# RCG support to the Octava Foundation Social Innovation Challenge
## -  Final reflections and options moving forward

## Executive Summary

In 2021, an agreement was reached between the Octava Foundation and the Research and Communications Group (RCG) for RCG to support the Foundation as it commenced its first Social Innovation Challenge. The purpose of the Octava Social Innovation Challenge was to seek **'accessible and affordable edtech solutions focused on underserved K-12 learners that utilize evidence-based educational content informed by the science of learning '**.

RCG had previously supported a similar MIT Solve Challenge and was contracted by the Octava Foundation to provide 'Monitoring, Evaluation and Learning' (MEL) support, and to more generally act as a 'critical friend' to the Foundation.

The centrepiece of RCG's support was the development of a MEL framework and MEL tools to guide performance measurement of both the core work of the Octava Foundation Social Innovation Fund and in specific relation to the Foundation's Social Innovation Challenge.

This report delves into Foundation performance, using the different performance measurement frameworks agreed between RCG and the Foundation at program commencement. Presentation of the report is framed around the different tools prepared by RCG to help provide the Foundation with a framework that articulated its core objectives, as well as indicators to help guide performance measurement of the Challenge. It also offers some thoughts on options for the Foundation moving forward.

Findings are primarily drawn from the input received from the cross-section of people interviewed by RCG who either contributed to or participated in the Challenge.

### *Theory of Change*

The theory of change underpinning the work of the Octava Foundation Social Innovation Fund is that **individuals from low-income families can enjoy increased potential to break the cycle of economic disadvantage if they have an opportunity to access and engage in quality education and skills development**.  Accordingly, the Social Innovation Challenge focused on supporting early-stage EdTech innovation with the aim of solving complex education, skills development and transition to work challenges in the region.

The agreed Theory of Change identified key organisational characteristics considered critical to enabling success with the Challenge. These are outlined below, with a summary finding of this review attached to each.

- *Working to ensure sophisticated, contemporary understanding of how educational disadvantage, extreme poverty and technology access intersect*

Stakeholders across the EdTech landscape laud the Octava foundation for its efforts to invest in understanding the baseline context of the SE Asian region and five countries that it chose to focus on, and also those key factors affecting educational disadvantage.

- *Ensuring an ambitious, robust and transparent marketing, application and selection process to guide the Social Innovation Challenge*

An independent review undertaken by RCG of the Challenge "Design, Promotion and Selection process" highlighted high levels of satisfaction amongst participants, based on strong appreciation for the overall process being:

- underpinned by extensive planning and research
- professionally executed (including MIT Solve's role)
- strategically drawing on the expertise of different supporters to the process
- willing to adapt and improve as the process unfolded

- *Support development of a semi-structured 'EdTech eco-system' that could collectively provide funding, mentorship, access to networks, and credibility to participants*

The Octava Foundation has made important progress in terms of demonstrating itself to be a serious, committed, ethical and knowledgeable new actor within the SE Asian EdTech community. While this has been effective in positioning the Foundation to take on an 'eco-system' leadership role, uncertainty as to future directions of the Foundation means that the eco-system remains informal and vulnerable to deconstructing as time passes.

- *A sophisticated Support Program was needed to underpin the Challenge, drawing on networks of MIT Solve, the Octava Foundation's own EdTech relevant networks, and targeted new partners*

Final interviews with Challenge participants highlighted generally strong appreciation for the support provided in addition to the grant, and also for the intent of support being holistic and consistently available across the grant period.

- *An ability to measure and evaluate Challenge performance, through research, monitoring and development of a culture of critical reflection and feedback*

There is general appreciation for the Foundation's 'learning culture', and the authenticity with which the overall program worked to reflect on its performance, welcomed feedback and constantly took steps to fine tune Challenge implementation.

## Program Logic

A Program Logic was also developed to describe in more detail the causal pathway from activities to outputs to a sequence of outcomes to impacts, in relation to the Challenge. As can be seen in table one below, the Foundation's work over the past two years has been largely successful in meeting or progressing to both 'Year Two' and longer-term objectives.

**Table One: Octava Foundation Two Year and Longer-term objectives**

| Year Two Objectives | Longer term objectives |
|---|---|
| 1. To have in place a viable pipeline of efficacious and scalable solutions for Octava Foundation's longer term regional portfolio<br>2. To have a stronger understanding of the EdTech environment in the region<br>3. To provide the selected Solvers with effective financial and capacity building support<br>4. To have mobilised a range of partners contributing to a supportive ecosystem | 1. To build a portfolio of EdTech/ education solutions with high potential to meaningfully effect /improve access and delivery of quality education<br>2. A semi-structured ecosystem supporting a regional portfolio of vibrant, effective innovators |

- **Year Two Objective One – Pipeline of efficacious and scalable solutions**

The Foundation provided funding and non-financial support to ten EdTech start-ups operational in the five target countries. These efforts were significantly varied in their approach, reflecting the learning attitude that the Foundation brought to its first Challenge. Determinations on progress towards this objective in terms of 'efficacy' or 'scalability' are

made difficult by there being no clear definitions or indicators in place to measure efficacy or scalability.

- **Year Two Objective Two – To have a stronger understanding of the EdTech environment in the region**

The Octava Foundation has taken a coherent approach to better understanding the context of EdTech in SE Asia, through deliberate steps such as investing in a White Paper, attendance at the Singapore EdTech summit, and assembly of experienced, knowledgeable and well regarded EdTech expertise within the eco-system it has begun to foster

- **Year Two Objective Three – To provide the selected Solvers with effective financial and capacity building support**

Solvers spoke enthusiastically of both the financial and non-financial support made available through the Challenge, with particularly strong endorsement of the training and coaching made available, as well as investment in the White Paper as a universal resource for Solvers and the eco-system to draw upon. While the grants provided were appreciated, some Solvers spoke of "$50,000 not going all that far", while others argued that a more flexible approach to grant making, based on needs, rather than the one standard set amount would have been more appropriate to context.

- **Year Two Objective Four - To have mobilised a range of partners contributing to a supportive ecosystem**

Collaboration with MIT Solve, the White Paper development process and output, judging recruitment and stewardship, and the Support program were all significant in positioning the Octava Foundation to be able to initiate and foster a supportive eco-system.

- **Longer-term Objective One – To build a portfolio of EdTech/ education solutions with high potential to meaningfully effect /improve access and delivery of quality education**

As is appropriate for a longer-term objective, portfolio development remains a work in process. Due to having 'applied a wide funnel' in initial selection of Solvers to receive grants, people perceive the Foundation as now being in a position where it needs to narrow its focus to ensure it proceeds deep enough to achieve results.

- **Longer-term Objective Two – A semi-structured ecosystem supporting a regional portfolio of vibrant, effective innovators**

As indicated already at multiple points, the Octava Foundation has been highly effective in convening a semi-structured eco-system to support the Social Innovation Challenge and broader Foundation work. Where and how this semi-structured eco-system can and will proceed will be dependent on the direction that the Foundation decides to take in terms of future programming in the EdTech sector.

## *Challenge outcome measures*

- **Outcome Statement One:    The Challenge design process is effective**

Both contributors to and participants in the Challenge spoke very positively of the Challenge being underpinned by a holistic, thoughtful and professionally developed 'Design process'. However, it should also be noted that there was very limited engagement of public education systems of participating countries during the Design process, which many felt impacted the degree to which the process was sufficiently 'holistic' in the input it enjoyed.

- **Outcome Statement Two:     Promotion of the Challenge is effective**

At closure of the application period, 123 applications had been submitted, surpassing the target set in the MEL Framework of 100. In total, 465 applications were commenced. In terms of applications by country, the split was as follows:

- Philippines     26.2%
- Indonesia       20.0%
- Malaysia        19.0%
- Vietnam         18.5%
- Thailand        16.4%

The quality of applications was uneven, but the number of applications of sufficient quality to warrant full consideration exceeded the target of 25, with 16 finalists being selected for detailed judging by a panel of 18 judges.

- **Outcome Statement Three:   The Solver selection process is effective**

A panel of 18 judges was recruited to support the selection process, and to help identify the solutions that were best aligned to the objectives of the Challenge. While judges reflected many well-known and highly credentialed EdTech experts, the panel had no public system representation, which appears to be a significant deficiency given that the Foundation viewed public education system engagement as such an important factor and opportunity in terms of impacting the 'bottom of the pyramid'. Efforts were made to include government representation, but there appeared to be a reluctance to participate. This likely also reflects that the Foundation's networks are not yet sufficiently engaged with this key cohort. Judges themselves felt well-briefed on the selection process, but several also spoke of the process being very time intensive – some saying they only stayed the distance because of the general professionalism and credibility of the overall Challenge design process.

- **Outcome Statement Four:     Octava Foundation and MIT Solve mobilize a diverse set of stakeholders around the Challenge and around the Solvers**

From the early mobilisation of a highly credentialed judging panel, to the contracting of Better Purpose, to the assembly of an acutely relevant panel of experts to support the judging and post-selection Support Program, the Foundation has been effective in laying the platform for an energised EdTech eco-system interested in the role of EdTech in addressing acute educational disadvantage in SE Asia.

- **Outcome Statement Five:     Solvers have a clear picture of their path to success, and achieve their key targets over the 12-month period**

In terms of setting clear measurements for success, Solvers for the most part struggled to put in place clear performance indicators beyond numbers of subscribers. Further, MIT Solve data gathering was primarily quantitative, and therefore limited in supporting full understanding of strengths and weaknesses. RCG efforts to support Solver MEL were insightful in terms of highlighting a very low baseline. Most agencies were open that they didn't really have the time, energy or resources to devote to a substantial MEL approach, even though they recognised that proving efficacy would be a critical step forward for them.

- **Outcome Statement Six:       Octava Foundation has a better understanding of the EdTech Sector in the region and how they can best make a positive contribution**

RCG enjoyed the privilege of regularly meeting with Foundation staff and Challenge participants and stakeholders. These meetings were insightful in terms of allowing regularly

updated perspectives on the work of the Foundation, and highlighted the breadth, sophistication and relevance of connections and relationships maintained by the Foundation.

## *Moving forward*

Having supported a breadth of organisations through the Octava Foundation Social Innovation Challenge, the Foundation now has myriad options as to where and how it might move forward.

- *Strengthen commitment to public system engagement*

Continue with SELECT Phase One Solvers who demonstrated commitment and progress in terms of public system engagement and integration, notably GSL (both Penimpin and Inspirasi), Let's Read and Kipin. Such a cluster of public system committed entities would work programatically in terms of allowing the Octava Foundation to partner with two technical entities (GSL and TAF) who have very strong understanding, networks and lines of communication with public education systems.

- *Support a Bahasa Indonesia/Melayu cluster*

Six of the Solvers are focused on Indonesia (4) and Malaysia (2). A strategic composition of 'Bahasa' speaking Solvers could provide another interesting programmatic option, with the Foundation working to support coordination and also engagement of higher levels of the public educations system in those two countries (or three, Brunei?) with the aim of supporting these key providers to make sense of all that is going on in the EdTech space.

- *Reading cluster*

Three Solvers are reading focused. This offers the Foundation the opportunity of working in the narrow band of reading, which is known to be highly relevant to strengthening educational outcomes for disadvantaged cohorts.

- *Rationalise geography, including serving under-served locations*

The Foundation could consider rationalising from five countries to one or two, in order to allow deeper dive research, more comprehensive understanding and relationship building with public education system leadership. Indonesia would be one option, given it is the 'main game' and has a population greater than the other four focus countries put together. However, it is already a crowded EdTech space. At the other end of the spectrum, Malaysia is under-served – but also experiences far less poverty than other countries.

- *Identify a strategic partner that complements the Foundation's offering*

Networks and eco-system that the Foundation has been able to assemble and/or integrate within are a unique asset, and would be a great complement to partners that are more narrowly focused. Conversely, the Foundation currently partners with Solvers that already enjoy the benefits of being well connected in the region through their 'parent entity':

- Lets Read, and The Asia Foundation
- Penimpin (and Inspirasi), and GSL
- Library for All, and Save the Children

Working through larger organisations such as The Asia Foundation, GSL and Save the Children could be strategic for the Octava Foundation, given the relationships and access to public system leadership that they can often facilitate. In turn, they would value Octava's niche offering and focus.

# 1.    Context

In early 2021, the Octava Foundation made contact with the Research and Communications Group (RCG) to discuss the potential of collaboration in relation to an EdTech Challenge they were commencing in partnership with MIT Solve - an initiative of the Massachusetts Institute of Technology focussed on facilitating innovation for social impact. RCG had provided support to a similar MIT Solve Challenge across 2019-20 and was contracted by the Octava Foundation to provide 'Monitoring, Evaluation and Learning' (MEL) support, and to more generally act as a 'critical friend' with which Foundation leadership could bounce ideas and receive frank feedback. Agreement on partnership parameters was reached in May 2021 with the current phase of RCG support due to conclude mid 2023.

The purpose of the Octava Social Innovation Challenge was to seek **'accessible and affordable edtech solutions focused on underserved K-12 learners that utilize evidence-based educational content informed by the science of learning '**. The geographic parameters of the Challenge were that solutions must be operating in at least one of Octava Foundation's target countries (Indonesia, Malaysia, the Philippines, Thailand, and Vietnam). Ten submissions were selected for funding, with each entity receiving a $50,000 grant to be utilised over a 12 month period.

The purpose of this document is to undertake a 'big picture' reflection on the work of the Octava Foundation over the past two years from the perspective of the RCG team, as a close-out of the current RCG contract. The paper draws upon the MEL Framework, perspectives of key stakeholders to the Challenge, data gathered by MIT Solve and reflects our own personal observations of Foundation performance to date, and options moving forward.

The 'raw material' for this reflection is the input received from the cross-section of people who either contributed or participated in the Challenge, as well as RCG's own thoughts on what worked, what didn't, and where to next for the Foundation.  The framework guiding the reflection are the 'baseline documents' developed in late 2021 – the Theory of Change, Program Logic and MEL Framework.

What follows are four chapters that each delve into Octava Foundation performance, using different performance measurement frameworks. Chapter two describes how the overall MEL Framework operates. Subsequent chapters look at performance against the Theory of Change (3), the Program Logic (4) and the Outcomes detailed in the MEL Framework (5). While this cascading approach will likely result in some repetition, it also offers the reader options as to how deep they want to delve.

A sixth and final chapter considers options for the Octava Foundation moving forward.


# 2.    The Monitoring, Evaluation and Learning framework

The centrepiece of RCG support to the Octava Foundation was development of a MEL framework and MEL tools to guide performance measurement of both the core work of the Octava Foundation Social Innovation Fund and in specific relation to the Foundation's Social Innovation Challenge. The composite parts of this MEL Framework were a Theory of Change, a Program Logic and MEL Framework, with Challenge specific outcome statements. These related, but different tools involved different articulations of the Foundation's approach, and aimed to help clarify, verify and measure whether or not Foundation supported

activities were well placed to set the Foundation on a pathway towards achievement of its intended outcomes.

To develop an agreed MEL framework, RCG consulted with key stakeholders to workshop and clarify exactly what outcomes the Foundation was seeking. This input was used to articulate and present how planned interventions would contribute to desired results— both in terms of (a) the causal pathway from <u>activities to outputs to a sequence of outcomes to impacts</u> (the Program Logic) and (b) the causal assumptions showing why and under what conditions the various links in the causal pathway are expected to work (the Theory of Change).

This information was then translated into a MEL Framework which detailed six outcomes, performance questions and performance indicators (when appropriate).

## 3.    Theory of Change

The theory of change underpinning the work of the Octava Foundation Social Innovation Fund is that individuals from low-income families can enjoy increased potential to break the cycle of economic disadvantage if they have an opportunity to access and engage in quality education and skills development.  This relates to a perceived linkage between improved educational attainment and the capacity for:

- secure employment and a sustainable income, helping contribute to a better quality of life
- transferable skills, relevant to successful navigation of personal and professional life
- an ability to establish networks and social capital, creating an ecosystem that help broaden opportunities across their lifetime
- 'interrupting' inter-generational poverty, through both income and modelling

The Social Innovation Challenge was the Foundation's first initiative outside Singapore, and determined to focus on supporting social innovation in South-East Asia, through supporting early-stage EdTech innovation with the aim of solving complex education, skills development and transition to work challenges in the region.

The Foundation also set itself a longer-term objective of helping establish a semi-structured ecosystem capable of supporting a regional portfolio of early-stage innovators.

An important early observation of RCG and others mobilised to support program implementation was that staff and leadership of the Octava Foundation were refreshingly clear-sighted in terms of the complexity of the challenge posed, and also that entrenched, often structural challenges commonly thwarted efforts to meaningfully reach those at the 'bottom of the pyramid'.

From the outside, people interested in EdTech perceived strong levels of awareness within the Foundation that solutions needed to be thorough, tested and realistic in their capacity to address the key pillars of disadvantage – accessibility, availability, affordability and quality. People also welcomed the Foundation's openness to the fact that 'silver bullets' don't exist, since as a cohort these people had too often experienced other EdTech interested actors jumping in too quickly to 'solutions', without adequate consideration of the EdTech landscape and what was needed to navigate entrenched obstacles. Perhaps most importantly, the Foundation recognised and accepted that it had a steep learning

curve ahead, and that year one would primarily be a matter of building clarity about where and how best they fit into the broad eco-system aiming to address acute educational disadvantage.

This unusual level of organisational self-awareness was welcomed by longstanding EdTech professionals, where people often spoke of their frustrations at similar efforts to those of Octava Foundation that were conceived with limited interest in what had and hadn't previously worked. This situation had the unintended consequence of building confidence in and energising goodwill towards the Foundation's efforts to develop an eco-system.

The agreed Theory of Change identified key features that were considered critical to enabling success with the Challenge, and also to help best position the Foundation itself to move forward beyond the Challenge.  These were:

- A need to be proactive and invest time and resources in working to ensure sophisticated, contemporary understanding of how educational disadvantage, extreme poverty and technology access intersect, disaggregated by country.

    o *This occurred both through direct interventions, such as the White Paper prepared by Better Purpose and the RCG review of the Challenge "Design, Promotion and Selection process", as well as through a general commitment to 'mainstream reflective practices' in terms of Foundation staff interactions with eco-system members. This effort has helped foster a sense of 'ownership' amongst the eco-system of the Foundations work and direction, and also nurture strong levels of interest to remain engaged with the Foundation as it moves forward.*

- Ensuring an ambitious, robust and transparent marketing, application and selection process that ensured applicants a high level of confidence in the overall process

    o *An independent review undertaken by RCG of the Challenge "Design, Promotion and Selection process" highlighted high levels of satisfaction with the process amongst participants, based on strong appreciation for the overall process being:*

        ▪ *underpinned by extensive planning and research*
        ▪ *professionally executed (including MIT Solve's role)*
        ▪ *strategic in terms of drawing on the expertise of different supporters to the process*
        ▪ *willing to adapt and improve as the process unfolded.*

    *This contributed to growing confidence both in the strength of the emerging eco-system, as well as amongst Challenge participants – with strong approval voiced for the process even amongst unsuccessful applicants.*

    *(The design, application and selection process will be reviewed in more deyail below at Chapter 5)*

- Support development of a semi-structured 'EdTech eco-system' that could collectively provide funding, mentorship, access to networks, and credibility to participants through the strong brand reputation that each partner would bring to the Challenge

- o *As suggested above, the Octava Foundation has made important progress in terms of demonstrating itself to be a serious, committed, ethical and knowledgeable new actor within the SE Asian EdTech community. While this has been effective in positioning the Foundation to take on an 'eco-system' leadership role, uncertainty as to the direction of the Foundation in coming years has meant at this point in time that the eco-system remains informal and vulnerable to deconstructing as time passes. The Foundation is also (understandably) hesitant about committing the funds necessary to an eco-system facilitation role, given its awareness of the level of effort and investment that would require to ensure meaningful results.*

- A sophisticated 'Support Model' that ensured access to the experience, approaches and networks of MIT Solve, the Octava Foundation's own EdTech relevant networks, and targeted new partners to ensure successful Challenge applicants functional access to the eco-system to help maximise their potential

  - o *Final interviews with Challenge participants highlighted generally strong appreciation for the support provided in addition to the grant. There was appreciation for the intent of support being holistic and consistently available across the grant period. However, different participants valued different aspects of the support. Coaching provided by Karla Garcia Tereul was consistently noted as being valued, for both its group coaching and also the individualised coaching sessions which honed in on organisation specific needs.*

    *One participant said "I'm an accidental entrepreneur, but was supported by Karla to believe that I have the knowledge and skills to succeed as one!"*

- An ability to measure and evaluate performance, through research, monitoring and development of a culture of critical reflection and feedback

  - o *There was appreciation across the spectrum for the Foundation's 'learning culture', and the authenticity with which the overall program worked to reflect on its performance, welcomed feedback and constantly took steps to fine tune Challenge implementation*

## 4. Program Logic

As mentioned above, the intent of the Program Logic was to describe in more detail the causal pathway from activities to outputs to a sequence of outcomes to impacts in relation to the Social Innovation Challenge. The Program Logic is attached below.

The logic set out both Two Year and Longer term objectives for the Foundation:

| Two Year Objectives | Longer term objectives |
|---|---|
| 5. To have in place a viable pipeline of efficacious and scalable solutions for Octava Foundation's longer term regional portfolio<br><br>6. To have a stronger understanding of the EdTech environment in the region | 3. To build a portfolio of EdTech/ education solutions with high potential to meaningfully effect /improve access and delivery of quality education |

| | |
|---|---|
| **7.** To provide the selected Solvers with effective financial **and** capacity building support<br><br>**8.** To have mobilised a range of partners contributing to a supportive ecosystem | **4.** A semi-structured ecosystem supporting a regional portfolio of vibrant, effective innovators |

# ii) Octava Social Innovation Challenge - Program Logic

**Long-term Objective**

To build a portfolio of EdTech/ education solutions with high potential to meaningfully effect /improve access and delivery of quality education and

A semi-structured ecosystem supporting a regional portfolio of vibrant, effective innovators

**Two Year Objectives**

To have in place a viable pipeline of efficacious and scalable solutions for Octava Foundation's longer term regional portfolio

To have a stronger understanding of the EdTech environment in the region

To provide the selected Solvers with effective financial and capacity building support

To have mobilised a range of partners contributing to a supportive ecosystem

## Inputs

The Challenge provides:
- Implementing partner - MIT Solve's Challenge methodology and regional EdTech 'White Paper'
- Octava Foundation: strategic oversight, program management & administration
- OF prize funding pool for direct grant to winning solvers
- Implementation cost
- Access to network
- Selected expert input to design, implementation
- Strong brand reputation
- Partner finances and technical expertise

## Activities

The Challenge delivers:
- Design of the application & selection process
- Development of regional EdTech 'White Paper'
- Challenge Promotion
- Judge recruitment & stewardship
- Program Development & Strategy
- Capacity and Technical Support
- Partner Coalition
- Application Screening, Review and Finalist Selection
- Selection of Challenge Winners
- Solver Needs Assessment
- Support program design and implementation
- Recruitment of support program partners
- Annual Assessment of Solver

## Outputs

The activities produce:
- White Paper - EdTech opportunity in 5 SE Asian countries
- 8 Solver organisations
- 10 months support program
- Octava Foundation and partner funding contributions
- Challenge performance reports
- Solver MEL plans
- Semi-structured support ecosystem

## Outcomes

Capacity changes in knowledge, attitudes, skills

*Solvers have:*
- strengthened confidence & knowledge in local/national education
- greater understanding of MEL principles
- greater skills, confidence & knowledge in other identified areas of need

*Octava Foundation and partners:*
- better understand the non-financial needs of each Solver
- are building increased awareness of the EdTech environment in the 5 countries

Behaviour changes

*Solvers:*
- are actively monitoring progress targets
- are more effectively engaging with key stakeholders
- are liaising regularly with other Solvers and schools
- interventions are aligned with govt. priorities and have buy-in

*Octava Foundation and Partners:*
- are regularly engaging with the Solvers to find out how they can best provide meaningful support
- can demonstrate positive impact on targeted participants
- actively engage in and contribute to the broader education innovation ecosystem in the region

Longer-term results

*Solvers*
- Desired number of Solvers achieve MEL targets
- have emerging diverse revenue streams
- interventions are serving underserved learners, educators and schools
- interventions are aligned with new funding sources

*Octava Foundation and Partners have a:*
- strong understanding of the EdTech environment in the 5 target countries
- viable pipeline of scalable solutions
- clear plan regarding the ongoing development of a regional education innovation ecosystem

As can be seen through review of the Year Two objectives and narrative in Section Three above, the Foundation has in large part met its Year Two objectives.

## Two Year Objectives

- **Year Two Objective One – Pipeline of efficacious and scalable solutions**

The Foundation worked with ten EdTech start-ups operational in the five target countries. These were significantly varied in their approach, reflecting the learning attitude that the Foundation brought to its first Challenge. Determinations on progress towards achievement of this objective in terms of 'efficacy' or 'scalability' are made difficult by there being no clear definitions or indicators in place to measure.

Almost all Solvers managed to reach the Year One targets they set for themselves, based on numbers of subscribers to their technology. While this does not necessarily correlate to efficacy or scaleability, it does suggest that the selection process managed to identify worthwhile solutions that have capacity to attain market traction.

Of the ten supported Solvers, many were focused on solutions suitable for application within public education systems. Of these, some focused on hardware solutions (Kipin). Others had a teacher and school leadership focus. Three were reading focused. While all Solvers were open regarding their struggle with the question of proving their efficacy, each understood the importance of establishing monitoring and evaluation systems capable of helping provide evidence of efficacy. Having said that, the quality of M&E systems in place varied considerably, with Penimpin and Inspirasi being the only ones to have a truly robust M&E system in place – which in large part related to them existing under the umbrella of GSL, which places great value on ensuring robust evidence around efficacy.

In terms of scaleability, most supported organisations teeter in the space of pre-scaleability, working somewhat frantically with potential funders to take the next step towards achieving greater traction and scaling.

- **Year Two Objective Two – To have a stronger understanding of the EdTech environment in the region**

As described above, the Octava Foundation has taken a coherent approach to better understanding the context of EdTech in SE Asia, through deliberate steps such as investing in the White Paper, attendance at the Singapore EdTech summit, and assembly of experienced, knowledgeable and well regarded EdTech expertise within the eco-system it has begun to foster. Beyond that, Foundation staff have shown a commitment to advancing their own understanding through active participation in regional networks, as well as instilling a general culture of enquiry into the work of the Foundation.

- **Year Two Objective Three – To provide the selected Solvers with effective financial and capacity building support**

Enthusiasm for the Support Program architecture set up around the Challenge is described above and set out in more detail at Chapter 5. In summary, it was well regarded, with particularly strong endorsement of the training and coaching made available, and investment in the White Paper as a resource that many Solvers draw on regularly.

Throughout interviews with Challenge stakeholders, a question was frequently asked as to whether or not the decision to run with an immovable $50,000 grant to all Solvers was the

best use of program resources, or whether more financial resources to fewer Solvers might have provided a more appropriate framework for Challenge implementation. Some Solvers also commented to the effect of "$50,000 not going all that far".

- **Year Two Objective Four - To have mobilised a range of partners contributing to a supportive ecosystem**

Collaboration with MIT Solve, the White Paper development process and output, judging recruitment and stewardship, and the Support program were all significant in positioning the Octava Foundation to be able to initiate a supportive eco-system. The language of 'positioning' is deliberately used, since there was/is significant enthusiasm for the Octava Foundation to assume a leadership and convening role in terms of EdTech in SE Asia. There is also universal enthusiasm amongst Solvers supported in the Challenge to remain connected to the Octava Foundation, irrespective of ongoing funding. This highlights the efficacy of the Foundation in quickly asserting itself as a significant and knowledgeable voice on the SE Asian EdTech landscape.

Connections to global organisations such as AWS and GSL are also significant and supportive of connection into the broader global EdTech eco-system.

## Longer term objectives

- **Longer-term Objective One – To build a portfolio of EdTech/ education solutions with high potential to meaningfully effect /improve access and delivery of quality education**

As is appropriate for a longer-term objective, this remains a work in process. Due to having 'Looked broadly' in initial selection of Solvers to receive grants, people perceive the Foundation as now being in a position where it needs to narrow its focus to ensure it proceeds deep enough to achieve results. By continuing to work with breadth – geographically and sectorally – there is a risk of the programming being unable to penetrate complexity to a point whereby the Foundation can affect actual change.

Options for 'going deeper' will be outlined in Section Six of this report.

- **Longer-term Objective Two – A semi-structured ecosystem supporting a regional portfolio of vibrant, effective innovators**

As indicated at multiple points above, the Octava Foundation has been highly effective in convening a semi-structured eco-system to support the Social Innovation Challenge and broader Foundation work. Where and how this semi-structured eco-system can and will proceed will be dependent on the direction that the Foundation decides to take in terms of future programming in the EdTech sector.

## 9. Challenge outcome measures

The foundation piece of the MEL Framework was a set of Outcome statements aimed at measuring overall performance of the Challenge process, from establishment through to closure. RCG prepared a report for the Octava Foundation External review of the Challenge Design, Promotion and Selection phases. The information that follows draws from the report and MIT data, and is augmented by information gathered from 1/ 'exit interviews' undertaken with Solvers and 2/ further consultations with providers of support during the Challenge.

**Outcome Statement One:**      **The Challenge design process is effective.**

*Performance Questions:*

- *To what extent did the research process and knowledge gathering add value to the design process?*
- *Was the sequence and timing of the design stages appropriate?*

Both contributors to and participants in the Challenge spoke very positively of the Challenge being underpinned by a holistic, thoughtful and professionally developed 'Design process'. However, it should also be noted that the public education systems of participating countries were barely engaged in the Design process, which could be argued to have denied the design process from being sufficiently 'holistic' in the input it enjoyed.

Investment in the White Paper was cited as an example of an organisation coming to a complex area of enquiry with few pre-conceived ideas, and a desire to work from a clear and accurate evidence base. In this sense, the White Paper output was practically helpful in terms of providing applicants with a relevant and reliable resource to draw upon in their application. However, the White Paper was also spoken of as a signal of the values and professionalism of the Octava Foundation, and was interpreted by many as evidence of the Foundation's commitment to genuinely understanding and finding appropriate solutions to educational disadvantage in Asia.

However, the White Paper was also perceived as 'heavy' and 'overly technical', with some suggesting they would have liked it to have been presented in different formats that allowed different user-types options as to the depth with which they engaged the information. It was also felt by some applicants that the White Paper could have more neatly aligned with the parameters of the Challenge – though this of course presented an acute challenge in the context of an ever-evolving process.

A summary of several statements coming from both applicants and contributors was that the early work indicated to them that this was a Challenge they wanted to be involved with, since it 'felt' different from their first interactions with similarly intentioned programs in terms of its potential to move forward and achieve results.

Clarity of design was also seen as having been enhanced by the diversity of views available to the process, and also an openness to receive and respond to feedback – especially knowledge emerging during the sprints.

The professionalism and dynamism of Challenge roll out was frequently commented upon, with clarity of the application guidance note cited as an example of the Foundation's determination to make it easy for potential candidates to apply.

**Outcome Statement Two:**      **Promotion of the Challenge is effective.**

*Performance Questions:*

- *Did the promotional activity generate sufficient interest?*
- *Which of the promotional tools was most effective?*
- *What evidence do we have of effectiveness?*
- *Did the campaign work more effectively in some countries than others?*
- *Did the promotional campaign generate applications of sufficient quality?*

- *Was there a sufficient and appropriate pool of applicants to select from?*

The Challenge application process commenced on July 15 2021, and ran through to October 18, 2021. Applicants spoke appreciatively of the timelines set out for applications, and how this contrasted to many other similar endeavours where application timelines were too tight. **At closure of the application period, 123 applications had been submitted, surpassing the target set in the MEL Framework of 100.** Worth noting is that 465 draft applications were commenced, meaning that only 26% parties interested enough to commence a draft managed to proceed to completion of the application.

An MIT Solver survey of applicants received 37 responses. When asked to rate from zero to ten, the likelihood that they would recommend an MIT Challenge to a friend/colleague enjoyed a very positive overall mean response was 8.3.

When asked about how the application process could be improved, there were no very strong themes. A handful mentioned that the focus on SE Asia counted them out because of their lack of connections in the region, but they felt they could have had something to offer if established networks was not a pre-requisite. e.g. "We do not currently execute in Vietnam or other SE Asian countries as per the mandate, but …..we firmly believe that our solution could immensely help the students in the region."

Promotion was led by MIT Solve which used several paid and organic digital marketing strategies, drawing from their experience of other Challenge process, especially those with an Asian focus. MIT Solve undertook valuable analytics around the promotion phase, providing evidence that the MIT Solve website, Facebook, LinkedIN and Instagram were all valuable promotional spaces Direct emailing of the opportunity to the MIT Solve email list was also valuable, but it was felt in conclusion that with such a specific targeted region and focus area, that more targeted email campaigns would likely have improved application numbers.

Word of mouth also proved to be a highly effective form of communication, further highlighting Foundation success in engaging relevant EdTech stakeholders who supported broad dissemination in relation to the Challenge opportunity. Strategically, the Foundation encouraged judges and other stakeholders to use their own networks and platforms to share information about the opportunity.

In terms of which countries people applied in relation to, the split was as follows:

- Philippines    26.2%
- Indonesia    20.0%
- Malaysia    19.0%
- Vietnam    18.5%
- Thailand    16.4%

Evidence of the effectiveness of the multi-faceted promotional approach came through the broad range of sources referenced by applicants, when asked 'where they heard about the Challenge'. Many commented that they learnt about the Challenge opportunity from multiple sources – further evidence that MIT Solve and the Octava Foundation had thoroughly scoped the EdTech landscape and succeeded in identifying relevant networks and actors. The participation of high-profile EdTech actors, clear links to Asian philanthropy and other donors were also cited as incentivising for applicants – as was the prestige of a potential association with MIT itself.

The quality of applications was uneven, but the number of applications of sufficient quality to warrant full consideration exceeded the target of 25, with 16 finalists being selected for detailed judging by a panel of 18 judges.

Thailand, Malaysia and Vietnam were poorly represented in the final selections. While this may not relate to promotion and awareness raising in those markets, there still appears to be an opportunity for more tailored communications at country level that are more responsive to country context. Such an approach would also open the door to involve senior public education system officials as a step towards building that linkage at an early stage. Contracting marketing and communications experts at country level to support promotion was another idea put forward.

Finally, it was observed that the White Paper proved to be an effective promotional tool, in terms of it being made available to applicants. People also valued its tone, in terms of it being promoted more as a 'discussion starter' than any definitive understanding of the EdTech context in SE Asia. This modesty of approach was interpreted as indicative of the integrity of the Octava Foundation, and its priority to foster learning and help advance understanding of how EdTech can potentially impact entrenched issues affecting educational disadvantage in Asia.

**Outcome Statement Three:   The Solver selection process is effective.**

*Performance Questions:*

- *Were the various stages of the selection process successfully implemented?*
- *In what ways might have the selection process been improved?*
- *Did the selection process identify the targeted number of suitable Solvers?*
- *What was the applicant experience of the application and selection process? What advice did they have regarding improvements to the process?*

A panel of 18 judges was recruited to support the selection process, and to help identify the solutions that were most aligned to the objectives of the Challenge. Throughout the period of judge participation, judges reviewed and scored applications asynchronously, met to deliberate and select 16 finalists, watched pitch videos and interviewed candidates, and participated in a final deliberation to select 10 Winners.

While judges reflected many well-known and highly credentialed EdTech experts, the panel had very limited public system representation – which on reflection seems at odds with a Foundation that viewed public education system engagement as such an important factor and opportunity in terms of impacting the 'bottom of the pyramid'. Efforts were made and invitations extended to government representatives, but there appeared to be an across the board reluctance to participate. And the one government representative that did agree to participate, didn't turn up at the required time. This likely highlights that public system networks are under-developed currently, and require focus moving forward.

The panel was also light on judges with actual pedagogical expertise and an understanding of 'efficacy' in achieving educational outcomes for disadvantaged cohorts. The combined impact of limited public education representation and pedagogical experience contributed to only limited representation of solutions focused on government education systems.

From within the judging panel and applicant pools, there was a general consensus that the Foundation did well in terms of the judging panel they assembled, with more than one

comment along the lines that it reflected 'the who's who of the SE Asian EdTech scene'. It was diverse and representative of the region, while also including more global perspectives on EdTech. There was also appreciation that it included people with significant experience judging similar proposals. This scenario gave participants confidence that they would receive fair consideration, and that each proposal would be judged on its merits.

Judges themselves felt well-briefed, with comment that the one-on-one time spent by the Octava Foundation with judges allowed better understanding of where it was the Foundation was hoping to head. This proved important given that the judging documentation and criteria were not as finely tuned as they could have been, meaning that these preliminary conversations were more important than anticipated. The one-on-one connection with judges also positively contributed to their tolerance of the heavier than anticipated workload associated with their participation.

In terms of improvements to the materials, it was suggested that clearer information in relation to the financial health of applicants (or at least finalists?), their pricing model, and more specific data points such as number of users, outcome indicators would have helped provide a clearer picture of the applicants' financial situation.

Practically speaking, judges wanted to note that the time obligation was significant, with some having suggestions as to how that could be mitigated. One proposal was to have one panel that selects finalists, and another that judges finalists. There was also the observation that there was a lot of 'face time' required, and that the process would have been less time consuming if other less synchronous models were considered.

Not surprisingly, successful applicants were happy with the selection process. Perhaps more importantly, unsuccessful candidates were also mostly satisfied with the process, with their biggest complaint being their inability to continue to benefit from the knowledge that the Challenge was generating. Several unsuccessful applicants proposed that there should have been non-financial ways for unsuccessful applicants to continue to be able to engage the network being developed by the Octava Foundation.

Finally, there was some commentary regarding the late decision to select ten rather than eight applicants. This was criticised from a process perspective, but also from the perspective of whether ten participants might stretch the support program too thinly. As it turned out, a small number of successful candidates chose to 'less enthusiastically' engage opportunities posed by the Challenge, thus lightening the management load that might have been posed by ten, fully engaged Challenge participants.

**Outcome Statement Four:   Octava Foundation and MIT Solve mobilize a diverse set of stakeholders around the Challenge and around the Solvers, bringing additional value to both the Challenge and Solvers**

*Performance Questions:*

- *Does Octava Foundation believe it has the support it requires to successfully oversee the Challenge?*
- *Are the Solvers able to clearly articulate their support needs? Does the process used to identify their needs work effectively?*
- *Are the Solvers satisfied with the support provided?*
- *What forms of support are most effective – funding, introductions/connection, networking with other Solvers, mentoring, coaching, media exposure?*

- *What is the experience of the partners/support providers?  What do they see as the main learnings from the first 12 months of the Challenge?*

As referenced at various points above, the overall process of the Social Innovation Challenge has been highly effective in raising the profile of the Octava Foundation as a professional, well informed, committed and important actor on the SE Asian EdTech landscape. From the early mobilisation of a highly credentialed judging panel, to the contracting of Better Purpose, to the assembly of an acutely relevant panel of experts to support the judging and post-selection Support Program, the Foundation has been effective in laying the platform for an energised EdTech eco-system interested in the role of EdTech in addressing acute educational disadvantage in SE Asia.

The overall program of support available to the process post selection involved two stages:

- Needs Assessment (March 2022)
- Support Program (April 2022 – January 2023)

*Needs Assessment objectives and implementation*

Prior to the orientation, Solvers were asked by MIT Solve to complete a comprehensive Needs Assessment, followed by one-on-one meetings with the MIT Solve and Octava teams to further discuss the Needs Assessment and to collaborate in further clarifying specific recommendations that would be helpful to support them organisationally, and individually (as organisational leaders).

While the process allowed highly specific needs to be addressed, the overwhelming proportion of needs expressed were in the areas of:

- Fundraising
- Marketing, market expansion and client expansion
- Scaling

- Scaling
- Performance measurement and efficacy studies
- Organisational governance

At the conclusion of this process, MIT Solve and Octava staff met to consider needs and identify ways of best working to aggregate those needs into a coherent overall Support Program, as well as a tailored support plan for each Solver.

At this point, working in collaboration with the Octava Foundation, MIT Solve provided Solvers with a customised Support Plan that included a list of contacts well positioned to respond to their specific needs.

*Solver Support Program*

The Support Program was launched in March 2022 with a "Winners Orientation Workshop", which detailed components of the Support Program and opportunities to engage within it.

The Support Program involved a mix of opportunities, including group offerings as well as individualised coaching and mentoring opportunities. Feedback from Solvers was overwhelmingly positive towards these opportunities, both in terms of the breadth and relevance of the opportunities, as well as the practical support they provided. An MIT Solve survey of participants found that eight of the ten Solvers rated the Support Program as being either 'catalytic' (5) or 'transformational' (3).

Problem solving/leadership coaching support provided by Karla Garcia Teruel from Growth Empowered was particularly highly regarded. Linkages into entities such as Amazon Web Services was also valued, as were fundraising and market oriented opportunities.

While most valued what was on offer, many also mentioned that they had entered the Challenge hoping that there would be more pro-active and effective support in facilitating fundraising opportunities, including introductions and more engaged, 'shoulder to shoulder' support to relationship building.

All ten Solvers expressed their intention/hope to continue their relationship with the Octava Foundation after the formal end of programming, irrespective of funding being available.

*Monitoring and Evaluation support*

Solvers had access to support from the Research and Communications Group in terms of monitoring, evaluation and learning approaches that they could apply to their work. This opportunity was inconsistently taken, up, with organisation's tending to be more focused on more existential matters of fund-raising, despite acknowledging the importance of measuring efficacy.

*Main learnings*

Supporters of the Challenge process were appreciative of being part of such a holistically considered approach, and regularly stated that their willingness to participate was impacted by the opportunity to work alongside others interested in the same space. Great value was also placed on cohort wide training and the opportunities that provided for different supported Solvers to meet, compare issues being faced and look at opportunities for collaboration. The Singapore EdTech Summit appears to have been catalytic in this respect, with those who travelled and participated particularly enthusiastic about the broader Solver network.

At risk of over-stating the importance of the White Paper, it was widely regarded as an important contribution to the sector, providing collated baseline information of direct relevance to the issues under discussion.

The Support Program was overwhelmingly endorsed through MIT Solve surveying, with more than 90% of ratings of individual Support Program components being 4 or 5 (out of 5) across 20 discrete questions.

**Outcome Statement Five:     The Solvers have a clear picture of their path to success, and achieve their key targets over the 12-month period**

*Performance Questions:*

- *Are the Solvers able to clearly articulate what success will look like for them over the 12-month funding period?*
- *Are the Solvers and Octava Foundation able to agree on suitable measures of success?*
- *Do any Solvers need to adjust the indicators/targets over the course of the 12 months? Is there an effective process to assess and adjust indicators over the course of the funding period?*
- *Are the Solvers able to achieve their 12-month targets?*

Solvers were supported by MIT Solve to set Year One goals for themselves at program commencement. The table below was prepared by MIT Solve and details baseline data, Year One goals, and progress against the Year One goal.

| Team | Baseline # of beneficiaries (March 2022) | Endline # of beneficiaries (January 2023) | # of new beneficiaries | Year 1 Goal | % to Year 1 goal |
|------|------|------|------|------|------|
| Bookbot | 300 | 29,000 | 28,700 | 10,000 | 290% |
| Cerebry | 20,500 | 100,000 | 79,500 | 79,282 | 126% |
| ICANDO | 87,500 | 99,000 | 11,500 | 320,000 | 30% |
| Kipin | 450,000 | 875,000 | 425,000 | 850,000 | 103% |
| KooBits | 196,285 | 250,000 | 53,715 | 500,000 | 50% |
| Let's Read | 36,565 | 40,161 | 3,596 | 50,000 | 80% |
| Pandai | 350,000 | 450,000 | 100,000 | 400,000 | 112.5% |
| PEMIMPIN GSL | No of schools: 1541 No of school leaders: 1221 | No of schools: 1854 No of school leaders: 3277 | No of schools: 313 No of school leaders: 2,056 | No of schools: ~2500 No of school leaders: ~3000 | No of schools: ~74% No of school leaders: ~109% |

While these simple metrics offer some insight to Solver progress over the year, it does nothing to consider the question of attribution and the role Octava Foundation played in Solvers progressing their position. One on one interviews with Solvers highlighted that while the Octava grant was greatly appreciated, it tended to be but one of several grant or support programs that Solvers were benefiting from – each with their own particular angle and contribution to the greater effort.

However, interviews also uncovered that Solvers often placed as much value on the non-financial support available through the Support Program as they did the grant, often stating that the Support Program had been significant in enhancing management, strategic thinking and staff utilisation.

This aligns with RCG work undertaken with the Atlassian supported MIT Solve challenge in 2019-20, where unexpectedly high value was placed by Solvers on non-financial support, with many participants citing examples of positive engagement with MIT and DFAT, and high-quality technical support being provided by Atlassian volunteers. However, it was also noted that non-financial support available in that particular Challenge was actually quite narrow, and insufficient to overall needs.

Worth noting in the Octava Challenge is that RCG interviews with MIT Solve highlighted how much further advanced is their support offering today compared to the time that they partnered with Atlassian. The Octava Foundation also did well in providing a structured, broad suite of non-financial support options, including workshops, mentoring, coaching, options to participate in conferences.

In terms of setting clear measurements for success, Solvers for the most part struggled to put in place clear performance indicators beyond numbers of subscribers. Further, the MIT Solve data gathering was primarily quantitative data, and therefore limited in supporting full understanding of strengths and weaknesses. RCG efforts to support Solver MEL were insightful in terms of highlighting a very low baseline within most agencies, who were open that they didn't really have the time, energy or resources to devote to a substantial MEL approach, even though they all recognised that 'proving efficacy' would be a critical step forward for them.

Exit interviews with Solvers highlighted that all have a generally clear understanding (often highly aspirational) of where it is they want to go in the next 12 months. However, in all cases, there are gaps between where they want to get to, and the resources required to get them there. It is also noted that 'where to' in the next twelve months is often determined based on opportunistic decision-making i.e. "someone is supporting us to go in this direction, so that is where we have decided to go."

RCG's 2019 surveying of Solvers involved in the Atlassian challenge highlighted a significant barrier to scaling being clear understanding and effective management of dealings with local systems and structures, market understanding and general challenges related to establishing the relationships necessary to carry an initiative forward.

Generally speaking, Solvers involved in the Octava Challenge seem to display stronger levels of awareness of relevant structures, with many maintaining significant relationships with key stakeholders on the landscape. However, RCG observes that vertical scaling remains a challenge with the Octava crop of Solvers, particularly in terms of Solvers engaging directly with higher levels of the public education system in the country in which they are operating. It is also a significant constraint in terms of Solvers considering options for entering additional markets. Moving forward, the Octava Foundation could more rigorously examine applicants to see if they genuinely have an understanding of, and connections to, the public systems that the Foundation hopes to impact. Or does the Octava Foundation pull back on its determination to engage and affect public education systems?

**Outcome Statement Six:      Octava Foundation has a better understanding of the EdTech Sector in the region and how they can best make a positive contribution**

*Performance Questions:*

- *Does the Octava Foundation have a better understanding of the regional landscape at the end of 12 months?*
- *What could have been done differently?*
- *Have there been any unexpected outcomes?*

RCG enjoyed the privilege of regularly meeting with Foundation staff across the journey to bounce ideas, discuss progress and also ponder obstacles. These meetings were insightful in terms of allowing regular updates from the Foundation on their work, and highlighted the breadth, sophistication and relevance of connections and relationships maintained by the Foundation team (notably Raman and Khai).

These observations were in many respects triangulated through RCG meetings with judges, Support Program contributors and Solvers themselves, where a regular theme was both an observation and appreciation for the degree to which the Foundation was well connected and enjoyed functional relationships with key players on the EdTech landscape.

In terms of what could have been done differently, it did seem that the commitment to public system engagement that was a feature of RCG's early discussions with the Octava Foundation got somewhat lost in the Challenge start-up and selection – exacerbated by the reluctance of public system actors to accept invitations to participate in events. It also seems to be the case that while the Octava Foundation has established its credentials within the network of civil society actors, entrepreneurs, philanthropists and investors, it has not been overly active in engaging those in public education systems looking to utilise EdTech as a solution to educational disadvantage. This relates in large part to the decision taken early on to support a broad cross-section of start-ups, few of which sought to engage the highest levels of the public education system.

If supporting Solvers towards scaling is a priority of the Octava Foundation, and public system engagement remains a priority, then it will be important that Foundation staff set about identifying champions within public educations systems as part of that effort. International organisation and NGOs (UNICEF, The Asia Foundation, Save the Children, UNESCO, etc.) could also potentially facilitate knowledge and access to public education systems in all five countries where the Octava Challenge occurred.

An RCG literature review undertaken in 2019 of challenges associated with scaling highlighted some interesting perspectives. The Brookings Institute noted that:

> *"…scaling does not happen in a vacuum. Largely guided by governments from national to local, the environment in which programs or policies operate plays a critical role in facilitating or impeding the scaling process."* [1]

This perspective was elaborated on through UNICEF's PPP Lab program:

> *"…making big bets to tackle a problem without first immersing yourself in understanding what is holding it in place is a recipe for disaster. On the other hand, bringing attention to shifting the power dynamics at play, identifying where people are connected or disconnected from others who must be part of the solution, exposing mental models that inhibit success, and investigating your own organization's conditions that help or hinder external aspirations - this is the nature of successfully changing systems. This is systems change … [A]pplying the systems lens early on appears to be one of the main factors for fostering success in effective and sustainable scaling".* [2]

If the Octava Foundation is aiming to reach disadvantaged children and youth at scale, then greater inclusion of public education system representation within the Foundation's 'semi structured' eco-system will be essential. It is also noted that existing partners, The Asia Foundation and Global School Leadership would be well placed to support such a refocusing. They also stand to potentially benefit in return from the networks that the Octava Foundation has developed with entrepreneurs in the SE Asian EdTech space.

The other big option for 'doing things differently' would have been to opt for an entirely different Challenge model. There is extensive literature on the process of challenges and

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[1] Perlman Robinson, J., Winthrop, R., with McGivney, E., (2016), Millions Learning: Scaling up Quality Education in Developing Countries, Brookings Institute. See the following readings in the Reference List at Appendix One for more detail on the importance of vertical scaling: 2, 3, 14, 17, 18, and 22

[2] Ubels, J. & Jacobs, F., (2018), Shaping successful scaling processes with public–private engagement, PPPLab Food & Water, p. 8 and 14

competitions and the various approaches that can be taken[3], and the wide variety of models provide numerous interesting options that the Octava Foundation could consider for any subsequent Challenge. For example:

- In some challenges the funding body has intensive engagement with applicants/finalists in the stages prior to the final selection process. This not only enables them to make a deeply informed decision regarding the successful applicants, but it also provides the ultimately unsuccessful organisations with a rich learning experience;
- Some partnerships commit to extensive sharing of information about the applicant organisations with other funding bodies, to increase likelihood diverse funding sources for the grantees, both in the present and the future; [4]
- In some challenges there is strong emphasis on collaboration and 'open innovation' between applicant organisations, so that they are learning from each other even during the selection process itself, with the possibility of 'communities of practice' forming;
- In some cases the funding partnership provides intensive support for successful applicants immediately following their selection – this can be a time when issues such as M&E can be explored in depth, and the most tricky issues identified and addressed.

## 10.    Options moving forward

Having supported a breadth of organisations through the Octava Foundation Social Innovation Challenge, the Foundation has myriad options as to where it might go moving forward. Some of these options and/ or major decision points (and RCG observations related to them) are as follows.

- *Strengthen commitment to public system engagement*

This could involve continuing with those Phase One Solvers who demonstrated commitment and progress in terms of public system engagement and integration, notably GSL (both Penimpin and Inspirasi), Let's Read and Kipin. Such a cluster would work programatically in terms of allowing the Octava Foundation to partner with two entities (GSL and TAF) who have very strong understanding, networks and lines of communication with public education systems. GSL could focus on school leadership, TAF would bring focus to highly marginalised, minority communities, Kipin can provide an important and relevant hardware intervention, and the Foundation could 1/ provide flexible support into that 'program', 2/ link in support from its eco-system, and 3/ work to build relationships with EdTech programming departments within ministries of education, to help build relationships and ensure them a seat at the table and greater levels of inclusion in EdTech networks.

- *Support a Bahasa Indonesia/Melayu cluster*

Six of the Solvers are focused on Indonesia (4) and Malaysia (2). As highlighted in the White Paper, Indonesia presents one of the most complex educational challenges in the region, and is also 'suffering' a flood of different EdTech options. Malaysia on the other hand is under-served. A strategic composition of 'Bahasa' speaking Solvers could provide another interesting programmatic option, with the Foundation working to support coordination and also engagement of higher levels of the public educations system with the aim of supporting them to make sense of all that is going on in the EdTech space. Given language and cultural

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[3] See Appendix 1 for key themes of this Literature Review and also a Reference list of reading.
[4] See Finding, Funding, and Scaling, (2019), Stanford Social Innovation Review

similarities, support could also be provided to extend Indonesian focused programs into Malaysia and vice versa.

- *Reading cluster*

Three Solvers are reading focused. This offers the Foundation the opportunity of working in a narrow band known to be highly relevant to strengthening educational outcomes for disadvantaged cohorts – reading. Bookbot have existing high level relations in Indonesia. Let's Read has exceptional regional access through its parent organisation, The Asia Foundation. Similarly, Library for All operates under the umbrella of the world's largest NGO – Save the Children. In this programmatic area, the Foundation could work to progress reading and access to books in highly under-served areas – perhaps through utilisation of Bookbot technology.

- *Rationalise geography, including serving under-served locations*

Irrespective of whether the Foundation chooses to work programmatically, or just focus in on further supporting select Solvers that it believes are on the right track, the Foundation should consider rationalising down from five countries to one or two countries, in order to allow deeper dive and relationship building with public education system leadership. Indonesia would be one option, given it is the 'main game' and has a population greater than the other four focus countries put together. However it is already a crowded EdTech space. At the other end of the spectrum, Malaysia is under-served – but also has far less poverty than other countries. In terms of poverty, the Philippines faces the most serious challenges of the five Foundation focus countries.

- *Identify a strategic partner that complements the Foundation's offering*

The networks and eco-system that the Foundation has been able to assemble are a unique asset, and would be a great complement to less nimble partners. The following organisations already exist on the Octava landscape:

- o The Asia Foundation (parent entity of Let's Read) is a very well established, high profile, well connected international organisation that has a great reputation for high quality work. Let's read focus on minority groups, and lesser documented languages provides immediate contact with under-served populations existing at the bottom of the pyramid.
- o GSL (through Penimpin and Inspirasi) is a dedicated educationally focused organisation, focused on the niche of school leadership, offering the Foundation an opportunity to direct future energy on the issue of school leadership in extremely under-served areas.
- o Save the Children International (through Library for All) aims to holistically respond to the needs of under-privileged children, which could open an opportunity for the Foundation to fill the space of bringing EdTech specialisation that augments the programming of the world's largest NGO. (Though a consideration in this context should be that that Library for All has struggled to date to establish a clear identity for itself – seemingly in large part due to the over-bearing presence and influence of Save).

# APPENDIX ONE:

## Key Themes arising from Literature Review to partnerships, scaling and selecting/supporting grantees and Reference List

The following themes emerged from a 2019 literature review undertaken by RCG in relation to partnerships, scaling and selecting/supporting grantees.

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**A. Public/Private and Multi Stakeholder Partnerships have a demonstrated capacity to operate very effectively in a development context. (3.1)**

There is extensive literature exploring the characteristics of partnerships which operate effectively in supporting grantees to scale up their innovative practice. There are common themes in 'healthy' partnerships, and many of these are highlighted in this literature review. There is value in partnerships (both when they start and at regular intervals during their operation) in doing a 'health check' to assess the quality of their partnership performance.

e.g. "*Private Public partnerships have been seen as one instrument for overcoming certain barriers to scale as they combine the competencies and experience of different actors to address difficult development issues and to create breakthroughs*" (1)

Reference List: See 1, 3, 5, 6 and 7 for more detail

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**B. Taking into account horizontal AND vertical scaling is critical – both in terms of selecting grantees and then supporting them to succeed. The challenges of vertical scaling are often not sufficiently addressed. (1.3)**

The issue of vertical scaling comes up regularly as being a critical factor – grantees need to have an awareness of the broader environment in which they will be operating, the systems they need to deal with, the political players, the main competitors. Partners need to engage with grantees about these issues and explore their capacity to address the inherent challenges.

- Horizontal: the innovation/technology driven view of scaling as an expansion of new practices
- Vertical: a systems change perspective – scaling up as changing the 'rules of the game' (2)

*"For effective scaling, it is necessary to understand the present system drivers and failures and to have attractive and viable alternatives. This is not the case with many scaling ambitions that are primarily product driven."* (1)

Reference List: See 1, 2, 3 and 7 for more detail

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**C. There is great value in addressing the issue of vertical scaling as early as possible, both during the grantee selection process and immediately following selection. (1.4, 3.1)**

Doing situation analysis/actor mapping/systems analysis is critical to understand the political, economic and social challenges facing any innovation. Grantees must have/develop a strong and deep local knowledge, and a scaling plan to address any barriers. Funders can work alongside and support grantees to take the ecosystem into account.

e.g. *"Making big bets to tackle a problem without first immersing yourself in understanding what is holding it in place is a recipe for disaster." "…applying the systems lens early on appears to be one of the main factors for fostering success in effective and sustainable scaling."* (2)

*"…scaling does not happen in a vacuum. Largely guided by governments from national to local, the environment in which programs or policies operate plays a critical role in facilitating or impeding the scaling process."* (14)

Reference List: See 2, 3, 14, 17, 18, and 22 for more detail

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**D. There are various ingredients/criteria for successful scaling that can form a reference point for the development of a selection/monitoring rubric or framework. (3.1)**

Partnerships can need to have a clearly thought through set of selection criteria when identifying grantees, and when making decisions about which grantees will move to the next phase of support. There are many examples of criteria that can be referred to when developing a selection framework.

For example, one paper proposes these 10 ingredients for successful scaling (1):

**1. Technology –** An effective and efficient solution for the issue at stake

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**2. Business case –** An attractive financial/economic proposition for users and others
**3. Awareness & demand –** A wish and readiness for the consumer or producer to use the solution
**4. Financing –** Effective financing options for users and providers or buyers
**5. Value chain development –** Effective input and supply provision and other support services
**6. Coordination platform –** Strategic collaboration between key stakeholders
**7. Public sector governance –** Enabling policies, regulations and mechanisms
**8. Lobby and advocacy –** A 'change coalition' that pursues scaling and influences others
**9. Knowledge and education –** The required knowledge and professional capacity and recognition
**10. Data & ICT –** Evidence and facts that underpin and communicate the scaling ambition
Reference List:  See 1, 2, 16, 17, 22, and 23 for more detail

**E.  Moving from Proof of Concept into Scaling is a critical and often problematic phase, where many innovations fail.  Funder support through this phase is vital. (2.4)**
Many papers refer to the point at which initiatives/products are ready to move into scaling, and the significant challenges which occur through this phase.  Terms used to describe it include the 'pioneer gap' (1) and the 'stagnation chasm' (2).  Funders often see this as a point at which new revenue streams should be taking over, but the transition is often complex and unreliable. Planning for this phase needs to be in place well before it arrives.
Reference List:  See 1 and 2 for more detail

**F.  Partnerships successfully supporting innovation in the development sector demonstrate a combination of flexibility/agility and careful planning and preparation. (2.1)**
It is important at the start of a partnership to make it clear what the measures of success will be, and why the partners believe that their approach will lead to successful outcomes.  Traditional development language would describe this practice and the related documentation in terms such as *Theory of Change*, *Program Logic*, and *Monitoring and Evaluation Framework*.  But even without using this language, having a hypothesis about why the partnership is good idea, and being able to define how the success (or otherwise) of the partnership will be judged, is fundamentally sound practice.
Reference List:  See 2, 3, 7, 8, 10 and 13 for more detail

**G.  Successful grantees generally require strong leadership, and there needs to be the capacity within the organisation to deliver on their objectives – funders need to know the organisation well enough to make these judgements. (2.4)**
Organisational capacity is a critical element of successful grantee organisations.  They need to have the capacity to grow and adjust as their initiative scales.  Partners need to think carefully about how they will make judgements about the capacity of the organisations they are planning to support, and how they will work with them through times of change and growth.
Reference List:  See 1, 2, and 13 for more detail

**H. There is extensive literature on the process of challenges, competitions etc. and the various approaches taken, raising numerous interesting options. (3.1)**
Challenges and competitions can take a diverse range of forms.  Partners should make themselves aware of all the options at their disposal should they go down the challenge route.  Points worthy of consideration include:

- More intensive engagement with applicants/finalists in the stages prior to the final selection process, developing the capacity of even the unsuccessful organisations (17, 19, 20, 22, 24)
- Greater sharing of information about the applicant organisations with other funding bodies, to increase likelihood diverse funding sources (17)
- More collaboration and 'open innovation' encouraged between applicant organisations, building 'communities of practice' (19, 21)
- Greater intensive support with successful applicants immediately following their selection, developing a stronger platform from which to build (16, 17, 22)

Reference List:  See 16, 17, 18, 19, 20, 21, 22 and 24 for more detail

**I. In strong partnerships there are honest conversations about areas of disagreement and conflict. Power differences are acknowledged and addressed. (2.1)**

Trust and respect are key elements of any successful partnership. Partners need to be willing to share their concerns and failures, and to provide feedback to partners when they identify issues that need to be addressed. Respectful, open communication is critical.

Reference List: See 3, 7, and 8 for more detail

**J. It is important to have a clear MEL framework set up at the start of the partnership, to track the performance of the partnership and the various grantees. (1.2)**

Partnerships are no different to any other development initiative – time needs to be committed in the early stages of the partnership to discussing what success will look like, how progress will be monitored and lessons learned, and how impact will be judged. Embedding MEL capacity and resources is vital. Examples of MEL commentary in the literature include:

- It is valuable to have carefully thought through immediate and intermediate outcomes, with a view to tracking progress (4)
- Look for indicators which can be used across multiple initiatives (4)
- Focus on growth and learning in the grantees, rather than just outputs and 'the number of people helped' (8, 13, 14)
- Make sure vertical scaling indicators are included (14)
- Critical to include customer feedback in the framework (30)

Reference List: See 4, 8, 13, 14 and 30 for more detail

**K. Good partnerships have clarity around the governance and administration of the activity taking place under the partnership umbrella. This is particularly important to reduce the administrative and reporting burden on the grantees. (2.1)**

Individual funders within a partnership can have varied approaches to monitoring the progress of grantees and dealing with budgeting and administrative matters. An inconsistent approach across a partnership can place unreasonable burdens of lightly resourced grantees. It is vital that partnerships display high quality governance and models the sorts of practices is seeks in the the grantees.

Reference List: See 3 and 6 for more detail

**L. High quality communication between partners, and between partners and the grantees, is a core feature of any successful partnership. (2.1)**

It seems obvious, but the literature refers consistently to the need for effective communication systems and processes to be put in place – between the various partners, between partners and grantees, between the various grantees, and between the grantees and the key players in the environment within which they are operating. The breadth and depth of the communication required means it cannot be taken for granted – it needs to be planned and resources. It is an area when partners have the potential to provide grantees with particularly valuable non-financial support.

Reference List: See 2, 3, and 7 for more detail

**M. It is important not only learn from mistakes, but also to document both the mistakes and learning. (1.2)**

It is one thing to talk about learning from mistakes – it is another thing to report on mistakes, share the learning and support changes to be made as a result. Innovation requires a willingness to learn from mistakes, but organisations are often reluctant to share such experiences for fear of negative judgement, withdrawal of funding etc. Grantees and partners alike need to be willing to share the experiences which things don't go as planned.

Reference List: See 3, 4, 6, and 10 for more detail

**N. A shift in power dynamics between funders and grantees to true partnership and two-way exchange of views can be an important contributor to successful scaling. (2.4)**

Rockefeller Philanthropy Advisors completed extensive research into successful scaling – they looked at more than 100 funders and 23 grantees. Shifting the power dynamics with grantees to operate as true partners was one of the key features of successful scaling initiatives. For instance:

- Enable the grantees to pursue pivots in strategy, and openly discuss power dynamics (12)
- *"Create a two-way exchange so participants get feedback from you – and you can learn more about how they think and act"* (21)

Reference List: See 12, 21, and 30 for more detail

**O. It is important for funders to have a deep understanding of the context in which potential/current grantees will be/are operating. (2.4)**

The Rockefeller research stresses the fact that funders must be continually learning – they need to develop more knowledge on shifting systems, and when and how to support grantees. Negotiating the complexity of vertical scaling is an area where the experience and capacity of funders is often under-utilised. *"Our interviews indicated that non-profits and social entrepreneurs rarely receive support from funders to reach or help influence … system actors."* (12).

Reference List: See 12 and 30 for more detail

**P. Funders should be actively seeking effective collaboration with other funders, to maximise the likelihood that good quality applicants will gain initial funding support and then transition to appropriate funding partners as they move through the various scaling phases. (2.3, 3.1)**

Another issue the Rockefeller Philanthropy Advisors and the Stanford Social Innovation Review stress is the importance of funders working actively and early to share information with other funders about their grantees and their performance, and to actively work with grantees to identify opportunities to transition to new revenue sources.

- Collaborate and share intelligence with other funders. Grantees often spend too much time on fundraising and reporting – please rethink! (12)
- Build on and share due diligence on potential grantees with other funders (13)

Reference List: See 2, 12, 13, and 17 for more detail

**Q. As soon as possible, release grantees from the treadmill of fund-raising and reporting. (2.4, 3.1)**

Funders often at one level acknowledge the importance of not having unnecessary and unreasonable reporting and administrative expectations of grantees, but in reality request high levels of detailed reporting on a regular basis. Consciously reducing this burden on grantees will free them to do the work funders want them to be spending their time on.

- Streamline and redesign the grant-making process. Avoid the cyclical trap of the very common one year grant. Treat it like venture capital. *"Exploring how funders can hold ourselves accountable to shifting systems as much as we hold grantees accountable for it will be a key part of our work in the future."* (12)
- Focus applications and reports on what the grantee is learning and changing, not on activities and outputs (13)
- Make funding decisions based on the documents grantees are likely to already have/are able to easily produce (13)

Reference List: See 12 and 13 for more detail

**R. Encourage and support a 'community of practice' between the grantees operating under the partnership. (1.2, 1.4, 3.1)**

Grantees want to learn from other organisations that are having (or have had) similar experiences to them. Partnerships can guarantee that grantees will learn from each other, but they can help to create an environment where there is the potential for such exchange of information to happen.

Reference List: See 11, 21, and 22 for more detail

> **S. It is important that any non-financial support provided to the grantees is driven by the needs of the grantees. (1.2, 2.3)**
> Partners often have great organisational capacity they are keen to share with Grantees. But in their enthusiasm to help, partners can fall into the trap of supplying support which doesn't in fact meet the needs of the grantees. It is important to have honest discussions about the non-monetary support that will be of benefit. Funders often *push* advice and opportunities rather than *pull* advice and opportunities. Grantees don't want to appear ungrateful so they put up with it. (12)
> Reference List: See 12, 17, 21 and 22 for more detail

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