Transforming Global Education Through Evidence

An Evaluation System for the BHP Foundation’s Education Equity Global Signature Program—Executive Summary
Preface

The BHP Foundation is investing significantly in global education programs and initiatives that are intended to improve the use of evidence to enhance education and learning. In the report on which this summary is based, we present a system to evaluate this investment during a five-year period. We provide a strategic theory of change, an analysis of challenges and lessons learned through the initiative to date, a framework of indicators to measure progress, an approach to analyze networks in support of better use of evidence in education, and a comparison with other similar foundations or social investment initiatives. Our system offers an evaluation framework for a philanthropic education program, an approach to understanding this program’s contribution and place in the broader global education reform movement, and a case study of how this program conceptualizes and measures its own progress. Our report will be of interest to the BHP Foundation and its program partners, policymakers engaged in global education, other foundations interested in evaluation models, and academics.

This study was undertaken by RAND Education and Labor, a division of the RAND Corporation that conducts research on early childhood through postsecondary education programs, workforce development, and programs and policies affecting workers, entrepreneurship, and financial literacy and decisionmaking. This study was sponsored by the BHP Foundation. The BHP Foundation is committed to improving educational equity for underserved students around the world.

More information about RAND can be found at www.rand.org. Questions about this report should be directed to Benjamin Master (bmaster@rand.org), and questions about RAND Education and Labor should be directed to educationandlabor@rand.org.
Executive Summary

Hundreds of millions of children worldwide are receiving an education of insufficient quality to provide them the tools needed to thrive. National governments and international organizations have made significant investments in education, but the gaps still remain. Recognizing this critical need to improve education, the BHP Foundation has made global education a priority for investment. After consulting with global education leaders and studying the findings of major global education reports, the BHP Foundation identified a key challenge: Although much evidence exists on how to improve education, these findings often go unimplemented.

In 2017, the BHP Foundation created the Education Equity Global Signature Program (henceforth called the Program) to make investments that help translate evidence about improving education into practice. The BHP Foundation selected and is funding the following five partner organizations that seek to translate research findings into global education practice:

1. the Center for Universal Education at Brookings Institution (CUE)
2. the Education Endowment Foundation (EEF)
3. the Global Business Coalition for Education (GBC-Ed)
4. Teach for All (TFA)
5. UN Women (UNW).

These partner organizations began implementing their projects in 2018.

The BHP Foundation aims to contribute to a step change in the quality of education in low- and middle-income countries and in disadvantaged communities in high-income countries. The BHP Foundation defines a step change as a significant, measurable improvement that is greater than incremental improvement and occurs in a short period of time. This step change will be caused by the introduction or implementation of evidence about improving effectiveness in some aspect of education. Through the Program, the BHP Foundation is investing in activities that seek to connect the education evidence base with educational practice. Specific goals include the following:

- enhancing opportunities for the education sector to measure performance and impact
• helping education leaders use evidence to inform decisionmaking
• supporting evidence-based innovation to disrupt current trends in disparity of education outcomes
• harnessing the power and influence of education thought leaders to influence public policy by contributing data and experience.

In support of these goals, the RAND Corporation is conducting a five-year evaluation of the Program. Our evaluation will assess the effectiveness of the Program’s strategy and its collective investment in the activities of the partners. This document summarizes the evaluation system that we developed for this effort and presents initial findings. The full report describing the evaluation system, *Transforming Global Education Through Evidence: An Evaluation System for the BHP Foundation’s Education Equity Global Signature Program*, is available at www.rand.org/t/rrA239-1.

The components of the evaluation system, described in the rest of this summary, are as follows:

• **Theory of change:** We worked collaboratively with the BHP Foundation to articulate the goals, assumptions, and mechanisms needed to carry out its strategy.

• **Indicator framework:** We identified key indicators that we will use to evaluate impact over the next several years in comparison with the theory of change, drawing from the partners’ own indicators.

• **Qualitative analysis of partner activities, challenges, and lessons learned:** We are conducting regular interviews with partners and reviewed their documents to understand how the activities of the partners contribute to the Program’s impacts.

• **Network analysis:** We are conducting network analyses to understand how different types of networks can be used to translate evidence into educational practice through, for example, policy change, norm spreading, and program implementation.

• **Comparison with other foundations and social investment initiatives:** We conducted interviews and reviewed documents related to six other major funders of social change initiatives to understand how the BHP Foundation’s strategy compares with and contributes to the broader landscape of global educational investments.

**BHP Foundation’s Theory of Change**

To frame our evaluation, we developed a theory of change (Figure 1). This framework describes how Program-wide activities will produce interim outcomes and how these interim outcomes will contribute to desired long-run outcomes and impacts. We devel-
**Figure 1**  
Education Equity Global Signature Program Theory of Change

**BHP Foundation Education Equity Global Signature Program Theory of Change**

**ACTIVITIES**
- Curate evidence about improving education
- Disseminate evidence-based strategies
- Develop capacity to leverage evidence
- Advocate to develop enabling environments
- Test potentially transformative innovations

**INTERIM OUTCOMES**
- Increased availability of data and evidence
- More-informed decisionmaking
- Networks of purposeful collaboration
- Empowered thought leaders and local actors

**LONG-TERM OUTCOMES**
- Increased share of investments in evidence-based policies
- More and more-efficient educational investments
- Improved educational attainment

**IMPACT**
- Increased agency for young people
- Equality in education and learning
- Transformation of education delivery
- Strengthened civil and economic conditions of societies

**Year 1**
Activities and outcomes in the BHP Foundation’s and partners’ sphere of control, and directly measured using SMART indicators

**Year 5**
Influenced through subsequent efforts to apply and scale-up program contributions

**Year ~10**
Indirect influences on actors and systems that create conditions for transformational change

**Year ~15**

SOURCE: Copyright BHP Foundation; used with permission. SMART = specific, measurable, appropriate, reliable, and time-bound.
oped this framework by reviewing the Program’s strategic plan and the logic models of each of the funded partners.

The funded activities of the Program include developing, curating, and disseminating evidence-based best practices in education, as well as developing the capacity of local actors to use evidence and to implement and sustain recommended strategies. There is also a focus on advocacy to develop enabling environments, including the norms, policies, and networks of collaboration that can facilitate best-practice adoption and scaling up of practices. The combination of greater access to evidence and enhanced local capacity to use it is expected to spur better-informed decisionmaking within the three- to five-year time frame of the current funded projects. Investments in local capacity building and advocacy will develop networks of purposeful collaboration and empower local leaders to adopt beneficial reforms.

Many of these interim outcomes must be sustained by local actors to contribute to longer-term outcomes even after the current partners have completed their funded work. In affected countries and regions, the Program aims to encourage more—and more-efficient—investments in education and improved educational attainment. Across the portfolio of program investments, the longer-term goal is to identify and create the conditions necessary to facilitate one or more step changes in evidence use and education delivery globally.

About the Partners

The five selected projects are managed by established global organizations, each of which brings its existing talent, resources, networks, and experiences to bear. These organizations each envision certain results from the Program funding, while their work collectively encompasses a range of activities designed to further the BHP Foundation’s objectives. Table 1 provides summary information about the partners and their projects.

CUE has three principal Program-funded workstreams: identifying effective innovations that can rapidly transform education, enhancing the use of data to drive outcomes, and scaling promising innovations. EEF is using Program funding to revamp its existing toolkit of research evidence. It is also partnering with organizations around the world to connect research and practice by funding research trials and building out networks of school-based evidence hubs to disseminate findings and build capacity. GBC-Ed seeks to foster a global ecosystem of businesses investing in education and to equip business investors with user-friendly tools that facilitate effective investments. TFA is using Program funding to expand knowledge about supports for community-level progress, understand how this knowledge is being used among educators and policymakers, and examine how pipelines of local leaders are developed. UNW is using Program funding to pilot its second chance education work to expand access
<table>
<thead>
<tr>
<th>Partner</th>
<th>Type of Organization and Principal Location</th>
<th>Project Name, Funding, and Duration</th>
<th>Synopsis of Work</th>
</tr>
</thead>
</table>
| CUE     | Think tank; United States                  | Millions Learning: Evidence and Innovation to Scale Impact  
$8.0 million (BHP Foundation), $13.1 million (total)  
July 2018–June 2023 | • Identify effective innovations to transform education through a global evidence review and country case studies  
• Develop tools that facilitate decisionmakers’ uptake of innovations  
• Engage with stakeholders to promote use of data to drive outcomes  
• Implement scaling labs in several countries to test innovations; share lessons learned; and enhance connections among researchers, practitioners, and policymakers |
| EEF     | Charity; United Kingdom                    | Building a Global Evidence Ecosystem for Teaching  
£9.9 million  
April 2018–March 2023 | • Curate, analyze, summarize, and repack- age existing research in a form that delivers key actionable insights to teachers and policymakers  
• Create a fellowship program that contributes to evidence generation and synthesis, as well as mobilization of stakeholders, by drawing on expertise and research from a variety of local contexts  
• Work with partner organizations across the world to test education interventions, build “evidence hub” networks of schools, and connect research and practice |
| GBC-Ed  | Nonprofit; United Kingdom and United States | Business Impact for Education Equity  
$5.4 million (BHP Foundation), $8.3 million (total)  
January 2020–March 2023 | • Consolidate and synthesize existing evidence on business investments in education  
• Incorporate evidence into user-friendly tools that facilitate effective investments  
• Foster development of global ecosystem of businesses and associated stakeholders coordinating to invest strategically in education |
| TFA     | Nonprofit; United Kingdom and United States | Leadership and Global Impact for Community Learning  
$14.8 million (BHP Foundation), $30.0 million (total)  
October 2018–September 2023 | • Expand knowledge about what works to drive community-level progress and enhance utilization of this knowledge among educators and policymakers  
• Establish Community Impact Labs as physical and virtual spaces to convene, disseminate findings, and share lessons learned  
• Build out the Global Learning Lab website to host resources on drivers of progress  
• Develop pipelines of local leaders and strengthen connections between TFA partner network alumni locally, regionally, and globally |
An Indicator Framework

Good practice in program monitoring and evaluation includes prespecifying key indicators of progress toward program goals and tracking these indicators over the life of a program. As part of our evaluation system, we developed a framework that links key indicators from the partners’ efforts to the activities and interim outcomes in the Program theory of change. These align with the work—and direct results of that work—expected to be achieved over the five years of the partners’ projects. Our framework categorizes each key indicator as corresponding to a particular step of the theory of change. For interim outcome indicators, we also identify which types of activities contribute to generating the interim outcome being measured.

Selecting the Indicators

We first compiled a library of more than 250 indicators that partners were planning to use and mapped them to the theory of change. Then we developed a shorter, targeted list of about 40 indicators; this list contained six to ten indicators from each partner. This selection was done through a two-step process. First, we developed an initial short list by analyzing the indicator library against SMART criteria. We initially prioritized the appropriate criterion because we were seeking indicators with clear alignment to the theory of change. We then identified indicators that met the other SMART criteria—in short, clear, tangible indicators that can be measured objectively during our evaluation. Second, we consulted with each partner to refine the indicators that best represented their work.
Activity and Interim Outcome Indicators
We selected 23 key activity indicators and 18 key interim outcome indicators; these indicators often mapped to multiple activities or multiple interim outcomes. We selected more indicators for some activities and interim outcomes than for others, and there is variation across the partners in terms of where their indicators are concentrated. This reflects differences across projects, as well as in which activities and interim outcomes can be measured well. There is also variation in the types of activities that lead to interim outcomes measured by the key indicators. There are indicators from most partners that measure progress toward interim outcomes resulting from curating and disseminating evidence, while there are fewer indicators for some other activity-to-interim-outcome pathways.

Long-Term Outcome Indicators
Although Program activities and interim outcomes can be measured well over the five years of the partners’ funded work by drawing on indicators from the partners, this often is not the case for the long-term outcomes. This is to be expected given the time-limited nature of the partners’ work and our evaluation, coupled with the longer time horizons needed to make progress toward long-term outcomes. Going forward, we will work with the BHP Foundation to identify targeted long-term outcome indicators that could be tracked beyond the life of the current funded projects to enable continued evaluation of how the Program theory of change is playing out. We also recommend monitoring additional indicators drawn from the United Nations Sustainable Development Goal 4 (SDG4), which relates to education, for countries where multiple partners are engaged in meaningful work connected to the Program.

Defining Success
Our goal is not to measure individual partners’ success. Instead, we flag areas of relative success or challenge with respect to the Program theory of change. During the evaluation, we will assign each key indicator a value of zero to three, which assesses the degree to which the partner met benchmarks for success based on data from and discussion with the partners. Then we will create a success index by rolling up the individual indicator ratings for each activity, interim outcome, and activity-to-interim-outcome pathway. We note that while summative indicator ratings will provide evidence of progress, the ultimate determination of the overall impact of the Program’s work is likely to be qualitative as well as quantitative. Although the indicators will measure to some extent whether the partners completed the activities that they set out to do in the five-year period, only judgment can determine whether that set of indicators has added up to success.

Figure 2 illustrates the key indicator framework for this evaluation, and Box 1 illustrates the selection of key indicators.
Figure 2
Key Indicator Framework for the Program Evaluation: Number of SMART Indicators and Partners with Indicators

<table>
<thead>
<tr>
<th>PROGRAM THEORY OF CHANGE ACTIVITIES</th>
<th>ACTIVITY INDICATORS</th>
<th>INTERIM OUTPUTS</th>
<th>LONG-TERM OUTCOMES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Curate evidence about improving education</td>
<td>11 Indicators All 5 Partners</td>
<td>6 Indicators CUE; EEF; TFA; UNW</td>
<td>Increased availability of data and evidence</td>
</tr>
<tr>
<td>Disseminate evidence-based strategies</td>
<td>14 Indicators All 5 Partners</td>
<td>5 Indicators CUE; EEF; GBC-Ed; TFA</td>
<td>More informed decisionmaking</td>
</tr>
<tr>
<td>Develop capacity to leverage evidence</td>
<td>10 Indicators All 5 Partners</td>
<td>1 Indicator UNW</td>
<td>Networks of purposeful collaboration</td>
</tr>
<tr>
<td>Advocate to develop enabling environments</td>
<td>6 Indicators CUE; EEF; UNW</td>
<td>0 Indicators</td>
<td>Empowered thought leaders and local actors</td>
</tr>
<tr>
<td>Test potentially transformative innovations</td>
<td>4 Indicators EEF; UNW</td>
<td>2 Indicators EEF; UNW</td>
<td>SDG4 metrics in select countries to monitor progress: Government spending on education Percentage of GDP Percentage of government expenditure</td>
</tr>
</tbody>
</table>

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NOTES: Activity and interim outcome indicators are distinct measures. However, each interim outcome indicator is associated with one or more activity categories. Partners are listed in cells when at least one key indicator measures their work in that cell. GDP = gross domestic product. LMIC = low- and middle-income countries.
Challenges and Lessons Learned to Date

Through this evaluation, we seek to understand the challenges affecting partners’ work, as well as lessons learned about navigating these challenges. In this section, we describe some lessons learned to date. We will track these and other emergent examples throughout the years of the evaluation.

Two notable types of common challenges confronted Program-funded partners’ work from 2019 to 2020: those pertaining to local or implementing partners and those pertaining to the larger context of project work.

In the first category, multiple partners expressed concern about the interest of local partner organizations in implementing certain project initiatives. They regarded stakeholders’ lack of interest and readiness to cooperate and lead reform efforts as a challenge (see example in the first box of Figure 3). On the other hand, some BHP Foundation–funded partners faced the challenge of having to handle high interest in and demand for their work. These partners had to consider how to meet demand without overstretching their organizational capacity (see the second box in Figure 3). A third challenge pertained to local partners’ capacity. Multiple partners found that their local partners had limited capacity to implement some components of their program and innovations.
Figure 3
How Partners Dealt with Challenges and Found Opportunities

1. EEF Demonstrated Relevance of Evidence Hubs to Local Partners

EEF leadership is learning that it can more effectively mobilize local jurisdictions by tapping into existing structures rather than creating new ones. Initially, EEF found that some partners were reluctant to create an evidence hub to generate, test, and support promising teaching practices based on the Research School Network in England. These partners struggled to understand the need for such hubs or to see their usefulness in translating evidence into practice.

To mitigate this challenge, EEF identified “hooks” in each partner country to introduce the idea of the evidence hub or connect it to existing structures that could serve as hubs. In Spain, for example, EEF’s partner, La Caixa Banking Foundation, is funding small-scale evaluations of promising education interventions. EEF now works with La Caixa to develop toolkits and other resources that build off these existing interventions and provide teachers and leaders with lessons about evidence-informed practices. In essence, EEF is developing the capacity to use evidence among teachers La Caixa was already working with.

2. CUE Is Developing Playbooks and Growing Lab Partners’ Capacity to Meet Demand for Technical Assistance

CUE has received multiple requests from various jurisdictions (e.g., ministries of education, Global Partnership for Education) seeking support to implement the key ideas of leapfrogging (quick progress) and scaling (expanding an approach rapidly). Demand for technical assistance from Scaling Labs partners is also high.

CUE wanted to develop an approach for sharing requested information with interested organizations without taxing its own staff. It will do so by publishing and widely disseminating playbooks of promising innovations and growing lab partners’ capacity so they can better support in-country stakeholders.

3. UNW Used Delayed Program Starts to Support Additional Planning

From October to December 2019, implementation of the Second Chance Education Programme was delayed in Chile because of civil unrest. In consultation with its local partners, UNW decided that it was too risky to proceed with the launch of course offerings, so it delayed implementation to 2020. Similarly, program implementation in Jordan was postponed due to a delay in the country’s approval process for humanitarian response activities. In both cases, project teams utilized the time gained as a result of the delay to plan detailed steps in preparation for full implementation.

4. GBC-Ed Has Learned the Value of Understanding the Broad Landscape of Business Needs and Solutions

GBC-Ed learned early on that there are no simple answers regarding what businesses need to support decisionmaking around investing in education. Therefore, it has sought to speak with stakeholders representing a wide range of business entities from different parts of the world—not only Fortune 500 companies. Through these conversations, GBC-Ed leaders have learned how businesses’ needs and solutions regarding education can vary significantly depending on the business’s context and characteristics.

5. TFA Pivoted Its Work to Include a Focus on Responding to the Pandemic

The coronavirus disease 2019 (COVID-19) pandemic has led TFA to shift the focus of its activities to better support learning during crises. Because of COVID-19, communities in which TFA partner organizations operated experienced a cascade of challenges. School closures limited learning opportunities for many children and led to an increase in children experiencing hunger, abuse, or other threats to their well-being. These circumstances forced organizations to consider the balance between focusing on the planned work and responding to pressing needs. Many partner communities prioritized support to children and families’ well-being, which, in turn, would support students’ abilities to learn. TFA recognized that such work could help illuminate the conditions that enable community impact and strengthen the argument for strong local leadership. As a result, while continuing its planned activities, TFA shifted its focus to incorporate community responses. It will publish a paper on the conditions that allow learning to continue during crises. The Community Impact Lab also pivoted its work to better address timely questions around teaching and serving during COVID-19—for example, by creating forums for sharing learning and collaborative problem-solving.
Partners reported that developing and maintaining strong relationships with local partners and stakeholders has helped to ensure progress in the face of these challenges. They also appreciated the driving force of a shared vision and passion among team members and many local partners. In addition, partners recognized the need to invest in building the capacity of local partners through training and learning sessions.

Complex issues in the broader context of product work underlie some of the challenges facing local partners. One issue is the perceived lack of system readiness, or culture of readiness, for innovations and transformative change. This culture is admittedly difficult to affect, but a shift is likely necessary to create meaningful change in the education system. A rapidly changing or unstable political landscape, with turnover in leadership or shifts in funding priorities, also disrupted multiple partners’ work (see the third box in Figure 3). An attendant realization was the importance of learning about and taking into account the landscape in which partners work and adjusting project strategies as necessary. This includes understanding the context and history of each partner jurisdiction. Learning to work with existing structures and systems, rather than against them, has been an effective approach. Considerations of context are also important because the needs of intended beneficiaries might differ and might not reflect partners’ preexisting expectations (see the fourth box in Figure 3).

Not least of all, the outbreak of COVID-19 in the first quarter of 2020 forced partners to pause, rescope, or pivot their work. COVID-19 exacerbated some existing inequities and brought urgent needs to the fore in certain countries and communities, leading partners and their local partners to shift their focus or expand their strategies. Out of the pandemic emerged the lesson that partners needed to be prepared, flexible, and responsive to emerging challenges. All partners reported losing momentum, but they also found ways to move forward, leveraging networks to collaborate on solutions to COVID-induced educational problems and using the moment to urge stakeholders to attend to educational inequities (see the fifth box in Figure 3).

**Networks for Translating Evidence to Impact**

Networks of stakeholders are a critical type of capacity building with respect to Program goals. Translating evidence to impact relies on the diffusion of innovation and organizational collaboration and the dissemination of best practices. These are inherently network-based processes because they rely on interactions and the transmission of information or resources among people or organizations. In line with this observation, many of the Program-funded partners are engaged in developing purposeful networks to facilitate their evidence-to-practice work. We include an examination of networks in our evaluation because the ways in which partner organizations draw upon networks to spur evidence use may provide useful examples for the BHP Foundation, the Program partners, and the field about what types of engagement with others or capacity
building are needed to do this work. Thinking strategically and intentionally about network development efforts can also enhance network resilience and impact.

In Figure 4, we provide example visualizations of the network structure for three components of UNW’s second chance education work in Mexico: (1) delivery of second-chance education, (2) advocacy to change norms around women’s access to education and employment, and (3) efforts to enact beneficial policies for women. UNW worked collaboratively with our team to map the working relationships between the partner organizations that support each of their goals. In addition to describing the breadth of organizational work in Mexico, these diagrams illustrate how different types of goals rely on different types of networks.

**Figure 4**
Visualizations of the Network Structure for UN Women Components

**Diagram A: Delivery of Second Chance Education in Mexico**
In its initial phase, delivery of second chance education involved regional collaborations, with all three regions sourcing from a central core of content providers.

**Diagram B: Advocacy to Change Norms and Attitudes**
A central stakeholder champions a campaign around norms, but distribution occurs through “hubs” of regional collaboration.

**Diagram C: Facilitating Policy Change**
A core of national stakeholders are most engaged in changing national policy. Policymakers gather information from regional constituencies, but decisions are made centrally.
Piloting the delivery of second chance education involved the collaboration of clusters of regional actors, who received support from a loose core of content providers. The sustainability of this educational delivery may depend on building the capacity of key implementing partners central to those regional clusters. Advocacy to change norms relied on the strength of regional distribution networks, in addition to direct outreach from a central actor. Efforts to influence policy exhibited a core/periphery structure: National ministries and major industry groups make most of the decisions after gathering inputs from various constituencies.

Our evaluation will include similar case study analyses of the networks of other Program partners to learn from their approach to building networks to foster sustainable change. We are working with EEF to understand the connections it has fostered among its global network of organizations and individuals engaged in evidence dissemination to inform decisionmaking. We plan to collaborate with CUE to illustrate the development of its network to support scaling lab innovations in Tanzania and CUE’s global communities of practice that connect stakeholders across multiple scaling labs worldwide. We are exploring the possibility of illustrating, in one regional context, the pathways through which the direct contributions of TFA’s Community Impact Lab can influence a larger group of key organizations through its informal alumni network.

**Insights from Other Foundations and Initiatives**

Other foundations or organizations investing in education, international development, or translating evidence into practice provide a useful reference point for developing the BHP Foundation’s Program strategy. We spoke with staff from and analyzed the strategies of the following six comparator organizations:

- the Bill & Melinda Gates Foundation Global Education Program
- the Mastercard Foundation
- the Education Development Center
- the Abdul Latif Jameel Poverty Action Lab
- the European and Developing Countries Clinical Trials Partnership
- the Alliance for Useful Evidence.

Many of these organizations’ strategies overlapped with those of the Program, although there were also areas of distinctiveness (see Figure 5 for more information).

All the comparators emphasize the importance of articulating a clear strategic vision, although they do so in various ways. As with the Program, some comparators define a theory of change that specifies the intended pathways by which their investments will achieve desired outcomes. However, others articulate a broader, more
Figure 5
Partners, Capacity Building Activities, Local Stakeholders, and Evaluation Methodologies

**Types of partner**
- Academics
- Universities
- Nongovernmental organizations
- Donors and funders
- Strategic experts
- Researchers
- Government bodies and ministries
- Implementing experts

**Types of capacity building activity**
- Supporting funding applications
- Systems-level interventions
- Infrastructure and facilities
- Project preparation and implementation
- Building local networks
- Training and mentorship
- Monitoring, evaluation, and learning capacity building

**Local stakeholders targeted by capacity building efforts**
- Education ministries
- Government departments
- Local nongovernmental organizations
- Research institutions
- Grantees
- Researchers
- Students
- Applicants

**Evaluation methodologies**
- Process measures
- Target based assessment
- Desk research
- Surveys
- Publication tracking
- Interviews
- Outcome measures
- Randomized controlled trials

**Evaluation methodologies**
- Targeted assessment
- Process measures
- Randomized controlled trials
- Outcome measures
- Interviews
flexible set of guiding principles alongside intended outcomes. These allow for more regional or partner-specific variation in approach.

All six comparators develop partnerships to maximize their impact and avoid duplication of effort, particularly those working in education, a field with multiple well-established actors. Some prioritize a close working relationship with one key implementing partner that offers a ready-made infrastructure. Others build a broad network of partners who share common goals. Partnerships with peer funders are particularly important. The BHP Foundation may similarly benefit from coordinating investments with other organizations supporting complementary work.

As with the BHP Foundation, all these organizations prioritize developing local capacity to establish the necessary infrastructure, resources, and expertise for local actors to lead sustainable change and to create an enabling environment for the translation of evidence into implementation. Capacity building spans a range of activities targeting different stakeholders. Several develop local networks of like-minded organizations to support scaling up interventions, sharing learning, and collaborating around advocacy and fundraising. Formal collaborations and convenings are the two main approaches to network development.

Some comparators emphasize cost-effectiveness, particularly those scaling up interventions (as opposed to piloting). They do so by conducting and sharing cost analyses, developing cheaper tools, and providing open-source tools. Considering cost-effectiveness might also be valuable early in project life cycles to gauge whether there is a feasible pathway to sustainable impact in the long term.

Finally, given the complexity of measuring impacts in varying contexts and over time, most comparators rely on a mix of qualitative and quantitative methodologies. However, they vary widely in their approach to evaluation. Some limit evaluation to individual projects and invest little in whole-portfolio evaluation. Some focus mostly on activities and outputs, recognizing the difficulty of measuring longer-term impact. One decided to not conduct evaluations because efforts were viewed as too hard to measure. The degree of evaluation typically goes hand in hand with the degree of specificity in strategy.

Overall, the BHP Foundation is not alone in the challenge it faces in evaluating broad, future, and sometimes qualitative impacts. Approaches to evaluation need not be uniform across the Program, and rigorous impact analyses related to specific outcomes or projects can still add value and help spur broader investment in an area.

Looking Ahead

In the coming years, we will analyze insights from the elements described here: progress aligned with the theory of change, meeting goals articulated in the key indicators, key trends and lessons learned with respect to notable challenges and areas of progress,
and how the Program partners develop and use their networks. Although it is still too early to determine what is or is not succeeding, we offer the following recommendations, which are informed by lessons learned to date:

1. **Specify pathways toward a step change in global education practice.** Program partners are undertaking activities that seek near-term direct impacts on education, but an important next step is further specifying what contributing to a step change looks like at the level of the Program. We think there is an opportunity to be more specific about those pathways to success, which in turn may support progress in measurement and assist in selecting and guiding new partners. A next step for our evaluation will be to work collaboratively with the BHP Foundation and Program partners to more clearly articulate the pathways to impact and assumptions underlying these pathways; this will help achieve desired outcomes at a global level. These pathways will be determined at both the overarching level of the Program and at the level of each partner’s contribution to the Program’s overall success.

2. **Identify long-term outcome indicators.** The long-term outcomes toward which the Program seeks to contribute will take more than five years of funded work to fully realize, and the indicators collected by partner organizations to track their own progress are currently not intended to measure whether the Program is having its intended long-term impact. The BHP Foundation could consider identifying indicators that it will use to gauge progress toward long-term outcomes.

3. **Apply solutions simultaneously at a systems level in a particular geographic area.** The BHP Foundation is investing in multiple areas of the enabling environment for improving education in multiple geographic areas. BHP Foundation–funded interventions are being carried out up and down the decisionmaking pipeline and run the gamut from governments to teachers to communities and business leaders. The BHP Foundation could consider how its investments can jointly or synergistically contribute to systemic changes in one or more specific contexts. These considerations could help to address a common challenge faced by partners about implementation at local levels. Such investments could be made in collaboration with current funded partners or could be a key consideration when identifying additional partners for future funded work.

4. **Elevate convening, linking, and facilitating as part of the BHP Foundation’s role.** The BHP Foundation could further connect with the wider global education reform movement, both as collaborators and as audiences for key insights from the Program’s work. In particular, the BHP Foundation could work to convene and link stakeholders that are concerned with improving global education. This would help the BHP Foundation articulate its leadership role beyond its investment in particular partners. The BHP Foundation could sup-
port additional convening (for example, with a highly visible event), policy advocacy, collaboration with other funders on shared priorities, and advocating for and facilitating the work of the partners through the foundation’s own networks.

5. **Focus on specific opportunities for collaboration among partners.** Program partners already regard the BHP Foundation as a facilitator, connecting partners and serving as a thought leader. The BHP Foundation could further connect current or future partners in ways that lead to concrete collaborations that advance the collective impact of the Program. As the BHP Foundation has knowledge of each partner organization’s work, it could envision and facilitate specific activities that particular partners could work on together locally or globally.

6. **Integrate return on investment in some future projects. For programs at the pilot stage, return on investment might not be the most important consideration.** Initial stages of new projects inherently involve risk and the opportunity for a wide range of potential returns. As projects are selected to continue or as they enter new stages of maturity, the BHP Foundation could consider increasing, sustaining, and measuring cost-effectiveness or social return on investment, much as some other comparator organizations do. This can better communicate to diverse audiences the intended scale of long-term impacts and contributions of Program activities and help avoid focusing too narrowly on only those interim outcome measures that are convenient to measure. It can also increase clarity around intended pathways to impact and facilitate monitoring of key assumptions about necessary conditions for effectiveness and efficiency.
In 2017, the BHP Foundation launched its Education Equity Global Signature Program, which is meant to enhance opportunities for disadvantaged young people to access a quality education and, through this, strengthen the civil and economic components of society. It does so through investing in efforts that increase the use of evidence to improve education.

In support of the BHP Foundation’s goals, RAND Corporation researchers are conducting a five-year evaluation of the program. This report is a summary of RAND’s research and plans for this evaluation.