

Specific guidance for domestic philanthropic organisations participating in the Global Partnership monitoring at the country level

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This document provides specific information for domestic philanthropic organisations¹ engaged in the GPEDC monitoring exercise at the country level. It should be read in conjunction with the [Monitoring Guide](#), which provides comprehensive information about the monitoring process and framework. Private foundations that provide development co-operation funds to governments that are participating in the monitoring as development partners should refer instead to the guidance for development partners [here](#).

BACKGROUND ON THE GLOBAL PARTNERSHIP MONITORING

What is the Global Partnership?

The Global Partnership for Effective Development Co-operation (Global Partnership, or GPEDC) was established by 162 country governments and 52 international organisations in Busan, Korea, in 2011 as a multi-stakeholder platform aimed at advancing the effectiveness of development co-operation and contributing to the achievement of sustainable development. The Global Partnership monitoring exercise is an internationally recognised instrument to track progress on the effectiveness commitments which are based on the four principles of effective development co-operation: 1) country ownership; 2) focus on results; 3) inclusive partnerships; and 4) transparency and accountability. Since 2011, there have been three rounds of Global Partnership monitoring: 99 partner country governments² have participated, together with their development partners³ and other development actors⁴.

How does the Global Partnership monitoring work in practice?

The monitoring is voluntary and multi-stakeholder in nature. It is led by national governments of partner countries (typically by a ministry of planning, finance or foreign affairs). It brings together bilateral and multilateral partners, philanthropies, the private sector, civil society, trade unions, and other development actors to discuss, share information and reflect on results. At the country level, the exercise is organised in five phases (Figure 1), with participating governments encouraged to define an implementation road map to anchor and integrate the monitoring into relevant national processes and/or existing institutional arrangements.

FIGURE 1 | PHASES OF THE GLOBAL PARTNERSHIP MONITORING



1. Refers to domestic private philanthropies that operate in the country where the monitoring exercise is taking place.
2. Partner countries refers to countries and territories that receive development co-operation.
3. Development partners refers to official agencies, including state and local governments, or to their executive agencies that provide development co-operation. This includes Development Assistance Committee (DAC) members and non-DAC bilateral partners, as well as multilateral development partners including, for example, multilateral development banks and vertical funds.
4. Includes civil society, the private sector, trade unions, philanthropies, parliaments and subnational governments.

When a country government decides to participate in the monitoring, a government official is appointed to co-ordinate the implementation of the exercise, including convening meetings and managing the data collection. The list of countries undertaking the exercise, their country-specific road maps and the contact information of the leading officials (referred to as national co-ordinators) are published on the [Global Dashboard](#) as they become available.

In an effort to institutionalise the monitoring process in country-level systems and processes, governments are encouraged to use existing frameworks, dialogue platforms, co-ordination groups and information management systems both to gather the required data and anchor dialogue on the results.

Why is the engagement of domestic philanthropic organisations in the monitoring so important?

The monitoring exercise provides a unique opportunity to engage in multi-stakeholder dialogue and identify joint solutions to overcome challenges to effective development co-operation. All domestic development actors are encouraged to participate, including development partners, civil society organisations (CSOs), the private sector, philanthropies, trade unions, parliaments and subnational governments. While they do not all have a role in reporting data, they can all engage in discussions about the country's results and identify ways to improve the effectiveness of partnerships and development co-operation in their country.

The monitoring offers two distinct but complementary roles for engaging domestic philanthropic organisations at the country level. The **first** is through overall engagement in the process and active participation in multi-stakeholder dialogues, action planning and follow-up. This typically happens in Phases 1 and 5 of the monitoring process. Several organisations could be engaged in this role. A **second role** is indirectly reporting data to assess the enabling environment for CSOs during Phase 2. Several organisations can also participate in this role, but the actual reporting happens through a "CSO focal point" who is responsible for consulting different types of organisations in the country, including **domestic philanthropic organisations**, and for providing representative views to the assessment. More details on these two roles, and what they entail, are provided below.

What are the key outputs and expected results of the monitoring?

The Global Partnership provides timely and relevant evidence on the effectiveness of development co-operation: to inform dialogue, change policies and practices, and garner political traction, at both the global and country levels. In addition to the key outputs listed in Table 1, the Global Partnership monitoring results inform other processes and reports, including on the implementation of the Sustainable Development Goals.

TABLE 1 | **KEY OUTPUTS OF THE GLOBAL PARTNERSHIP MONITORING EXERCISE**

At country level	At global level
<p>Evidence is provided through country results briefs and country data sets which contain detailed results of the monitoring per participating country.</p> <p>These country-specific outputs serve as a basis for interested actors to discuss and understand country results and to jointly craft and implement action plans to increase the effectiveness of development co-operation and achieve greater development impact.</p>	<p>A Global Progress Report, produced every four years, presents evidence on the global state of effectiveness based on data collected from all the countries and partners that carried out the monitoring in the period. This report informs political dialogue at Global Partnership High-Level Meetings.</p> <p>Periodic summaries of results outlining global key trends and findings are also planned.</p>

Note: For more details on the Global Partnership monitoring process and outputs, refer to Part 2 of the Monitoring Guide.

KEY ACTIVITIES IN WHICH DOMESTIC PHILANTHROPIC ORGANISATIONS ARE EXPECTED TO PARTICIPATE

1. During the inception phase

The inception phase is when the monitoring process starts in the country. In consultation with the Global Partnership Joint Support Team (JST), the national co-ordinator prepares a road map to plan the monitoring implementation, linking with and integrating other relevant ongoing processes in the country and ensuring adequate time for each phase. In this phase, the national co-ordinator identifies focal points for CSOs and for development partners⁵ to raise awareness about the effectiveness agenda and the monitoring exercise and mobilise them to participate. The phase results in a **kick-off meeting** at a strategic and political level, which brings together all the relevant stakeholders to agree on the road map and scope of the monitoring and secure high-level commitment to the exercise. This phase is also key for these various stakeholders to organise themselves and prepare their engagement.

1.1 Kick-off meeting

An important activity involving country-level actors, including domestic philanthropic organisations, is the monitoring kick-off meeting. This meeting is organised by the government implementing the exercise. Its objective is to officially launch the exercise in the country; raise awareness about the monitoring; and build a common understanding of its objectives, timeline, and roles and responsibilities. The kick-off meeting typically takes place at a strategic and political level, convening all the relevant country-level development actors. As such, it helps develop relationships at the technical level to secure contributions from the various stakeholders throughout the exercise.

To raise awareness widely in the country about this exercise and effectiveness issues, the government is encouraged to invite a range of people and organisations to attend the meeting, including domestic philanthropic organisations. Preparation for this meeting on the side of philanthropies would include becoming familiar with the monitoring (by reviewing this document and the detailed Monitoring Guide) and co-ordinating with peers to collect inputs and views to be shared at the kick-off meeting. Feeding back after the meeting to those consulted might also be envisioned.

2. During the data collection phase

2.1 Assessment of the enabling environment for CSOs

The political, financial, legal and policy context in which CSOs work, as well as how they organise themselves and work with governments and development partners, deeply affects their development effectiveness and contributions to achieve development results. This assessment aims to capture governments', CSOs' and development partners' perceptions about the environment in which CSOs operate in partner countries. Although domestic philanthropic organisations have unique characteristics compared to other CSOs, they are considered CSOs for the purpose of this assessment.

These perceptions are collected through a questionnaire that is ideally answered in the context of a dialogue co-ordinated by the government with a focal point from CSOs and a focal point from development partners. The questionnaire's 17 questions are organised into 4 thematic modules (see section C. [here](#)). [Characteristics of practice](#) are available to help respondents choose the answer to each question that best matches the situation in the country. There is no need to reach a consensus between the government, the CSO focal point and the development partner focal point, since each group's answers are captured separately. A constructive discussion of the different perspectives is, however, encouraged. The questionnaire can also be answered after the dialogue, if preferred.

5. If the country is doing the optional Kampala Principles Assessment, focal points from the private sector, trade unions and possibly a second focal point from civil society also need to be identified.

The CSO focal point identified by the government in the previous phase receives an email with a link to the online reporting tool which contains the questionnaire. When logging in for the first time, the CSO focal point is prompted to complete their identification details (name, email and organisation). They can circulate the [questionnaire](#) to other relevant organisations for information and consultation but cannot share the link. After answering the questionnaire, the CSO focal point can save the answers and come back to them later or they can submit them. Once the answers are submitted, however, they can no longer be modified. After submission, the answers are visible to the national co-ordinator, who submits the data to the JST.

To provide representative views in the dialogue and the questionnaire, the CSO focal point is expected to consult widely within the country, reaching out to diverse types of organisations that form civil society, **including domestic philanthropic organisations** and trade unions. Views from all those consulted need to be consolidated into one representative CSO answer for each of the 17 questions. Although domestic philanthropic organisations are a segment of civil society, there may be areas assessed in the questionnaire that affect them differently, or that are particularly relevant for them due to their nature. Therefore, a separate optional question is offered for domestic philanthropic organisations if they have different views about an issue that is particularly relevant to them. Their answers to the optional question are also reported through the CSO focal point. If the CSO focal point finds it helpful, the Global Partnership's global constituency leads may be able to provide country contacts for domestic philanthropic organisations. These contacts can be organised through the JST.

> For more details about the content of this assessment, refer to Part 3 of the Monitoring Guide. The full questionnaire can be found in [Annex 1](#).

3. During the data review and submission phase

During this phase, the JST reviews all the information collected and submitted in the previous phase to ensure the data are comprehensive and accurate, and requests clarifications from the national co-ordinator if needed. To respond to the JST, the national co-ordinator may consult the CSO focal point and ask for clarification or additional information, who in turn may reach out to the domestic philanthropic organisations consulted in the previous phase.

4. Dissemination of the results and transition to action

Following the final data submission, the JST closes and collates the data from all monitoring components to allow for aggregation and analysis. Within three weeks from when the national co-ordinator submits the final data to the JST, a final data set in Excel containing the country's key results and the underlying raw data is made publicly available in the Global Dashboard. In parallel, the JST develops a country results brief, which provides a more comprehensive and user-friendly overview of the country's results. This brief is made available in the Global Dashboard within three months of the final data submission to the JST. Domestic philanthropic organisations engaged in the monitoring are encouraged to review the country's results and disseminate them widely to raise awareness to prepare for the reflection, dialogue and action phase.

5. During the reflection, dialogue and action phase

After the comprehensive country results brief is made available, a process of reflection, dialogue and action can begin. The duration and exact format of this action-oriented phase varies and is adapted to the country-specific context. Ultimately it focuses on using the monitoring results to generate action. This phase should be championed at a high political level, involve multi-stakeholder dialogue, link to relevant national processes and issues, and be continuous such that it informs and links to participation in a subsequent monitoring round.

Like the kick-off meeting, the national co-ordinator is encouraged to engage with and invite domestic philanthropic organisations to participate in this phase. Participating organisations can bring additional topical analysis and other relevant information to provide different perspectives and enrich the discussion.⁶ Organisations can prepare for dialogues and meetings with the government and other actors by reaching out to and co-ordinating with diverse philanthropies in the country to collect their inputs and views. Feeding back to those consulted afterwards should also be envisioned, especially on actions emerging from the joint planning and potential follow-up mechanisms.

FREQUENTLY ASKED QUESTIONS

i. Is it guaranteed that domestic philanthropic organisations will be invited to participate in these activities?

Multi-stakeholder engagement is an essential feature of the Global Partnership monitoring. Carrying out this process in a country without engaging domestic philanthropic organisations and other actors certainly weakens its quality and defeats its purpose. When the government plans the monitoring implementation with the JST, it is strongly encouraged to include philanthropies and other actors. Guidance on how to do this in a meaningful manner is also provided. Nonetheless, as the government leads the monitoring, it has the prerogative to decide whether to do this, how to go about it and which stakeholders to engage. Domestic philanthropic organisations may not be invited to engage in the monitoring or perhaps the organisations invited by the national co-ordinator are not well known and/or are not those which some would see as most suitable for this role.

ii. Can several domestic philanthropic organisations participate?

For the kick-off meeting and dialogues around results and action planning, it is possible and encouraged to invite a variety of organisations. Whether to do this and who is invited rests with the government leading the exercise in their country.

Reporting to the assessment of the enabling environment for CSOs is done through a CSO focal point, so only one person completes the questionnaire, ideally providing consolidated views. Typically one person brings these views to the dialogue. However, to prepare for answering the questionnaire and attending the dialogue, the CSO focal point is expected to engage and consult a wide variety of organisations, including domestic philanthropic organisations. This is thus when a range of philanthropies can participate.

iii. Can domestic philanthropic organisations engage at the regional and global levels?

Domestic philanthropic organisations participating in the monitoring at the country level could potentially be invited to discuss and share experiences at regional or global encounters. Global Partnership High-Level Meetings, which take place every four years, are an example of a multi-stakeholder dialogue that addresses effectiveness issues and where philanthropies play a fundamental role. The monitoring Global Progress Report provides important evidence to these meetings, including about the CSO enabling environment and how many countries have undertaken an inclusive dialogue as part of the monitoring.

6. The country results brief will include some relevant secondary data (not collected through the monitoring exercise) which are topical to the monitoring exercise and can help contextualise monitoring results. During the dialogue and action phase, stakeholders may wish to introduce additional secondary data, such as from other reports or surveys, which can further enrich the discussion and help triangulate the monitoring results with other information.

iv. What support is available for participating domestic philanthropic organisations?

The following support materials provide valuable information to domestic philanthropic organisations:

- [Monitoring Guide](#): Provides comprehensive information about the full monitoring process and framework.
- [Questionnaire](#): Contains all the questions that are part of the Global Partnership monitoring, including also those that are not answered by domestic philanthropic organisations.
- [Glossary](#): Defines terms used in the questionnaire.
- [Global Dashboard](#): Contains country pages with country-specific monitoring information, including the implementation road map, the data set with results and the country results brief.
- [Characteristics of practice](#): This is specific to the assessment of the enabling environment for CSOs. It provides a detailed description of each answer option for each of the 17 questions.

The Global Partnership Joint Support Team also offers a virtual Help Desk. Questions, requests or technical issues with the online reporting tool can be sent to: monitoring@effectivecooperation.org.