



METHODOLOGY SHEET FOR GLOBAL PARTNERSHIP FOR EDUCATION (GPE) INDICATORS

Indicator title	Indicator (27) Percentage of donors' pledges commitments fulfilled (cumulative)
Result measured (from GPE Results Framework):	GLOBAL-LEVEL OBJECTIVE - Strategic Objective (4) More and Better Financing (a) Encourage increased, sustainable, and better coordinated international financing for education by diversifying and increasing the Global Partnership's international donor base and sources of financing
JUSTIFICATION FOR INDICATOR	
Background/context for indicator:	Donor contributions are the source of financing for the Global Partnership for Education. The ability to finance education grants to support education sector development in developing country partners depends on them. On June 26, 2014, the Second Replenishment Pledging Conference gathered more than 800 participants from 91 countries in Brussels in order to raise funding. The event started a four-year replenishment cycle, up to 2018, and was considered "a pivotal moment in efforts to harness the financial resources and political will needed to achieve the goal of universal, quality, basic education for all children." ¹
Rationale for indicator selection:	The new financial and policy pledges made in Brussels aim to "help ensure that sound national education plans can be implemented by more than 60 GPE developing country partners." Sixteen donors made official pledges at the Brussels replenishment conference, another three donors made pledges afterward, and one donor has since contributed to GPE during the period without officially pledging, for a total number of 20 donors. This indicator is included as it reflects (a) the extent to which GPE donors, overall, follow-up on their pledges to the Partnership; and (b) the financial capabilities of GPE. Specifically, this indicator monitors the payments being made by the donors versus what they have pledged to pay, cumulatively across years, as per their contribution agreements. This figure will be expressed as a percentage of the pledged funds (as per signed contribution agreements) in their pledged currency. Payment values in US\$ using the foreign exchange rate at the time of pledging (June 2014) will be available for additional analysis.

¹ Global Partnership for Education, *Final Pledge Report. Second Replenishment Pledging Conference* (June 2014), retrieved May 10, 2016, from <http://www.globalpartnership.org/content/pledge-report-gpe-replenishment-conference-june-2014>

DEFINITION

This indicator measures donor commitment (pledge) fulfillment, by comparing what is signed by each donor to be paid cumulatively to GPE, against the actual contributions received by the GPE in said year(s).

In the context of this indicator:

Indicator definition:

- “Donors” encompass bilateral, multilateral, and non-traditional donors.
- “Pledges” stand for signed contribution agreements and comprise those made at the time of the replenishment as well as the ad-hoc additional contributions agreements that were signed in subsequent years.

“Contributions” signify payments actually received by GPE.

Percentage of contributions received versus signed agreement amount in the pledging currency of the donor. This percentage will cumulative, and will be reported each fiscal year.

Unit of measurement:

Not Applicable

Disaggregation:

fiscal year
 calendar year \

Year for data reported (select only one and mark an “x”)

Frequency of data collection:

Annually on June 30 of each year, for feeding the corporate indicator and informing the annual GPE results report.

DATA TREATMENT

Source of information for collecting data:	Source document, template, etc.:	SAP database
	Source agency:	World Bank Trustee

The data are tracked on a weighted percentage basis, using the pledging currency of the donor (indicator data) as per signed contribution agreements. Each donor's pledge weighted percentage is calculated by converting the pledged amount to be paid to US\$ using the exchange rate of the date of the replenishment and weighing it against the cumulative total.

Formula:

This is being tracked cumulatively and works as follows. If a donor has a signed contribution agreement with a schedule to pay EUR100m to GPE from 2015 through 2018 in four equal installments of EUR25m per year, this will be taken to provide the targets, milestones, and to determine the baseline. For fiscal year 2015, an expected payment will be entered as EUR25m. If the donor pays EUR25m to GPE, the baseline value of 100% will be derived. The milestone for both the following years (2016) and the end target will be 100%.

Step-by-step calculations of the cumulative value to feed the corporate indicator:

STEP 1: To determine donor contribution weighted value for the

given period, that is, up to and including the actual reporting year [see column C of annex 4]:

1. Convert the cumulative non-US\$ pledges (i.e., up to and including the actual reporting year) into US\$ using the June 26, 2014 exchange rate.
2. Divide the resulting cumulative pledge in US\$ for each donor by the cumulative total amount pledged in US\$ (up to and including the actual reporting year), as follows:

$$WPLEDGE_{i,t} = \frac{pledge_{i,t}}{\sum_{i=1}^n pledge_{i,t}}$$

Where:

$WPLEDGE_{i,t}$ = donor i contribution weighted value in fiscal year t
 $pledge_{i,t}$ = US\$ (equivalent) of donor i pledge as per signed in contribution agreement in fiscal year t

STEP 2: To determine, thereafter, the donor payment percentage against the cumulative pledge [see column E, annex 1], the cumulative actual (non-converted) donor payments (i.e. up to and including the actual reporting year), are to be divided by the cumulative pledge in the original currency, for the same time-period, and multiplied by 100:

$$\%paid_{i,t} = \frac{payment_{i,t}}{pledge_{i,t}} * 100$$

Where:

$\%paid_{i,t}$ = donor i payment percentage in fiscal year t
 $payment_{i,t}$ = payment in original currency for donor i in fiscal year t
 $pledge_{i,t}$ = value of pledge in original currency for donor i in fiscal year t

To determine the cumulative corporate indicator value for a given period (i.e. up to and including the actual reporting year), multiply each donor value as per step 2 above by each donor's weight as per step 1 above.

$$DF_{i,t} = \sum_{i=1}^n (\%paid_{i,t} * WPLEDGE_{i,t})$$

Where:

$DF_{i,t}$ = donor i funding in fiscal year t
 n = total number of donors in the sample for the given period

Data limitations (if any known / anticipated):

None

Interpretation

Results approaching 100% indicate that nearly all of contributions pledged for a given time period were actually

received by GPE during this timeframe. High values reflect donors' commitment to follow-through with their obligations and provide the necessary financial means for the Partnership to support DCPs. Results tallying 100% are expected as it is anticipated that all donor contributions, signed either at the time of replenishment or subsequently, will be fulfilled by donors per the terms and schedule stipulated in the contractual arrangement.

REFERENCES

Global Partnership for Education. *Final Pledge Report. Second Replenishment Pledging Conference*. June 2014). Retrieved May 10, 2016, from <http://www.globalpartnership.org/content/pledge-report-gpe-replenishment-conference-june-2014>

ANNEXES

Annex 1- Data Collection tool

Data collection tool utilized for collecting the data, if any:	SAP database
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Annex 2- Standard Operating Procedure

Process Name: Data Collection, Quality Assurance, & Storage for Indicators # 27	Owner: R&P Team	Updated:
Function: Measuring GPE Impact	Version #: 1	Review:
Material changes from prior version of SOP		
None; this is the first version.		
Summary This SOP describes the process for data collection, quality assurance, and storage for indicator # 27 (Percentage of donors pledges fulfilled) of the GPE results framework.		
Results / Outputs This process should result in the results framework being updated with quality assured data on indicator# 27. Interim outputs of the Secretariat: Completed data collection template Final Output: Updated results framework database		
Scope <ul style="list-style-type: none"> • Begins: The process begins with the Financial Officer, Operations collecting data from World Bank Trustees via SAP on contribution status report which details the signed contribution agreements and on cash receipts report which details the cash receipts paid in by donors. • Ends: The process ends with updated data being integrated into the results framework database by the Monitoring and Evaluation Data Manager. • Includes: All procedural aspects • Excludes: Methodological aspects of calculating the indicator value. These can be found in the methodology sheet. • Note: Data will be collected annually. 		
Standards (Policies, Approvals, Deadlines, etc.): <ul style="list-style-type: none"> • Policies: GPE 2020, Monitoring Sheet for GPE Results Framework Indicator #27 • Deadlines: M & E Data Manager updates results framework database with the Indicator # 27 data by 30th October 		

<ul style="list-style-type: none"> Approval: The completed data template is prepared by the Financial Officer, Operations and includes quality checks by the M & E Data Manager and final approval from the Head of M & E
Issues /Risks:
<ul style="list-style-type: none"> Data may not be available on time and this might delay the process.

Overview:



Steps in the Process	Roles / Responsibilities	Outputs / Deliverables	Tools / Templates
1. Collect Data Typically by 30th August			
<ul style="list-style-type: none"> Collect data from World Bank Trustees via SAP on contribution status report which details the signed contribution agreements and on cash receipts report which details the cash receipts paid in by donors 			
2. Aggregate Data Typically by 30th September			
<ul style="list-style-type: none"> Enter data into the template provided by the M&E Data Manager 	<ul style="list-style-type: none"> Financial Officer, Operations 		Data Collection Template
<ul style="list-style-type: none"> Compute indicator values using the completed data collection template 	<ul style="list-style-type: none"> Financial Officer, Operations 	Completed Data Collection Template	
<ul style="list-style-type: none"> Review completed data collection template and send comments/queries to the Financial Officer, Operations 	<ul style="list-style-type: none"> M & E Data Manager 		
<ul style="list-style-type: none"> Respond to the comments/queries, updates data collection template as necessary and forward to M & E data Manager 	<ul style="list-style-type: none"> Financial Officer, Operations 	Updated data collection template	
3. Update Results Framework Database Typically by 30th October			
<ul style="list-style-type: none"> Forward data collection template to the Head of M & E for review and approval. 	<ul style="list-style-type: none"> M & E Data Manager 		
<ul style="list-style-type: none"> Review & approve completed data collection template 	<ul style="list-style-type: none"> Head of M & E 	Approved data collection template	

<ul style="list-style-type: none"> Update results framework database using completed template submitted by the Financial Officer, Operations 	<ul style="list-style-type: none"> M & E Data Manager 	Updated results framework database	N/A
• Notify the donor of the availability of data in the results framework database through the intranet		M & E Data Manager	

Annex 3- Additional Analysis

- (1) Comparison of actual receipts versus pledges, individually (as per signed contribution agreements).
- (2) Comparison of the payment value in US\$ using the foreign exchange rate at the time of pledging (June 2014) and the actual US\$ receipt.
- (3) Calculation of the yearly value (as opposed to the cumulative value used for the corporate indicator):

STEP 1: To determine donor contribution weighted value for the given year [see column C of annex 1]:

- a. Convert non-US\$ pledges for given year into US\$ using the June 26, 2014 exchange rate
- b. Divide the resulting pledge in US\$ for each donor by the total amount pledged in US\$, for the given year:

$$WPLEDGE_{i,t} = \frac{pledge_{i,t}}{\sum_{i=1}^n pledge_{i,t}}$$

Where:

Pledge_i = US\$ (equivalent) of donor i pledge as per signed contribution agreement in fiscal year t

Example: If a donor pledges to pay EUR 25m, which at the time of pledging was worth USD 34m, then this would be used to calculate said donor's weight within the overall payment. Meaning if the total expected USD payments as of the pledging date are USD 500m, this donor's weight would be 0.068 (USD 34m/USD 500m).

STEP 2: To determine, thereafter, the donor payment percentage against pledge [see column E, annex 1], the actual (non-converted) donor payments for the given year are to be divided by the pledge in the original currency, for the same time-period, and multiplied by 100:

$$\%paid_{i,t} = \frac{payment_{i,t}}{pledge_{i,t}} * 100$$

Where:

Payment_{i,t} = payment in original currency for donor i in fiscal year t

Pledge_{i,t} = value of pledge in original currency for donor i in fiscal year t

Example: If this donor pays the full EUR pledge of 25m, then its percentage paid to target is 100%, and its contribution will contribute to 6.8% of the sum total for that period. An example is attached in **Annex 1** showing how the weighting structure would fit in using this approach.

STEP3: To determine the corporate indicator value for a given year, multiply each donor value as per step 2 above by each donor's weight as per step 1 above.

$$DF_{i,t} = \sum_{i=1}^n (\%paid_{i,t} * WPLEDGE_{i,t})$$

Where:

$DF_{i,t}$ = donor i funding in fiscal year t

n = total number of donors in the sample for a given year

Annex 4 - Four examples of calculations for corporate indicator #27

(a) Example 1 (Donors paying at 100%)

		(A)	(B)	(C) = (B)/(B total)	(D)	(E) = (D)/(A)	(F) = (C*E)
Donor	Contributing Currency	Target Payment Fiscal Year (in Contributing Currency, millions)	USD Value of Contributing Currency on June 26, 2014	Weighted Calculation using the USD value in Column B (in percentage)	Actual Amount Paid in Contributing Currency (in Millions)	Calculation for Donor payment percentage versus pledge	Donor's represented percentage using Donor's weight in overall total
Donor 1	EUR	29	39.5	19.7%	29	100%	20%
Donor 2	AUD	30	28.2	14.1%	30	100%	14%
Donor 3	USD	40	40.0	19.9%	40	100%	20%
Donor 4	GBP	30	51.1	25.4%	30	100%	25%
Donor 5	CAD	45	42.0	20.9%	45	100%	21%
Total			200.8	100%			100%

(b) Example 2 (Donors 1 and 3 paying at 75%, Donors 2, 4, 5 paying at 100%)

		(A)	(B)	(C) = (B)/(B total)	(D)	(E) = (D)/(A)	(F) = (C*E)
Donor	Contributing Currency	Target Payment Fiscal Year (in Contributing Currency, millions)	USD Value of Contributing Currency on June 26, 2014	Weighted Calculation using the USD value in Column B (in percentage)	Actual Amount Paid in Contributing Currency (in Millions)	Calculation for Donor payment percentage versus pledge	Donor's represented percentage using Donor's weight in overall total to calculate the indicator percentage
Donor 1	EUR	29	39.5	19.7%	21.75	75%	15%
Donor 2	AUD	30	28.2	14.1%	30	100%	14%
Donor 3	USD	40	40.0	19.9%	30	75%	15%
Donor 4	GBP	30	51.1	25.4%	30	100%	25%
Donor 5	CAD	45	42.0	20.9%	45	100%	21%
Total			200.8	100%			90%

(c) Example 3 (using example 1, but adding in a new donor for next Fiscal Year)

		(A)	(B)	(C) = (B)/(B total)	(D)	(E) = (D)/(A)	(F) = (C*E)
Donor	Contributing Currency	Target Payment Fiscal Year (in Contributing Currency, millions)	USD Value of Contributing Currency on June 26, 2014	Weighted Calculation using the USD value in Column B (in percentage)	Actual Amount Paid in Contributing Currency (in Millions)	Calculation for Donor payment percentage versus pledge	Donor's represented percentage using Donor's weight in overall total to calculate the indicator percentage
Donor 1	EUR	29	39.5	16.3%	29	100%	16%
Donor 2	AUD	30	28.2	11.7%	30	100%	12%
Donor 3	USD	40	40.0	16.6%	40	100%	17%
Donor 4	GBP	30	51.1	21.2%	30	100%	21%
Donor 5	CAD	45	42.0	17.4%	45	100%	17%
Donor 6	NOK	250	40.7	16.8%	250	100%	17%
Total			241.5	100%			100%

(d) Example 4 (using example 2, but adding in a new donor for next Fiscal Year)

		(A)	(B)	(C) = (B)/(B total)	(D)	(E) = (D)/(A)	(F) = (C*E)
Donor	Contributing Currency	Target Payment Fiscal Year (in Contributing Currency, millions)	USD Value of Contributing Currency on June 26, 2014	Weighted Calculation using the USD value in Column B (in percentage)	Actual Amount Paid in Contributing Currency (in Millions)	Calculation for Donor payment percentage versus pledge	Donor's represented percentage using Donor's weight in overall total to calculate the indicator percentage
Donor 1	EUR	29	39.5	16.3%	21.75	75%	12%
Donor 2	AUD	30	28.2	11.7%	30	100%	12%
Donor 3	USD	40	40.0	16.6%	30	75%	12%
Donor 4	GBP	30	51.1	21.2%	30	100%	21%
Donor 5	CAD	45	42.0	17.4%	45	100%	17%
Donor 6	NOK	250	40.7	16.8%	250	100%	17%
Total			241.5	100%			92%