

Partnership Guide

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Introduction

This Partnership Guide seeks to reflect the values, thinking, approaches, and commitments of the Partnership for Economic Inclusion (PEI). The Partnership Guide draws on the experiences and lessons in setting up PEI, which was formalized in April 2018. This followed an initial transition period from the Consultative Group to Assist the Poor (CGAP) in October 2016. The content and approach of the Partnership Guide has benefited from extensive discussions and consultations across PEI network of formal and informal stakeholders.

The Partnership Guide has **three primary functions:**

- To set out an overall vision and work strategy for PEI
- To serve as an organizing framework for stakeholders across PEI network, setting out common language and ideas
- To provide guidance for current and prospective stakeholders engaged with PEI

The Partnership Guide is seen as a living rather than a final document. PEI is a new type of global partnership with a challenging ambition and a vast range of concerned stakeholders. In this context, PEI is committed to a spirit of learning by doing and ensuring timely and responsive shifts where necessary in the course of a shared mission. From the core values that animate PEI and PEI approach to scaling up economic inclusion for the poorest, to the finer implementation details, this Partnership Guide describes the mission of PEI Partnership and how partners can advance a shared agenda. In the spirit of learning by doing and working together, the Partnership Guide will be updated as necessary to reflect evolving perspectives and knowledge.

The Partnership Guide is a supplementary resource to PEI Multi-Donor Trust Fund (MDTF) Administrative Agreement (AA). In the event of any conflict or inconsistency between the Guide and the terms of the AA, the terms of the AA shall prevail. A Glossary of Key Terms is included for reference in appendix A.

What Is the Partnership for Economic Inclusion?

Mission

The Partnership for Economic Inclusion (PEI) is a **new global partnership with a mission** to support the adoption of national economic inclusion programs that increase the earnings and assets of extremely poor and vulnerable households. PEI brings together global stakeholders to catalyze country-level innovation, and it consolidates and shares global knowledge. It is hosted by the Social Protection and Jobs Global Practice (SPJ) of the World Bank. PEI was established with an initial five-year time frame. (Refer to Box 1 for key definitions and terms.)

PEI responds to the **global momentum to strengthen inclusive and sustainable growth** to Leave No One Behind. This is reflected in the Sustainable Development Goals to “end poverty in all its forms everywhere by 2030.” This momentum plays out in a dynamic global context that is changing labor market participation, employment, and the nature of social protection for the poorest. Going forward, such changes are shaping the social contract between governments and citizens and the role of future economic inclusion.

The partnership builds on the considerable success of “graduation programs” worldwide, pioneered by BRAC in Bangladesh and promoted globally by the CGAP, the Ford Foundation, and others. Since 2002, graduation programs have been implemented in more than 50 countries, providing a time-bound package of interventions spanning social assistance, financial inclusion, livelihood coaching, and empowerment. These programs have demonstrated promising impacts in income and asset generation, poverty reduction, and food security.

PEI aims to create cost-effective and scalable investments for extremely poor and vulnerable populations. In doing so, PEI will emphasize the empowerment and agency of women through gender-intentional program design as a cross-cutting priority.

PEI recognizes the imperative of situating “economic inclusion” as part of an overarching country context, where multiple demands and constraints shape national poverty reduction strategies. The scale-up of economic inclusion programs increasingly occurs against a dynamic backdrop at country level marked by changing labor market participation, employment, and the nature of social protection for the poorest (WDR 2019). Very often a series of megatrends are further shaping the direction of these programs, including climate change, urbanization, and displacement. Going forward, such changes are shaping the relationship or social contract between governments and citizens, as well as the role of future economic inclusion.

A major area of focus within PEI will be the interlinkages across the space for social protection and jobs. On average, 44 percent of the world’s population is covered by some social protection programs, although coverage is much lower in low-income countries (about 18 percent). The programs range from social assistance (often also called social safety nets, and including cash or in-kind transfers, school feeding programs, public works, and so on) to social insurance or active labor market interventions. Within these national social protection systems, social safety nets benefit nearly 2.5 billion people worldwide, and they have been developing very fast, especially in sub-Saharan Africa. Developing and transition countries invest an average of 1.5 percent of gross domestic product (GDP) on these programs.

Well-targeted government delivery systems for social safety nets can form the operating environment for delivery of additional benefits and services. They can provide a springboard for the package of additional support that extremely poor and vulnerable segments would need to enhance their income earning, livelihoods, and economic opportunities. Such delivery systems often include policies and mechanisms for outreach, identification, intake, registration, assessment of needs, payment, and provision of services. They may also include referral mechanisms, and, in some countries, dense networks of caseworkers or other front-line workers have been deployed to deliver services, training, and information to the poor.

Box 1: Key Terms and Definitions

The following working definition is proposed:

Economic inclusion is the gradual integration of individuals and households into broader economic development processes. A central principle of economic inclusion, which is a term sometimes used interchangeably with productive inclusion, is that poor and vulnerable households encounter ‘poverty traps’ and face multiple constraints.

Economic inclusion programs are a multidimensional bundle of coordinated interventions which aim to increase the incomes and assets of poor and vulnerable people. Common interventions include a combination of cash or in-kind transfers; skills training or coaching, or both; access to finance; and links to market support.

The definition of the population segments often targeted by economic inclusion programs is “people living in extreme poverty (that is, those with incomes at or below the \$1.90/day international poverty line, adjusted for purchasing power parity) who can work on a sustained basis,” or “poor people who, because of their personal and/or community characteristics, face barriers in accessing opportunities to earn sustainable livelihoods and have elevated risks of being/staying in poverty and/or being socially marginalized.”

Value Proposition of PEI

Supporting National Programs: PEI serves as a global platform supporting the development and expansion of national economic inclusion programs for extremely poor and vulnerable populations. PEI has emerged against a surge of operational work in diverse country settings. For example, at present there are an estimated 140 “economic inclusion” projects with World Bank Group (WBG) financing covering over almost 70 countries (PEI 2020). A 2017 review identified approximately 99 programs in 43 countries, supported by a range of actors outside of the WBG (for example, the United Nations (UN), nongovernmental organizations (NGO)).

Operationalizing Economic Inclusion within World Bank Operations: A defining opportunity of the WBG partnership is the potential to link economic inclusion programs to the diverse portfolio of national programs, financed in part by the WBG. Increasingly, national governments engaged with the WBG seek to

strengthen economic inclusion programming through country strategies that focus on expanding job opportunities, social protection, and financial inclusion, among other priorities. In this context, PEI will leverage engagement across different Global Practice (GP) areas within the World Bank. For example, the World Bank currently provides over US\$15 billion for safety net financing to 90 countries, and PEI seeks to leverage these opportunities with operational links, already established, to programs in various countries, including Afghanistan, Bangladesh, Egypt, Iraq, Madagascar, Malawi, Mozambique, Panama, and Uzbekistan, and broader advisory services to a growing list of countries including Malawi, Kenya, Ethiopia, Pakistan, and India. (See Box 2 for an example of how “leverage” works in practice.)

Box 2: Leveraging National Programs through World Bank Group Financing.

During the first six months of PEI, a Call for Proposals was launched to allocate \$1.8 million of funds for technical assistance to 10 demonstration countries in receipt of WBG financing. The selected portfolio of Grant Awards was allocated to Afghanistan, Bangladesh, Egypt, Iraq, Madagascar, Malawi, Mozambique, Panama, Uzbekistan, and Zambia. Complementing the Grant Awards, these countries further benefit from access to the broader expertise represented by PEI stakeholders.

This portfolio leverages existing and pipeline country operations that are supported by WBG financing. This provides an opportunity to leverage against much larger investments and spur operational work and policy dialogue around economic inclusion. For example, PEI’s first Call for Proposals leverages against a set of operations combining approximately \$1.6 billion of International Development Association (IDA) and International Bank for Reconstruction and Development (IBRD) operations across the 10 countries. Of this financing, approximately \$350 million is specific investment dedicated toward economic inclusion. For example, in Malawi the WBG has recently approved IDA financing of \$140 million for a national safety net program, which combines a \$30 million subcomponent for economic inclusion. PEI now seeks to shape these national programs through (i) a Grant Award of \$180,000 to boost technical assistance and (ii) the engagement of PEI stakeholders in Grant Award implementation.

The Call for Proposals revealed strong demand for PEI support: 38 countries expressed interest in a PEI Grant Award. The final portfolio covers 5 different practice areas of the WBG: Social Protection and Jobs, Agriculture, Finance, Competitiveness and Innovation, and Social Development Global Practices. The selection process for Grant Awards was robust and set a high standard through its engagement of global experts, as well as by the transparency and accountability mechanisms embedded within the WBG.

Leveraging a Partnership Network: To meet global demands, PEI will leverage its partnership network, which includes an evolving set of stakeholders spanning national governments and bilateral, multilateral, NGO, research, and private sector organizations (see Box 3). The partnership network is critical in terms of contributing to evidence-based good practice, crowding in expertise, and providing a platform to refine and share cutting-edge knowledge on economic inclusion. The partnership network is also important in contexts where government programs and capacity (and even political will) to advance this agenda are extremely limited or nonexistent. For example, in countries experiencing fragility, conflict, and violence (FCV), the role of nonstate actors such as donors and NGOs providing humanitarian and development assistance could be especially important.

PEI aims to leverage global expertise and mobilize collective action and knowledge through a partnership devised to crowd-source global expertise, engage new and traditional actors, and influence global thinking. For example, UN agencies such as the Food and Agriculture Organization (FAO), the International Fund for Agricultural Development (IFAD), the UN High Commission for Refugees (UNHCR), and the World Food Programme (WFP) are expanding their engagement in this class of programming. International NGOs such as BRAC, Concern Worldwide, Fundación Capital, Trickle Up, and World Vision have played a pioneering role. Several research and policy organizations have complemented this operational space, including Innovations for Poverty Action (IPA) and the Abdul Latif Jameel Poverty Action Lab (J-PAL). To respond to this demand, the World Bank is increasing its IBRD and IDA lending operations (in Social Protection, Jobs, and Agriculture, among other sectors), and other public and private funders, such as UK aid, the German Federal Ministry for Economic Cooperation and Development (BMZ), the Australian Department of Foreign Affairs and Trade (DFAT), and private philanthropies are increasing their investment as well.

Box 3: Defining the Partnership Network

PEI Partnership Network refers to a set of formal and informal stakeholders and includes:

- Funding Partner: A financing donor that supports PEI through a Multi-Donor Trust Fund (MDTF), administered by the World Bank in accordance with the terms of the Administration Agreement (AA). Funding Partners may include sovereign and non-sovereign organizations.
- Technical Partner: An organization that is formally linked to PEI through an agreed understanding on their roles and responsibilities.
- Member at Large: A person/individual appointed to serve on PEI's Advisory Council (AC) based on their thought leadership and global experience.
- Affiliate: An informal stakeholder that engages with PEI work and mission. This may be an organization or entity such as a Community of Practice (CoP), working group, or global coalition.

Refer to section entitled Governance Arrangements for further information on how these different stakeholder groups are organized.

Vision

PEI supports a new generation of approaches to economic inclusion to operationalize the scale-up of government-led programs. This builds on emerging lessons from economic inclusion programs, some of which are in the early stages of testing and adaptation, while others are expanding quickly or have ambitions to expand. PEI seeks to test innovations in program design and implementation in selected countries, harvest lessons from these innovations, support country learning, and promote global knowledge-building on emerging best practices.

PEI focuses on two intertwined results: the adoption of scaled, government-led economic inclusion programs and the creation of a cutting-edge platform for global learning and knowledge. Taken together,

PEI results have the potential to affect the lives of millions of citizens globally. Appendix B sets out the detailed Results Framework that underpins the partnership.

Initially PEI will support three pathways to scale. Through these interconnecting pathways, innovations in economic inclusion will be integrated within national social protection and antipoverty programs:

1. Integrating strategies to promote more and better job and livelihood opportunities. For the poorest and most vulnerable, access to employment tends to be informal, risky, and often limited by labor constraints. Therefore, a range of relevant experiences (including in rural development, urbanization, youth) can help unlock entry points for improved job and livelihood opportunities.
2. Improving the effectiveness of social safety net systems. Impact evidence shows that social safety net interventions such as cash transfers can promote economic opportunities, with beneficiaries more likely to expand own-businesses and own-farm labor. Across the world, there is an increasing emphasis on expanding “cash plus” program interventions that build on established programs.
3. Strengthening program delivery systems (for example, beneficiary identification, payments, social accountability) as a mechanism for improving access to economic inclusion. This implies a strong role for financial inclusion.

PEI work program is organized around the following three priorities, which are designed to be mutually reinforcing:

- **Country Engagement:** harnessing global expertise to provide technical advice and grant support for selected governments to design, implement, expand, and continuously improve their economic inclusion programs.
- **Global Knowledge Sharing:** strengthening knowledge exchange, including through the establishment of a PEI virtual platform and identifying and distilling good practices, guidelines, tools, and training for diverse audiences and contexts.
- **Innovation and Learning:** leading innovation and research activities focused on the most critical gaps in knowledge and practice. Disseminating findings and developing knowledge products will help improve the performance of government programs and inform global operations and advisory services.

PEI will seek to mobilize funding resources to support the adaptation and scale-up of national programs. Over time PEI aspires to a model of direct country co-financing, supported through a Recipient Executed Trust Fund (RETTF) model in which funds are provided to recipients in ways that complement WBG financing efforts.

Guiding Partnership Objectives and Values

Partnership Objectives

PEI seeks to achieve the following over the coming 5 years:

- **Development and incorporation of evidence-based good practices by governments in the design and implementation of economic inclusion programming:** Ensure that large numbers of very poor people and vulnerable households benefit from effective programs that expand their economic opportunities.
- **Establishment and communication of knowledge on how governments can adopt, adapt, and scale economic inclusion programming:** Support the expansion of national programs for economic inclusion and facilitate a new wave of innovation and adaptive learning, so government agencies and other large-scale implementers can succeed in shifting their antipoverty programs and systems towards effective and scalable economic opportunity programming.
- **Increased expertise to support economic inclusion programs:** Increase capacities for the development of high-quality program design and implementation by promoting knowledge exchange, peer-to-peer learning, and evidence generation and sharing.
- **Increased funding for economic inclusion programming:** Mobilize and leverage financing to support the expansion of economic inclusion across a variety of contexts and program experiences.

Partnership Values

As a collective, several shared values are driving the direction of PEI. These values build on each of our organization's values and principles, including the World Bank Core Values¹.

- Demonstrated commitment to a **common vision** in scaling up economic **inclusion** for the poorest that is **practically grounded, results oriented**, and focused on **impact** and outcomes for the poorest and most vulnerable.
- **Mutual respect** across organizations, recognizing complementarities and added values.
- A focus on **integration** that encourages collaboration across boundaries and borders, as well as constructive disagreements. This includes reducing silos across and within stakeholder organizations.
- Promoting **innovation and continuous learning** to foster adaptation and evidence-based program design and implementation.
- A **commitment to diversity** at all levels to ensure our work is informed by different perspectives and experiences and actively pursues inclusion of all backgrounds and identities—including gender, geographical, racial, and cultural representations, work styles, and perspectives.

Governance Arrangements

The strategic value of PEI is reflected through the governance setup of the MDTF, which comprises the MDTF **Steering Committee (SC)**, which benefits from the expertise and advice of PEI **Advisory Council (AC)**. PEI **Management Team (MT)** supports these bodies and carries out the work program. The World Bank is the trustee of the MDTF, with responsibility for the Trust Fund operations under the terms of the Administration Agreement, including with respect to the implementation of Bank-executed activities and the supervision of recipient-executed activities. Figure 1 sets out an organogram that describes the organization of the entire PEI network.

PEI is supported by the World Bank-managed Multi-Donor Trust Fund (MDTF), with initial contributions from the New Venture Fund (NVF) on behalf of Co-Impactⁱⁱ and German Development Cooperation (Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH commissioned by and on behalf and for the account of the German Federal Ministry for Economic Cooperation and Development (BMZ)). The work program is implemented through contributions to PEI's dedicated programmatic MDTF administered by the World Bank. The MDTF is also the primary vehicle to support PEI governance structure and management.



Figure 1: PEI Organogram: An organizing framework

PEI MDTF's objectives, activities, and governance are set out in the MDTF Administrative Agreement (AA). The AA formally references PEI MDTF Results Framework, which lays out the overall Theory of Change, development objective, core definitions, and key outcomes and outputs, developed through prior consultation with representatives of organizations active in the Graduation Community of Practice (CoP) prior to the approval the MDTF Concept Note (CN).

PEI Management Team

PEI Management Team (MT) supports the mission of PEI, manages its day-to-day operations, and provides technical leadership. PEI MT operates under the WBG's policies and procedures. It implements the approved Annual Work Plan and MDTF budget. PEI MT is also responsible for:

- Supporting the Steering Committee (SC), including the Chair, and the Advisory Council (AC)
- Organizing and coordinating donor partner meetings (including the SC), AC consultations, and other PEI MDTF-related events;
- Preparing PEI strategic framework, Annual Report, Results Framework, Annual Work Plan, and budget for technical inputs from PEI AC and presentation to and approval by PEI MDTF SC;
- Assessing and deciding on activities to implement PEI work plan;
- Supervising and evaluating activities funded by the MDTF;
- Monitoring and reporting on the results of the MDTF and use of funds, including tracking of key performance indicators in the Results Framework;
- Preparing ad hoc reports to the SC, as necessary;
- Providing administrative support to the SC including but not limited to developing agendas, documenting decisions, maintaining records of the SC, and other similar administrative tasks, as required; and
- Proposing a slate of AC members for agreement with the SC, based on nominations by PEI Technical Partners and the broader stakeholder base.

Trustee

The WBG is the trustee of PEI. The roles and responsibilities of the trustee are to establish and administer trust funds pursuant to WBG procedures and the terms of the Administration Agreements entered between the trustee and donors.

PEI Steering Committee

Roles and Responsibilities: The Steering Committee (SC) provides strategic guidance and direction on the implementation of Trust Fund activities, reviews and approves work plans and budgets presented by PEI MT, and reviews progress reports provided by PEI MT based on the Results Framework described in Section 4.1 of Annex 2 of the AA.

Composition: PEI MDTF SC consists of a representative of the Bank, as Chair, and a representative of each donor contributing to the Trust Fund. New donor engagement to support the resourcing and expansion of PEI is a priority. When other donors join the MDTF, they are bound by the current AA, which can only be changed with concurrence of the WBG and all the donors.

The SC will be expanded with an intent to ensure a complementary mix and a manageable number of funding partners who bring commitment and energy, in addition to resources. PEI will look to engage and balance traditional (for example, sovereign donors) and new types of partnership models (for example, Co-Impact, other foundations), and in doing so hopes to engage "Global South" representatives.

Roles and Responsibilities of SC Chair: The roles and responsibilities of the Chair include but are not limited to:

- Calling and presiding over regular and any special meetings of the SC.
- Consulting and providing strategic advice to the SC in coordination with PEI MT.

Meetings: The SC meets at least twice a year, as convened by the Bank. At least one meeting per year is in person. Typically, the late Spring (April–May) meeting will focus on review of the mid-year progress report and work planning for the upcoming fiscal year (which starts July 1), whereas the Fall meeting will include review of the Annual Performance Report and other matters. The agenda and background materials for each meeting will be circulated at least one week in advance. Decisions will be made by consensus. SC members who are unable to participate during a meeting may provide inputs electronically to the Chair in advance of the meeting. A technical adviser or staff person from the same organization may accompany SC members at meetings.

Decisions Between Meetings: The SC may make decisions between meetings on an electronic basis or in ad hoc meetings through a process facilitated by PEI Management Team.

PEI Advisory Council

Roles and Responsibilities: An Advisory Council (AC) will provide advice on strategy, technical matters, and partnership development. The AC has a critical role to provide direct support to PEI MT. The SC will seek to ensure that inputs from the AC are reflected in PEI Work Program. The AC will also provide an informal bridge reflecting the perspectives and viewpoints of PEI Technical Partners and affiliates. AC members are requested to reflect individual and organizational experiences, in advancing a common PEI agenda.

Specifically, the AC may provide technical inputs for the MDTF priorities and implemented activities, through review and advice concerning PEI Annual Work Program, and other strategic and technical matters as requested by the SC. The AC may provide technical inputs on the Annual Work Program ahead of its submission to the SC for the SC's review and approval during the bi-annual SC meeting.ⁱⁱⁱ

Appointment and Composition: PEI MT will identify a slate of potential AC members for discussion and agreement with the SC. The slate of potential AC members is based on nominations or self-nominations made by PEI Technical Partners and the engagement efforts of PEI MT. **The AC term duration is 2 years, with one term renewal possible. The inaugural AC will transition with** a cohort from the outgoing Interim Advisory Council (IAC) to ensure continuity and institutional knowledge.

The AC will be comprised of 10–12 members, ideally 11 members, organized along the following lines: One WBG Permanent Representative (given fiduciary role within MDTF), up to 6 spots from PEI Technical Partners, up to 3 spots for “Members at Large” (reflecting global experts, thought leaders), and 2 additional spots for representatives reflecting wider affiliate linkages or global expertise. In composing the AC, PEI will look to ensure that constituencies are well represented, including governments, particularly those of the Global South; other public-sector entities including UN agencies; NGO implementers and service providers; funders; and research and advocacy organizations. Additionally, PEI will look to ensure diversity including gender, ethnic, and regional balance and will look to minimize conflicts of interest with the overall PEI MDTF to the extent possible, as covered in further detail in the section on Maximizing Partner Efficiency. Existing SC members will be invited to AC meetings in an observer capacity.

Meetings: AC meetings will occur every 4 months with one meeting a year occurring in person. PEI Program Manager to participate ex officio and Chair meetings.

PEI Technical Partners

Roles and Responsibilities: To maximize mobilization of expertise, resources, and influence for economic inclusion, PEI invites organizations with substantial existing engagement in this field to become institutional “Technical Partners.” The Technical Partners will represent key constituencies involved in advancing this agenda, including governments, other public-sector entities including UN agencies, NGO implementers and service providers, funders, and research and advocacy organizations. Technical Partners are expected to be actively engaged in PEI, including participating in PEI initiatives and sharing their own knowledge with other Technical Partners. Key roles and responsibilities include:

- Committing significant expertise, capacity, and/or other resources to the field through engagement with PEI;
- Actively participating in PEI activities, including identifying and sharing knowledge and practice relevant to issues and challenges in the field and PEI country support, innovation, research, and knowledge management activities;
- Engaging in brainstorming around PEI Annual Work Plan;
- Reporting relevant data to the global survey and other information-gathering initiatives organized or supported by PEI;
- Nominating representatives for the AC to PEI MT, including self-nominations or nomination of other organizations or Members at Large (individuals); and
- Sharing information and raising questions and concerns to PEI MT and/or AC members on PEI economic inclusion programming

Appointment and Composition: PEI is in the process of formalizing its Technical Partner base, which will involve a targeted outreach to a subset of organizations. Existing Technical Partners are comprised of founding organizations to PEI represented in the IAC. After an initial outreach effort, the Technical Partner base of PEI is anticipated on an open and ongoing basis. Technical Partners will be engaged by PEI with a view to provide continuity to PEI founding organizations and include new organizations that have demonstrated commitment to and influence on economic inclusion. PEI will seek a complementary mix of expertise and organizational perspectives across different constituencies including governments, other public-sector entities including UN agencies, NGO implementers and service providers, funders, and research and advocacy organizations. PEI will look to ensure meaningful diversity including organizations from the Global South. Engagement of Technical Partners is anticipated for the initial duration of the partnership.

Affiliates

The broader partnership network is comprised of a range of stakeholder entities including governments, CoPs, coalition networks, and institutions, with varying intensities of engagement with PEI. Beyond the formal organizational structure of PEI, there are many organizations and individuals that are deeply engaged in promoting economic inclusion whether as policy makers, NGOs, practitioners, or researchers. In fact, CGAP has worked consistently over the years with a large group (the Graduation Community of Practice) that has played a pioneering and significant role in shaping much of the conceptualization and

practice relating to economic inclusion. There are other such groups, in social protection, in livelihood programming, in financial inclusion, and in community development, that share much of the vision that PEI holds. Many of them would want to stay cognizant of and, indeed, contribute to the discussion, dialogue, and practice that PEI pursues, without being part of the formal PEI structure. It would benefit PEI to have some mechanism to interact with these groups; for example, the WBG/United Nations Children's Fund (UNICEF)-supported Cash Transfers in Africa CoP, or the UNHCR-supported Poverty Alleviation Coalition.

Graduation Community of Practice: Founded on the momentum of the Graduation CoP, PEI seeks to maintain a direct and central link with it. The Graduation CoP warrants a higher intensity of support, recognizing that (i) it is a critical source for knowledge and, in some respects, a codependent entity to PEI; and (ii) its vitality relies on its informal nature. Accordingly, over the short term, PEI seeks to support the Graduation CoP by (i) financing short-term consulting and providing technology resources (for example, WEBEX) to support CoP engagement; (ii) sponsoring an annual CoP Award to finance promising knowledge initiatives from the CoP collective; and (iii) continuing outreach via newsletter, website, and help desk support. Through these and other potential activities, PEI seeks to support the Graduation CoP in fine-tuning its longer-term outlook.

Working Together

Work Program

PEI work program is currently organized around the following three priorities (or pillars), which are devised as mutually reinforcing, to ensure that country engagement efforts leverage global knowledge and learning efforts, and vice versa. Experiences from the Country Engagement pillar, in particular, are envisioned to anchor and shape the direction of broader global knowledge activities and innovation and learning efforts.

Country Engagement

Objective: The objective of PEI's Country Engagement pillar is to catalyze the adoption and implementation of scaled economic inclusion programming led by governments.

Approach:

- Leveraging the World Bank portfolio and partnership opportunities: A defining opportunity under PEI is the potential to link economic inclusion programs to a wide portfolio of World Bank operations. Increasingly, World Bank clients are seeking support to develop economic inclusion programming through country strategies that focus on expanding social protection, job opportunities, community development, and financial inclusion. The pillar also seeks to proactively leverage expertise and resources across the partnership network (that is, existing partner engagements at country level to support PEI grant awardees, or connecting across partner organizations to support just-in-time country level requests for help with design, implementation, and learning).
- Country-level advisory services: PEI MT anticipates strong demand for country-level advisory services from all regions, low-income (IDA) as well as middle-income (IBRD) countries. PEI MT will prioritize support for country and partnership requests as follows: (i) support for PEI grant awardees (that is, ongoing high-level advisory support to inaugural PEI grant awardees including IDA and IBRD countries; and (ii) strategic country engagement (that is, just-in-time, short-term advisory services to meet requests from IDA and IBRD countries, particularly those that complement the portfolio of grantees and reinforce learning agenda priorities).
- Extracting evidence, lessons, and guidance for other countries and the global learning agenda: Country engagement experiences will strongly reinforce the wider PEI knowledge and learning agenda, including development of guidance for governments and their development partners. Country engagement experiences will be tracked via case studies and webinars, products that may be leveraged to facilitate information exchange and engagement across the partnership.

Global Knowledge Sharing

Objective: The objective of the Global Knowledge Sharing pillar is to strengthen the flow of knowledge on economic inclusion for more effective country engagements and to position PEI as a cutting-edge global platform for learning and knowledge.

Approach:

- Charting a new agenda for economic inclusion: PEI will work to set a prioritized agenda to accelerate learning and the identification of good practices. PEI team will work closely with partners to set the agenda and areas of inquiry for economic inclusion in the coming years, with a focus on building guidance for governments that will also be relevant to other stakeholders. The Global Learning Event will be key to advancing this new agenda, bringing together learning throughout PEI pillars, from countries and convening Technical Partners of PEI.
- PEI as a center of excellence: PEI aspires to be a leading-edge platform for learning and global knowledge. Drawing from a diverse stakeholder base including government and PEI Technical Partners, PEI is uniquely positioned to ensure a flow of high-quality information and analysis and to strengthen connections across a broad community of practice. A central feature of this approach will be efforts on community building, both drawing in and sharing knowledge. Also, key to this goal will be efforts on the part of PEI MT to advance its knowledge and communications infrastructure, including creating and populating a dedicated website with standardized tools and resources (for example, curated information repository, logo, and branding). This will create a knowledge and practice hub for the field that can be enhanced over time.
- Adding value with signature knowledge products: Over time, PEI team will lead, guide, or contribute to specific knowledge products. A priority deliverable for this coming year includes the State of Economic Inclusion 2021 Report. The team will also work with interested partners to create materials to support training and capacity building tailored to diverse needs across the sector. A major focus will be supporting the flow of practical and operational knowledge. At its minimum, this will include briefing materials, data sets, literature reviews, ready-to-go PowerPoints, and so forth. PEI MT will facilitate and provide substantive leadership for virtual and face-to-face learning through regular webinars, global/regional events, and hosting and participating in learning courses.

Innovation and Learning

Objective: The objective of the Innovation and Learning pillar of PEI is to support new research and distill evidence on economic inclusion.

Approach:

- Addressing critical knowledge gaps: To achieve large-scale, transformative economic inclusion programming, critical knowledge gaps need to be filled. First-generation programs implemented in diverse settings with rigorous evaluations have proven the potential of graduation-type programs to sustainably increase incomes of extremely poor households. PEI now needs to support a new generation of impact evidence and other knowledge to support adaptation, innovation, and scaling

of government-supported programs.

- A work in progress: This pillar remains a work in progress and will be an area where further time and discussion with PEI Technical Partners will be required to flesh out a multiyear work program. PEI MT aims to ensure strong facilitation of evidence and learning in the sector, and over time to support work on frontier issues by filling critical knowledge gaps on priority topics such as operational models for scaled implementation, costing, and promotion of women's empowerment and gender equality.

PEI MT will prepare high-level work plans and budgets for the MDTF, including the process by which activities are funded by the MDTF (for example, Call for Proposals or other process). As noted above, the AC will provide advice on strategy and program implementation prior to SC review and approval. PEI Technical Partners may also be consulted to provide inputs.

Box 4: Working Together in Practice: PEI Experience of FY 2020

PEI FY 2020 work program was forged collaboratively across PEI MT, AC, and SC. In the formulation of the work plan, the partnership network prioritized four principles:

- Leveraging the Partnership: PEI focuses on two interwoven results: adoption of government-led scaled economic inclusion programs and creation of a front-line platform for global learning and knowledge. PEI draws on the unique added value of its Technical Partners including governments, NGOs, multilaterals, development partners, and research organizations. An important entry point is the leveraging of World Bank operations.
- Consolidating: The work plan is timely, as PEI moves from a planning to operational mode. During this phase, high-impact activities are accelerated, with a focus on country engagement and global knowledge sharing and emphasizing careful prioritization and sequencing of tasks.
- Synergies across work program pillars: Work program pillars are devised as mutually reinforcing to ensure that country engagement efforts leverage global knowledge and learning efforts, and vice versa. FY 2020 efforts have focused heavily on country engagement efforts in recognition of their importance for extracting, sharing, and informing broader knowledge activities.
- Smarter communications: The work plan recognizes the need for a clearer vision of PEI's added value and a clearer set of communication tools to accompany this (dedicated website, central knowledge repository, standard communication materials).

In the course of program implementation, PEI has adopted a highly collaborative approach built on three pillars:

- Country Engagement: engagement of network, facilitation of introductions to partnership, outreach to WBG operational teams.
- Global Knowledge: A SWAT team mentality on key products, relying on strong engagement by partners (for example, the SEI 2020 concept created jointly with Technical Partner input, survey outreach, and technical engagement.) The delivery of the Global Learning Event plans to follow a similar approach.
- Innovation and Learning: An organic, learning-by-doing approach, to build on country engagement and knowledge and to, over time, engage and draw on energy of affiliate groups.

Modes of Collaboration

As a new and emerging partnership, PEI seeks to identify smart and effective modes of collaboration to support day-to-day program operationalization. Key directions include:

- Facilitating links and introductions to WBG operations: Using operations clinics, “help desk” queries, and PEI-sponsored events (for example, webinars, Global Learning Events)
- A SWAT team mentality: Engagement of PEI Technical Partners to support PEI MT on specific partnership deliverables
- Selective support to PEI affiliates: Prioritizing tasks and initiatives among affiliates that have a clear demand for PEI support across organizations
- A careful use of working groups: Engaging working groups that have a clear purpose and are ideally time-bound, with appeal across several partner constituencies
- Rapid brainstorming and periodic “pulse checks” with PEI stakeholders: Conducting ad hoc 1-hour brainstorms on technical issues, using quick survey tools to check the pulse of Technical Partners, and so forth.

Monitoring

PEI Management Team will prepare two reports per year for the Steering Committee, with reference to PEI MDTF Results Framework:

- **Annual Performance Report:** by September 15 and in advance of the Fall SC meeting, covering the previous fiscal year ended June 30 covering the portfolio of major MDTF-funded activities; and
- **Mid-year Progress Report:** by March 15 and in advance of the Spring SC meeting, reporting on activities and progress for the first half of the fiscal year through December 31.

As reflected in the Administrative Agreement (AA), the Bank, through the Development Partnership Center, will submit to the donor information including: current financial information relating to receipts, disbursements, and fund balances, updated quarterly; final financial information relating to receipts, disbursements, and fund balances within six months after all commitments and liabilities under the Trust Fund have been satisfied and the Trust Fund has been closed; and within six months following the end of each Bank fiscal year, an annual single audit report, and a combined financial statement for all cash-based trust funds together with the Bank’s external auditor’s opinion.

General

This Partnership Guide may be adopted or amended by approval of the SC. PEI MT will receive inputs from the AC and SC as needed, on suggestions or updates for this Partnership Guide. PEI MT maintains and distributes records of any such amendments.

Maximizing Partnership Efficiency

The Partnership for Economic Inclusion strives to be an efficient, high-functioning, and beneficial engagement mechanism for all stakeholders. The following section discusses aspects devised to maximize partnership efficiency.

World Bank Multi-Donor Trust Fund Mechanism

PEI was established under a Multi-Donor Trust Fund mechanism to allow for contributions from multiple donors, the pooling of their funds, and administration under a single set of agreed terms. All donors participating in an MDTF are required to sign administration agreements/arrangements, which have the same annexes specifying activities to be funded, eligible expense categories, governance arrangements, operational and financial reporting, and so on.

Given the pooled nature of funds, participating donors cannot earmark their contributions for specific recipients or activities. Donors can state a nonbinding preference to finance specific sectors or themes, but these preferences are not to impose a legally binding commitment by the World Bank. Although preferencing is to be limited to a trust fund's thematic, sectoral, or geographic aspects, preferencing cannot be at both the geographic and project level and cannot be at the expenditure category level.

Therefore, all donors participating in the MDTF must be informed of any preferencing requests to ensure complete transparency. Donors considering preferencing should be aware that preferencing will not be reflected in a fund's financial reports. This approach supports the Paris Declaration on Aid Effectiveness and unties aid, which reduces transaction costs for partner countries and improves country ownership and alignment. In addition, this restriction also supports the Bank's ability as fund administrator to optimally manage the fund to maximize its global impact.

Promoting Transparency and Accountability

The various stakeholders that comprise PEI recognize the critical importance attached to issues of transparency and accountability within their various institutions and in World Bank Group operations. Transparency and accountability mechanisms for PEI activities are in place to ensure the effective and efficient use of the funds. As a partnership hosted at the WBG, PEI follows the standard fiduciary policies and processes applicable to all Trust Funds, whether they are Bank or Recipient Executed. As a global institution, the WBG has a range of mechanisms in place to mainstream transparency and accountability (see Box 5).

In addition to the mechanisms embedded within the WBG, PEI also routinely supports transparency and accountability in its day-to-day work program through a number of efforts, which include, among other things, (i) the maintenance of an information repository for stakeholder organizations, (ii) documentation and sharing of regular meetings minutes, (iii) sharing of information in advance of AC and SC meetings, (iv) regular reporting on activities, and (iv) the availability of PEI Program Manager to various stakeholders for additional information and dialogue.

Box 5: Sample Transparency and Accountability Mechanisms within World Bank Group

- Information on WBG authorizing environment: [Board of Directors](#) (approval mechanism for all World Bank-financed operations)
- Project Information: [World Bank Operations Portal](#) (complete project information)
- Information on investment lending: [Products and Services](#) (search for information on project preparation processes, clearance processes, and so on)
- Environmental and Social Policies: [Policy Guidance](#) (the cornerstone of our work to protect people and environment from adverse impacts)
- Management of Fraud and Corruption: [The Independent Integrity Unit](#) (an independent unit within WBG)
- Information and Knowledge: Access to information Policy 2010 (enabling the public to access a wide range of Bank info/documents)
- Grievance Redress Services: [GRM at the WBG](#) (further mainstreamed since 2014)
- Independent Complaint Mechanisms: [Inspection Panel](#)
- Internal Service for Staff Grievance: [Ombudsman Office](#)

As part of transparency, funding partners, upon corresponding registration, have the opportunity to access the Development Partnership Center (DPC). As part of an effort to consolidate and improve external access to information, the Development Partnership Center was launched as a single-stop portal for development partners to access financial data previously available through the Donor Center in Client Connection, and to facilitate access to relevant documents for ease of use.

Communications, Branding, and Visibility

In order to ensure the effectiveness of PEI outreach and public efforts, the following branding and communication principles are in place to be taken into consideration:

- PEI has a distinct identity and brand.
- Flagship PEI publications will follow the WBG process for authorization including Concept Note, peer review, and decision meeting.
- Less formal outputs will follow a lighter publications process to ensure rapid information flow, although thorough peer review and management clearance will be an integral part to all outputs.
- Publications can be cobranded (with WBG units and/or PEI Technical Partners).

On the communications front, PEI will continue to use periodic newsletters to communicate and engage with external stakeholders and PEI Technical Partners. In doing so, PEI aims to integrate more strongly with the WBG systems and infrastructure, in technical collaboration and in leveraging available systems and expertise. PEI will be strengthening its knowledge management strategy to support knowledge-sharing activities and operational effectiveness, using tools and platforms readily available and security compliant.

In terms of visibility, as reflected in the AA, where appropriate, the Bank will acknowledge the donors' contributions in references made by the WBG with respect to the Trust Fund in publications, press releases, or other similar written materials. Such communications will be shared in advance to concerned organizations. Logos of funding partners and Technical Partner organizations will be included on PEI website.

Promoting a Common Agenda

Given the partnership nature of PEI, participation by the funding partner, SC, AC, and Technical Partner should be consistent with the Partnership Guide in order to avoid any type of conflicts of interest. Partners will maintain best efforts to amicably settle any dispute, controversy, or claim arising over the course of the partnership. The commitment of partners involved and the degree to which all share the common partnership goals will be a key determinant in the likelihood of achieving PEI objectives. In the case of an emerging issue or concern, PEI has mechanisms in place to avoid conflicts of interest:

- **Arbitration of trust fund allocations:** PEI MT, in coordination with the SC, will follow relevant WBG fiduciary policies in the allocation of resources. The AC will not be involved in resource allocation decisions. PEI Technical Partner organizations are expected to advance common rather than institutional goals. WBG policy clearly defines that MDTF donors cannot be recipient or beneficiary of Trust Fund resources in any way or form, including through bidding for projects.
- **Disclosure:** Prospective SC and AC members will be asked to disclose any potential conflict of interest with the partnership.
- **Partnership oversight and management:** The WBG participates on the SC and AC, with WBG hired staff leading PEI MT. The roles and responsibilities of each entity have been defined to ensure clear transparency and accountability mechanisms (for example, ensuring adequate space at the SC for joint decisions and authorization; PEI MT led by a Program Manager).

In order to ensure decision making is based on the best interests of the Partnership, the responsibilities established in the Governance Annex 3 of the AA are to be followed.

Appendices

Appendix A: Glossary of Key Abbreviations and Terms

- **AA:** Administration Agreement, entered between the World Bank and donors to the Partnership for Economic Inclusion (PEI) Multi-Donor Trust Fund (MDTF)
- **AC:** Advisory Council of the Partnership for Economic Inclusion Multi-Donor Trust Fund
- **BETF:** Bank-Executed Trust Funds that support the Bank's work program and for which it has implementation responsibility. These BETFs follow the requirements of the Bank Budget Policies and Procedures in the Administrative Manual (internal to the Bank), and ASA project cycle.
- **BMZ:** German Federal Ministry for Economic Cooperation and Development
- **CGAP:** Consultative Group to Assist the Poor, a global partnership with the mission of advancing financial inclusion, which is hosted by the World Bank. CGAP has supported development of the graduation field and the Graduation Community of Practice (CoP) since the mid-2000s in partnership with the Ford Foundation. Between 2006 and 2014, the CGAP-Ford Foundation Graduation Program partnered with local organizations and governments to launch 10 pilot projects in eight countries. A robust learning and evaluation agenda, including qualitative research and/or randomized controlled evaluations, was embedded in all the pilot sites. In June 2017, CGAP reached agreement with the World Bank's Social Protection and Jobs Global Practice (SPJ) that its Graduation Initiative would transition to SPJ and is now known as the Partnership for Economic Inclusion (PEI).
- **CMU:** Country Management Unit of the World Bank Group
- **CN:** Concept Note
- **Co-Impact:** Co-Impact is a global collaborative for systems change. It brings together philanthropists, foundations, and other funders to support systems change efforts in low- and middle-income countries around the world, in the areas of education, health, and economic opportunity, and with a particular emphasis on gender and inclusion. It is a fiscally sponsored project of the New Venture Fund (NVF), a U.S. 501(c)(3) public charity.
- **CoP:** Community of Practice. The Graduation CoP was created and facilitated by CGAP (see “CGAP” above). It consists of individuals and organizations engaged in supporting the graduation approach and other economic inclusion programs that serve extremely poor and vulnerable households; the Graduation CoP is an important constituent of PEI.
- **Economic inclusion:** defined as “multisectoral interventions that support and enable households to achieve sustainable livelihoods and increase their incomes and assets, while building human capital and promoting social inclusion.” A leading example of this type of program is that applying the “graduation approach.”
- **EoI:** Expression of Interest, the application submitted in response to a Call for Proposal
- **Extremely poor populations:** people living in extreme poverty (that is, those with incomes at or below the \$1.90/day international poverty line, adjusted for purchasing power parity), who can work on a sustained basis, and also poor people who, because of their personal and/or community characteristics, face barriers in accessing opportunities to earn sustainable livelihoods and have elevated risks of being/staying in poverty and/or being socially marginalized
- **FAO:** Food and Agriculture Organization
- **FCV:** Fragility, conflict, and violence

- **FY:** Fiscal year, which runs from July 1 through June 30 for the World Bank Group
- **GDP:** Gross domestic product
- **GIZ:** Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH
- **GLE:** Global Learning Event of PEI
- **GP:** Global Practice of the WBG
- **GPSA:** Global Partnership for Social Accountability
- **IAC:** Interim Advisory Council of the Partnership for Economic Inclusion, constituted in early 2019 to guide the startup of PEI
- **IBRD, IDA, and IDA Blend:** Economies are divided into International Bank for Reconstruction and Development countries (IBRD), International Development Association (IDA) countries, and Blend countries, based on the operational policies of the World Bank. IDA countries are those with low per capita incomes that lack the financial ability to borrow from the IBRD. Blend countries are IDA-eligible but also creditworthy for some IBRD borrowing
- **IFAD:** International Fund for Agricultural Development
- **IPA:** Innovations for Poverty Action
- **J-PAL:** Abdul Latif Jameel Poverty Action Lab
- **M&E:** Monitoring and Evaluation
- **MDTF:** Multi-Donor Trust Fund
- **NVF:** The New Venture Fund (NVF), a U.S. 501(c)(3) public charity, which supports innovative and effective public interest projects.
- **PEI MT:** PEI Management Team, comprised of WBG hired staff and consultants supporting the Partnership and carrying out the MDTF-funded work program (also referred to as the “PEI core team” or “PEI team”)
- **PEI:** Partnership for Economic Inclusion, a global partnership devised to support national governments in the development and implementation of economic inclusion programs to sustainably increase the income, assets, and resilience of extremely poor and vulnerable populations
- **Results Framework:** An explicit articulation (graphic display, matrix, or summary) of the different levels, or chains, of results expected from a particular intervention—project, program, or development strategy.
- **RETF:** Recipient Executed Trust Fund that the Bank passes on to a recipient that has implementation responsibility, and for which the Bank plays an operational role; that is, the Bank appraises and supervises activities supported by these funds. RETFs are aligned with processes, systems, and oversight arrangements applicable to IBRD/IDA lending operations on a risk-adjusted basis, including fiduciary and safeguard policies (Environmental and Social Framework, or ESF) and the application of the Results Framework. All RETFs follow the Investment Project Financing processes.
- **SC:** Steering Committee of PEI MDTF, consisting of the World Bank (as Chair) and donors to PEI MDTF
- **SPJ:** Social Protection and Jobs Global Practice of the World Bank, and host of PEI
- **STC:** Short-Term Consultant of the World Bank Group
- **TFLAP:** Trust Fund Learning and Accreditation Program
- **TORs:** Terms of Reference
- **TTL:** Task Team Leader of World Bank Group projects

- **UN:** United Nations
- **UNICEF:** United Nations Children's Fund
- **UNHCR:** UN High Commission for Refugees
- **Vulnerable populations:** groups facing restrictions in accessing economic opportunities or in participating in the social life enjoyed by the majority or in exercising rights of citizenship, due to their gender, ethnicity, religion, national origin, economic background, displacement, age, disabilities, or sexual preference. These groups are especially vulnerable to shocks.
- **World Bank:** International Bank for Reconstruction and Development, host of PEI and Trustee of its MDTF
- **WBG:** World Bank Group
- **WFP:** World Food Programme

Appendix B: Results Framework

Note: As the Results Framework below predates the Partnership Agreement, please note that its use of the term “PEI Members” is synonymous with the term “Technical Partners” in the Partnership Guide.

High-Level Outcome	Indicators	Data Source
Households achieve higher income and assets.	- In at least one country, 75 percent of participating households have improved assets and income 24 months after entering the program	- Reporting from program-level M&E data, including independent verification of government agency results as feasible and appropriate (and required for at least one country)
Intermediate Outcomes		
Governments develop and incorporate evidence-based good practices on design and implementation into their economic inclusion programming.	<ul style="list-style-type: none"> - No. of governments that have put in place evidence-based policies supporting economic inclusion programming - No. of governments that have adapted existing systems to incorporate evidence-based economic inclusion programming - No. of governments piloting evidence-based economic inclusion programming - No. of governments implementing evidence-based economic inclusion programming at scale 	<ul style="list-style-type: none"> - Global landscaping survey, World Bank portfolio and pipeline analysis and ASPIRE database (if relevant data are collected and available) - Reporting from program-level M&E data - Midterm stakeholder consultation (including independent verification and analysis of qualitative as well as quantitative indicators)

<p>Knowledge is established and communicated on how governments can adopt, adapt, and scale economic inclusion programming.</p>	<ul style="list-style-type: none"> - No. of research studies/evaluations completed or underway by PEI that fill identified knowledge gaps in the field - No. of governments adopting, adapting, or scaling economic inclusion programs using best practices and standards - No. of innovation workshops conducted with relevant government stakeholders. - No. of peer-to-peer knowledge sharing activities (other than innovation workshops) conducted with the inclusion of members from relevant parties such as government, the World Bank, and other development partners and CoP members 	<ul style="list-style-type: none"> - Global landscaping survey - Tracking of policy advice, technical assistance, and peer exchange to governments, from M&E - Tracking of research completed and underway - Analysis of findings from proof points, case studies, evidence, and CoP insights (through stakeholder surveys) - World Bank portfolio & pipeline analysis
<p>Increased expertise is available and supporting economic inclusion programs.</p>	<ul style="list-style-type: none"> - No. of active PEI Members (track no. per constituency) - No. of CoP participants 	<ul style="list-style-type: none"> - Tracking of PEI Members; including qualitative evidence of their expertise, engagements, and participation in training programs (as provider and/or recipient), Mid-Term Stakeholder consultation
<p>Increased funding is available for economic inclusion programming.</p>	<ul style="list-style-type: none"> - Increase in level of government funding provided for economic inclusion programming - Increase in no. of funders supporting, and level of funding for, economic inclusion programming 	<ul style="list-style-type: none"> - Tracking - Global landscaping survey - World Bank portfolio and pipeline analysis

PEI has engaged and leveraged its location within World Bank.	<ul style="list-style-type: none"> - Level of World Bank funding for economic inclusion programming - No. of World Bank-supported programs incorporating EI component that is informed by PEI/CoP, no. of people targeted by these programs - No. of references to economic inclusion programming in World Bank leadership statements 	<ul style="list-style-type: none"> - World Bank portfolio and pipeline analysis - Global landscaping survey
Outputs	Indicators	Data Source
Advice is directly provided to governments on innovations and good practices. Advice is provided to governments' development partners, including to raise funds.	<ul style="list-style-type: none"> - No. of governments provided with intensive support by PEI/CoP - No. of governments receiving light-touch support by PEI team/CoP <p>(Combined total for the 2 indicators above of at least 6-8 countries over 5 years)</p> <ul style="list-style-type: none"> - No. of governments' development partners provided with support by PEI team/CoP - Percentage of governments/governments' development partners provided with/receiving support by PEI team/CoP that state that the support has been useful for their work on economic inclusion. 	<ul style="list-style-type: none"> - Tracking - Periodic satisfaction surveys with engaged governments - Midterm stakeholder consultation (survey and qualitative interviews)
Studies are undertaken on critical issues for economic inclusion programs, including: <ul style="list-style-type: none"> - Cost effectiveness - Government implementation - Adaptation to different segments - Gender-responsive programming 	<ul style="list-style-type: none"> - No. of studies carried out - No. of topical working groups (WG) and WG events/engagements dedicated to adaptation and innovation of the approach 	<ul style="list-style-type: none"> - Tracking, including no., topic, type of M&E, and WG activity/deliverable
Landscaping survey and database	<ul style="list-style-type: none"> - Publication of global landscaping report (annual) - Database available and updated on a regular basis 	<ul style="list-style-type: none"> - Tracking

<p>Knowledge products, good practices documents, workshops and meetings</p> <p>PEI Members enabled and supported</p> <p>Training and capacity building</p>	<ul style="list-style-type: none"> - No. of outputs (knowledge products, workshops and convenings, trainings, etc.) - No. of participants/users (track no. per constituency for PEI Members and no. of World Bank staff) - No. of participants/users reporting satisfaction level (reporting content useful for their work) 	<ul style="list-style-type: none"> - Tracking (standard output categories) - PEI Member and CoP surveys and feedback - Midterm stakeholder consultation
<p>Reporting on household-level income and assets from a sample of PEI-supported programs, based on M&E data</p>	<ul style="list-style-type: none"> - No. of outputs reporting on household level income and assets 	<ul style="list-style-type: none"> - Literature review - Program M&E data
<p>Engaging website that serves as a platform for resources and dissemination of evidence and good practices</p>	<ul style="list-style-type: none"> - Completed website - No. of page views, unique visitors, and other Google analytics that capture use of website 	<ul style="list-style-type: none"> - Tracking - Periodic satisfaction survey
<p>Fundraising for PEI is conducted.</p>	<ul style="list-style-type: none"> - No. of funders and World Bank representatives receiving support and engaging with PEI - No. of funder guidance engagements 	<ul style="list-style-type: none"> - Tracking - Periodic satisfaction surveys with funders and World Bank representatives

NOTES

ⁱ For example, (i) World Bank Core Values include: impact, integrity, respect, teamwork, and innovation; (ii) Co-Impact: Outcomes focus, program partner and community led, beginners mind, unity in diversity, trusting partnership; (iii) BRAC: Integrity, Innovation, Inclusiveness, and Effectiveness; (iv) GIZ: Sustainability (social responsibility, ecological balance, political participation, and economic capability), Basic Law of Federal Republic of Germany, and principles of the United Nations Global Compact (UNGC); and (iv) Trickle up: Economic empowerment, digital innovations, partnerships for scale, social empowerment, and embracing change.

ⁱⁱ Co-Impact is a global collaborative for systems change. It brings together philanthropists, foundations, and other funders to support systems change efforts in low- and middle-income countries around the world, in the areas of education, health, and economic opportunity, and with a particular emphasis on gender and inclusion.

ⁱⁱⁱ PEI MT will facilitate the consultation process by soliciting, summarizing, and responding to the AC feedback in a document forwarded to the SC in advance of its meeting.