education: M.A. (Cand. Oecon) in economics (1969) from the University of Oslo, Norway (focusing on macro-economic planning and econometrics). Ph.D. in Philosophy (1983) from the University of Lancaster, UK (focusing on educational planning in developing countries).

Employment:
- Norwegian Ministry of Finance: Consultant (January – September 1967). Participated in team preparing long-term projections for the Norwegian economy;
- University of Oslo: Research assistant (September 1967 – February 1968). Worked on models for projecting demand for skilled manpower in OECD countries;
- OECD, Center for Education Research and Innovation (CERI), Paris, France: Education Research Fellow (October 1969 – September 1971). Conducted a research program on “Institutional Management in Higher Education” including methods to improve planning and management processes in universities in six OECD countries;
- UNESCO, Paris (October 1971 – September 1981). Held various positions in the UNESCO Office of Statistics, including head of the Office’s Education Analysis and Projection Unit. This included (i) helping countries improve their collection and analysis of education statistics; (ii) developing instruments for collecting international statistics on teachers; (iii) conducting a large number of quantitative studies for UNESCO on education development largely in developing countries (including a major study for the World Bank and for UNFPA); and (iv) conducting a series of two-week training workshops for senior government officials on the collection and use of education and demographic statistics for educational planning (totaling about 15 workshops largely in Asia and Africa over a period of three years). This was a joint project between UNESCO, UNFPA and SIDA;
- Head of Division of International Economics, Norwegian Institute of Foreign Affairs (NUPI), Oslo, Norway (October 1981 – September 1984). Recruited to establish this new division in response to the interest of examining the implication of the (then) increasing world-wide discussion of a “New Economic Order”. The division’s work focused on economic development in developing countries, and the role and limitations of development assistance in this regards. Also continued to conduct a number of training seminars on educational planning for UNESCO and some work for UNICEF (in Sudan);
• **World Bank, Washington DC, USA** (October 1984 – December 2004): Held various positions including:

(i) **1984 – 1990**: Senior Education Planner and task manager for World Bank-financed education projects largely in West Africa (including Burkina, Chad, the Gambia, Mali, Mauritania, Niger; Senegal, Sierra Leone);

(ii) **1990 – 1991**: Principal Education Planner in the Education and Employment Division of the Central Population and Human Resources (PHR) Department. Largely responsible for conducting studies on the impact of the World Bank’s lending for education in developing countries, providing technical support to World Bank education task managers and organizing training activities for World Bank education sector staff to “retool” their technical skills as part of the World Bank’s follow-up to the 1990 World Conference on Education for All in Jomtien. Help prepare and lead panel at the 1990 Jomtien conference for ministers of education in the Sahel countries;

(iii) **1991 – 1994**: Division Chief of the Population and Human Resources Division of the Sahel Department. The division (about 45 staff) was responsible for The World Bank’s education, health, nutrition and population projects in 8 Sahel countries;

(iv) **1994-1996**: Division Chief, Macro Economic Division for Western Africa Department. This division (about 55 staff) was responsible for conducting the Bank’s macro-economic analytical work and lending in West Africa;

(v) **1996 – 2002**: Sector Director, Human Development Department, Africa Region (AFTHD). This department (at that time about 200 staff) is responsible for The World Bank’s work on and support for education, training, health, nutrition, population and social protection for all of Sub-Saharan Africa. In addition to supervising the department’s staff and lending program, the work included a significant stepping up of the Bank’s analytical and partnership programs in Africa, including participation in the Bank’s preparation and follow-up to the 2000 Dakar conference on Education for All and the Fast Track Initiative (FTI);

(vi) **2002 – 2004**: Senior Education Advisor to the Vice-President of the Africa Region, responsible for providing strategic advice and professional leadership to the World Bank’s work on education and training in Sub-Saharan Africa.


**Consultant**: January 2005 – present. Largely for the World Bank, but also for UNICEF, UNESCO, FTI, the French Ministry of Foreign Affairs, NORAD, Center for the Study of International Cooperation in Education, University of Hiroshima, the *Centennial Group* and the Democratic Republic of Congo. In particular:

• **World Bank**: Preparation and facilitating two study tours (Singapore, Vietnam) and other knowledge exchange activities for African education policy-makers to learn
from the experience of East Asian countries. This includes being co-editor of two books published by the World Bank (see below). Also participated in preparation of, and wrote summary report on, conference for African ministers of education and of finance on “Sustaining the Education and Economic in Africa during the Crisis”, organized jointly by AfDB, ADEA and the World Bank (2009). Other analytical work includes preparation of background paper on “The Evolving Allocative Efficiency of Education Aid” for the Eight Annual High-Level Group meeting on EFA held in Oslo, Norway, December 2008, leading a team reviewing the World Bank’s education portfolio in sub-Saharan Africa, and being lead consultant on a major study on how to enhance the availability of affordable textbooks in Africa (ongoing).

- **UNICEF:** This includes presentations to UNICEF education staff (in New York and at the Regional Office for East Africa, Nairobi), and supporting joint work by the World Bank and UNICEF on the “School Fee Abolition Initiative” (including editor of a book co-published by UNICEF and the World Bank on fee abolition) and providing support for the UNICEF/UNESCO Institute for Statistics’ comprehensive survey of out-of-school youth, including supporting a workshop in Brazil to plan the work in Latin America.

- **Fast Track Initiative (FTI) now the Global Partnership on Education (GPE) Secretariat:** This includes (i) supporting Task Force on extending the coverage of the (then) Education Program Development Fund (EPDF), (ii) preparing background paper on the pros and cons of expanding the coverage of FTI beyond primary education, and (iii) contributing to two regional capacity-building workshops for African countries that benefit from GPE funding.

- **NORAD:** Provided support for NORAD’ role as lead agency for ADEA’s “Working Group on Education Communication (COMED)” by acting as interim chair of the COMED steering committee, June 2006 – June 2007. Now advising NORAD on an ongoing evaluation of the effectiveness of Norwegian education aid channeled through UNICEF and GPE.

**Other advisory tasks include:**

- Member (in personal capacity) of the board of UNESCO’s International Institute for Educational Planning – IEP (2006 – present);
- External advisor (2007 – 2008) for the National Education Commission for the Democratic Republic of Congo (DRC). This has been followed by several missions to support the Government, the latest in April 2012 to review on behalf of the local donor group their education plan underpinning the DRC’s request for GPE support;
- Member of group French Ministry of Foreign Affair’s group evaluating French bilateral education assistance (2006-2007);
- Evaluation of the Center for the Study of International Cooperation of Education in Education (CICE) at Hiroshima University (2007). This has been followed by other work for the CICE, including guest editor of October 2010 issue of their Journal of International Cooperation in Education (special issue on “aid effectiveness”) and lecturing at the CICE;
• Member of a group advising the AfDB on development of a “New Approach to 
Capacity Development in Africa” (2009);
• Advisor, Research for Development Institute (R4D), Washington DC, on education 
(2007 – present);
• Have contributed to a number of international studies and fora such as the “Policy 
Action Group on Learning”, conducted by Canadian NGO (2009 - 2010), African 
Development Bank Workshop on capacity-building (2010); Salzburg Global Seminar 
(2010 and 2011 sessions); keynote speaker at a symposium on education aid 
effectiveness at Hiroshima University (2011), and at the “Japan Education Forum” 
(February 2012 session);
• Contributed as external advisor in drafting/advising on sections of “UNESCO’s 
Education Sector Strategy 2020” (not yet published).

Publications: Various reports and papers, mainly on education development in 
developing countries, mostly in Sub-Saharan Africa. Most recent (all since retirement 
from the World Bank):

• Co-editor of two books published by the World Bank (in preparation of and 
follow-up to study tours for African policy makers to Singapore and Vietnam): 
“An African Exploration of the East Asian Education Experience” (2008) with 
Jee-Peng Tan), and “Towards a better Future: Education and Training for 
Economic Development in Singapore since 1965” (published in 2008, with Lee 
Sing Kong, Goh Chor Boon and Jee-Peng Tan)
• Edited and wrote introductory chapter of book co-published by World Bank and 
UNICEF (2009) on “Abolishing School fees in Africa: Lessons from Ethiopia, 
Ghana, Kenya, Malawi, and Mozambique”.
• Preparation of papers on the allocative effectiveness of education aid (some of 
these are referred to above). Guest editor of October 2010 issue of “Journal of 
International Cooperation in Education”, published by Hiroshima University.
• Paper on “Aid Dependency Risks in the Education Sector: A Review of Issues” in 
“Journal of Educational Planning and Administration”, New Delhi, Volume 
XXIV, Number 3, July 2010.
• Report for R4D Institute on “Education Resource Mobilization and Use in 
Developing Countries: Scope for Efficiency Gains through more Strategic Use of 
Education Aid” (2011).
• Report for the Salzburg Global Seminar on “Using Aid Strategically to Promote 
Education Development: The Need for a More Effective Global Aid Architecture” 
(2011);
• “Breaking the Human Capital Barrier and Attaining the 2050 Vision for Africa” 
(with Ruth Kagia) Background Paper on Human Development for the Africa 2050 
Study prepared by the Centennial Group (2013).
Rasmus Heltberg, Profile

- Economist with 18 years of experience in operations, research and program management, of which 11 years for the Bank.

- Broad and deep expertize in development: poverty, vulnerability, social development, rural development, social protection and labor, and adaptation to climate change.

- Excellent analytical skills for applied policy analysis, extensive publication record in many development topics combined with operational, team lead, and administrative experience.

- Superb writing, presentation, and synthesizing skills.

- Core member of the WDR 2014 “Risk and Opportunity: Managing Risk for Development” team.

**World Bank, 2002-present**

<table>
<thead>
<tr>
<th>Lead Evaluation Specialist, Independent Evaluation Group, 2013-</th>
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<tr>
<td>Coordinator responsible for evaluations of global programs and partnerships. Redefined the work program. Oversaw and participated in evaluation of GAVI. Advised programs on independent evaluations.</td>
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<tr>
<td>Core team member and lead author for chapter on communities’ risk management. Involved in report planning, messaging, writing, consultations, and dissemination.</td>
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</table>

**Program Manager and Senior Technical Specialist, Social Development Department, 2007-12**

- Managed the Trust Fund for Environmentally and Socially Sustainable Development (TFESSD), the premier trust fund for Bank-executed analytical work on social, poverty, environment, and climate change. Allocated $50 million. Responsible for all aspects of managing this program in coordination with Norway and Finland donors and four Bank sectors. In charge also of reporting, quality control, knowledge management, and organizing seminars and consultations.

- Realtime crisis monitoring, in charge of a 17-country qualitative research, publishing findings as *Living through Crises* (edited with Naomi Hussain and Anna Reva), World Bank New Frontiers of Social Policy series and as *Coping and Resilience* in Journal of Development Studies.

- Analytical work on social dimensions of adaptation to climate change, publications focused on community-based adaptation, social policy & adaptation. Also member of DM2009 on climate adaptation; led ‘Lessons Learned’ research

- Cross-support to SP reports in Armenia, Bulgaria, and Tajikistan (on social safety nets); China Eco-farming project (impact evaluation); India National Rural Livelihoods Project (food security and nutrition); Kenya (rainfall insurance); Tanzania Productive Safety Net Project (climate change & SP).

- Contributed work on social accountability as well as social development aspects of crisis, gender and household energy, and corporate reviews of strategies and DPLs.

- Innovated the use of games as a platform for client engagement.
Rasmus Heltberg, CV

Sr. Social Protection Economist, South Asia Human Development, 2004-07

Team leader and team member on labor, disability, safety nets, and human development reports and projects in Pakistan, Bangladesh, and Maldives. Led the SP policy dialogue and work program in Pakistan. Specific tasks included:

- Policy lending: team member in PRSC and provincial DPLs responsible for SP; launched a Conditional Cash Transfer pilot and set up impact evaluation (Pakistan).

- Project lending: TTL for the Pakistan Earthquake Disability Project & 2 related JSDF grants; team member in Disability and Children-at-risk and National SP project; TTL for IDF grant for monitoring safety net programs, designing and carrying out a special-purpose survey (Bangladesh); team member Integrated Human Development Project (Maldives)

- AAA: TTL for Safety Net Report (Pk); designed a special-purpose safety net survey, organized major workshops, liaised with donors and secured trust funding. Contributed to several PREM and FPD reports on poverty, SP, and labor. Helped the government write National SP Strategy. TTL for SP report and survey collection (Maldives); “lessons learned” piece on SP and disasters (regional); led regional labor market stocktaking and contributed analysis of labor markets in Pakistan and Sri Lanka.

- Natural disaster response: member of response teams for Maldives tsunami and Pakistan earthquake.

Young Professional, 2002-03

- Oil and Gas Policy Unit, working on household fuel use and fuel switching and petroleum revenue management.

- South Asia PREM, contributed reports on poverty, targeting and labor markets in Sri Lanka and Pakistan.

Pre-Bank Academic and consultancy experience

- Associate Professor in Development Economics, Institute of Economics, University of Copenhagen, 2000–02. Taught development economics to Masters and undergraduate students; supervised a large number of Master dissertations; and researched poverty and inequality. This job deepened my knowledge of teaching, mentoring, and applied econometrics with STATA.

- Assistant Research Professor Development Economics, Institute of Economics, University of Copenhagen, 1999–2000. My research focused on institutions and policies for natural resource management, especially forests, and relied heavily on household survey data.

- Consultant (environmental economics), Economic Planning Unit, PM’s Secretariat, Malaysia for NIRAS, January-March 1999. Developed and conducted training in economic instruments for environmental management in Malaysia.
Education

- Ph.D., Development Economics, University of Copenhagen (Denmark), 1998. Development microeconomics and natural resource management. Independently collected data on forest management institutions in India.
- M.Sc., Economics, University of Copenhagen, with concentration in development economics, 1995.

Publications

Peer-reviewed Publications


Addressing Human Vulnerability to Climate Change: Toward a ‘No Regrets’ Approach, Global Environmental Change, 2009 (with Paul Siegel and Steen Jorgensen).


Natural Resources and the Poor. Introduction to a special volume of the Journal of Natural Resources Policy Research edited by Rasmus Heltberg, January 2010.


Public Spending and Poverty in Mozambique, in Debt Relief for Poor Countries, Palgrave Macmillan, 2004 (with K. Simler and F. Tarp) (also published as IFPRI FCND Discussion Paper 167).

The Robustness of Poverty Lines Reconsidered, Economic Development and Cultural Change, 2002 (with K.
Rasmus Heltberg, C. Matusse, G. Dava and F. Tarp).

### World Bank reports and papers

Climate-Responsive Social Protection: Background Paper for the World Bank’s New Social Protection Strategy (with co-authors).
Social Protection in Tajikistan (policy note and chapter in Poverty Assessment)
Armenia Public Expenditure Review: A Note on Social Transfers (policy note and chapter in PER)
Scaling Up Social Accountability in World Bank Operations, SDV Note May 2009 (with Sanjay Agarwal and Myrtle Diachok)
Targeting and Poverty Impact of Bulgaria’s Social Protection Programs (policy note)
Social Protection in Pakistan (formal ESW)
Social Protection in Maldives: Options for Reforming Pensions and Safety Nets (formal ESW)
Project Appraisal Document for Pakistan Earthquake Disability Project
Helping South Asia Cope Better With Natural Disasters (SASHD Discussion Paper)
Punjab Poverty and Labor Markets (input to formal ESW)
Poverty and Employment in NWFP (input to formal ESW)
Labor Markets in South Asia (Stocktaking report)
Sri Lanka Labor Market study
Guatemala: Household Fuel use and Fuel Switching, ESMAP Technical Paper
Toward Better Revenue Management in Nigeria, COCPO
Fuel Switching Reconsidered: A Multicountry Study, ESMAP Technical Paper

### Dissemination (select)

- Various blogs, mostly on blogs.worldbank.org
- Many presentations at conferences and learning events
- The World Bank’s Experience with Cash Support in Some Recent Natural Disasters,
Rasmus Heltberg, CV
Humanitarian Exchange Magazine (40) 2008, ODI.
- Numerous workshop presentations and Danish language dissemination pieces.

### Languages and Country Experience

English (fluent), Spanish (Advanced Intermediate), Danish (Mother tongue), and French (fair).

I have worked in Armenia (1 trip), Bangladesh (2 trips), China (1 trip), India (several visits lasting up to 3 months), Kenya (1 trip), Malaysia (3 months), Maldives (4 trips), Mexico (1 trip), Mozambique (4 trips), Pakistan (16 trips), Sri Lanka (2 trips), Tajikistan (2 trips), Tanzania (2 trips), and with governments of Denmark, Finland, Norway, and the UK.
CURRICULUM VITAE
Karen Elizabeth Mundy

PERSONAL INFORMATION

Name: Karen Elizabeth Mundy
Nationality: Canadian
Telephone: 416 465-3614 (home); 416 831-2476 (cell)
Permanent Address: 174 Gough Avenue, Toronto, Ontario CANADA, M4K 3P1
E-mail Karen.mundy@utoronto.ca

CURRENT APPOINTMENTS

Professor & Associate Dean, Research, International and Innovation
Ontario Institute for Studies in Education, University of Toronto, Canada

President Elect, Comparative and International Education Society (US)

CAREER HIGHLIGHTS AND ACCOMPLISHMENTS

• An award-winning scholar with a 17-year track record in research and research publication.
• Recognized expert on Education for All and on the role of international and non-governmental organizations in its achievement.
• Experienced administrator with key skills in the areas of team building, grant-based fundraising, knowledge mobilization and strategic planning for organizational change.
• Skilled public speaker with a wide network of contacts in the international development and not-for-profit worlds.
• Experienced program evaluator, including for large scale project and organizations: including World Bank African Education Portfolio Review, an 8 case study review of Hewlett Foundation programs, evaluation of UNICEF’s Child to Child program in Ethiopia; USAID’s education reform programs in Africa.

CAREER HISTORY

2012-Present Professor and Associate Dean, Research, International and Innovation
Ontario Institute for Studies in Education, University of Toronto, Canada
252 Bloor St. West, Toronto Canada, M5S 1V6

Led the administration and strategic research and international initiatives, including oversight of all research, professional development and commissioned activities.

Part of the strategic leadership team for a Graduate Faculty of Education comprised of 125 tenure-stream faculty, with a total annual budget of $ 90 million.

2012 (Jan-July) Interim Chair, Department of Adult Education and Counselling Psychology, OISE
Karen Mundy - Curriculum Vitae

2002-2012  Associate Professor and Canada Research Chair
    Director, Collaborative Degree in Comparative, International and Development Education
    Ontario Institute for Studies in Education, University of Toronto
    [Cross-appointed, University of Toronto, Munk School of Global Affairs]

1996-2002  Assistant Professor, International and Comparative Education
    Stanford University School of Education, Stanford University, California

2010-present  Founding Chair, Canadian Global Campaign for Education (CGCE)
    (2004-2008) The CGCE is a network of 22 Canadian NGOs, universities, and teachers unions which supports research and policy dialogue on Education for All.
    http://www.campaignforeducationcanada.org/

1995-present  Research and Evaluation Consultant

EDUCATION

1996  Doctor of Philosophy, Sociology of Education and Comparative Education
    Ontario Institute for Studies in Education (OISE), University of Toronto

1992  Master of Arts, Adult Education (Specialisation in Comparative Education)
    Ontario Institute for Studies in Education (OISE), University of Toronto

1985  BA (Honours), English and History
    Concordia University, Montreal, Canada

SPONSORED RESEARCH and EVALUATION PROJECTS


    o Research project funded by the Open Society Institute
    o Involves review and analysis of World Bank’s education policies, research, and project portfolios – including the work of the International Financial Corporation.

    o Evaluation of Hewlett support for EFA advocacy at the global and national levels.
    o Led a team of 6 researchers who produced 8 research products, including an evaluation of the Global Campaign for Education, and five case studies on the impact and future prospects for EFA advocacy in the U.S., U.K., Netherlands, Mali and Uganda.

Kerr, K. and K. Mundy.  (Completed November 2010). Improving Access and Quality of Basic Education through Aid Effective Approaches.  Canadian International Development Agency.
    o Completed background review paper (29 pp.) and 5 policy tools for use by CIDA’s education sector staff.
Karen Mundy - Curriculum Vitae


- Member of a panel that interviewed more than 50 key World Bank staff and African education thought leaders; reviewed the World Bank’s African education research and lending portfolios.
- Led the preparation and writing of a final report for the Bank summarizing past accomplishments and key drivers and opportunities for its Africa education sector activities going forward.


- Researched and prepared comprehensive study of the World Bank’s activities in the Africa education sector between 2000 and 2009. Study included analysis of geographic and sub-sectoral trends in lending, research and policy development.
- Study was used as the foundational document for strategic planning in the region/sector.


- Directed a team of 6 researchers to conduct case studies of civil society policy roles in the basic education subsector (study included unions, parents associations, NGOs, citizen and faith groups).
- Produced 4 independent studies, three published monographs and two masters thesis from the research, available online at: [http://cide.oise.utoronto.ca/civil_society/](http://cide.oise.utoronto.ca/civil_society/)


- Directed a team of 4 researchers in developing a series of case studies of global citizenship education policies implemented at the provincial, district and school levels in French and remains the single most cited source on global citizenship education.

1. Journal Articles (Selected)


Karen Mundy - Curriculum Vitae


2. Books and Monographs (* = refereed)


3. Refereed Book Chapters (Selected)


5. Selected Technical Reports, Policy Briefs, and Evaluations


Karen Mundy - Curriculum Vitae


TEACHING (GRADUATE LEVEL)

- Global Governance and Educational Change
- Introduction to International, Comparative and Development Education
- Internship in Comparative, International and Development Education
- The Politics of International Cooperation in Education
- International Education Policy Workshop
- Politics of Education in Comparative Perspective
- Educational Change in Africa: Historical, Sociological and Political Dimensions

GRADUATE ADVISING AND SUPERVISION

Doctoral Thesis Completions: 9
Masters of Arts Thesis Completions: 36

EDITORIAL ROLES

Editorial Board Member:
- International Journal of Educational Development
- Compare (British Comparative and International Education Society).
- Globalization, Societies, Education


Regular Reviewer for: Comparative Education Review; Compare: Review of International Political Economy; Canadian Journal of Education; Globalization, Societies, Education; American Journal of Educational Research; International Journal of Educational Development; Oxford University Press
Curriculum Vitae

MOSES O. OKETCH, B.Ed (Hons.), M.S., PhD.

ADDRESS (Work)
Moses O. Oketch, PhD
Institute of Education
University of London
20 Bedford Way, London
WC1H 0AL
UK.

Tel: +44 (0) 20 3073 8314
Fax. +44 (0) 20 7612 6632
Mobile +44(0)7725620434
Email: m.oketch@ioe.ac.uk or oketch2002@yahoo.com

EDUCATION

University of Illinois at Urbana-Champaign, Ph.D., (Emphasis in Economics of Education), 2002

University of Illinois, Urbana-Champaign, M.S., (Emphasis in Economics of Education), 1999

University of Nairobi, B.Ed. (Hons.), 1995

ACADEMIC AND OTHER PROFESSIONAL APPOINTMENTS

- Director of Research, African Population and Health Research Center (APHRC), Nairobi-Kenya, since Dec 1, 2012.
- Institute of Education, University of London: Reader in Educational Planning and International Development, October, 2010-Present.
- Institute of Education, University of London: Senior Lecturer in Educational Planning and International Development, August, 2007-September 2010.
• Institute of Education, University of London: Module Leader, Planning for Education and Development Module, 2004-Present (face to face and online).
• Vanderbilt University, Peabody College: Research Assistant Professor of Public Policy & Education, Aug. 2002- Dec. 2003.
• University of Illinois at Urbana-Champaign, Department of Educational Policy Studies: Graduate Research/Teaching Assistant, Jan.1998- July 2002.
• University of Illinois at Urbana-Champaign, Office of Budget and Resource Planning, Deans Office, College of Education: Graduate Assistant, 2000-2002 (summers only).
• University of Nairobi, College of Education: Administrative Assistant, Principal’s Office, 1996/97.
• Minyenyia secondary school: teacher, 1996
• Lenana High School, Nairobi: Student Teacher, May-August, 1994.

Other Academic/Research Affiliations/Appointments

• Adjunct Full Professor, University of Pennsylvania (Penn) since April, 2013
• Senior Researcher (Economics of Education), London International Development Centre (LIDC), London- since 2008.
• Academic Researcher (Economics of Education), Center for Learning and Life Chances in Knowledge Economies and Societies (LLAKES), London- since 2008.
• Researcher (Educational Planning), Consortium for Research on Educational Access, and Transition (CREATE), University of Sussex- 2006-2011.

AREAS OF RESEARCH AND TEACHING INTEREST

• My research interest is in the economics of education and education policy analysis with reference to sub-Saharan Africa. Specifically my writing and research is around measuring the contribution of education to individuals through earning profiles and rates of return, externalities and other non – market benefits; education finance, education access and quality, and skills development and vocational education challenges, and the determinants of economic growth in SSA in relation to education and other factors of growth. More recently I have analysed and written on the utilization of private schools by the poor and opportunity to learn in schools- to understand why some schools are more effective than others in Kenya. I have also applied randomized control trial in the study of interventions that can improve learning outcomes in early grade literacy and numeracy in East Africa.
RESEARCH-PUBLICATIONS

Edited Books


Unterhalter, E., and Oketch, M. O. (2009), (Eds.) The international in higher education: Dichotomies and diversity, London Review of Education (Special Issue), Vol. 7.1. ISSN 1474-8460, Institute of Education, University of London Press.


Selected Scholarly Publications in refereed Journals


Selected Book Chapters


permission, Copyright 2007 by International Journal of Educational Development/Elsevier).


**Membership to professional organisations**

Member Comparative and International Education Society (CIES), since 1998
Member UKFIET since 2004
Member Royal Economic Society- 2011
Member IUSSP- 2012
Member of Independent Steering Committee, Global Partnership for Education, since Jan 2013
Member of ADEA Scientific committee, Since 2012
Pauline Rose
Director, Education for All Global Monitoring Report, UNESCO, Paris
Email: p.rose@unesco.org Tel.: +33 9 51 61 76 44

Academic qualifications
DPhil (Development Studies), University of Sussex (2002).
MSc (Economics) Distinction, University of London (1993).

Key posts held
2011-present Director, EFA Global Monitoring Report, UNESCO, Paris
2007-2008 Reader in International Education, University of Sussex
  Chair, Sussex Development Studies Consortium
  Deputy Director, Centre for International Education
2005-2007 Senior Lecturer in International Education, University of Sussex
2002-2004 Lecturer in International Education, University of Sussex
2001-2002 Lecturer in Education and Development, School of Development Studies, University of East Anglia.

Expertise and experience
- Economics of education, social development and public policy, focusing on:
  o Financing and governance of education
  o Educational marginalisation and inequality: gender and poverty
  o Education, conflict and fragile states.
- Research and evaluation of policies of national governments and aid agencies.
- Fieldwork adopting quantitative and qualitative approaches in sub-Saharan Africa, in particular Ethiopia, Malawi, Nigeria, Uganda, Zambia; and South Asia, in particular Bangladesh, India, Pakistan.
- Management of large inter-disciplinary teams.
- Dissemination of evidence-based policy to policymakers and NGOs.

EFA Global Monitoring Report
Director:
2013/14 Education for All Global Monitoring Report: Teaching and Learning [under preparation]
2012 Education for All Global Monitoring Report: Youth and Skills: Putting Education to Work
Lead Researcher:
Selected other publications

**Authored Book**

**Edited Books and Special Issues of Journals**
2011 Special Issue on Education and Armed Conflict, *Prospects* Vol 41 No 2
2009 Special Issue on Non-state Provision of Education in Africa and South Asia *Compare* Vol 39 No 2: 127-299
2005 Special Issue on Decentralisation of Education, *Compare* Vol 35 No 2: 105-220 (Jointly edited with Caroline Dyer)
2005 Special Issue on International and National Targeting of Education’ International Journal of Educational Development Vol 25 No 4: 361-475 (Jointly edited with Kenneth King)

**Peer Reviewed Journal Articles**
2011 ‘Analysing collaboration in service delivery between NGOs and states’ *Public Administration and Development* Vol 31 No 4: 294-305
2009 ‘NGO provision of basic education: alternative or complementary service delivery to support access to the excluded?’ *Compare* Vol 39 No 2: 219-233
2006 ‘Collaborating in Education for All? Experiences of government support for non-state provision of basic education in South Asia and sub-Saharan Africa’ *Public Administration and Development* Vol 26 No 3: 219-230
2005 ‘Decentralisation and privatisation in Malawi – Default or design?’ *Compare* Vol 35 No 2: 153-165
2005 ‘Decentralisation for educational development? An editorial introduction’ Compare Vol 35 No 2: 105-113 [Jointly authored with Caroline Dyer]


2005 ‘International development targets and education: Towards a new international compact or a new conditionality?’ Journal of International Development Vol 17: 97-100 [Jointly authored with Kenneth King].


Other reports

2007 ‘Absorptive capacity in the education sector’ Paper prepared on behalf of the Education for All Fast-Track Initiative, commissioned by DFID, Ministry of Foreign Affairs France, and Global Campaign for Education.

2006 ‘Supporting non-state providers in basic education service delivery’ Paper prepared for DFID Policy Division.


2004 ‘Political will and capacity for attaining the Gender MDG’ Background paper for DFID’s 2005 Girls’ Education Strategy.

Curriculum Vitae
Dr. Liesbet Steer

Tel: +1 703 821 1868 or +1 703 975 8555  Nationality: Belgian
Email: lsteer@brookings.edu  Address: 7017 Benjamin St, Mclean, VA

Qualifications:
Sector Development in Vietnam’s Transition.”
University of East Anglia (UEA), Norwich, UK (dissertation): 2002-2005
London School of Economics, London (LSE), UK (PhD course work): 1998-1999

1998-1999  Master of Science in Applied Quantitative Economics
Summa Cum Laude
University of Antwerp, Belgium
Laureate in Economics (prize for best economics student) – Castelein & Jussiant
Foundation

Languages:
Dutch  Mother tongue
English  Fluent
French  Conversational (reading: fluent)
German  Conversational
Indonesian  Conversational

Developing country residence:
Lived and worked for 10 years in East Asia: Vietnam, Indonesia, Cambodia and Laos.

Areas of expertise:
Results measurement  - Led programs and research evaluating development progress and the use of
impact evaluations.
- Managed introduction of results based approach to program design and
systems of monitoring and evaluation at The Asia Foundation.

Development financing  - Leading education financing work at the Brookings Institution; and broader
development financing research at the Centre for Aid and Public Expenditure, ODI
- Led donor working group on implementing the Paris Agenda in local
economic development programs in Indonesia as Director of Asia Foundation
(under the Indonesian multi-donor Decentralization Support Facility).

Institutions for development  - Led research analyzing institutional drivers of development progress at ODI;
doctorate focused on institutional economics
- Led research and development programs in Indonesia in the areas of private
sector and local economic development, domestic trade and regulatory
reform. Institutional development was a cross-cutting theme.

Research/survey methodology  - Extensive experience in managing surveys for the purpose of informing
policy including working with large quantitative databases and econometric models as well as qualitative surveys and building analytical and data
collection capacity in developing country institutions.
Posts held:

2013-present  
**Fellow, Center for Universal Education, The Brookings Institution, Washington DC**
Leading the Center’s research streams on (1) education financing: including international and domestic financing, aid effectiveness and innovative financing and (2) the Learning Barometer:

- Leading research on equity and financing including country case studies in Bangladesh (ongoing), Nigeria and Malawi (forthcoming)
- Leading the preparation of the Arab Learning Barometer (ongoing) and Asia and Latin America Learning Barometers (forthcoming)
- Led preparation of forthcoming research paper on “Role of multilateral banks in basic education financing” for the High Level Learning for All Roundtable “Coordinating and Financing Delivery of Education” – September 2013
- Led preparation of 8 country papers for the Learning for All Ministerial – April 2013; (co) authored papers on Ethiopia and Nigeria

2008-2013  
**Director, Development Progress, ODI, London**
Developed and led a 6-year research project (2009-2015) on Development Progress funded by the Bill & Melinda Gates Foundation. The project aims to better understand, measure and communicate what works in development and why. This work included providing technical direction to a large research team (+20 people) implementing case studies and data analysis on progress in education.

**Research Fellow, Centre for Aid and Public Expenditure, ODI, London**
Managed and contributed to various research projects on development with a particular focus on assessing development results, aid effectiveness, results based aid & impact evaluation, new aid flows and role of private actors in aid.

Projects (with commissioning organization):
- Progress towards the MDGs: MDG Report Card (Bill & Melinda Gates Foundation and UN Millennium Campaign)
- Financing Universal Primary Education: Opportunities and Constraints (The William & Flora Hewlett Foundation)
- Progress on the Aid Effectiveness Agenda and Accountability of Aid (the Commonwealth Secretariat)
- Impact Evaluation Production and Use (DFID)
- Poverty and Social Impact Analysis Review (PSIA) (World Bank)
- Review of Good Practice on Mutual Accountability at Country Level (GTZ and Working Group for Aid Effectiveness OECD-DAC)
- UK Progress Report on Making Aid Effective - case studies on Vietnam and Cambodia (DFID)

2005-2007  
**Director, Economics Department, The Asia Foundation, Jakarta, Indonesia**
Managed the Foundation’s largest economic research and policy program in Asia (US$3.5 million per year).
Areas of focus: governance and regulatory reform, local government service delivery, private sector development and investment climate performance measurement.
Responsibilities included:
- Designing and implementing research on local public service delivery, the investment climate and domestic trade.
- Designing and implementing technical assistance programs in Indonesia - funded by international donors and implemented in conjunction with national and international research and development institutions.
- Monitoring and evaluating results. Introduced a new monitoring and evaluation system to more accurately measure program results of implementing partners.
- Engaging with policy makers at local and national level to discuss policy reform, new program ideas, and program implementation.
- Managing a team of 15 research and program officers and consultants.
- Chairing private sector development donor working group and leading local economic reform working group under Indonesian multi-donor Decentralization Support Facility.

2001-2002
Managed and chaired major development research seminar series.
National Economics University, Hanoi, Vietnam, & World Bank

Research seminar series for Vietnamese and international development specialists (covering topics ranging from aid effectiveness, health and education to macroeconomics and trade policy, financial sector deepening, and political economy of reform).

1999-2002
Independent Economic Consultant based in Hanoi, Vietnam:

Centre for International Economics, Canberra, Australia:

World Bank, Vietnam:

International Finance Corporation (IFC), Mekong Project Development Facility, Vietnam

1998-
Researcher, London School of Economics and Political Science, London, UK
Research on national accounts, satellite accounts and other economic measurement
1999 methods to study the impact of tourism and trade in services in the economy.

1995-1997 Researcher, Erasmus University Rotterdam, The Netherlands
Research project at Erasmus Business School, topics included tourism and development, globalization and cross-cultural management of tourism industry.

1994-1995 Researcher, University of Antwerp, Faculty of Economics, Belgium
Macro economic impact/input output analysis. Analysis of labor, tax and social effects of cultural sector.

Selected publications and reports:


