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SYSTEMS OF EDUCATION

The Secret Sauce of Development Professionals: Tools for Assessing TOR Potential to Source Scalable Learning Interventions

Funder Toolkit—Guiding Framework and Reflective Checklist

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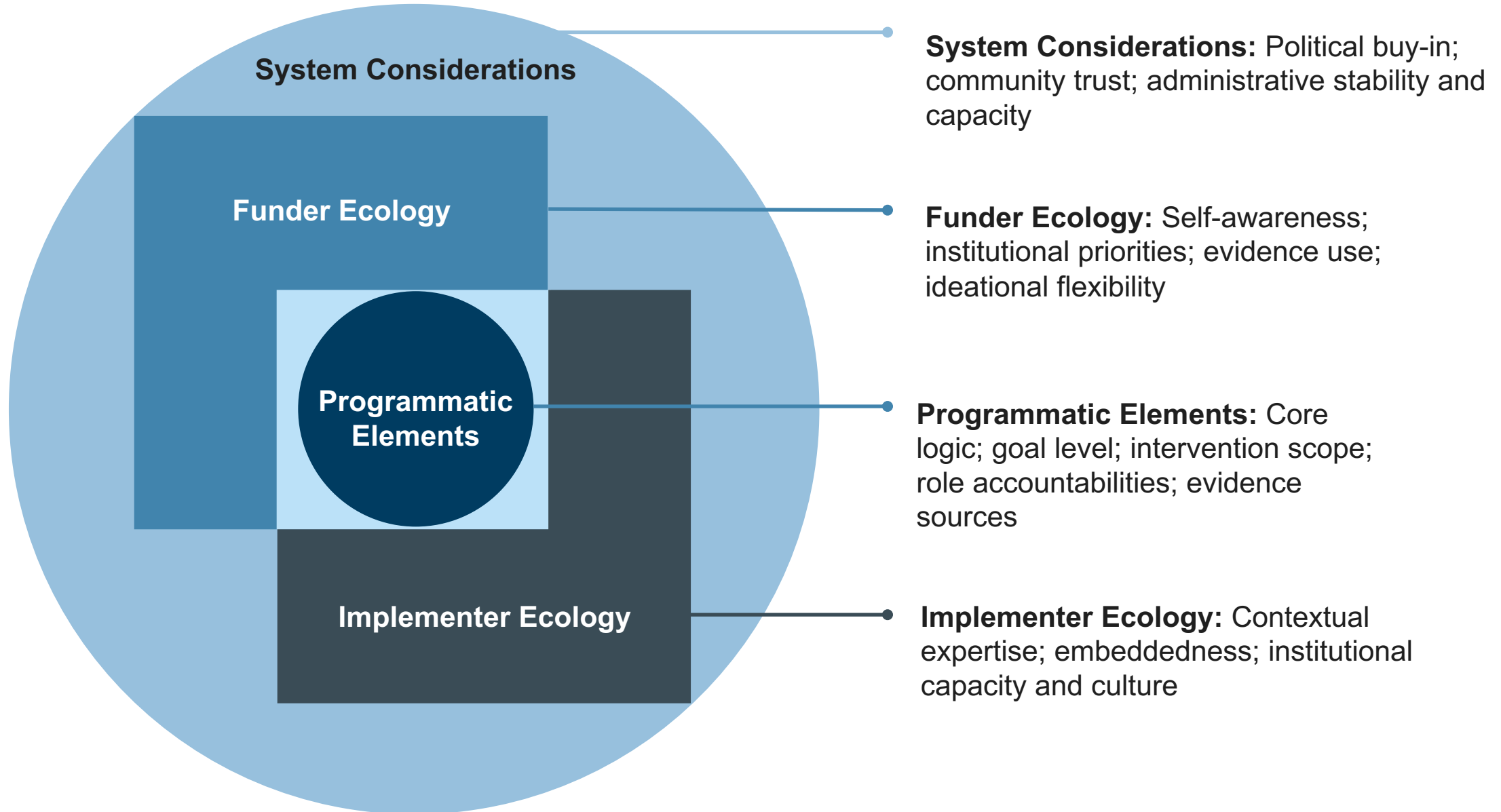BILL & MELINDA GATES foundation

This conceptual framework:
- illustrates various **components** of a **successful procurement ecosystem**
- highlights how successful funders **structure their thinking** when designing and assessing TORs.

Professionals approached TOR review using four interlocking levels of analysis:
- **system considerations**
- **funder ecology**
- **implementer ecology**
- **programmatic elements**

You can use this framing to **assess TOR potential**, examining **possibilities** and **pitfalls** in procurement documents **across each of these four dimensions**.

Procurement Ecosystem: A Guiding Framework for TOR Success

System Considerations: Political buy-in; community trust; administrative stability and capacity

Funder Ecology: Self-awareness; institutional priorities; evidence use; ideational flexibility

Programmatic Elements: Core logic; goal level; intervention scope; role accountabilities; evidence sources

Implementer Ecology: Contextual expertise; embeddedness; institutional capacity and culture

This reflective checklist **mirrors the thought processes** that **successful practitioners** use when **reviewing TORs**.

Before using this list:

- reflect on the **purpose(s) of your planned intervention**
  No TOR can or should aspire to excel across every dimension below.
  With your specific intentions in mind, prioritise the questions most aligned with— and most feasibly addressed by—your programming.

- note that **framework elements are interconnected**
  Each question likely fits into multiple elements. But, to facilitate usage, each question is assigned to just one primary category.

Reflective Checklist: Ten Questions for TOR Review Summary

System Considerations

1. To what extent does this intervention **align with existing government** and **civil society activities**?

2. To what extent does this intervention tap into, or propose to cultivate, **political will** and **community appetite**?

Funder Ecology

3. To what extent does this intervention demonstrate a mentality of **iteration** and **experimentation**?

4. To what extent does the funder adopt the role of a **nurturing collaborator**?

Implementer Ecology

5. To what extent does **implementer selection** prioritise the **organisational characteristics** most likely to **enable systemic change**?

Programmatic Elements

6. To what extent does this intervention **target mindset and behavioural change** to support intended practice improvements?

7. To what extent does this intervention logically respond to **a clear problem statement**?

8. To what extent does this intervention logically lead to **systems-level outcomes**?

9. To what extent is this intervention based on **localised, contextual knowledge** and **expertise**?

10. To what extent are **measurement and evaluation** criteria justified by **core programme logic**?

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Framework Element: System Considerations

Framework Element	Question	Sub-Question
System Considerations	**1** To what extent does this intervention **align with existing government** and **civil society activities**?	❑ Does this intervention contemplate **long-term funding** arrangements? ❑ Does it propose ways **to complement or augment**, rather than reinvent, **existing activities**? ❑ Does it seek to **strengthen**, rather than circumvent, **public systems, organisations, and processes**?
	2 To what extent does this intervention tap into, or propose to cultivate, **political will** and **community appetite**?	❑ Does this intervention explicitly **acknowledge the ongoing need** to cultivate political will and community appetite, across various levels of action? ❑ Does it **map and differentiate** the **specific change agents** necessary to sustain will and appetite? ❑ Does it demonstrate knowledge of, or a drive to assess, specific areas of **educational demand**? ❑ Does it propose **specific processes for cultivating will** towards the intended activities?

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Framework Element: Funder Ecology

Framework Element	Question	Sub-Question
Funder Ecology	**3** To what extent does this intervention demonstrate a mentality of **iteration** and **experimentation**?	❏ Does this intervention identify specific **moments to pause, reflect, and iterate** on proposed activities and emergent best practices? ❏ Does it explicitly acknowledge the **lack of silver bullets** and **quick fixes**? ❏ Does it explicitly reflect on what remains **unknown** or **unclear**? ❏ Is it framed as a **best-bet attempt**, given current knowledge, while remaining **open to new learnings** and **inputs**?
	4 To what extent does the funder adopt the role of a **nurturing collaborator**?	❏ Does the funder commit to intentionally **nurturing implementer capacity** and **networks**? ❏ Does it establish a clear and transparent process for **external experts to question and shape** the proposed intervention? ❏ Does it delineate **clear role accountabilities and responsibilities** for each partner, including government actors and community members? ❏ Does it recognise and value the **topical and technical expertise** of selected partners?

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Framework Element: Implementer Ecology

Framework Element	Question	Sub-Question
Implementer Ecology	**5** To what extent does **implementer selection** prioritise the **organisational characteristics** most likely to **enable systemic change**?	❑ Does the selection process provide room for organisations to demonstrate their **unique core approach and change philosophy**? ❑ Does it recognise, and seek to **minimise**, **the linguistic, financial, and technical burdens of application**? ❑ Does it require organisations to demonstrate **compelling "relational evidence"** within the system, including strong local networks and a proven track record with partners across multiple leadership levels? ❑ Does it enable organisations to highlight **characteristics of their leadership teams**, such as continuity plans and clarity of vision? ❑ Does it push organisations to **demonstrate alignment** between **institutional mission**, organisational **track record**, and **proposed programming**?

Framework Element: Programmatic Elements

Framework Element	Question	Sub-Question
Programmatic Elements	**6** To what extent does this intervention **target mindset and behavioural change** to support intended practice improvements?	❑ Do these changes relate **directly to teaching and learning practices**? ❑ Do they emerge from an analysis **of classroom-level challenges**? ❑ Are they intentionally sequenced to gradually **build momentum and shift mindsets**? ❑ Do they actively **involve constituents** to build long-term community **ownership**?
	7 To what extent does this intervention logically respond to **a clear problem statement**?	❑ Is this problem statement based on a recent assessment of **participant barriers and needs**—or does it propose a participatory scoping period? ❑ Does it reference **previous solution attempts**, and hypothesis about why they failed? ❑ Does it highlight and contrast **challenges and solutions from comparable contexts**? ❑ Does it include **key barriers** for those at the core of proposed changes, namely **teachers and students**?

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Framework Element: Programmatic Elements

Framework Element	Question	Sub-Question
Programmatic Elements	**8** To what extent does this intervention logically lead to **systems-level outcomes**?	❑ Are systems-level outcomes designed with reference to **long-term durability**? ❑ Are they described using a **sequential, processual lens**? ❑ Are they compellingly justified with **narration of the evidence** driving the proposed change process? ❑ Do they involve a strategy to **build system capacity** and **strengthen local talent pipelines**?
	9 To what extent is this intervention based on **localised, contextual knowledge** and **expertise**?	❑ Does this intervention build in **time for (re)scoping with participants**, before implementing activities? ❑ Are there multiple opportunities for **government and civil society constituents to question and challenge** programme logic? ❑ Does programme knowledge emerge from **dialogic design practices**, such as community steering committees or forums? ❑ Does this intervention **emerge from contextual realities**, rather than beginning from desired programming components?

Framework Element: Programmatic Elements

Framework Element	Question	Sub-Question
Programmatic Elements	**10** To what extent are **measurement and evaluation** criteria justified by **core programme logic**?	❑ Do the **resources** offered, including funding and facilitation, **reasonably enable the proposed timeline, scope, and scale** of activities? ❑ Are **deliverables** considered in terms of **the time and resources required to execute each**? ❑ Is each **deliverable** logically **linked to the long-term change strategy**, building a sense of momentum toward long term change? ❑ Do reporting requirements **complement or build on existing deliverable activities**? ❑ Are the **types of evidence** sought **flexible** and **contextually-relevant**?

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