Call for Expressions of Interest: Building Knowledge and Capacity for Scaling the Impact of Educational Innovations in Developing Contexts
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The International Development Research Centre (IDRC) and the Global Partnership for Education (GPE) invite expressions of interest from individual organizations, or consortia of multiple organizations, for a project intended to build knowledge and capacity to scale the impact of educational innovations in GPE member countries.

The project funded through this expression of interest will:

(1) design and lead action research on scaling across KIX-funded projects;
(2) conduct additional research that engages multiple perspectives on the processes and critical success factors on scaling education innovations in GPE member countries; and
(3) use findings from this research to produce practical and conceptual guidance on scaling that balances quality, equity, efficiency and sustainability for education systems and outcomes in developing country contexts.

This call is part of the Knowledge and Innovation Exchange (KIX), a joint endeavor between the GPE and IDRC. KIX aims to strengthen national education systems and accelerate educational progress in GPE member countries by filling knowledge gaps, increasing access to evidence, and strengthening systems to support the generation and uptake of evidence and innovations in GPE member countries. KIX supports knowledge exchange across countries and funds projects at the global and regional levels, with a focus on deepening knowledge about effective means of scaling proven approaches to address challenges in the education systems of developing countries.

GPE supports the education sectors of low income and lower-middle income countries in which completion rates for primary school are less than 85%. Many of these countries are affected by conflict and fragility. In some, access to education and retention continue to be a problem, while overall quality is low in many more. While some improvements are underway, accelerating the pace of change will be critical to meet the needs of the next generation and to achieve the targets in SDG4. This is why a crucial emphasis for KIX is the support of workable scaling approaches to strengthen national educational systems of GPE member countries; it is also why we are taking a systematic and critical approach to scaling.

The deadline for submission of expressions of interest is December 13, 2019 (23:59 EST).
1 Background and Rationale

A key knowledge gap in improving education systems in developing contexts is how to effectively bring innovations to scale while maintaining the quality, equity, efficiency, and sustainability of their impacts.\(^1\) While there has been an enormous proliferation of educational innovations in recent decades, few of them have succeeded in scaling and demonstrating their intended outcomes.\(^2\) Going to scale remains one of the biggest challenges for local and international actors in their efforts to improve educational access and quality in developing contexts (Brookings Institution, 2016). This challenge is exacerbated by our very limited knowledge of scaling educational innovations in these contexts where education progress is most lacking and where limited resources, capacities, and evidence base make scaling a challenge. Overall, we lack empirical evidence to understand what it takes to effectively bring educational innovations to scale and thus to develop empirically grounded scaling frameworks (IDIA, 2017, p. 9).

In addition to this knowledge gap, some argue that successful scaling is hampered by innovations not being designed with scale in mind and by a lack of approaches oriented towards facilitating a social impact. Many innovations are not developed with clear scaling strategies and do not actively manage the pathway to scale (Cooley, 2019, p. vii). Further, most of what we understand today about scaling up social change has been informed by practices from industry, pharmacy and technology start-ups whose scaling paradigms focus on commercial success rather than social impact (McLean & Gargani, 2019). While we can learn from these paradigms, they are insufficient for social innovation in the field of education.

Some also believe that effective scaling is impeded by the so-called “traditional approaches” which include, but are not limited to, a linear view of scaling, a focus on the mere expansion of an innovation, and the shielded conditions of pilot projects. Critics point out that scaling is “rarely a straightforward linear process that can be planned in advance and evaluated as such at the end” (McLean & Gargani, 2019, p. 175). They view it as a complex, dynamic and adaptive process, especially if innovators pay careful attention to the settings in which the innovation is implemented and to the needs of recipients, are invested in achieving a social impact, and are engaged in an ongoing evaluation of scaling, using its results to refine the process.

Critics also note that traditional approaches are overly focused on the expansion of coverage and that they are not necessarily concerned with the larger transformation of an educational system—the modification of structural conditions, teaching and learning practices, and social relations—so that the essential principles of an implemented innovation can be sustained over time (Sabelli & Harris, 2015). They advocate viewing scaling as a matter of improving education rather than merely spreading the use of an innovation. They argue that innovators should work with educational stakeholders to change their institutions in ways that will support not only the innovation at hand but also future improvement efforts (Sabelli & Harris, 2015, p. 28).

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\(^1\) Within KIX funded projects, we conceive of an innovation as a tool, practice, policy, program, methodology, or any other intervention that can be used to improve education access and quality in developing contexts.

\(^2\) For the purposes of the project, we conceive of scaling in terms of not only bringing an innovation to a large scale but also trying out an innovation at a small scale to ensure scalability.
Lastly, opponents to traditional scaling approaches note that pilot projects are usually isolated from political, economic and social processes that can have an immediate impact on the adoption and implementation of the innovation (Woltering et al., 2019). They argue that innovation pilot programs cannot take place in isolation from consideration of power dynamics, institutional processes, prior experience, financial resources, and different stakeholders, all of which contribute to an environment that enables or impedes innovations to scale. They suggest that navigating these different factors should therefore be part of the pilot process.

As a complex and dynamic process, successful scaling depends in part on the capacity of innovators to constantly learn and adapt (McLean & Gargani, 2019). Innovators can benefit from mentorship and capacity building supports, especially in the areas of scaling science, monitoring and evaluation, and adaptive management (e.g., Brookings Institution, 2016; Humanitarian Education Accelerator, 2019; UNICEF, 2016). Action learning processes assist those involved to systematically reflect on their experiences and practices, rigorously documenting what happens, and using evidence to act. Such processes allow innovators to reflect on the impacts of their work, adapt their scaling strategies or even stop scaling if the impacts are negative.

With the larger debates in mind and considering the limited knowledge about scaling the impact of educational innovations in developing country contexts, KIX is funding multi-country, multi-regional grants that will build evidence to support the scaling of proven innovations in GPE member countries. These projects are being selected through a global call, and they will begin in early 2020. In addition, KIX will fund more projects starting in 2020 through regional calls that will also focus on ways of improving education access and quality, based on adapting and further developing innovative approaches. As such, KIX will have a broad variety of projects that will build knowledge and capacity for scaling of educational innovations for social impact.

Seeking to systematically support and learn across these individual experiences, and to situate that learning within a broader enquiry about factors that affect scaling pathways and possibilities, IDRC and GPE invite expressions of interest from individual organizations or consortia of multiple organizations that will lead action research across KIX-funded projects. For the purposes of this project, we conceive of action research as a systematic process of learning by and for those taking the action, done to improve their own practice. In addition, the project will also pursue complementary research in GPE member countries to produce high-quality evidence and actionable learning on scaling the impact of educational innovations. The project would use its results to immediately inform and improve the efficacy of KIX-funded projects, and contribute to a broader discussion about scaling educational innovation in developing contexts.
2 Scope and Objectives

This call aims to fund action research across KIX-funded projects and build empirical evidence with an aim to (1) enhance the quality and results of KIX-funded projects with tools, mentorship and opportunities for co-learning between KIX grantees, and (2) produce actionable knowledge for a broader variety of education stakeholders about scaling educational innovations in developing contexts.

The project will consist of two key components:

(1) **Action research on scaling**: this component will include designing and conducting research across KIX-funded projects to generate meta-learnings throughout their duration and use findings to support KIX grantees and their scaling efforts. This component will also include offering, adapting, and developing frameworks, methodologies, toolkits or other resources, with accompanying mentorship, for between ten and twenty KIX-funded projects. It may also involve individual and collective support to these projects. It is expected that the action research component of the project will balance being systematic and standardized to generate broader learning, while also offering tailored support to different types of projects in different contexts.

(2) **Complementary research on scaling**: moving beyond the KIX-funded projects, this component will include examining the factors that do or do not support scaling efforts, drawing on the perspectives of multiple stakeholders—governments, teacher associations, teacher training, private sector, or others—involved in scaling pathways. It is expected that the component will be able to develop learning about enabling and impeding factors of scaling educational innovations in the context of GPE member countries that focus on improving education access and quality and are relevant to KIX’s six thematic priorities: teaching and learning, early childhood care and education, equity and inclusion, gender equality, data systems, and learning assessment systems. Findings of this research will also feed in the action learning process of KIX-funded projects.

All elements of the project are expected to pay attention to issues of quality, equity, efficiency, and sustainability, and how these factors change as educational innovations are adapted and scaled.

General objective of the project is:

To improve the effectiveness of efforts to scale the impact of educational innovations in developing country contexts.

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3 See Appendix A for the list of GPE member countries by region.
4 These six thematic priorities, which have been developed in consultation with GPE member countries, guide KIX programming, including its global and regional grants.
Specific objectives of the project are:

(1) To enhance quality of scaling efforts of KIX grantees through strengthening their capacities.
(2) To develop new knowledge about scaling educational innovations in ways that optimize quality, equity, efficiency and sustainability of impacts in developing country contexts.
(3) To provide both conceptual and practical guidance to education stakeholders in developing countries on scaling educational innovations.

The following research questions are suggested to guide the research component of the project:

Overall question: How can educational innovations be designed, adapted, and scaled to improve education access and quality within GPE member countries while maintaining quality, equity, efficiency and sustainability of their impacts and enabling transformative change of educational institutions?

Sub-questions:

(1) How are KIX-funded projects designing, adapting, implementing and scaling the impact of educational innovations across the different political, economic, social and cultural contexts of GPE member countries? To what extent and to what effect?
(2) How do KIX-funded projects and other education stakeholders respond to key issues of quality, equity, efficiency, and sustainability across the different contexts? What trade-offs (if any) do they make to respond to these issues? What are the range of unintended impacts in scaling processes seen by the projects?
(3) What factors, conditions, and design characteristics are most critical to the success, and lack of success, of scaling efforts within and beyond KIX-funded projects?
(4) What can we learn about efforts to not just scale an innovation but support an institutional capacity for scaling?
(5) What are key meta lessons for designing, adapting, adopting, monitoring and evaluating innovative approaches to improve education in developing contexts? How can those lessons inform different stakeholders involved, including government ministries? What do the lessons imply about existing conceptual frameworks about scaling?

Organizations submitting expressions of interest are invited to tailor the objectives and questions, and offer ways to focus their study, to produce a useful and innovative contribution to the overall problematique.
3 Funding and Duration

KIX will allocate CA$3.5 million (US$2.72 million) through this call. The project can be up to 42 months in duration. Funding can be allocated to individual organizations or groups of organizations (henceforth consortia) working together to implement the project. Only one individual organization or consortium representing multiple organizations will be awarded the grant.

4 Eligibility

This call for expressions of interest is open to individual organizations or groups of organizations located within and outside of GPE member countries. Organizations applying for this project can be non-profit or for-profit.

Eligible applicants must have a proven record of working in developing contexts and supporting the scaling of innovations in these contexts, preferably in the field of education. Organizations committed to develop research to inform and influence scalability of education innovations are encouraged to apply.

Transdisciplinary consortia are encouraged to apply. Consortia may consist of up to four organizations. In case of a consortium, the expression of interest needs to provide a rationale explaining why the consortium has come together to implement the project and describing the role and added value provided by each member organization. Consortia must describe the governance and coordination arrangements they will use to produce high quality work and support fair and equitable partnerships. Consortia should include at least one organization based in a GPE member country.

NB: This call for expressions of interest is not open to individuals, government ministries and agencies, or for-profit providers of core education services.
5 Expression of Interest Requirements

The applicant organization (or, in the case of consortium, the lead organization) should submit an expression of interest of no more than 4,000 words that clearly addresses the following:

- What contribution to knowledge and capacity building the project will aim to make, including the intended outcomes and the main outputs;
- What specific research questions and conceptual frameworks the organization (or consortium) will pursue;
- The methodology the organization (or consortium) will use to conduct both the action research and complementary research;
- How the organization (or consortium) will use its results to engage and support both KIX projects and broader educational stakeholders;
- What the organization (or consortium) has learned through its work in scaling and how these lessons will inform the ways in which the organization(s) will approach the project (explain the organization’s (or consortium’s) experience(s) relevant to the project);
- What major challenges the organization (or consortium) foresees in implementing the project and what actions it will take to address them;
- The team composition and resources deemed necessary to successfully implement the project, including its evaluation and governance processes (in the case of consortium, outline the roles each member would play, which organization would lead, how partners would coordinate equitable and effective partnerships); and
- What the interest of the organization (or consortium) in applying for this project is and how this project aligns with their organizational mandate.

In addition to the expression of interest, applicants are expected to submit:

1. contact information of the lead applicant and members of the consortium if applicable;
2. Institutional Profile Questionnaire (IPQ) to be completed by the lead applicant; and
3. abridged CVs of the lead applicant with relevant experience and key contact individuals from other organizations in the case of the consortium (CVs should be no longer than two pages).
6 Evaluation

Methodology and expertise for research (30%):

- Methodology outlines rigorous mechanisms and approaches for conducting action research, and additional knowledge-building on scaling educational innovations in developing contexts.
- Methodology presents creative, feasible, and cost-effective approaches to facilitating an action learning process among KIX grantees in order to support their scaling efforts.
- Methodology articulates knowledge mobilization and uptake strategies.
- Experience in conducting applied, action research that is oriented both to direct users (grantees) and to a wider audience and learning community.

Knowledge and expertise in scaling (30%):

- Experience and learning about scaling pathways, especially in developing contexts.
- Proposed research is grounded in solid conceptual framework regarding scaling issues, including the interplay between equity and inclusion, quality, efficiency and sustainability in scaling innovations.

Expertise in learning facilitation and knowledge mobilization (15%):

- Ability to facilitate knowledge exchange through participatory mechanisms both virtually and face-to-face.
- Experience in designing and developing products that support knowledge sharing and use: high quality practitioner-oriented outputs, toolkits, rapid knowledge syntheses, supporting resources, and policy briefs.
- Proposal to publish and disseminate academic-oriented outputs.
- Experience in knowledge mobilization for policy and practice improvement.

Organizational performance (20%):

- Experience working in developing contexts.
- Capacity to respond in an adaptive manner to a potentially large number of widely distributed innovation projects.
- Availability of the systems, resources, and management capacities necessary to succeed in conducting research on scaling, providing technical support to KIX grantees, and facilitating learning among them through an ongoing action learning process.
- Monitoring, evaluation and learning strategy.
- In the case of consortia, appropriate plans for coordination and governance.
- Capacity to work in English and French (other languages would be an asset).

Organizational motivation (5%):

- Evidence that the organization’s programmatic strategy, institutional mandate, and previous experience align with and are relevant to the project.
7 Submission and Review Process

The expression of interest and all requested supporting materials must be sent by email to kixcalls@idrc.ca, with a timestamp no later than 23:59 EST on December 13, 2019.

The review process will consist of the following steps:

(1) Verification of eligibility requirements and expression of interest completeness: IDRC will review all submitted expressions of interest to ensure they meet eligibility requirements and all necessary materials. Incomplete expressions of interest or those that do not meet the requirements will not be considered further.

(2) Review and ranking of expressions of interest: IDRC will review eligible expressions of interest using the evaluation criteria. Each expression of interest will be reviewed by at least two IDRC program officers. Expressions of interest will be ranked on the basis of scoring and subsequent IDRC discussion.

(3) Shortlisting expressions of interest: On the basis of scoring and internal discussion, IDRC will shortlist high-quality expressions of interest and will invite them to submit a proposal.

8 Call Timeline

<table>
<thead>
<tr>
<th>Activity</th>
<th>Date</th>
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<tbody>
<tr>
<td>Expression of interest release date</td>
<td>Oct 18, 2019</td>
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<tr>
<td>Webinar: English, 9:00 am EST</td>
<td>Nov 5, 2019</td>
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<td>Webinar: French, 11:00 am EST</td>
<td>Nov 5, 2019</td>
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<td>Expression of interest submission deadline</td>
<td>Dec 13, 2019</td>
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<td>Invitation to submit proposals</td>
<td>Dec 20, 2019</td>
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<td>Submission of proposals</td>
<td>March 1, 2020</td>
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<td>Final selection</td>
<td>March 13, 2020</td>
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9 Inquiries

If you have any questions about this call for expressions of interest, please contact IDRC at kixcalls@idrc.ca.

English and French FAQ webinars will take place on November 5 to answer questions about the call for expressions of interest. Only those who register will receive access to the webinar platform (click here to register). Please send your questions in advance by October 31.

Any inquiries that affect all applicants will be posted anonymously online on an FAQ site. Applicants are strongly encouraged to monitor this website for any updates regarding the call.
## Appendix A

List of GPE Member Countries by Region:

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<thead>
<tr>
<th>Region 1: Anglophone Africa (19)</th>
<th>Region 2: Francophone Africa (20)</th>
<th>Region 3: Asia/Europe/Middle East and North Africa/Pacific Islands (21)</th>
<th>Region 4: Latin America and the Caribbean (8)</th>
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<td>Eritrea</td>
<td>Benin</td>
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<td>Ethiopia</td>
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<td>Gambia</td>
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