



USAID
FROM THE AMERICAN PEOPLE



EVALUATION

Wings to Fly Mid-term Performance Evaluation

June 2, 2015

This study is made possible by the support of the American People through the United States Agency for International Development (USAID). The contents of this study are the sole responsibility of Stuart Leigh, Edwin Ochieng and Management Systems International and do not necessarily reflect the views of USAID or the United States Government.

WINGS TO FLY

MID-TERM PERFORMANCE EVALUATION

June 2, 2015

Contracted under IDIQ No. AID-623-I-12-00001, TO AID-615-T0-14-00011

Kenya Support Program

Photos: Diba Godana, DSSB Member, Isiolo

DISCLAIMER

This study is made possible by the support of the American People through the United States Agency for International Development (USAID). The contents of this study are the sole responsibility of Stuart Leigh, Edwin Ochieng and Management Systems International and do not necessarily reflect the views of USAID or the United States Government.

TABLE OF CONTENTS

Acronyms	iv
Glossary of Terms	vi
Executive Summary	7
Recommendations for USAID	10
Summary of Recommendations for EGF.....	10
Activity Background	11
Overview of Development Problem.....	11
Activity Strategy	11
Development Objectives and Intermediate Results.....	12
Development Hypothesis and Activity Design.....	12
Current Activity Status: Life Cycle and Accomplishments.....	13
Evaluation Purpose & Questions	14
Evaluation Methods & Limitations	14
Evaluation Methods	14
Data Collection	15
Data Analysis.....	15
Limitations.....	16
Findings & Conclusions	16
Question 1: Equitability of Informing and Selecting Youth	16
Findings.....	16
Conclusions.....	23
Question 2: Financial and Psychosocial Support	24
Findings.....	24
Conclusions.....	32
Question 3: Best Type of Monitoring and Reporting	34
Findings.....	34
Conclusions.....	36
Recommendations	37
Annex 1: Recommendations for EGF	40
Annex 2: Detailed Figures	44
Annex 3: Detailed Tables	51
Annex 4: Evaluation Methodology and Workplan	62
Annex 5: Detailed Final Evaluation Methods & Limitations	157
Annex 6: List of Information Sources	161
Annex 7: Signed Conflict of Interest Forms	165
Annex 8: Wings to Fly PMP Performance Monitoring Indicators and Data Collection Plan	167
Annex 9: Maps	172
Annex 10: DSSB Member Letter from EGF for APHIAplus Member	177
Annex 11: Mentoring Policy Procedures and Standards- Kairu	179
Annex 12: Wings To Fly 2015 Media Plan	180
Annex 13: Wings to Fly Scholars Selection Manual	181
Annex 14: WtF Selection Requirements 2012 - 2015	182
Annex 15: Constituency Bursary Allocation Formula	186
Annex 16: Secondary Bursaries-Similar Populations-Different Poverty Indices	187
Annex 17: Wings To Fly Budgets and Spending 2013-2014	188
Annex 18: WtF Materials Package Usage and Sufficiency	189
Annex 19: Tertiary and University Graduates	190
Annex 20: External Interest In Enhanced Reporting	197
Annex 21: WtF Mentoring Design	199
Annex 22: Photos	203
Annex 23: M&E Roadmap – Kimetrica_ EGF v 2 – Education	208
Annex 24: Performance Indicator Reference Sheet 11-14	217
Annex 25: PMP Activity Indicators and Corresponding PIRS	227

LIST OF FIGURES

Figure 1: USAID WtF Scholars by Province/Intake Years (2012–2013) & APHIAplus 500 (2013) 17
 Figure 2: USAID Scholars’ Vulnerabilities by Category & Province 18
 Figure 3: All USAID Scholars 2011–2013 by Gender 21
 Figure 4: USAID Scholar Performance, Term 3 2012 and 2013 26

LIST OF TABLES

Table 1: Respondents Reached..... 15
 Table 2: Donor Requirements 2012-2015 Planned, Not necessarily Actual..... 21
 Table 3: Centralizing Tendency (Sample DSSBs Serving Multiple Districts) 22
 Table 4: EGF OVC Scholar Performance in KCSE – 2012, 2013 vs. 2014 WtF & Nationally 26
 Table 5: Wife without WtF Scholarship..... 27
 Table 6: WtF Mentor Provided 28
 Table 7: Mentor Visited School 29
 Table 8: WtF Relationship to CDCS Development Objective 2 35

ACRONYMS

ADS	Automated Directives System
AIDS	Acquired Immune Deficiency Syndrome
AOR	Agreement Officer's Representative
APHIAplus	AIDS, Population and Health Integrated Assistance Plus
ASAL	Arid and Semi-Arid Lands
BGDM	(Equity Bank) Business Growth and Development Manager
CDCS	Country Development Cooperation Strategy
CDE	County Director of Education
CDF	Constituency Development Fund
COP	Chief of Party
COR	Contracting Officer's Representative
CV	Curriculum Vitae
DEO	District Education Officer
DFID	Department for International Development
DO	Development Objective
DSSB	District Scholarship Selection Board
EALP	Equity Africa Leaders Program
EB	Equity Bank
EBL	Equity Bank Limited
EDY	Education and Youth (office of USAID/Kenya)
EGF	Equity Group Foundation
EMIS	Education Management Information System
GD	Group Discussion
GDA	Global Development Alliance
GM	General Manager
GOK	Government of Kenya
HELB	Higher Education Loans Board
HIV	Human Immunodeficiency Virus
ICT	Information and Communications Technology
IR	Intermediate Result
KBC	Kenya Broadcasting Corporation
KCPE	Kenya Certificate of Primary Education Examination
KCSE	Kenya Certificate of Secondary Education Examination
KEPSHA	Kenyan Primary School Head Teachers Association
KES	Kenyan Shillings
KfW	KfW Bankengruppe
KII	Key Informant Interview
KNEC	Kenya National Exams Council
KPI	Key Performance Indicator
LOA	Life of Activity
M&E	Monitoring and Evaluation
MCF	MasterCard Foundation

MD	Managing Director
MOEST	Ministry of Education, Science and Technology
NESP	National Education Sector Plan
OVC	Orphans and Vulnerable Children
PEPFAR	President's Emergency Plan for AIDS Relief
PIRS	Performance Indicator Reference Sheet
PMP	Performance Management Plan
PPR	Performance Plan and Report
PWC	Price Waterhouse Coopers
RSA	Research Solutions Africa
SIM	Subscriber Identity Module
SO	Strategic Objective
SOO	Statement of Objectives
TOT	Training of Trainers
TV	Television
TVET	Technical Vocational Education and Training
UKaid	United Kingdom's Department for International Development
USAID	United States Agency for International Development
USB	Universal Serial Bus
USG	United States Government
WtF	Wings to Fly

GLOSSARY OF TERMS

Findings	Empirical facts collected during the study
Conclusions	Interpretations and judgments based on the findings
Recommendations	Proposed actions for management
County Branch	An Equity Bank branch that is the sole branch in the county, and thus responsible for selecting Wings to Fly scholars from other county districts.
Orphans and Vulnerable Children	Relevant to eligibility for PEPFAR financial support, varying definitions of this term have been used over the period of the Wings to Fly program (2011: OVC: “A child who is orphaned or made more vulnerable because of HIV/AIDS. An orphan is a child, 0–17 years old, who has lost one or both parents to HIV/AIDS. A vulnerable child is defined as one who is HIV-positive; lives without adequate adult support; lives outside of family care; or is marginalized, stigmatized or discriminated against.” 2012: OVC: “Children who have lost a parent to HIV/AIDS, who are otherwise directly affected by the disease or who live in areas of high HIV prevalence and may be vulnerable to the disease or its socioeconomic effects.”)
Primary School	A school in which children between the ages of about 5–13 receive primary or elementary education. In Kenya, primary school encompasses first through eighth grades.
Psychosocial Support	A core service area reportable under PEPFAR funding.

EXECUTIVE SUMMARY

Wings to Fly (WtF) is a public-private partnership involving Equity Bank Limited (EBL), Equity Group Foundation (EGF), USAID, MasterCard Foundation (MCF), the United Kingdom's Department for International Development (UKaid), KfW Bankengruppe (KfW) and other partners. Started in 2010, it offers full scholarships covering tuition, room and board to allow more than 10,000 academically talented but economically deprived and vulnerable children to complete secondary education. Recipients also benefit from personal mentoring, leadership training and career guidance. Upon graduation, the highest-scoring students may join a linked pre-university program. The project goals include: 1) increasing access to secondary and higher education for talented, economically disadvantaged young people; 2) supporting an educated, self-reliant and productive youth population to help Kenya drive its own development agenda; and 3) encouraging the private sector to take a leadership role in realizing Kenya's development goals. With an initial USAID grant award of \$17.4 million in late 2011 from the President's Emergency Plan for AIDS Relief (PEPFAR) and a later contribution of \$9 million, USAID's part of the project has a total estimated budget of \$26.4 million. Through Sept. 30, 2014, \$15.9 million had been obligated and \$9.9 million spent. USAID's contribution to WtF supports 2,678 secondary school students who are orphans and vulnerable children (OVC), as defined by PEPFAR. These same funds also supported 488 scholars from a previous OVC scholarship program through the end of secondary school (149 students who became the first USAID-funded cohort to receive full WtF program benefits), tertiary or mid-level college (66 students) or university (273 students). As of April 2015, the USAID-funded component of WtF is three years and five months into a five-year project life cycle, with an end date of Nov. 9, 2016. WtF has substantial funding commitments through 2023. Beginning in 2016, MasterCard Foundation (MCF) will fund 1,000 new scholars annually through 2020, with EGF committed to funding an additional equal number of new scholars each year for five years.

The objectives of this midterm evaluation are to help USAID and EGF determine what activities are or are not working well and why, and to assist in making any necessary modifications and midcourse corrections. The 2,678 USAID supported WtF scholars receive the same services that all other WtF scholars do, so the full set of program services and operational issues have been examined. Where standardized exam data is not yet available for the 2,678 USAID students, who were only inducted to Form I in 2012 and 2013 and have not yet graduated, available WtF graduate data has been analyzed as a proxy to more reliably assess program effectiveness. Three questions guided the evaluation.

Question 1 (Q1): "How equitable was the process in informing and selecting vulnerable youth from geographically diverse areas to participate in the scholarship program?" Equity is considered in terms of 1) the treatment received by eligible scholarship applicants and 2) how WtF is in keeping with funder requirements regarding eligible beneficiaries and with national government mandates.

Q1 Summary Findings: PEPFAR OVC definitions have changed since the program began. In addition to being required to select PEPFAR OVC scholars, EGF was to select equal numbers of boys and girls, with 60 percent from Nyanza and Rift Valley provinces. In 2012, the 60 percent requirement was met. In 2013 EGF was to include 500 AIDS, Population and Health Integrated Assistance Plus (APHIPlus) scholars, but included only 201, with 299 additional scholars reportedly from areas of high HIV prevalence also included. Of all USAID secondary scholars, 49.6 percent are girls and 50.4 percent are boys.

The 116 District Scholarship Selection Boards (DSSBs), managed by EB branches, are representative of local stakeholders and generally follow uniform codified procedures. WtF is advertised via national and local radio stations and TV. The commissioning ceremony when students are formally inducted into the program, which is broadcast on TV, uses 60 percent of advertising funds. EGF intervenes as needed to ensure that selected WtF scholars are placed in appropriate schools. Of the 262 districts in Kenya, 146 are served by DSSBs and EB branches located in other districts. Based on a survey of four DSSBs serving other districts, on average 51.7 percent of the scholars they select come from the DSSB's own district and 13.8 percent on average from any one remote district. The Ministry of Education, Science and Technology (MOEST) has a relevant Constituency Bursary Allocation Formula designed to address differences in levels of poverty among geographic areas.

Conclusions: Despite different donors with varying geographic and gender requirements and varying understandings of the term OVC, the definition of which should be clarified for EGF by USAID, the project has established measures to ensure fairness in selecting OVCs for WtF, including gender equity in access. The project design, making use of Equity Bank's wide infrastructure and growing outward from bank branch locations, is cost-effective in student management, but has led to a concentration of benefits to scholars from districts where DSSBs are located. EGF allocates a few additional scholarships to county branches that are the sole Equity Bank branch in a county. The formula for allocating scholarships, which changes annually and is affected to a degree by donor requirements, is reasonable and simple and appears even-handed. However, it is too simple to produce balanced access nationally or deal affirmatively and proportionately with different levels of poverty across counties and districts.

Question 2 (Q2): "What were the key elements of success and main challenges in providing financial and psychosocial support to vulnerable children?"

Q2 Summary Findings: EGF has had no general manager (GM) for monitoring and evaluation (M&E) for over a year and a half and had short-term staffing in that position previously. It is currently without a GM for education and leadership. While much data is gathered and reported upon, WtF M&E policies and procedures have not been formalized. A contract with Kimetrica has produced a draft M&E framework to address this deficit. Certain M&E database fields (e.g., scholars' home district) need substantial cleaning and currently prevent district-level analysis. FY 2014 quarterly reports show underspending by more than \$570,000 each quarter and an average burn rate of 65 percent.

"Psychosocial support" as defined by EGF has been given to 130 scholars via referral to outside professionals. After underperforming for years, in the last year the mentorship program was deeply revised. Improvements include: new policies and procedures emphasizing a school-based approach with visits every term, a mentor-mentee ratio of 1:5, objective criteria for identifying mentors and a practical curriculum for use by mentor trainers and mentors in the field. EGF reported growth in the numbers mentored in 2014 from 1,371 in Term 1 to 2,377 in Term 3. Recruitment efforts have identified more than 1,000 willing mentors, but of 394 USAID-supported scholars surveyed, 61 percent reported not having a mentor. More than a third of USAID scholars are not yet even matched with a mentor in EGF's database. Scholars' leadership skills are promoted at annual congresses and through mentorship. Of surveyed scholars, 81 percent found WtF "very useful" or "extremely useful" in promoting their leadership achievements. However, although one WtF PMP indicator is students' actual leadership

positions at school, EGF's data system is not yet configured to capture this information. A WtF E-Learning portal is under development, but not yet providing regular service to scholars or mentors.

Virtually all USAID scholars report that EGF consistently pays school fees and provides material support on time. The possibility of formal education beyond secondary school for USAID scholars is dependent on their Kenya Certificate of Secondary Education (KCSE) exam scores. While USAID scholars' pre-graduate test scores are school-based and so not comparable, 72 percent scored C+ and above, the score required for university admittance, in a recent term. Using 1,155 WtF graduates' 2014 KCSE scores as a standardized proxy allowing assessment of relative performance, 93 percent scored C+ or above. Boys tended to score higher than girls. WtF does not yet have a system to remain in contact with graduates other than high scorers who enter EGF's pre-university program. An alumni association for all has been partially planned. Some governors have asked EGF how they may sponsor additional scholars.

Conclusions: Though challenged by rapid growth, the major part of WtF's core mission has been well accomplished — sponsoring needy children, many of them OVCs as required by PEPFAR, ensuring that they are placed in appropriate schools, paying their school fees and necessary supportive costs on time, and ultimately producing a significant percentage of academically high-achieving secondary school graduates. EGF has an opportunity to develop collaborations with counties to leverage local resources and increase the number of scholarships.

WtF has not deployed all the human resources required to keep pace with and effectively manage its rapid growth (such as the GM for M&E and many hundreds of mentors), and has not ensured delivery of all planned services to scholars (e.g., mentoring) or M&E systems sufficient for USAID reporting. WtF's burn rate is low relative to its pipeline and budgets. Insufficient human resource planning has resulted in underspending and underperformance against timelines and work plans. Operational application of the term "psychosocial support" is not well defined within and between WtF and USAID and needs to be clarified. Despite major improvements in the last year, the new mentoring program is not yet reliably serving all USAID scholars. Annual leadership congresses are inspirational for many WtF scholars, though indicators on leadership roles taken are lacking. Without a strategy to remain in contact with alumni, WtF may lose touch with the majority of them and miss opportunities to 1) assist the many who will not be admitted directly to tertiary education and 2) assess WtF's impact over time.

Question 3 (Q3): "As the project continues, and in light of USAID's new results framework, what type of monitoring and reporting would best support regular assessment of achievement toward the Mission's objective?"

Q3 Summary Findings: WtF aligns with USAID's Country Development Cooperation Strategy (CDCS) under DO2, IR 2.2, and its various sub-IRs. WtF is scheduled to end Nov. 9, 2016, and current USAID and PEPFAR requirements will remain applicable until then or until changed and approved by USAID. Future decisions (e.g., concerning funding sources, definition of terms, services offered, outcome emphasized) will determine if USAID will use current or revised indicators beyond that date. PEPFAR funds require continued use of two current indicators, including psychosocial support. EGF's M&E does not yet support accurate reporting of all required indicators.

Conclusion: The current PMP indicators are largely appropriate for future use, but do not fully reflect or distinguish the project's intended outputs and outcomes. WtF may choose to reprogram obligated funds

or receive further obligations from USAID and PEPFAR or other new USAID funding sources. This may affect indicators. It would be possible to close the project on its Nov. 9, 2016 end date, with no adjustments to indicators (or minor ones). But if USAID wishes to more accurately measure the project's results, especially long-term, a few new indicators adopted soon will help USAID better understand and measure the value of its investment. Specifically, indicators are needed to track county and community involvement in the project and the degree to which graduates obtain higher education.

The report recommendations, summarized below, have been separated into two groups: those for USAID and those for EGF.

Recommendations for USAID

Q1. Equity: USAID should confirm with EGF the applicable definitions of 1) "OVC" and permitted beneficiaries under PEPFAR funding; 2) "psychosocial support," identifying the WtF services and OVC types that may be counted and reported under this indicator (PEPFAR C5.6.D: Number of eligible adults and children provided with psychological, social or spiritual support); and 3) "mentoring," specifying the WtF mentoring activities that may be counted and reported and under which indicators. USAID should also clarify for EGF and for the record the geographic requirement for scholars to be drawn from Nyanza and Rift Valley provinces in certain percentages.

Q2. Successes and Challenges: If further PEPFAR funds are granted, USAID should emphasize selection of HIV-affected candidates, possibly through renewed requirement of APHIA^{plus} involvement in scholar selection. Given the low burn rate, USAID should discuss with EGF budget reprogramming and adjusting activities in view of this evaluation to optimize WtF, with special attention to alumni needs.

Q3. Monitoring and Evaluation (M&E): USAID should communicate new M&E requirements to EGF per the new CDCS results framework and confirm or revise existing indicators and develop new ones as needed for any ongoing, reprogrammed or new activities. Additional indicators are likely needed to track desired CDCS-relevant outcomes under the current program through November 2016.

Summary of Recommendations for EGF

Recommendations for EGF are numerous and detailed and are presented by question in Annex I.

For Q1: Six recommendations deal with issues such as amplifying WtF's emphasis on HIV-affected candidates during scholar selection, implementing HIV education for mentors and secondary scholars, and re-examining WtF's tendency to centralize benefits in DSSB/Equity Bank (EB) branch districts/sub-counties. **For Q2:** Sixteen recommendations relate to various operational challenges, including the need to track what happens to the many WtF graduates not admitted directly to university or EGF's pre-university program, possibly through an alumni association that has long been in EGF work plans but has not yet developed, and the need to complete and operationalize a monitoring and evaluation (M&E) framework and institute sufficient M&E procedures. **For Q3:** Six recommendations relate to indicator development, M&E and reporting. They target processes to ensure that indicators are aligned with USAID's new results framework and capture the most important and relevant WtF outcomes and are reported accurately and in line with USAID requirements. The first two of the final six recommendations, related to reporting and indicators, should be carried out with USAID.

ACTIVITY BACKGROUND

Overview of Development Problem

The human immunodeficiency virus/ acquired immune deficiency syndrome (HIV/AIDS) epidemic has devastated sub-Saharan Africa, leaving millions of Africans living with the disease and millions more orphaned by HIV/AIDS. It is also one of the major threats to educational achievement rates, consuming resources meant for promotion of education. Education plays a critical role in reducing the impact of HIV and AIDS in Kenya. Despite increased primary school enrollment, educational advancement has been greatly weakened as a result of AIDS-related problems, foremost being an increase in poverty levels and inability to pay secondary and tertiary school and university tuition and fees.

Activity Strategy

The Wings to Fly (WtF) program is an initiative of Equity Bank Ltd. (EBL), implemented by Equity Group Foundation (EGF) as the lead partner, reaching scholars from across the country. WtF is a large public-private Global Development Alliance (GDA) partnership involving the United States Agency for International Development (USAID), Equity Bank (EB), EGF, MasterCard Foundation (MCF), the United Kingdom's Department for International Development (UKaid), KfW Bankengruppe (KfW) and other partners. WtF offers full scholarships covering tuition and room and board to allow thousands of academically talented but economically deprived and vulnerable children to complete secondary education. Scholarship recipients also benefit from leadership training, career guidance and personal mentoring. The highest-scoring secondary students upon graduation may join a linked pre-university program. Overall, the partnership supports more than 10,000 young Kenyans, and will provide them access to a full secondary education by 2019.

USAID and the President's Emergency Plan for AIDS Relief (PEPFAR) were supporting an Orphans and Vulnerable Children (OVC) Scholarship Program slated to end soon. WtF offered a way to continue this work.¹ Presently, WtF's financial support stands at \$128 million, of which USAID has contributed more than 20 percent using PEPFAR funds. With an initial USAID award in late 2011 of \$17.4 million and a later contribution of \$9 million, USAID's activity has a total estimated budget of \$26.4 million. USAID's component was designed to serve 2,678 WtF secondary school students and to continue supporting 488 scholars from the previous PEPFAR-funded OVC scholarship program, which is managed by PricewaterhouseCoopers (PWC), through the end of secondary school (149 students who became the first USAID-funded WtF cohort), tertiary or mid-level college² (66 students) or university (273 students). Under the current USAID grant, EGF absorbed the remaining 488 scholars from the PWC

¹ OVC Scholarship Program with Equity Group Foundation Award No. AID-623-G-12-00001 Attachment B: Program Description, Dec. 7 2011; Action Memorandum for the Mission Director (Action Memo and Due Diligence Report), Dwaine Lee, June 23, 2011; Action Memorandum for the Acting Mission Director (Amendment to Action Memo dated June 23, 2011), Dwaine Lee, Nov. 21, 2011; Action Memorandum for the Mission Director (Amendment to Action Memo dated June 23, 2011), Dwaine Lee, Jan. 30, 2013.

² In Kenya, the term "tertiary schooling" generally denotes mid-level colleges (akin to U.S. two-year colleges) and polytechnics. It is a distinct category of educational institution from universities.

program (some at secondary and some at higher levels) into the “USAID OVC Scholarship Program,” which EGF managed alongside WtF and is now completed.

Development Objectives and Intermediate Results

The WtF activity falls under development objective (DO) 2 of USAID’s new Country Development Cooperation Strategy (CDCS), “*health and human capacity strengthened*,” and under intermediate result (IR) 2.2, “*increased use of quality health and educational services*.” Currently, the EGF/WtF performance management plan (PMP)³ (see Annex 8) calls for reporting on 12 indicators that fall under two activity strategic objectives (SOs) and three activity-level IRs:

- SO1: *Increased Access to Secondary Education and Improved Leadership Capabilities for OVC*
 - IR1.1 *Scholars access and successfully complete secondary education*
 - IR1.2 *Scholars hold leadership positions and participate in co-curricular activities at school*
- SO2: *Increased Access to Tertiary Education by OVC*
 - IR2.1 *OVC complete tertiary education*

Wings to Fly is also required to report on two standard indicators used by the U.S. government (USG) in its performance plan and reports (PPRs): “*Number of learners enrolled in secondary schools or equivalent non-school based settings with USG support, disaggregated by sex*” and “*Number of individuals from underserved and/or disadvantaged groups accessing tertiary education programs*.”

Development Hypothesis and Activity Design

By allowing OVCs to complete secondary school, WtF substantially increases their educational, economic and personal opportunities, better equipping them to contribute to their communities and Kenyan society as a whole.⁴

EGF leverages the local presence of EB branches to build awareness of the program using a range of communication channels to reach scholars in every county. The EB business growth and development managers (BGDMs) lead the formation of local district scholarship selection boards (DSSBs), which are appendages of the EGF. The DSSBs have representation from a wide range of stakeholder constituencies. With the BGDM as secretary and a district education officer (DEO) as chair, the DSSB manages the scholar selection process, which is mandated to ensure objectivity. This makes it possible to validate and assess applications through screening, shortlisting, interviews and a home visit, all based on a uniform set of criteria. A salient characteristic of the WtF initiative is its intended transparency and the inclusivity of the selection personnel and process. It is meant to be fair in terms of gender and location. The application is open to any student who is from financially deprived conditions and receives a high score on the Kenya Certificate of Primary Education Examinations (KCPE). Through its

³ This is now called the activity M&E plan in ADS 203, but at the time the activity was designed and contracted, it was called a PMP.

⁴ This statement is a synthesis of the development hypothesis in USAID documents including the activity description in award documents.

vulnerability assessment procedures, WtF targets high-achieving and needy (orphan, vulnerable or HIV-affected) students from all districts in Kenya. The bank pays fees for selected scholars and provides them with a stipend and shopping hamper at the beginning of each school term. Scholars also receive mentoring and psychosocial support from the program. At annual congresses, students meet with successful personalities and career counselors who give motivational talks aimed at inspiring them and honing their leadership skills.

Current Activity Status: Life Cycle and Accomplishments

As of April 2015, the USAID-funded component of the larger WtF program was three years and five months into a five-year activity life cycle, with an end date of Nov. 9, 2016. It is substantially funded through 2023. Regardless of USAID's ongoing participation, beginning in 2016 MCF will fund 1,000 new students annually through 2020 with EGF committed to funding an additional equal number each year for those five years. Entering students in 2020 will finish in 2023. WtF produced a small secondary school graduating class in 2013 and a larger one of 1,155 students in 2014; the great majority of them have performed far above national averages.

EVALUATION PURPOSE & QUESTIONS

This external evaluation comes near the midpoint of USAID's contribution to the WtF activity. Its objectives are to help determine what components are or are not working well and why, and to assist funders and EGF staff in making any necessary modifications and midcourse corrections. The evaluation provides pertinent information to assist USAID and EGF in learning what is being accomplished, whether processes are geared toward reaching intended beneficiaries and how the activity can 1) be more effective and 2) report adequately within the new USAID CDCS results framework. The evaluation questions and an explanation of each are below:

How equitable was the process in informing and selecting vulnerable youth from geographically diverse areas to participate in the scholarship program?

This question required exploration of the equity of WtF processes, focusing specifically on the fair treatment of all who apply, whether the activity is reaching the intended OVC beneficiaries in geographically diverse areas, and fairness relative to national and donor policies and mandates.

What were the key elements of success and main challenges in providing financial and psychosocial support to vulnerable children?

This question aimed to determine whether all activity components are being implemented as planned by examining program outputs and outcomes to date related to key indicators, including academic performance/completion, efficiency in timing of inputs, stakeholder satisfaction and critiques, as well as participation in key program components such as mentorship/leadership. It aimed to understand challenges and successes disaggregated by sex and respondent type. Answers to this question will support any adjustments to strengthen the program for future years and follow-on iterations.

As the activity continues, and in light of USAID's new results framework, what type of monitoring and reporting would best support regular assessment of achievement towards the Mission's objective?

This question's purpose was to identify a monitoring and reporting approach that would best fit the new USAID/Kenya CDCS results framework and support IR 2.2, "*Increased use of quality educational services.*"

EVALUATION METHODS & LIMITATIONS

Evaluation Methods

This evaluation draws on a mixed-methods approach, using both qualitative and quantitative techniques that include desk review; key informant interviews (KIIs) and group discussions (GDs) with key stakeholders; and a representative survey of scholars and head teachers. The design triangulates evidence across data types and sources, with survey results yielding statistically representative data. For more detail on the methodology, see Annex 5.

Data Collection

Desk review: The evaluation team reviewed activity documentation provided by the Kenya Support Project (KSP), USAID, EGF and a range of online and print resources.

Key Informant Interviews: Seven structured questionnaires were developed to probe issues related to the three evaluation questions: six KII questionnaires for EGF central management, Equity Branch WtF teams, MOEST, APHIAplus, USAID and other sponsors; and a seventh for APHIAplus chiefs of party (COPs) for use by email. Forty-one KIIs were conducted.

Group Discussions: A structured questionnaire was designed for the GDs, which were held with EGF implementing staff, WtF-implementing EB staff and DSSB members in Isiolo, Meru, Nairobi, Kiambu, Kisumu and Homa Bay. The goal was to provide insight on the selection processes in addition to DSSB members' and bank staff's perceptions of program successes and challenges.

Table 1: Respondents Reached

Organization/Category	Method	Number
Equity Group Foundation Leadership	KII	1
Equity Group Foundation Program Staff	KII, GD	2
Equity Group Foundation Program Staff	GD	6
Equity Bank (BGDM)	KII	6
WtF Field Team	GD	12
DSSBs	GD	53
USAID	KII	3
MOEST	KII	11
Partners – MCF, DfID, KfW, APHIAplus (6)	KII	9
Secondary Students	Survey	394 (194m, 200f)
Graduates: EGF (PWC) OVC program	Survey	51 (26m, 25f)
Head Teachers	Survey	150
TOTAL		698

Survey Development: Three survey instruments (Annex D of Annex 4) were developed by the evaluation team leader and coded for field use. They were designed to probe issues related to WtF's main service patterns as experienced by the various stakeholder groups identified in Table 1.

Sample Design: The evaluation used a representative sample design to select the students and, from a sample frame of 680 schools, selected 150 schools and head teachers to be surveyed. Survey results produced results at a confidence level of at least 90 percent and a margin of error under 5 percent for scholars and under 10 percent for head teachers.

Data Analysis

Quantitative analysis included frequency distributions, cross-tabs and trend analysis. In addition, the team used a range of qualitative analyses, including planned versus actual comparison between program descriptions, work plans, PMP targets and periodic performance and pattern/content analysis of KII and GD data. The team also noted significant convergences and divergences in responses. After field visits,

the team conducted follow-up interviews in person and by phone and email to resolve the conflict among significant divergent findings in the reporting of facts, perceptions or opinions (e.g., between EGF and the branches). Using a mixed-methods approach, data from various methods (the survey, KII and GDs) have been integrated to arrive at findings. This triangulation process involved convergence/divergence analysis for examining data from different methods and levels.

Limitations

A potential for respondent bias existed, since program beneficiaries were being interviewed. Tools were developed with probing questions to offset this. EGF's EMIS data on districts where scholars went to school and resided at the time of their application was highly inaccurate and included district names different from any real districts. The absence of clean district-level EMIS data was a major impediment to fine-grained analysis of the WtF geography. County data was available, however, which allowed the evaluators to create provincial analyses to address particular requirements of USAID's support for WtF.

A request was made to the Kenya National Exams Council (KNEC) for data that never arrived, making one important calculation impossible. The data requested would have documented, by district, the number of Standard 8 students taking the 2013 KCPE coming from 1) DSSB/EB districts and 2) "remote districts" (districts other than those in which "their" DSSB and WtF-coordinating EB branch are located) to compare the ratio of those two numbers to the ratio of the number of WtF scholarships awarded from those same districts. The "centralizing tendency," or tendency to select more scholars from one district than another, that became apparent in the DSSB/EB districts relative to the remote districts they serve may be less pronounced when viewed relative to districts' Standard 8 population distributions.

FINDINGS & CONCLUSIONS

Question 1: Equitability of Informing and Selecting Youth

Q1: How equitable was the process in informing and selecting vulnerable youth from geographically diverse areas to participate in the scholarship program?

Findings

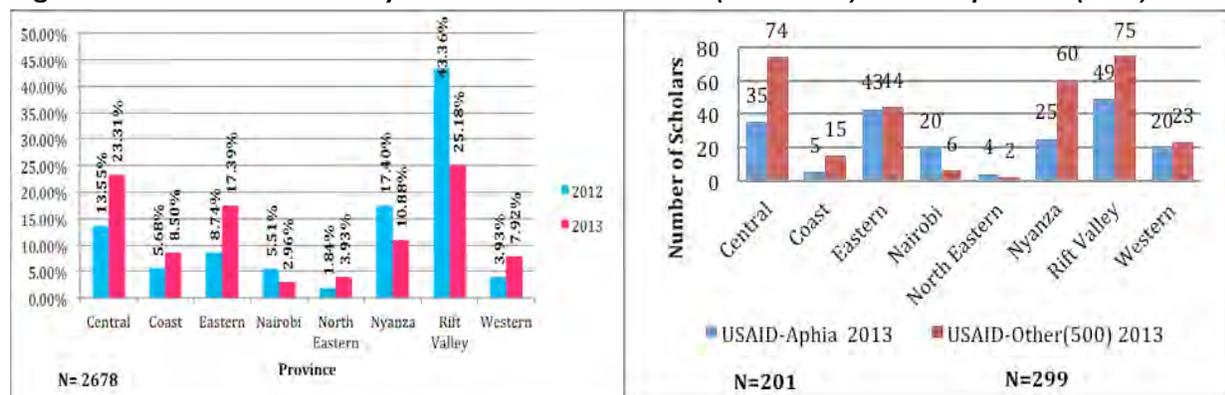
Inclusion of HIV-affected scholars in WtF: USAID is the only major WtF funder requiring service to OVCs as defined by PEPFAR: children affected by HIV/AIDS. Other major funders require only that they be disadvantaged. The Nov. 10, 2011, "Audit of USAID/Kenya's Assistance to Orphans and Other Vulnerable Children" by USAID's Office of the Inspector General recommended the Mission require a grantee to: 1) provide services only to OVCs, as defined in PEPFAR guidance and 2) track program expenditures in PEPFAR priority areas (e.g., education, psychosocial support). Nov. 10, 2011, is also the day USAID's WtF activity took effect. The OVC definition in the WtF program description is virtually identical to the one in the audit.⁵ This differs from the OVC definition in the July 2012 PEPFAR

⁵ OVC: A child who is orphaned or made more vulnerable because of HIV/AIDS. An orphan is a child, 0–17 years old, who has lost one or both parents to HIV/AIDS. A vulnerable child is defined as one who is HIV-positive; lives without adequate adult support; lives outside of family care; or is marginalized, stigmatized or discriminated against.

Guidance for OVC Programming, which includes children “directly affected by the disease or who live in areas of high HIV prevalence and may be vulnerable to the disease or its socioeconomic affects.” USAID’s PEPFAR coordinator said USAID used the same OVC definition for both the 2008–2013 PWC OVC scholarship program and for WtF: “Eighty percent of WtF beneficiaries are single or double orphans. We don’t require evidence of HIV necessarily as long as they are vulnerable. For WtF, we were a bit lenient on the definition of HIV evidence. Retrospective analysis found that HIV should be emphasized. It was a conscious decision to follow an expanded OVC definition.” To make it more likely that PEPFAR-defined OVCs were included, USAID intended for EGF to select scholars “as follows: 30 percent will come from Nyanza Province, the next 30 percent will come from Rift Valley Province and the remaining 40 percent will be selected from across the country, especially those areas where the Equity Bank has a presence.”⁶ EGF, however, understood and applied this as a 60 percent requirement for both provinces. Provinces, though receding in importance for geographic analyses in Kenya, are a geographic subdivision of interest to USAID for WtF (see Annex 9: Maps). EGF EMIS data shows that, among the USAID 2012 intake cohorts, 17.4 percent came from Nyanza and 43.4 percent from Rift Valley, thus meeting a 60 percent requirement for that year (see Figure 1 below – all figures and tables are located in annexes 2 and 3). For both years together, the total is 48.4 percent (Figure 1, Annex 2).

The USAID PEPFAR coordinator indicated that concern about the degree to which WtF was emphasizing HIV/AIDS led to additional requirements as further funds were obligated, including: 1) In 2013, 500 HIV-affected APHIAplus scholarship recipients would be selected; and 2) In 2014, “Healthy Choices for a Better Future” HIV/AIDS prevention education for WtF scholars would be integrated into the work plan. According to EMIS data, however, only 201 APHIAplus scholars became WtF scholars. One reason EGF gave for not meeting the total of 500 was that not many APHIAplus scholars had the required 350 KCPE cutoff score. Another distinct group of 299 was created to meet the APHIAplus 500 scholar requirement, but they did not come from APHIAplus. EGF’s former general manager (GM) for education said they found “as many as we could from high-prevalence areas and put them under USAID funding.” Of these 299, 135 are from Nyanza and Rift Valley (Figure 1 below). Privacy regulations make it difficult to accurately assess the frequency of HIV involvement.

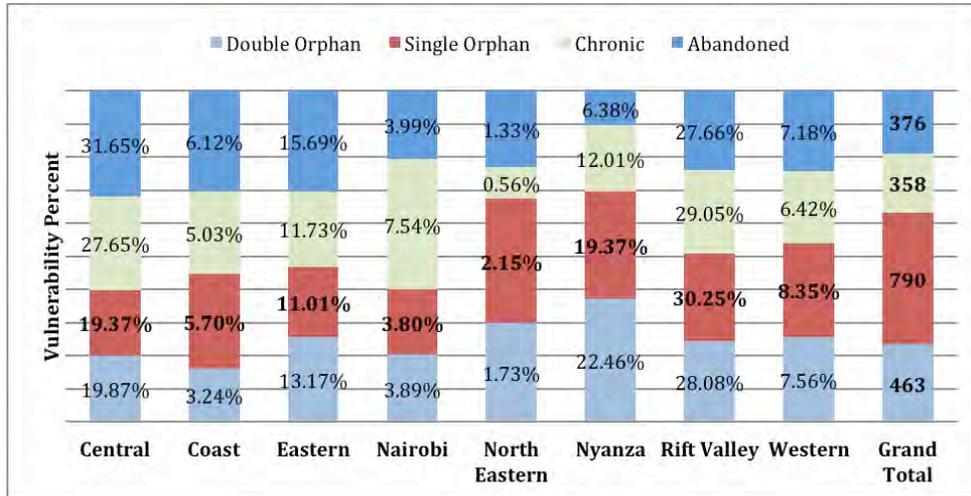
Figure 1: USAID WtF Scholars by Province and Intake Years (2012–2013) & APHIAplus 500 (2013)



⁶ USAID Action Memorandum from Dwaine Lee, director of the Office of Education and Youth, Nov. 21, 2011, p. 2.; also PEPFAR Kenya Operational Plan Report, 2013, page 708.

Among all USAID WtF scholars, EMIS classification data on scholars' vulnerabilities, as assessed by DSSBs, show 463 double orphans, 790 single orphans, 358 who have a chronic health condition in the family and 376 who were abandoned (see Figure 2). All six DSSBs use double orphanhood as a useful proxy for HIV involvement, and interpret the other above-mentioned vulnerabilities as frequently related to HIV. Using double orphanhood and/or a chronic health condition as a proxy for HIV-affectedness yields an incidence of 16 percent of all 2012 and 2013 USAID scholars. Adding every single or double orphan yields a 47 percent incidence.

Figure 2: USAID Scholars' Vulnerabilities by Category & Province



Extreme poverty and child-headed households are also emphasized in the selection. Among the 394 (194 m/ 200 f) USAID scholars asked why they believe they were selected, 90 percent identified poverty, 19 percent report orphanhood and only 2 percent reported “family living with HIV.” Head teachers report poverty (88 percent), orphanhood (71 percent), family living with HIV (19 percent) and family with chronic health condition (12 percent) as common reasons for selection (Figure 2, Annex 2).

DSSB members in six locations variously estimated the percentage of WtF scholars who are HIV-affected (someone in the family has HIV). Those estimations averaged 25 percent. Applying this to the 2,680 2012 and 2013 USAID WtF scholars in EGF’s EMIS, the WtF activity is serving about 670 HIV-affected USAID scholars. Using the vulnerability categories of children who have lost one or both parents, the total would be between 670 and 1,250. Using the more inclusive 2012 PEPFAR definition of OVCs, the numbers could be larger still.

Scholar Selection and Placement, DSSB Composition and Management, Outreach, Advertising:

While the 116 WtF DSSBs are composed differently, composition is similar across them. DSSB members comprise 11–13 local stakeholders who are asked to be members based on the constituency they represent (see Tables 1–2, Annex 3). Usually a single member represents each constituency, except for EB, which has the business growth and development manager (BGDM) as secretary and one or two bank agents, plus a technical non-voting member, the branch WtF champion. A district education officer (DEO) is usually the chair, except where a number of DEOs sit on the DSSB and they agree to have the county director of education (CDE) chair the board. Some DSSBs serve a single district, while others serve as many as seven with multiple DEOs on the DSSB (e.g., the Kisumu DSSB has seven DEOs with

two EB branches represented). The 2011 grant specified that the AIDS integrated assistance program APHIAplus be “represented throughout the selection process.” However, five of six APHIAplus COPs reported that no one from APHIAplus in their region had ever been asked to sit on a DSSB. One COP knew an APHIAplus staff member who joined the Busia DSSB in 2015 (see Annex 10) and who reported that all scholars he helped select were HIV-affected.

Thirteen DSSBs are managed by “county branches,” which are the sole EB branch in the county and so must assess the WtF applications from additional remote districts. The budgets for DSSB activities are determined by the local branch and are not reimbursed by EGF. One manager was concerned that spending too much on DSSB work could hurt the branch’s bottom line and place him at a disadvantage when Equity Bank evaluated him against other branch managers.

DSSB members are volunteers and receive no remuneration except some reimbursement for travel. Prior to 2014, DSSB members worked for one week in January each year. As of 2014, they are expected to serve at least one more Saturday for DSSB mentoring when they meet with all local WtF scholars and the scholars’ parents or guardians. Many members reported getting satisfaction from serving their communities, but members of three DSSBs also indicated they would like some formal acknowledgment for their service. WtF’s internal “2013 WtF Selection Process Assessment Draft Report” noted the possibility of member attrition and called for “a common economic incentive for DSSB members, which will increase their commitment to the process.” One DSSB member said: “There is issue of accommodation, food, vehicles, the terms and conditions are very hard. The time is too short for traveling, even the allowances should be increased. The manager is doing a good job, but the terms and conditions for the board is not good.” One adaptable model of acknowledgment and appreciation, using certificates and plaques for long-serving WtF mentor volunteers, was suggested in EGF’s Mentoring Policy, Procedures and Standards (see Annex 11). A DSSB member also suggested “members get appointments, not necessarily get allowances, in order to boost the curriculum vitae (CV).”

WtF advertising takes place twice a year: prior to and during selection and a month or so later during the commissioning ceremony, when all new WtF scholars are brought to Nairobi just prior to starting secondary school. Program advertising originates at two levels: 1) media buys using centrally created content managed from Nairobi by EB’s corporate communications department and 2) local distribution by the EB branches of notices from EGF head offices and occasional local content, such as radio appearances by BGDMS. The 2015 central media buy consisted of 18 independent regional FM radio stations, 10 Kenya Broadcasting Corporation (KBC) regional stations (with emphasis on local-language radio) and four newspapers. Five national TV stations were used, but only for a live broadcast of the commissioning ceremony. Media buys to inform the public about the selection process were budgeted at 40 percent of the Kenya shillings (KES) 19.2 million 2014–2015 media budget (see Annex 12). Media coverage of the subsequent commissioning ceremony used 60 percent of the media budget, with the one-day live television broadcast consuming 47 percent. An APHIAplus COP found this unnecessary: “Parading of children in Nairobi after recruitment is not appropriate. This should be decentralized to regions/counties to enable more participation of grassroots stakeholders.” The evaluation did not gather information on the number of advertisements per region or the reach of various local radio stations into marginalized areas.

EGF and DSSBs report that notices of the WtF scholarship requirements and deadlines are distributed locally to schools either directly by the bank or through the DEO. The written notices originate from EGF as a letter signed by the EB managing director and CEO and EGF's executive chairman. DSSB members or bank staff also inform churches, mosques and barazas (community group meetings) verbally or by written notice. Of scholars surveyed, 47 percent heard about the WtF opportunity at school and 32 percent learned of it by radio. Head teachers cited radio (59 percent), TV (69 percent) and newspaper (48 percent) as dominant sources. Scholars, families and head teachers learn about WtF by a variety of means, depicted in Figure 3 (Annex 2).

Applications are available through EB branches or bank agents operating from their places of business. Students must have KCPE marks of 350 or better to apply. In some cases, scholars who score lower may be selected from districts with lower marks if they are in the top 5 percent of students of their gender in that district. It is unclear to the evaluators, however, how and if lower-scoring students would know they were eligible based on their positions relative to this percentage. While DSSBs report that DEOs make efforts to inform and serve all, children living farther from the bank branch or bank agent have greater difficulty submitting applications in the time available. When many applications are received, bank staff may screen applications for cutoff marks, financial qualification and completeness in advance of DSSB meetings, as was done in Kisumu in 2015 when more than 1,200 students applied.

The processes for student selection are codified in the DSSB's WtF Scholar Selection Manual (see Annex 13). This contains instructions, the application form, assessment forms and guidelines. The manual is used by the BGDM to train DSSB members. EGF reports that the BGDMs have latitude in how they use the manual. EGF informed the evaluators that the manual is not provided to members. The paragraphs in the manual on applicant scoring/ranking are not clearly written. Three of six DSSBs reported using a numeric scale to assess candidates during interviews. Each scale was different and varied from the one prescribed in the manual. Three DSSBs used no scale at all. The 2013 *Wings to Fly Selection Process Assessment* noted: "At present, judgment by the DSSB members is to a large extent highly subjective. ... Whenever possible, the program should endeavor to develop scores also mentioned in the DSSB manual. This would make it easy for the DSSB members to decide on different cases in a more objective manner." All DSSBs agree the interview is where crucial information is exchanged and decisions are made. Home visits are used to confirm the decisions made at the interview. Few visits beyond the number of available scholarships are required to complete selection. For example, in 2015 the Kiambu DSSB visited only 16 homes to select 15 scholars and the Homa Bay DSSB visited 20 homes to select 15 (Table 3, Annex 3).

EGF, EB staff and DSSBs report occasional complaints from the public about fairness, most often from those who are disappointed that their child was not chosen. DSSBs report that in some cases this is because they do not understand the selection criteria. Branch managers report that when the rules are explained, complainers are usually assuaged. Some complaints alert DSSBs to someone trying to deceive the board (e.g., Isiolo had two cases in a recent year). Two DSSBs used the same term, "stage management," to describe such deceit. In one case, someone rented a disheveled home to show to the DSSB and give the illusion of poverty. In two regions, BGDMs noted complaints from politicians that were a form of pressure to assist particular students or locations. This pressure was resisted.

MOEST coordinates scholar placements in secondary schools. KIIIs and DSSBs noted that EB and DSSBs occasionally help a scholar change schools after MOEST placement, with the consent of the parent or guardian. For the USAID scholars for whom school type EMIS information is available, slightly more females (550) than males (544) are in the highest-quality (national) schools. Head teachers report that EGF may be involved in placements in 19 percent of cases (see Table 4, Annex 3). Figure 4 (Annex 2) shows teachers' and scholars' perceptions about scholar placement.

All DSSBs and 96 percent of surveyed WtF scholars believe the selection process is fair. Of head teachers, 81 percent responded that the selection process was fair, while 10 percent thought it was unfair. When asked what made it fair, the most common response was that WtF “selected the bright and the needy” followed by the response that WtF “visits students (at their homes) and assess(es) the candidates who deserve” it.

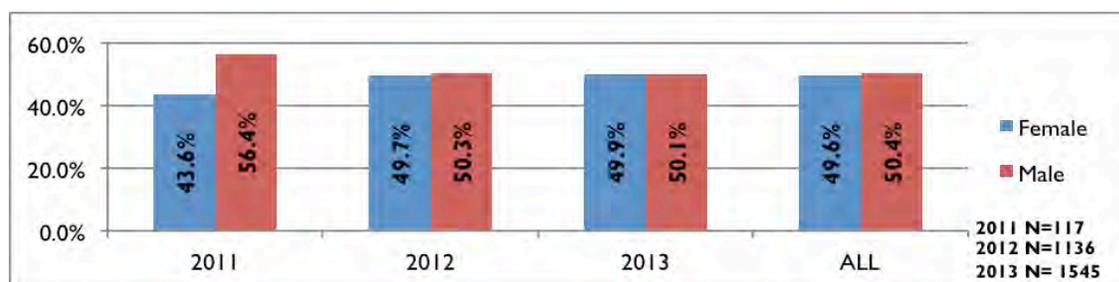
Gender and Geographic Balance: Donor requirements affect both geographic and gender balance in WtF (Table 2, below, and Annex 14 – WtF Selection Criteria).

Table 2: Donor Requirements 2012-2015 Planned, Not necessarily Actual

DONOR	Boys	Girls	Total	Geographical Criteria
MCF	2,140	2,140	4,280	All
MCF-D	7	11	18	All
KfW (Girls: Boys = 3:2)	384	576	960	Kisumu, Nairobi, Nakuru, Mombasa
USAID	1,339	1,339	2,678	60% Nyanza & Rift Valley, 40% others, (or possibly 30% / 30% / 40%), including 500 APHIAplus scholars in 2013
EBLE	563	500	1063	All
Grand Total (DfID Not Shown)	4,433	4,566	8,999	

Gender: Figure 3 shows actual gender balance in access to USAID-funded scholarships with 1,387 females (49.6 percent) and 1,411 males (50.4 percent). The minor overall difference is largely due to the cohort inherited from PWC in 2011. Most scholar survey responses EMIS results reported here are disaggregated by gender. Noticeable differences that occur are discussed in the relevant report sections (academic achievement, mentoring, leadership, etc.).

Figure 3: All USAID Scholars 2011–2013 by Gender



Geography: EB has 166 branches, with at least one branch in each of Kenya’s 47 counties. As the acting GM for education at EGF and at least one USAID representative stated, WtF is cost-effective because the use of EB’s wide infrastructure absorbs what would otherwise be large logistics costs. There are 116

DSSBs operating in 47 counties, but with 262 districts in the country, 146 districts are served by DSSBs located in other districts. The program identifies and supports children from all counties in Kenya, but higher numbers are selected from districts where EB has a branch managing a DSSB. EGF tries to include scholars from neighboring and remote districts where no branch exists. In 2015, WtF allowed county branches to award five more scholarships than other branches. In 2014, they allowed them 10 more (see Annex 14). By EGF policy, no prior allocation of scholarships exists for remote areas or particular districts, but in practice this sometimes occurs. Three of seven DSSBs contacted took at least one scholar from each district under its purview (Busia – seven, Homa Bay – four, Isiolo – three) because they felt each district had to have at least some benefit from the program. In Isiolo, the DSSB factored in the county’s ethnic diversity in view of the communities’ sensitivities to such inclusion.

The WtF database lists 433 unique names of home districts, but the country has only 262 districts. Precise district-level analysis is not yet possible due to the activity’s unclear EMIS data, but will become possible if the data are cleaned. However, based on visits to four DSSBs that serve multiple remote districts, one of which is a county branch, on average 51.7 percent of these DSSBs’ WtF scholars come from the DSSB’s own district, while the average remote district is represented by just 13.8 percent of its DSSB’s selected scholars (Table 3 below and tables 7a – 7d, Annex 3). This suggests a centralizing tendency, but the analysis does not yet factor in the relative populations of districts’ KCPE candidates (or enrolled Standard 8 students), which might justify all or some of the differences.

Table 3: Centralizing Tendency (Sample DSSBs Serving Multiple Districts)

Type	No.	Avg. % of DSSB’s WtF Scholars from this District
DSSB Districts (with DSSB in the district)	4	51.7%
“Remote” Districts (without, served by above)	14	13.8%

MOEST and USAID Equity Frameworks: USAID and the GOK intend to harmonize their efforts through 2018, as expressed in the CDCS, which states, “USAID/Kenya and its partners will also seek to ensure that all Kenyans, especially underserved and marginalized populations, participate in social services. ... Underserved populations include youth, women and orphans and vulnerable children. They also include ethnic minorities in various geographic areas.” The MOEST’s National Education Sector Plan (NESP) framework recommends strategies targeted to the needy and the first mandate of the 2014 Task Force on Secondary School Fees was “to expand access to secondary school education.” In tune with WtF objectives, the CDCS commits USAID to “increase access to secondary and tertiary education for youth from marginalized backgrounds by providing scholarships, mentorship, information and communications technology (ICT) and life skills training.” The MOEST has a “Constituency Bursary Allocation Formula” that reflects its concern with regional differences and with equity. It uses 1) the ratio of the constituency incidence of poverty and the national poverty index; 2) the ratio of the constituency secondary school population and the national secondary school population; and 3) the annual available funds to generate a currency allocation for each constituency. Annex 15, which shows this formula in application, is an illustrative spreadsheet provided by the MOEST. Annex 16 is a spreadsheet derived from it that clearly illustrates the affirmative effect of indexing for poverty and population on transfers for secondary education support. Note: Constituencies similar in population in Kitui (Annex 16, yellow highlighting) received distributions varying by a factor of 3. WtF staff members say that marginalized communities have lower KCPE scores, which creates a challenge in serving them

within WtF. This issue was accommodated in Isiolo this year with the admission of a girl from Garbatulla scoring 329, based on “the 5 percent rule” used for similar accommodations in the past.

Conclusions

Service to PEPFAR OVCs: Various understandings of the term OVC exist within PEPFAR, USAID/Kenya and WtF. The required involvement of HIV among OVCs is particular to USAID, so WtF attends to this as a special requirement. USAID has allowed WtF to use a lenient OVC definition and the number of HIV-affected USAID scholars is estimated at 670–1,250 out of 2,678, possibly higher. Geographical requirements intended to ensure service to HIV-affected WtF scholars were met for 2012 (using the requirement that 60 percent of scholars come from Nyanza and Rift Valley together). Other quota requirements were not precisely met, with 201 rather than the targeted 500 APHIAplus scholars selected. An additional 299 scholars are said to have come from areas of high HIV prevalence. APHIAplus has also not been involved in the selection process as proposed in 2011, except on rare occasions when their presence may have increased the inclusion of HIV-affected OVCs.

Geographical Balance: Scholars are selected in greater numbers from EB districts that convene the DSSBs. This centralizing tendency is a product of the activity design, which has limited mechanisms for allocating scholarships to or stimulating applications from districts other than the bank’s own district. The formula for allocating scholarships, which changes annually and is affected to a degree by donor requirements, is reasonable and simple and appears even-handed. However, it is too simple to produce balanced access nationally or deal affirmatively and proportionately with different levels of poverty across all counties and districts. Scholars from the average remote district are represented about a fourth as often as those from the branch and DSSB districts. This figure is not adjusted for relative populations of districts’ KCPE candidates or enrolled Standard 8 pupils. If a proportional number of scholarships are not being given to children from remote districts, from Arid and Semi-Arid Lands (ASAL) or from marginalized and remote areas, the MOEST’s “pro-poor” mandate and USAID’s CDCS both provide policies supportive of affirmative action, and the MOEST’s secondary bursary formula, which includes relative poverty and population indices, is available for EGF to adapt to more clearly, thoroughly and subtly address the issue of equity for children from all districts.

Gender (Access): Access to WtF scholarships is highly balanced in terms of gender equity.

Scholar Selection: DSSB members are representative of an appropriately broad range of constituencies, though with significant variability in the particulars based on local context. DSSB rules are followed closely with a level of subjectivity in the determination of neediness due to the absence or irregular use of numerical scoring during interviews. This is partly due to the fact that the directions on scoring in the manual are unclear. In spite of this limitation, vulnerability checklists are used thoroughly and similarly across DSSBs, with similar weighting of various vulnerability types. Final selections are bound by rules promoting equity, reflect the consensus of broad representation and appear to be seen as fair by the community. Transparency of the process is high except where bank staff screen applications before taking them to the DSSB. DSSB members’ enthusiasm for DSSB work varies and member attrition is a concern. With DSSB mentoring duties in addition to a full week for student selection, some DSSB members feel that their role has not been well communicated to them by EGF and is not sufficiently acknowledged. DSSB budgets, if they exist, are developed by each branch and are not supported by EGF.

Outreach and Advertising: The advertising media budget is balanced 60/40 toward the one-day commissioning ceremony. The reach of local advertising and notifications is unknown, but EGF and the MOEST could do more to ensure that all schools are informed.

Complaints: Complaints about selections occasionally come from applicants' disappointed families or friends, politicians and others. The disappointed are generally satisfied when the rules are explained. Political pressure is successfully resisted by BGDMs, again by citing the rules.

Placement in Schools: WtF is effective in seeing that students are placed in schools that are of a level commensurate with their academic performance.

Question 2: Financial and Psychosocial Support

Q2. What were the key elements of success and main challenges in providing financial and psychosocial support to vulnerable children?

Findings

The successes and challenges of WtF are analyzed below in terms of the activity's main operational areas and beneficiary services.

Organization, Staffing: Staffing issues exist both in Nairobi and the branches. EGF, which has 11 divisions, reports that it is recruiting for the currently vacant positions of GMs for monitoring and evaluation (M&E) and five of the seven social service divisions (see Figure 12: Organogram, Annex 2). EGF has been without a GM for M&E for more than a year and a half and had short-term staffing in that position previous to that. The mentoring team, now centralized in Nairobi, is seeking two mentoring field coordinators to bring the total to seven. Six will be stationed in regional banks. At the 116 branches, the BGDM is assisted by a WtF champion, often a customer service or marketing staff volunteer, whose key performance indicator (KPI) duties do not include these responsibilities. A KII at EGF reported that EGF recently proposed to EB operations that they put WtF KPIs in champions' job descriptions.

Activity Finance: The burn rate for WtF is low in comparison to the estimated activity costs over the life of the activity (LOA) (\$26.4 million through 2016), and also low in comparison to EGF's quarterly budgets.⁷ As of Sept. 30, 2014, EGF had obligated \$15.9 million but spent only \$9.9 million, leaving more than \$6 million unspent. Quarterly reports in 2014 dated March 31, June 30 and Sept. 30 show underspending of each quarter's budget by more than \$570,000 at an average burn rate of 65 percent (see Annex 17). At the current spending rate with no further obligation of funds, WtF is likely funded through mid-2016, a few months short of the USAID activity's end. If the full estimated \$26.4 million is obligated, the activity could continue at the current burn rate for two and a half years beyond the November 2016 end date. Reprogramming WtF funds is a possibility.

⁷ EGF cited a number of reasons for this: Here is the list of areas of lower-than-expected spending: books, uniforms, shopping, medical and psychosocial support, Leadership Congress, mentoring workshops, December workshops, documentation, monitoring and evaluation and personnel costs.

Academic Finance: EGF transfers fee payments to schools through direct transfers and through checks carried by students. Of surveyed scholars, 99 percent reported school fees being paid for them and 95 percent reported these fees were paid on time (see tables 8a and 8b, Annex 3); 100 percent reported receiving stipend or pocket money (see Table 8a, Annex 3); and 99 percent reported receiving stipend and transportation money on time (see Table 8c, Annex 3). Of the 99 percent, 75 percent say the stipend is sufficient for the intended purposes (see Table 9, Annex 3).⁸ All head teachers confirmed the school's receipt of school fees, which are generally (86 percent) paid all at once and on time (see Table 10, Annex 3). The scholarship package provides a shopping hamper, uniform, books, toiletries and gender-sensitive materials (e.g., sanitary pads). Details about package items and their levels of use are provided in Annex 18. Figure 6 (in Annex 2) shows the frequency of on-time provision of fees and stipends and delivery of the scholarship package's material items.

Academic Performance: Progression and completion rates are above national averages. Among the 2011 WtF intake class, 98 percent progressed to Form 4, exceeding the 2013 national progression rate of 90 percent. The 2010 and 2011 WtF intake classes completed secondary school at 96 percent and 97 percent respectively. USAID-supported WtF scholars are now in Forms 3 and 4. Consequently, standardized information on their academic performance is not available. Test scores available show only their performance relative to schoolmates (see Figure 4 below). While end-of-year grades were not available for 2014, grades for a large number of the two USAID cohorts were available for the third term of 2013.

EGF has not provided non-standardized test scores to USAID or the evaluators disaggregated by gender. The cut-off points utilized above are those used in our analyses of KCSE scores, where C+ is the point at which scholars qualify for university. B+ is the point at which scholars in recent years have often gained direct admission to government universities. A- is the point at which WtF students are admitted to the EGF pre-university program, Equity Africa Leaders Program (EALP). In the absence of standardized national data for USAID scholars, the 2014 KCSE exam results of 1,155 Form 4 WtF scholars is used to predict how USAID scholars may do on the KCSE in late 2015 and 2016.

⁸ The stipend has recently been reduced for new scholars, from KES 1,500 to KES 1,000 per term.

Figure 4: USAID Scholar Performance, Term 3 2012 and 2013

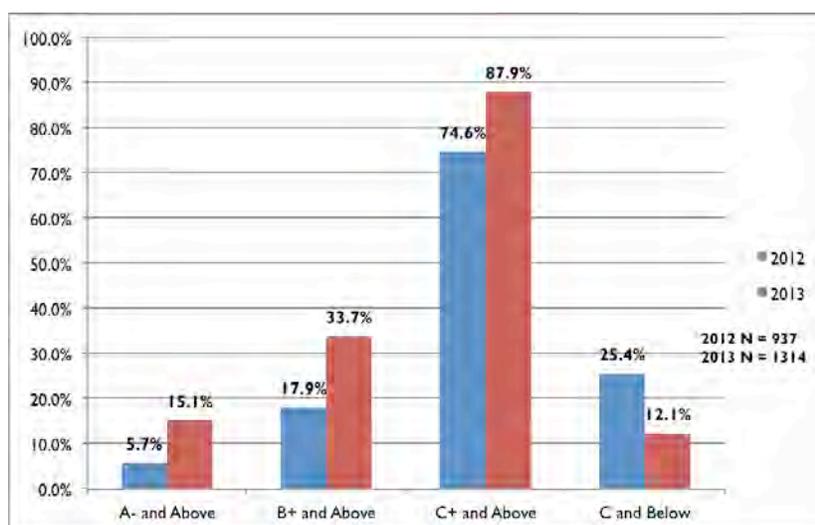


Table 4 below and Figure 7 (Annex 2) show WtF scholars far outpacing national averages, with 1,072 students (93 percent) scoring C+ or above, the minimal qualification for university entry, vs. 31 percent nationally; 575 (50 percent) had grades of B+ or above, the approximate cutoff for a place in a government university this year, vs. 7 percent nationally. Only 7 percent had C grades or below, compared to 69 percent nationally. Girls taking the exam outnumbered boys by more than 200 (680 vs. 475), but boys tended to score higher: 59 percent of boys and 43 percent of girls scored B+ or above. In 2014, WtF boys outperformed girls on the KCSE with results as follows: at the level of A- and above, 40.6 percent m/21.6 percent f; at the level of B+ and above, 59.4 percent m/43.1 percent f; and at the level of C+ and above, 94.5 percent m/91.6 percent f. (See Figure 8, Annex 2). Conversely, 81 percent of head teachers surveyed said WtF had greater positive effects on girls' achievement than boys' (Table 36, Annex 3). The 2014 WtF KCSE results above also mean that 50 percent of WtF graduates scored B or below. Consequently, without direct admission to a GOK institution, their future educational prospects are uncertain. EGF reported that the minister of education had assured Dr. Mwangi that Higher Education Loans Board (HELB) loans would be available to all qualified WtF scholars.

Table 4: EGF OVC Scholar Performance in KCSE – 2012, 2013 vs. 2014 WtF & Nationally

GRADE	EGF-(PWC)- WtF 2012 1 year in WtF n=114	EGF-(PWC)- WtF 2013 2 years in WtF n=27	ALL WtF (2014) 4 years in WtF n=1,155	NATIONALLY (2014)
A- and Above	5%	11%	29%	3%
B+ and Above	10%	19%	50%	7%
C+ and Above	49%	59%	93%	31%
C and Below	51%	41%	6%	69%

Of 150 head teachers, 74 percent said WtF scholars were “above” or “far above” average academically (see Table 29, Annex 3). Boys seem to be performing slightly better than girls. Class ranks for 1,176 WtF scholars in 150 surveyed schools show 24 percent (27 percent m/21 percent f) in the top 10 percent and 77 percent (80 percent m/75 percent f) in the top half of their class (see Table 11, Annex

3). Of 394 scholars, 58 percent (61 percent m/55 percent f) said that if not for WtF, they “would not have gone to secondary school,” while 36 percent said they “would have gone to a different school” (see Table 5 below).

Table 5: Wife without WtF Scholarship

If you had not received the WtF scholarship, what do you think would have happened to you?	Male		Female		Total	
	Count	Percentage	Count	Percentage	Count	Percentage
Gone to a different Secondary School	67	35%	75	38%	142	36%
Gone to this Secondary School	2	1%	4	2%	6	2%
Not gone to Secondary school	119	61%	109	55%	228	58%
Don't Know	6	3%	12	6%	18	5%
No Response	0	0%	0	0%	0	0%

Of 149 secondary USAID PWC scholars at intake in 2011, 141 took the KCSE exam. In 2012, 114 did so and 56 (49 percent) scored C+ or above to qualify for university, while 11 (9.7 percent) scored B+, with six entering EALP. Of 27 scholars taking the exam in 2013, 16 (59 percent) attained C+ or above and five (18.5 percent) scored B+ or above, with all five joining EALP. The increases in both score categories between 2012 and 2013 (10.2 percent and 8.8 percent respectively) may indicate the effect of more time benefiting from WtF mentoring and program inputs (see Figure 9, Annex 2; and Table 4, above). EGF reports that all 339 college and university PWC scholars completed their studies, except for nine in further studies (e.g., law). Detailed survey information about these students is in Annex 19. Except for the 11 students in EALP and the nine in further university studies, EGF does not have information about what happened to the PWC scholars.

Psychosocial Support: As a PEPFAR “core service area” and as a USG indicator in the WtF PMP and Data Collection Plan (PEPFAR C5.6.D), the definition of “psychosocial support” is important. WtF uses a narrow definition. EGF said in a first meeting, “Psychosocial needs are not addressed by the mentoring program. When issues are identified, they are referred out. There is a company called 3-Fold, a coordinator of counselors, who we contracted.” EGF has referred 130 children for psychosocial support counseling. When asked for a definition of psychosocial support, USAID’s HIV/AIDS Care and Support Sub-Team leader and APHIAplus agreement officer’s representative (AOR) said, “This is applied in acute cases.” Later, however, he said that WtF mentoring and the Annual Congress would constitute psychosocial support. EGF’s senior program manager for mentoring said, “mentoring is pre-emptive to psychosocial support.” APHIAplus COPs report they have a network of workers skilled in psychosocial support for the HIV-affected. They also report little or no communication between EGF and APHIAplus activities. They say they maintain regular contact with affected APHIAplus scholarship recipients’ families, including those who joined the WtF activity. WtF’s 2014 work plan included HIV prevention training for all scholars using the Healthy Choices for a Better Future curriculum, but this has not taken place. EGF said they may have to reprogram their budget to deliver Healthy Choices by training all mentors during the 2015

“We’re working on developing a policy on mentoring. We can have a whole pool trained in each district who can be assigned to three children. I think it’s possible. Even **if we use WtF as a pilot** because we wish to get a program to apply to adults mentoring children and teachers mentoring each other, it has a wider scope. We are working on strategies to implement it and we have begun piloting in a few schools.”

– **MOEST Education Secretary Ms. Leah Rotich**

Annual Congress and through subsequent online training of trainers (TOT) instruction. The mentors will then cascade training, sensitizing scholars during subsequent mentoring sessions using Healthy Choices strategies and information. EGF reports that such infused mentoring may begin in December 2015.

Mentoring: The WtF Mentoring Program has four pillars: 1) Academic Excellence, 2) Value-Centered Life, 3) Leadership and 4) Giving Back. The 2014 second quarter report noted that WtF mentoring encompasses three forms. The first level of mentoring is school-based, meaning visits by EALP or university students. The second level is DSSB mentoring, in the form of one-day meetings in large groups with scholars’ parents/ guardians invited and with optional opportunities for scholars to speak with a DSSB member. The third level takes place during the Annual Congress. EB staff members describe another level of mentoring, where scholars may receive advice when visiting their home branch each term. Branch staff members are being trained as mentors, although branch champions and BGDMs report that due to work pressure, they have not been able to effectively reach out to mentees. The EGF Mentoring Program manager said that branch champions are not, in fact, expected to go to the schools. Work plans for 2012 and 2013 included an e-learning portal for mentors, but this never developed. EGF quarterly reports note many challenges (e.g., difficulty in recruiting mentors, problems with travel reimbursement, unavailability of Kenyan Primary School Head Teachers Association (KEPSHA) mentors for school visits, and head teachers’ resistance to allowing mentors to visit schools).

In late 2013, officials deeply rethought the mentoring program. New policies and procedures emphasized a school-based approach with visits every term and a mentor-mentee ratio of 1:5 (see Annex 11). The mentorship program now has objective criteria for who should and should not be a mentor, guidelines on how often to meet and for how long and a practical curriculum outline that can be used by mentor trainers and mentors in the field (see Annex 11). EGF reports the numbers mentored in 2014 growing from 1,371 in Term 1 to 2,377 in Term 3. Mentor progress forms are being used and some of that data is captured in an Excel spreadsheet for better reporting and management (see Annex 22, photos A, B, C). Assisted by EALP members, nine campus mentor recruitment sessions took place in 2014–2015 (Annex 22, photo D). The roster of mentors now includes 1,006 EALP and university students, 237 EB staff, 83 KEPSHA members and 29 others. Of the 150 of 394 surveyed scholars who said they have a mentor, 88 (59 percent) indicated their mentors were university students and 41 (27 percent) said their mentors work in the bank (see Table 13, Annex 3).

Table 6: WtF Mentor Provided

DO YOU HAVE A MENTOR PROVIDED TO YOU BY THE WtF PROGRAM?	MALE		FEMALE		TOTAL	
Yes	87	45%	63	32%	150	38%
No	106	55%	135	68%	241	61%
Don't know	1	1%	2	1%	3	1%
TOTAL	194	100%	200	100%	394	100%

Under the new guidelines, students are matched to mentors by interest and gender. EGF reports that it has assigned 1,006 EALP members and university students to mentor scholars, but assignments do not ensure that visits occur. EGF data showed 425 (38 percent) of 1,117 scholars in the 2012 USAID intake cohort without an assigned mentor, as were 482 (32 percent) of the 1,528 2013 USAID scholars. Of 394 USAID WtF (Form 2, 3 and 4) scholars surveyed, 241 (61 percent: 55 percent m/68 percent f) reported that they do not have a WtF mentor (see Table 6 above). Contact between mentors and

mentees remains below target at an average for 2014 of less than two times (2.2m/1.4 f) (see Table 17 Annex 3). Of the 150 scholars who have a mentor, 33 percent (26 percent M/41 percent F) had never been visited at school by their mentor (see Table 6 below). Of those with a mentor, 84 percent (88 percent m/ 78 percent f) said mentoring was “very” or “extremely” useful (see Table 16, Annex 3).

Table 7: Mentor Visited School

HAS YOUR MENTOR EVER VISITED YOU FOR A MENTORING SESSION AT SCHOOL?	MALE		FEMALE		TOTAL	
Yes	64	74%	37	59%	101	67%
No	23	26%	26	41%	49	33%
TOTAL	87	100%	63	100%	150	100%

It is not possible to reconstruct whether and how many actual visits any student received in 2014 or any year. A mentoring field coordinator wrote: “We do not have any data that captures the number of visits at schools.” Klls indicated the mentoring program is decentralizing with proposed regional placement of seven mentoring field coordinators, who will also be required to monitor the mentoring program.

Guidance and Counseling: Four types of counseling are described in WtF documents: 1) psychosocial, 2) other personal developmental, 3) college and 4) career. Under “Priority Six: Social Competencies and Values,” the NESP cites “mentoring, molding, guidance and counseling.” Kenya Education Secretary Ms. Leah Rotich reports this area of policy and practice is under review. EGF has already played a role in review discussions, convening a seminar to explore with the MOEST best practices in counseling and guidance. The MOEST is looking at WtF as a “pilot” with concepts that may be generalized system-wide.

Of surveyed head teachers, 98 percent have a guidance department (see Table 19, Annex 3), but Klls say the designated teacher has the same full course load and is often not well prepared for the role. Of 254 scholars reporting personal non-academic counseling, 70 percent received it from a school counselor and 9 percent from an EGF counselor (see Table 20, Annex 3). All surveyed schools reported having a “careers master”; 93 percent of head teachers reported that their students regularly seek career counseling services from this person (see Table 21, Annex 3). Of students surveyed, 69 percent say they received career counseling (see Table 22a, Annex 3). Of those receiving counseling, 64 percent received it from the school’s careers master and 31 percent received it from an EGF mentor or counselor (see Table 22b, Annex 3). EGF does not provide WtF scholars with college counseling unless they enter the EALP program, where a college counselor serves those EALP students who wish to study in the U.S. Of 1,155 students in the 2014 WtF class, 340 scored A- or better and will join EALP. Klls, however, noted particular needs of students qualifying for university by scoring C+ or above, but who do not earn places there due to limited spaces for government-subsidized university education (this year requiring B+ or above). These mid-level students are at risk of ending their education after secondary school; a number of Klls urgently recommended them as candidates for further support and counseling.

Leadership Development: The August Congress in Nairobi is where WtF specifically aims to build scholars’ leadership aspirations and skills. Virtually all WtF scholars in 2010, 2011 and 2012 attended the annual congresses. Of 394 scholars surveyed, 377 (96 percent: 94 percent m/98 percent f) have attended at least one congress (see Table 23a, Annex 3). Here they listen to eminent Kenyan and international speakers who motivate them to become leaders. Scholars may also speak with EALP and

other mentors and interact with WtF students from around the country. They also may have opportunities for career guidance and counseling, as EGF arranges for speeches by university career placement officers. Of the surveyed scholars, 62 percent (69 percent m/55 percent f) reported holding or having held a leadership position at school (see Table 24, Annex 3). Among the 394 surveyed scholars, 322 (81 percent) said WtF is “very useful” or “extremely useful” in promoting their leadership achievements (Table 25, Annex 3). Of 150 surveyed head teachers, 100 (66 percent) rated WtF as “effective” (35 percent) or “very effective” (31 percent) in helping students reach their full potential in terms of leadership opportunities (see Table 26, Annex 3). Scholars report that the congresses are effective learning opportunities, with 61 percent reporting they learned “mentorship leadership and study skills” there.

One WtF PMP indicator is students’ actual leadership positions at school. EGF stated that leadership positions and participation in co-curricular activities are not easy to monitor, and indicators and methods need to be defined for monitoring and reporting. EGF’s data system is not yet configured to capture this information even if it were collected, so it currently does not contain any such information. When 394 USAID scholars (194 m/200 f) were asked if they now hold or ever had held a leadership position at school, 244 (62 percent) said yes. A great percentage of males said yes than females did (69 percent m/55 percent f).

Recently, the number of scholars has made management of the Annual Congress logistically challenging, with no way to accommodate all of them at one time and place. Forty-two percent of scholars surveyed say they attended a 2014 congress (see Table 23b, Annex 3). As EGF’s managing director (MD) said, “The Annual Congress is supposed to be for all, but it is getting impossible to host them all at once.” This year, EGF plans to have two congresses: one for Forms 3 and 4 and another for Forms 1 and 2.

“E-Learning Portal” Equitel: EGF has begun to deliver digital content to the WtF community in three ways: via mobile phone, by computer (see Annex 22, photos E, F) and by Universal Serial Bus (USB) flash drive. At the August Congress in 2014, Form 4 students received an Equitel Subscriber Identity Module (SIM) card so that their phones could access Wings to Fly Learning and text message quiz materials over EB’s proprietary Equitel mobile phone and payment system. They also received a flash drive with supplementary curriculum-based educational videos, past exams for six subjects — two languages, three sciences and one math — and links to a few external sites. Form 3s received only the phone SIM cards in November. An EGF M&E officer reported that 1) those who received the phone SIM cards said the quizzes were excellent and fun and 2) the software is as easy to use on small phone displays as it is on smartphones with larger screens. Three branch champions were asked to try to log in to WtF Learning. None could, and they said they never had done so. EGF said newly developed materials for Forms 1 and 2 were being uploaded, which was one reason that access was not possible. Another reason is that WtF Learning is available to scholars only during holidays. Free access to WtF Learning at schools on personal computers is unconfirmed.

Monitoring and Evaluation: Reports from 2013 to the present and interviews in 2015 confirm a lack of a monitoring and information management design for WtF, as well as a longstanding absence of senior EGF M&E staff to develop or implement a framework. A 2015 KII said, “We don’t have an M&E guidance policy and procedures do not yet exist. They are in process of being developed.” A year earlier, the Q4 2013 report said: “M&E framework needs to be completed and adopted quickly as this is a significant

area of weakness”; the Q2 2014 report said: “M&E spent less than 1/10th of its budget”; and from Q3 2013: “EGF’s GM of M&E left.” Despite this, EGF has a working data management system that services many of its core reporting needs. Funders like USAID and KfW are generally satisfied with the quality of WtF’s reporting. Reports are concise and carry clear graphic representations of cohorts’ grades relative to benchmarks, together with other quantitative displays. At the same time, EGF is unable to track certain indicators for which it is responsible in its PMP (e.g., number of mentoring visits per term per scholar, leadership positions held by scholars). EGF also does not use the PMP grid format to report on actual PMP indicator figures achieved alongside the pre-established targets. The data system is not fully configured to provide necessary information for management and reporting, and EGF has not established the monitoring processes to gather and record certain data. EGF recently hired Kimetrica to design an M&E framework. A draft of that framework called “EGF Pillar-Specific Theory of Change Diagrams: Monitoring Framework – Education Pillar (2014–2019)” now exists (see Annex 23). It shows nine impact indicators, 18 outcome indicators and 15 output indicators. Two or three outcome indicators and four output indicators are similar or identical to USAID WtF PMP indicators. A final version was due in April 2015.

EB branch staff members provide WtF data in various ways. They input data about scholarship applicants and selected scholars into the system from computers at the branch (see Annex 22, photo G). Prior to 2014, slow system speeds and inadequate data architecture often prevented them from doing so. Systems became overburdened, crashed and prevented staff from meeting reporting deadlines. Consequently, data in EMIS for all WtF *applicants* prior to 2014 is incomplete, while selected scholar data is largely reliable. Former data inputting from the field has resulted in unclear EMIS data (e.g., 433 uniquely named home districts while Kenya has only 262). On the WtF computer interface available at branches, some input buttons/links and information functions that are visible are not functional (e.g., mentoring activity) (see Annex 22, photo H). Academic grades are sent to Nairobi for entry there.

Mentoring data is managed offline, separately from EMIS. EGF has started recording matched scholars and mentors and dates scholars receive visits at school. The system does not appear configured to easily track visits each term to particular scholars, or distinguish types of mentoring. The range of monitoring procedures has not been established. Few monitoring form types are used (e.g., Mentor Progress Form). Asked about school visits, a champion said, “Rarely, maybe once in a term, average three schools in a year. We have no formal monitoring.” Senior mentoring staff said, “Visiting schools is the Head Office’s responsibility.” This may be regionalized when mentoring field coordinators are deployed.

Life After WtF – Alumni Association and EALP: Starting in 1998 with one student, EALP has given the top-scoring boy and girl in each district an internship at the bank and KES 30,000 monthly while working. Half of the earnings go into a savings account for higher education expenses. EALP students also participate in DSSB mentoring sessions and annual congresses, providing testimonies about their lives to inspire WtF scholars. Admission to EALP now goes to the top boy and girl in the county and to WtF scholars scoring A- and above. Based on the 2014 KCSE results, 340 of 1,155 WtF graduates were admitted. The other 815 scholars will not benefit from EALP counseling and most will not have the subsidized higher education that comes to those who gain direct admission to a government university.

An EGF manager said that, during the DSSB forums and the Annual Congress, they try to establish a platform for an ongoing community of WtF scholars. Launching an alumni association was in the 2014

work plan, but it has been delayed. EGF says it will start in 2015; however, the range of its functions is not specified. Interest exists for WtF to do more to assist alumni scoring below B+ (i.e., 50 percent of the 2014 graduates) with counseling and services to help them access further educational and employment opportunities. USAID noted that verifying WtF's long-term impact would be greatly aided if WtF could track outcomes for all its graduates, not just those in EALP. Impact Performance Indicator #8 in EGF's new draft M&E framework is "Immediate Post-Secondary Studies Opportunities," with enumerated categories EALP, Private University, Technical Vocational Education and Training (TVET), Work (e.g., self-employment) and Unemployed. EGF is discussing alumni association activities with MCF. KfW recently funded a Phase Two cohort and added requirements for WtF to network with companies and INGOs to broaden possibilities for WtF graduates to access further education and training.

Decentralization / Devolution / Sustainability: Governors in at least two counties (West Pokot and Homa Bay) have indicated that they would like to fund additional scholars together with WtF. EGF is beginning to discuss how to accomplish this with county stakeholders (governors). The WtF website offers sponsorship opportunities for the public. One suggested model is for counties to separately pool funds to support county students who were assessed by DSSBs, but who fell below the cutoff point for selection. WtF is discussing with at least one governor the unit costs for four years. WtF's preferred price is now about KES 800,000. The most expensive secondary schools have fees of about KES 120,000/year (close to KES 500,000 for four years). EGF indicated that governors might accept a figure somewhere between KES 500,000 and KES 800,000. One BGDM recalled Dr. Mwangi saying the cost with all "wrap-around services" was about KES 600,000: A BGDM said, "EGF is becoming more decentralized. It has not been mooted officially, but we can see it coming."

With seven mentoring field coordinators to be stationed in six regions and Nairobi, WtF will have EGF staff more widely deployed and well-positioned to develop new linkages. APHIAplus COPs have mentioned the possibility of linking more strategically with WtF for the benefit of HIV-affected OVCs.

Conclusions

Organization, Management and Finance: EGF is a growing organization with aspirations to make contributions in seven social service spheres. EGF leverages the skills and presence of 116 EB branches to offer cost savings and simplified scholarship administration and logistics. EGF performs one of its most important functions very well, making timely payments and tracking thousands of school fees and stipends three or more times a year and providing scholars with physical scholarship package items. A low burn rate, however, points to shortfalls in management over time, resource implementation planning and specifically in hiring for M&E and in mentoring expenditures. Insufficient human resources has resulted in underspending and underperformance against timelines, work plans and activity objectives.

Academic Success: WtF is providing life-changing education for 2,678 USAID scholars and enabling nearly 2,000 highly disadvantaged scholars a year to complete four years of secondary school with scores far above the national average. Many will continue on to tertiary or university education. Special concern exists for those students whose KCSE grades qualify them for university, but are not high enough to win the students an available place. Except for EALP, long-term academic or employment success is not tracked and so cannot inform conclusions on WtF's full impact and value for money. WtF has lost touch with about 130 of the 141 graduates from 2012 and 2013. Without the attention an

alumni association might provide, EGF could lose contact with more than 70 percent (815) of the class of 2014.

The PWC secondary scholar cohorts who graduated in 2012 and 2013 may indicate that the longer scholars are in the WtF program (e.g., two years instead of one), the better they do on the KCSE. EGF successfully supported PWC university and tertiary cohorts to complete their higher education. EGF has not kept contact information for many of these graduates. As with WtF, alumni outreach might serve a useful purpose in understanding activity impact and value over time, as well as offer moral support.

Psychosocial Support: It is not clear what an operative definition of psychosocial support should be for PEPFAR-aligned reporting by WtF; USAID and PEPFAR could advise. WtF is not equipped to provide psychosocial counseling and manages a limited number of acute cases through referrals to outside professionals. The inclusion of “Healthy Choices” is expected to raise WtF skills in this area, but this inclusion is a year late and still is not planned in detail or budgeted. It is unclear whether mentors will be able to be trained adequately online and then effectively inform scholars via “cascading” in a series of mentoring sessions over months. It is an ambitious approach that could leverage capacities in online education now developing in WtF. Though WtF does not yet communicate with or take advantage of the skills of the APHIAplus network, APHIAplus COPs said stronger relationships between WtF and APHIAplus could 1) ease EGFs burden and make it more effective in providing psychosocial support to HIV-affected scholars and 2) educate scholars in HIV-related issues (possibly using Healthy Choices).

Mentoring: Mentoring is fundamental to the WtF value proposition. After struggling for years to deliver regular mentoring services, WtF commissioned a new design and now has a reinvigorated school-based mentoring program with clear policies and procedures. EGF is actively recruiting volunteer mentors; visits to schools are increasing and new data-capture procedures are under way. EGF has just begun to use Excel to track mentor visits to individual scholars by date. With further changes to the spreadsheet, WtF could report accurately at the level of detail its USAID PMP indicators require. Still, WtF is challenged to provide mentoring to all scholars. Survey data shows that girls are not being served as fully as boys. With more than 60 percent of surveyed scholars without a mentor and more than one-third of USAID scholars not yet matched with a mentor, much work remains.

Guidance and Counseling: EGF offers general personal and career counseling under the headings “Mentoring and Leadership.” College counseling is not provided to the great majority of WtF students, though values inherent in WtF make it clear to them that attending college is a worthy goal. Graduates scoring in the lower 50 percent on the 2014 KCSE (below B+) will likely need counseling about their futures. It is encouraging that EGF’s new M&E framework may track graduates’ post-secondary choices. EGF has an opportunity to adjust its own programming to address post-secondary options for WtF scholars, and explore with the MOEST ways to improve secondary school guidance and counseling. Having already convened a conference on the subject EGF has positioned itself as a potential thought and practice leader. The MOEST views WtF mentoring (and guidance) practices like a “pilot.” EGF seminars could be an entry point for more productive cooperation with the MOEST on many issues.

Leadership: Annual leadership congresses are inspirational for many WtF scholars. Here, they are exposed to positive role models and mix with a geographically broad range of peers. The content of the congresses focuses largely on mentorship, leadership and good study habits. Students are focused on the

importance of taking leadership roles in school and later in life, but indicators are lacking. It will be important to assess the effectiveness of the new design for separate congresses for subsets of scholars.

“E-Learning Portal” & Equitel: EGF has begun to make online and digital learning available. Significant potential exists to use these supplemental learning resources in WtF, but few scholars or staff members are using the new Wings to Fly Learning system. On phones, it is available only during school holidays. Free access to WtF Learning interactive quizzes on computers may be always available, though this was not verified. Materials delivered last year to Form 4s on USB drives are useful and attractive, but no current WtF students have them. Healthy Choices TOT is scheduled to be adapted as an online course, but the probable effectiveness is difficult to project.

M&E: To date, WtF has lacked M&E top-level staff, as well as M&E policies and procedures. EGF has not deployed the monitoring and data management resources on time or sufficiently for a large activity that has grown rapidly. It has begun to address the lack of policies and procedures through a contract that has produced a draft “monitoring framework” that suggests what may need to be tracked, when and how. Required PMP indicators (e.g., for mentoring and leadership) have not been properly tracked and reported. While deficient in these ways, the existing system provides much required data to support reporting to donors. USAID and KfW are generally satisfied, characterizing reports as well written and graphically attractive. While the system functions, USAID indicator (PMP) data is incomplete. Field placement of mentoring coordinators may improve monitoring, mentoring and data capture.

Alumni Association and EALP: Though in the 2014 work plan, the planning and definition of functions of an alumni association has not yet occurred. An alumni association could offer WtF graduates community and counseling or referrals to such services to assist them with higher education placement and other post-secondary opportunities. It would provide a way to track continuing education of WtF graduates and, thus, better measure the value of WtF over time. It could be modest, providing phone contact, email and an e-newsletter as its main services. WtF scholars are likely motivated by the possibility of joining EALP, which offers the possibility of future support. EALP has a college counseling office that may offer a starting point for an alumni association post-secondary counseling service.

Decentralization / Devolution / Sustainability: WtF has earned much goodwill and political support at many levels. This should enable EGF to leverage additional public and private resources in the 47 counties. County governors are expressing interest in augmenting WtF financing to sponsor additional children. EGF has an opportunity to implement one or more models of collaboration with counties.

Question 3: Best Type of Monitoring and Reporting

Q3. As the activity continues, and in light of USAID’s new results framework, what type of monitoring and reporting would best support regular assessment of achievement toward the mission’s objective?

Findings

Development Objective 2 (DO2) and Indicator IR2.2: WtF objectives relate closely to USAID CDSC’s DO2, “Health and Human Capacity Strengthened,” and to one of its three intermediate results, IR 2.2, “Increased Use of Quality Health and Education Services.” IR 2.2 has three illustrative sub-IRs

that each relate to WtF under its present design (see Table 7 below). These IRs may be engaged to various degrees under activity design modifications and/or budget reprogramming.

WtF is scheduled to end Nov. 9, 2016, and current USAID and PEPFAR requirements will remain applicable until then or until changed and approved by USAID. Future decisions (e.g., concerning funding sources, definition of terms, services offered, outcome emphasized) will determine if USAID will use current or revised indicators beyond that date. Assuming PEPFAR funds continue, two USG reporting requirements for OVC programs tied to “core services” or “priority areas” will likely remain: 1) “number of OVCs accessing education” and 2) “number of OVCs receiving psychosocial support” (PEPFAR C5.6.D). The former is explicit in the PMP and current indicators are sufficient (e.g., “number of scholars attending school”). The latter is less so. It is referred to in a table called “Data Collection Plan by Area of Program Activities” attached to the PMP. This Data Collection Plan provides two definitions of this USG psychosocial support indicator: “Number of mentorship visits carried out – per term per scholar,” and “Number of scholars attached to a mentor.” The current WtF service patterns provide two ways of delivering psychosocial support (and measuring it for reporting): 1) referrals (of which there have been 130), and 2) per term per scholar mentoring (which has not yet been measured).

Table 8: WtF Relationship to CDCS Development Objective 2

CDCS Development Objective 2 (DO2), Health and Human Capacity Strengthened	
CDCS Illustrative Sub-IRs	How WtF relates to IR 2.2 and Illustrative Sub-IRs
Sub-IR 2.2.1: Strengthened national health and education institutional capacity, leadership and programs to provide increased access to quality services.	WtF focuses directly on increasing access to quality education for OVCs. Chairing of DSSBs by MOEST DEOs underscores co-leadership by GOK staff. MOEST may look at WtF as a “pilot”; with EGF already modeling mentorship and producing seminars (on guidance), the MOEST may engage with possible implications for national policies and practices.
Sub-IR 2.2.2: Improved county-level accountability, institutional capacity, leadership, management of service delivery;	Accountability and leadership of stakeholders already exists. With increased information sharing, collaboration, devolution of limited authorities to counties via pooling of county and private funds for additional scholarships but with scholars selected by WtF.
Sub-IR 2.2.3: Greater community involvement in social service delivery promotion and utilization	Involvement already present in scholar selection. With addition of county-funded scholarship processes and selections vetted by WtF, community involvement is likely to increase.

Revised Performance Indicator Reference Sheets (PIRS) were drafted in November 2014 (see Annex 24). EGF’s PMP sub-IRs map to the PIRS closely (though textual inaccuracies exist in the PIRS; e.g., it has two sheets numbered 6). Annex 25 shows the map and suggests new terms to improve utility. The PMP table includes columns for target and actual figures, but the columns’ data are identical (see Annex 8).

Actual monitoring and data management procedures affect the accuracy and usefulness of reporting to USAID. Under Q2, we noted issues that must be addressed before EGF reporting on certain existing indicators, or others to be developed, can be assumed to be correct. The USAID PEPFAR coordinator said, “There are M&E problems that we are aware of.” Issues include absence of M&E guidelines, policies and staff, absence of procedures and data on 1) mentoring visits per student per term distinguished by type of mentoring, 2) leadership positions held and 3) faulty home district data, etc. All of these relate to reporting. Note: The term “mentoring” is used broadly within WtF, but for purposes of PMP reporting, it is now confined to school-based visits (per term per child) and attendance at DSSB mentoring

sessions. Despite problems, funders are generally satisfied with current reporting. “In most cases, the reports do talk about the numbers we need. Basically it’s a good job” (USAID).

Other external institutions have expressed interest in improved reporting and communication with EGF. Annex 20 presents a number of their quotes and summaries of their comments on this matter. Such comments were received from the MOEST, five of the six APHIAplus COPs and at least half of the DSSBs. Head teachers (81 percent) would also like more communication with EGF/WtF (Figure 10, Annex 2).

Other Relevant Indicators: The original WtF PMP included an indicator for academic grades, “Number of scholars attaining a minimum of B,” which was later eliminated. Though not required, EGF has continued to report on student grades each term. While such grades are not standardized, they reflect WtF students’ standing relative to their classes and give timely indications of successes and challenges at the student and school levels.

DSSB members (Kisumu) recommended that EGF develop strategies to assist WtF scholars who score between C+ and B+ on the KCSE and consequently have to find their own way to higher education. WtF’s Robert Loyelei discussed the possibility of encouraging the continued engagement of WtF graduates who scored in that range by offering them a modest stipend for a limited time if they bring their letter of admission to a higher education institution, and facilitating college counseling possibly through its alumni association. WtF could also assist them in gaining HELB loans. Such an area of emphasis could require a new indicator.

Conclusions

WtF can report in the future under DO2 IR2.2 and, if confirmed, illustrative sub-IRs 2.2.1, 2.2.2 and 2.2.3. Emphasis of one sub-IR or another will depend on the activities EGF chooses to emphasize. The details of monitoring and reporting that will best support assessment of WtF relative to DO2 and IR 2.2 depend on the program’s evolving design. That design may evolve via adoption of one or more of this evaluation’s recommendations, via budget reprogramming of obligated funds, via program modifications upon obligation of new funds or change in the funding source.

Current PMP indicators are useful for 1) continuing assessment of WtF outcomes and 2) retrospective assessment of WtF’s performance regarding the PWC cohorts since the indicators include “OVC complete tertiary education.” This indicator is not likely to be reused in WtF, given that USAID is no longer supporting any OVC tertiary education. However, should EGF adopt a recommendation to track WtF and PWC secondary graduates through its alumni association or otherwise, and if the PMP activity-level indicator under *current* sub-IR 2.1.1 is adjusted to be the same as the correlated PIRS text (“Number of individuals from underserved and/or disadvantaged groups accessing tertiary education [higher education]”), then tertiary activity (e.g., TVET, etc.) would remain reportable as a long-term outcome of WtF (useful in assessing activity impact and value for money).

If future funding for WtF does not come from PEPFAR, emphasis on HIV-affected OVCs and related indicators could be reduced. When future activity-level indicators are developed, they will include many already being used in the PMP, especially in relation to the CDCS’s sub-IR 2.2.1. Additional indicators may be developed to measure certain desired outcomes like 1) activities supporting sub-IRs 2.2.2 and

2.2.3, as these target county-level involvement (e.g., accountability, leadership, leveraged inputs, service delivery, community ownership, stakeholder support, etc.) and 2) WtF services provided to graduates related to their higher education or to tracking their educational progress. Though not currently a required indicator, student grade reporting is useful and should continue.

EGF's use of identical figures for targets and actual indicator quantities in the PMP indicates that it has not used this format for reporting actuals. This could be the result of 1) using terms like "mentoring," "psychosocial support" and "leadership" in such a way as to not discriminate between services that are of meaningful quality and services that are not; and/or 2) exceeding the target in all cases and entering the target number instead of the larger actual figure (unlikely) or 3) unfamiliarity with proper use of the "actuals" cells in PMP reports. EGF is reviewing its monitoring and data management procedures and has an opportunity to revise definitions of services and, in consultation with USAID, its PMP indicators to improve the accuracy and usefulness of its reports.

RECOMMENDATIONS

For USAID: Recommendations Related to Equity (Q1)

1) Three definitions to address: USAID should confirm the applicable definition of "OVC" and the permitted beneficiaries in WtF under PEPFAR funding. It should also clearly define "psychosocial support" and identify or confirm the types of WtF services and OVCs that may be counted and reported under this indicator (PEPFAR C5.6.D). It should also confirm with EGF the operative definition(s) of "mentoring" and what types of WtF mentoring activities may be counted and reported under which indicators. Examples include a) distinguishing "school-based" from all other mentoring types and large-group motivation sessions (DSSB) from individualized or small-group sessions and b) possibly disqualifying Annual Congress meetings as sufficient for reported mentoring unless small-group or individualized mentoring takes place there and is documented. USAID should also establish whether school-based mentoring visits for all WtF scholars constitute instances of "psychosocial support" for PMP reporting and whether this would be more warranted if Healthy Choices content is delivered during those visits.

2) For retrospective reporting, USAID should clarify with EGF the geographic requirement that was operating for scholars to be drawn from Nyanza and Rift Valley provinces.

For USAID: Recommendations Related to Successes and Challenges (Q2)

3) If further PEPFAR funds are granted, USAID should emphasize selection of HIV-affected candidates for WtF, possibly through renewing the requirement for involvement from the APHIA^{plus} program.

4) Recalling that EGF has indicated that Healthy Choices likely requires them to reprogram their budget, after EGF considers this report, USAID should meet with them to discuss reprogramming. EGF has an opportunity now to rebudget a range of USAID WtF activities to address any operational issues and accommodate any new plans for decentralizing, M&E staffing, alumni association service development, etc., and to bring its quarterly and annual budgets more in line with actual spending.

5) When reprogramming the budget or when obligating further funds, USAID should consider reinforcing or complementing any post-graduate (secondary)/alumni support activities that EGF is undertaking with KfW. This would support EGF in further assisting WtF graduates who do not gain direct admission to government institutions of higher education, and better assess the long-term outcomes, impact and value of its investment in WtF.

For USAID: Recommendations Related to Reporting and Monitoring (Q3)

6) USAID should communicate new M&E requirements to EGF, given the new CDCS results framework, and confirm or revise existing indicators or develop new ones for any ongoing, reprogrammed or new activities. *Additional indicators are likely needed to track certain desired WtF outcomes (particularly CDCS-relevant ones) that are now developing or are likely to develop.* For example: 1) activities supporting DO2 sub-IRs 2.2.2 and 2.2.3, as these sub-IRs focus on county involvement, accountability, leadership, service delivery, ownership (e.g., leveraged financial and in-kind resources for awarding additional scholarships; number of scholars funded from private sources; number funded by county governments; number of committees from “remote districts” that help inform applicants to apply to WtF, etc.), and 2) tracking of and services for mid-level WtF graduates related to their quests for higher education (e.g., number of scholars receiving college and career counseling, number of letters of reference sent to HELB in support of scholars’ applications for HELB loans, number of enrollments to tertiary institutions verified by scholars’ student identifications, etc.). PMP indicators and most recent PIRS are shown in relation in Annex 25 with comments and suggested additional terms to improve utility.

7) USAID should require that EGF use the PMP reporting grid at regular intervals and do so using real figures for actual service numbers delivered in the period and cumulatively. USAID should train EGF staff in this simple reporting format to ensure compliance.

8) Independent of PMP/PIRS requirements, USAID should require EGF to continue to report aggregate scholar grades, though this can be reduced in frequency from quarterly or per term to annually at the end of the academic year as part of the first calendar quarter report.

For EGF: Note: The numerous and detailed recommendations for EGF are in Annex 1. Below we present a few priority recommendations and urge study of the full set.

For EGF: Recommendation Related to Equity (Q1)

1) To compensate for the centralizing tendency of the WtF design, in consultation with the MOEST and donors, re-examine WtF’s current approach to allocating additional scholarships to county branches.

2) As long as PEPFAR remains a WtF funder, EGF should amplify its emphasis on HIV-affected candidates during scholar selection and emphasize HIV education for all secondary scholars. Involving APHIAplus in the selection process as members of DSSBs is one way to make such an emphasis more likely.

For EGF: Recommendation Related to Successes and Challenges (Q2)

3) Complete the M&E framework design and implement any revisions to data capture, query and reporting systems and the monitoring processes themselves system-wide.

4) WtF should immediately implement the WtF alumni association to try to keep graduates engaged so their futures can be known and the long-term impact and value of WtF better understood.

For EGF: Recommendation Related to Reporting and Monitoring (Q3)

5) Confirm/revise current PMP and PIRS indicators and align them with the CDCS. Existing PMP indicators are adequate with adjustments as suggested in Annex 8 – PMP-PIRS Table, and adopt a rigorous approach to PMP quantitative reporting using the PMP reporting grid.

6) Work with USAID to develop any new indicators aligned with the CDCS that may be needed for existing, new or reprogrammed activities.

ANNEXES

ANNEX I: RECOMMENDATIONS FOR EGF

Recommendations Related to Equity (Question 1):

1) Analyze and rewrite the paragraphs in the section of the DSSB manual that describe procedures for scoring and/or ranking candidates and conduct further training of DSSB chairs and branch managers in the scoring and weighting of vulnerability categories for both the interview and the home visits. Clarify what kind of number scale to use, how and whether candidates are to be ranked top to bottom or placed in suitability groups of similar ranking, or whatever best practice will be used. In preparation for doing so, re-examine the findings of EGF's "Draft Selection Assessment Report" that also advised using a numerical scoring system to reduce subjectivity in the selection process.

2) Work with DEOs, CDEs and the MOEST to ensure that all primary school heads are informed about the availability of WtF scholarships and the deadlines for each step in the application and awarding processes well in advance of the release of the KCPE exam results. BGDMs should work with the DEOs and CEDs to circulate a flier to all primary school heads for them to post at schools. Consider following up on the suggestion made by the MOEST director of field services that the MOEST post a placard or notice at elementary schools with information about various available scholarships.

3) Consider how to provide all DSSB members with a greater sense of their value to EGF and EB through more consistent communication from the Head Office and through acknowledgments of various kinds. In doing so, re-examine the findings of EGF's "Draft Selection Assessment Report" that noted potential issues related to morale, member attrition and possible inefficiencies resulting from member dissatisfactions. Suggested strategies include:

- Letters of appointment signed by Dr. Mwangi or EGF's managing director clarifying expectations and roles,
- a personal copy of the DSSB manual for all members,
- occasional national or regional forums for DSSB groups to share experiences and results,
- full reimbursement of personal and travel expenses incurred in DSSB service,
- consistent and generous refreshment and meals (as appropriate) provided at all meetings,
- overnight accommodation when needed for distant travel,
- physical demonstrations of appreciation for periods of dedicated service like those outlined by Dr. Kairu in his Mentoring Policies paper: e.g., certificates after a year, plaques after five years,
- annual reports from Head Office about the progress of the WtF scholars nationally, and
- regular reports from EB branch about the progress of the DSSB's own WtF scholars.

4) Clarify with the various Equity Bank branches what the DSSB budgets should include, and have the Head Office review and approve them annually so that BGDMs can be assured that they are in line with WtF policies and can make adjustments annually as needed. These budgets should include a line for local advertising and outreach that may be larger for county branches/DSSBs and those other DSSBs that serve many districts than for others, as well as a line for travel that may be larger for county branches.

5) To compensate for the centralizing tendency inherent in the WtF design, in consultation with the MOEST and donors, re-examine WtF's current approach to allocating additional scholarships to county branches (and possibly other multidistrict branches as well) for 1) the more equal treatment of remote districts and 2) to more proportionally address equity of opportunity and access with affirmative action plans for marginalized communities. In doing so, EGF should seriously consider adapting the MOEST's formula for computing constituency distributions of secondary bursary budgets based on relative poverty index ratios, relative secondary school population ratios and available budget (or in WtF's case, available scholarships).

6) As long as PEPFAR remains a WtF funder, EGF should amplify its emphasis on HIV-affected candidates during scholar selection, and emphasize HIV education for all secondary scholars. Involving APHIAplus in the selection process as members of DSSBs is one way to make such an emphasis more likely.

Recommendations Related to Successes and Challenges (Question 2):

1) WtF should immediately implement the WtF alumni association to try to keep graduates engaged so their futures can be known and the long-term impact and value of WtF better understood. While the idea being explored with MCF of having alumni "activities" that will motivate them to engage is useful, a more disembodied "light" and consistent version of an alumni association may be more important. Ongoing contact would be by phone and email, with a website and a periodic e-newsletter with information about service offerings and invitations to be in touch.

2) EGF should consider offering, through the alumni association or otherwise, services and strategies to address the particular needs of those not admitted directly to colleges and universities. EGF should be committed to tracking future transition to tertiary and university for all its alumni (including the 141 PWC secondary graduates). Priority should be given to assisting graduates of WtF in the first year or two after graduation by offering college and career counseling or referrals to such services as available. Letters of reference for HELB loans should be automatically part of the EGF support system for all graduates. Strategies to motivate "middle of the pack" students to pursue next formal steps in their education should be considered (e.g., offering modest stipends for the initial year of enrollment in a higher education institution / formal employment program or internship).

3) In providing college counseling, WtF may build on the experience of the EALP college counseling office.

4) If reprogramming the budget or for further obligations, discuss with USAID the possibility of reinforcing or complementing any post-graduate / alumni support activities that EGF is undertaking with KfW, including strategies to bridge WtF graduates to TVET and other post-secondary options, and of tracking their admission to and completion of those programs.

5) Continue providing referrals for professional services to scholars in need of psychosocial support counseling. For those with issues related to HIV/AIDS, consider the potential of the APHIAplus network in providing support. Meet with APHIAplus to explore linkages to provide WtF scholars and their families with a range of support services in the many localities served by the APHIAplus program.

6) Interact more frequently with the MOEST. Seek formal opportunities to explore with them the issues and outcomes related to the mentoring program, understanding that they may be viewing WtF mentoring as a pilot for what might be done throughout the system. Related to this, continue dialog with them over policies in guidance and counseling, possibly with a follow-on conference/seminar on the subject leading to actionable plans. WtF's "guidance" functions could be partially devolved to (or shared with) MOEST guidance staff at secondary schools following educational activities for MOEST school-based staff, and for MOEST trainers and WtF mentor coordinators (including KEPSHA?). Such training should incorporate best practices in secondary school counseling (personal, college, career).

7) Focus academic counseling and mentoring on WtF scholars in Form 3 and Form 4 with average grades of B and below.

8) Analyze revised WtF indicators with USAID and other donors as appropriate and any probable additional indicators they may require prior to completing the framework to be sure that all data needs are accounted for. Complete the M&E framework design and implement any revisions to data capture, query and reporting systems, and the monitoring processes themselves system-wide, to ensure that they support the information requirements for any envisioned mid-course correction to all program components, as well as supporting all reporting requirements on indicators such as those required by USAID. Special consideration should be given to the geographical aspects of the system to support regular sharing of information with subcounty, county and national governments.

9) Determine the degree to which decentralization will be allowed in inputting data from the branch level or from mentoring field coordinators who may wish to input monitoring data remotely.

10) Attend immediately to procedures for recording various types and instances of mentoring provided and received, and for recording leadership positions held. EGF's mentor database team should configure its Excel files to capture mentoring visits with columns/fields for each main type of mentoring session: three for each term's school visits, one or two for DSSB mentoring and one or two others for congresses.

11) As far as possible for existing WtF scholars, clean EMIS home district data by consolidating duplicate district names that are the result of spelling errors or are otherwise obviously inaccurate. For new students, revise the data capture system to provide only a finite range of options (e.g., with a drop-down menu) for recording home districts. Communicate this approach to the branches, so that the champions follow these procedures in logging information about candidates / scholars. Summary scholar data by intake year at the 116 branches should be checked against records in EMIS at the Head Office to ensure that data matches between EMIS and all 116 separate locations.

12) Ensure that M&E senior staff salaries are competitive with those of comparable companies and NGOs so that retaining M&E staff is not a continuing problem.

13) Expedite implementation of the Healthy Choices training curriculum online so that it takes place at the school level by the end 2015.

14) Meet with APHIAplus to discuss possible support to WtF they might offer in: 1) providing feedback to families of APHIAplus scholarship recipients now in WtF or other identified HIV-affected WtF scholars, 2) providing training of trainers in Healthy Choices, 3) supporting mentors in the field to better

implement Healthy Choices content and training in school-based mentoring sessions and 4) even consider recruiting APHIAplus staff as mentors. EGF should also provide them, as stakeholders and possible allies, with regular periodic reports as may be helpful in fulfilling the functions outlined above.

15) Provide budget for regular transportation and travel allowances for mentoring field coordinators.

16) Implement one or more models of collaboration with county governors to provide additional secondary scholarships (after re-examining costs to confirm a practical, affordable price). These may or may not be full WtF scholarships with all wraparound services pending the costs attendant on those services and the price paid by the counties. Due to the potential issues of scale involved in this concept, WtF's relationship with the MOEST becomes more important since the scale of the guidance and mentoring programs required to support many more county-funded scholars could call for a greater role to be played by MOEST and school staff.

Recommendations Related to Reporting and Monitoring for USAID / Others (Question 3):

1) Confirm/revise current PMP and PIRS indicators and align them with the CDCS. Existing PMP indicators are adequate with adjustments as suggested in Annex 10 – PMP-PIRS Table. If the current mentoring indicator is sufficient to fulfill reporting requirements for PEPFAR C5.6.D (psychosocial support), no new indicator is needed, but adjustment of the PMP indicator should be made in line with the revised PIRS definition as follows: “Number of scholars who are attached to a mentor and are mentored (visited by their mentor).”

2) Develop any new indicators aligned with the CDCS that may be needed for existing, new or reprogrammed activities. These might be related to 1) refinements or new areas of emphasis as noted in the conclusions (e.g., the number of WtF graduates receiving college and career counseling in the year after graduation; the number applying for entry to an institution of higher education; the number of WtF graduates placed in internships in the year after graduation) or 2) activity areas now surfacing and called for by DO2's sub-IR 2.2.2 and 2.2.3 (e.g., indicators related to county government participation in providing additional scholarships, demonstrated private and public leverage, “community ownership,” civic institutional capacity developed, training provided, collaboration with the MOEST on such activities as workshops on guidance and mentoring, etc.).

3) Provide regular reports to the MOEST, reporting periodically through the director of secondary and tertiary. This will be appreciated and provide opportunities for dialog that may lead to collaborative activities.

4) Adopt a rigorous approach to PMP quantitative reporting using the PMP reporting grid at regular intervals to be determined with USAID using real accurate figures for actual service numbers delivered in the period and cumulatively. EGF staff should seek training from USAID in this simple reporting format to ensure compliance.

5) Continue reporting aggregate student grades to USAID, though this is likely independent of PMP / PIRS requirements. This can be reduced in frequency from quarterly to annually as part of the calendar first quarter report.

6) To support success under Question 3, implement all suggestions related to M&E made under Q2.

ANNEX 2: DETAILED FIGURES

Figure 1: USAID WTF Scholars by Province for both Intake Years 2012 & 2013

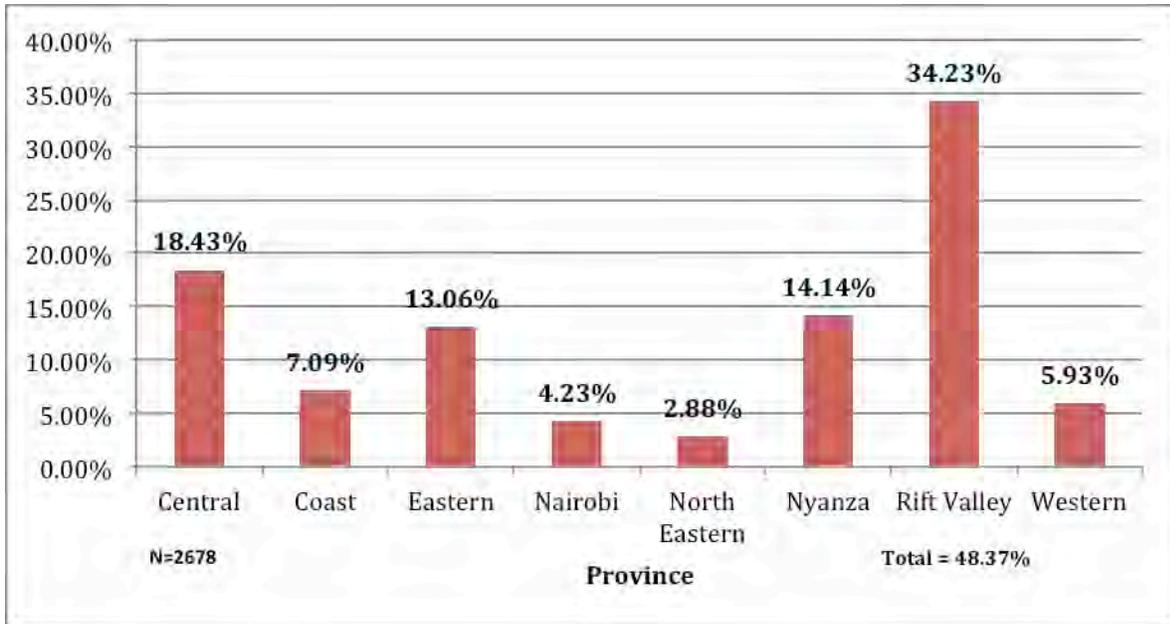


Figure 2: Reasons for Selection

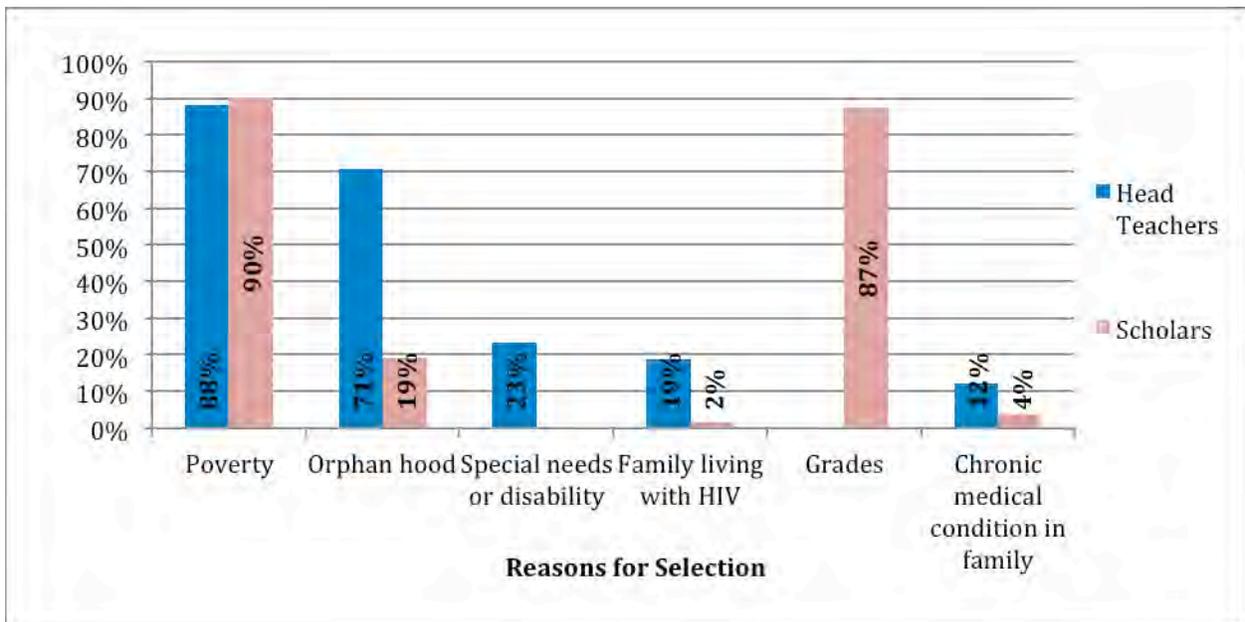


Figure 3: Source of Information on WTF

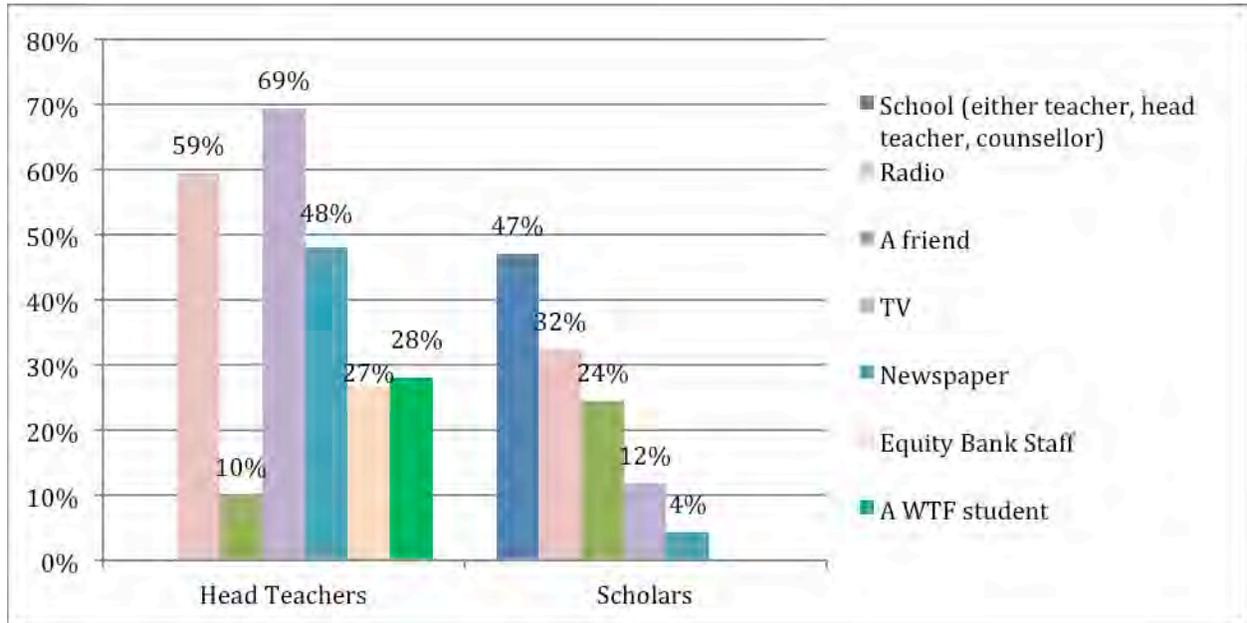


Figure 4: Scholar Placement

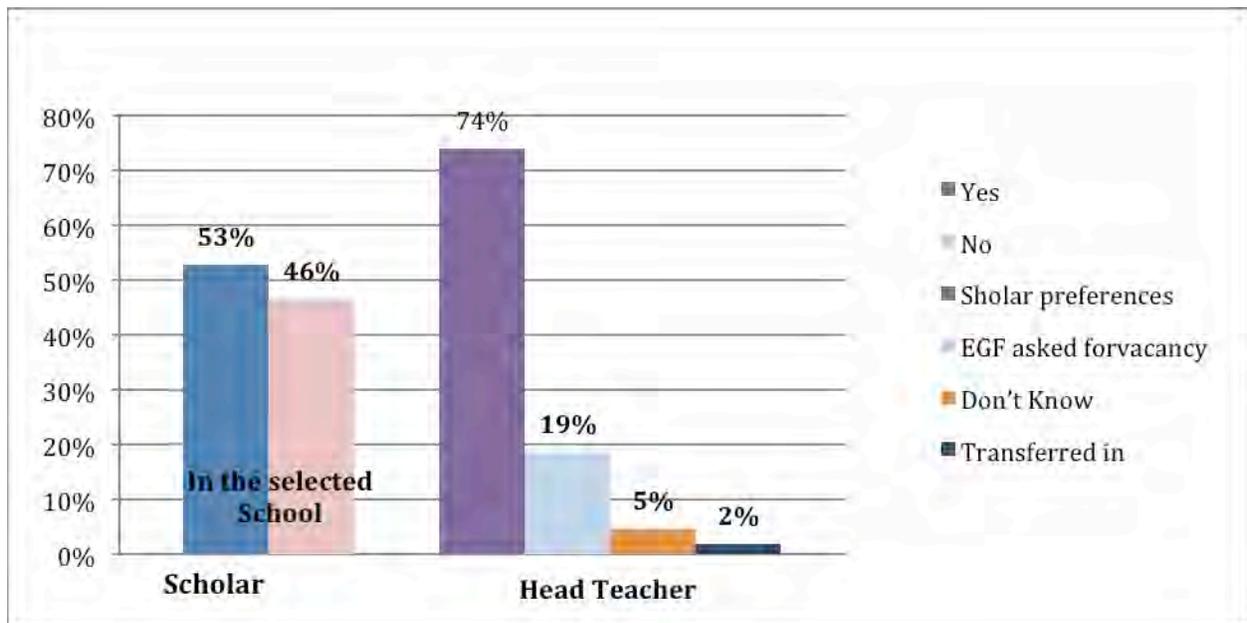


Figure 5: USAID EGF & WTF Scholars by Province, Gender and Years (2011-2013)

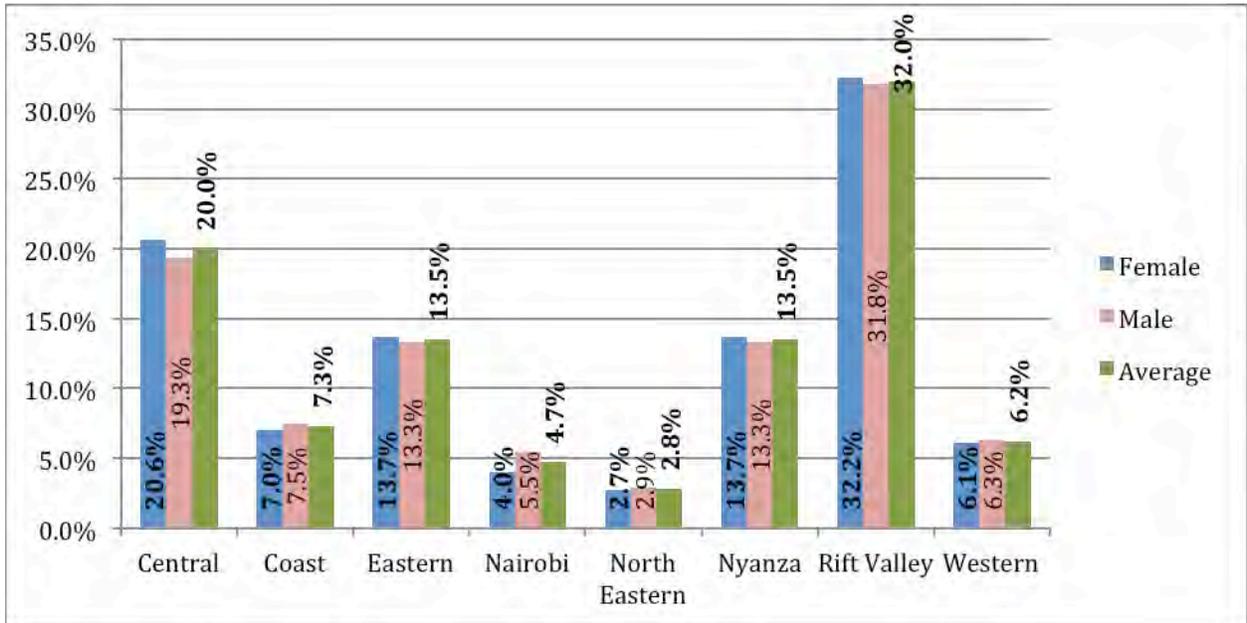


Figure 6: Scholarship Items Received On Time



Figure 7: WTF Graduating Scholars Performance 2014 KCSE vs. National Performance

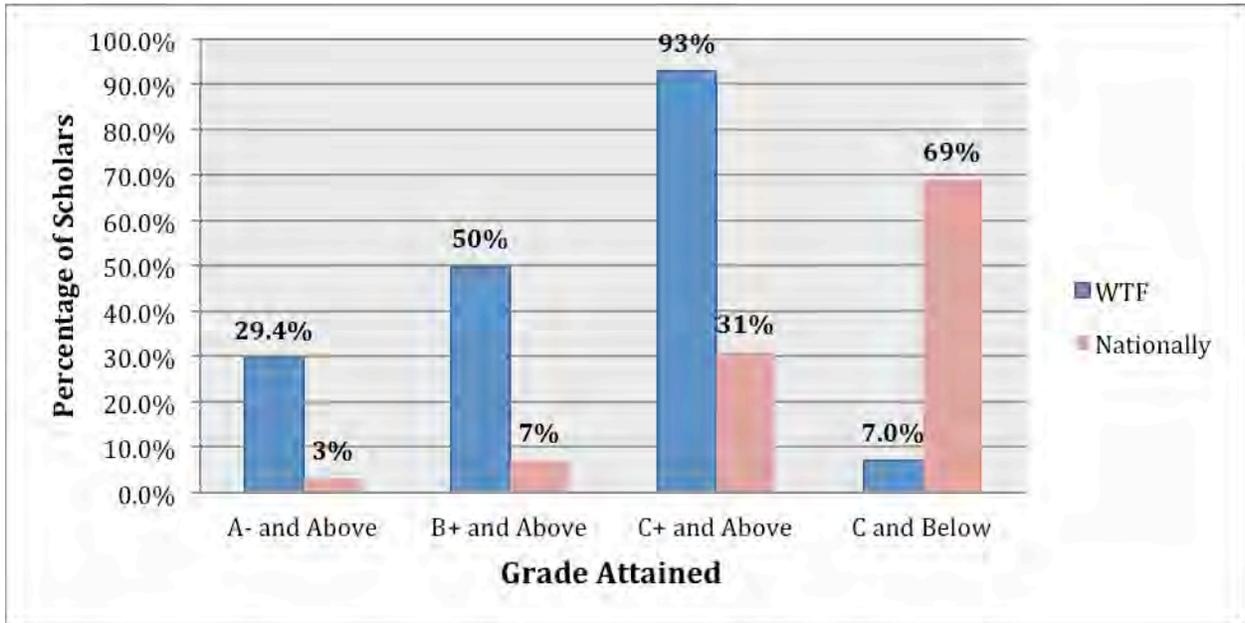


Figure 8: WTF Scholars' Performance 2014 KCSE by Gender

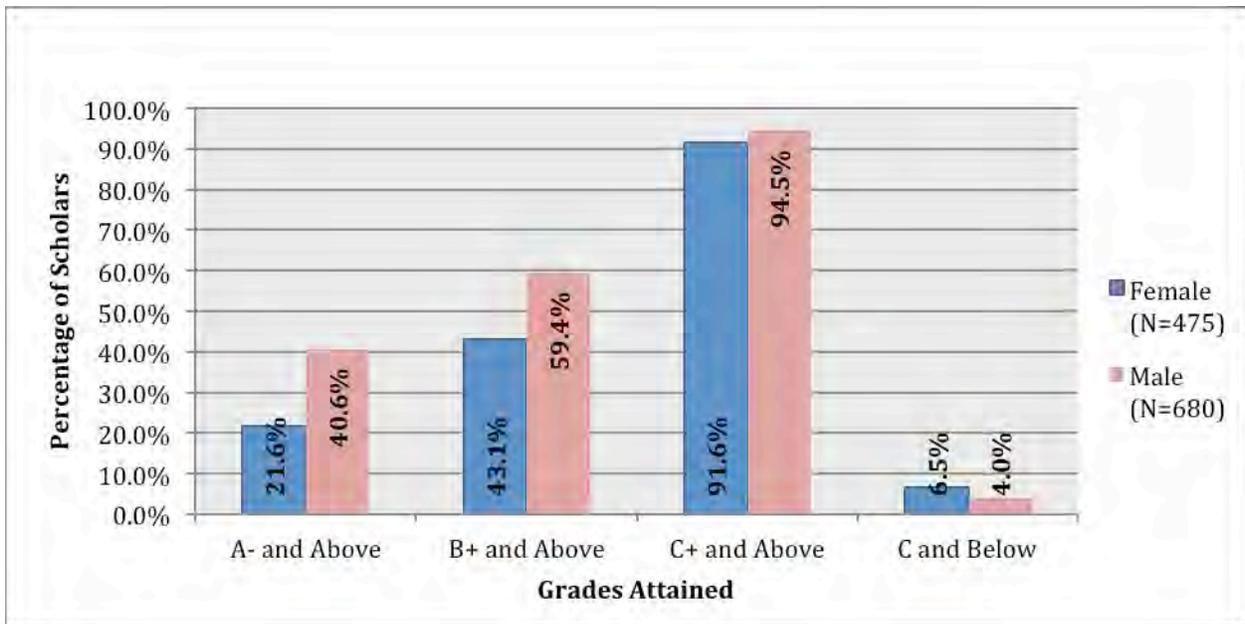


Figure 9: PWC-EGF-USAID OVCs Performance Trend

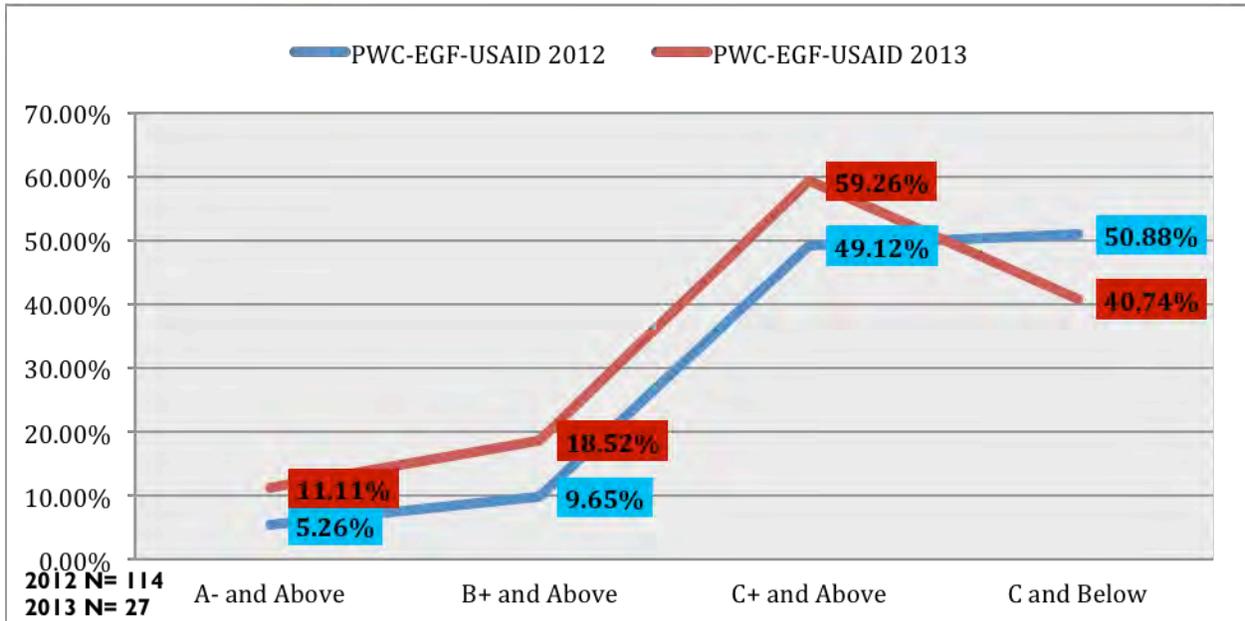


Figure 10: More Communication with WTF Desired

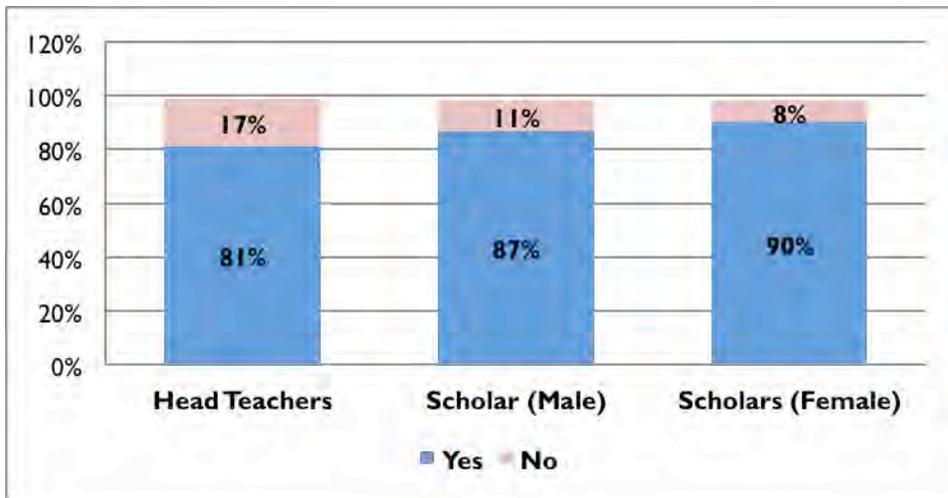


Figure 11: Organogram (Subset)

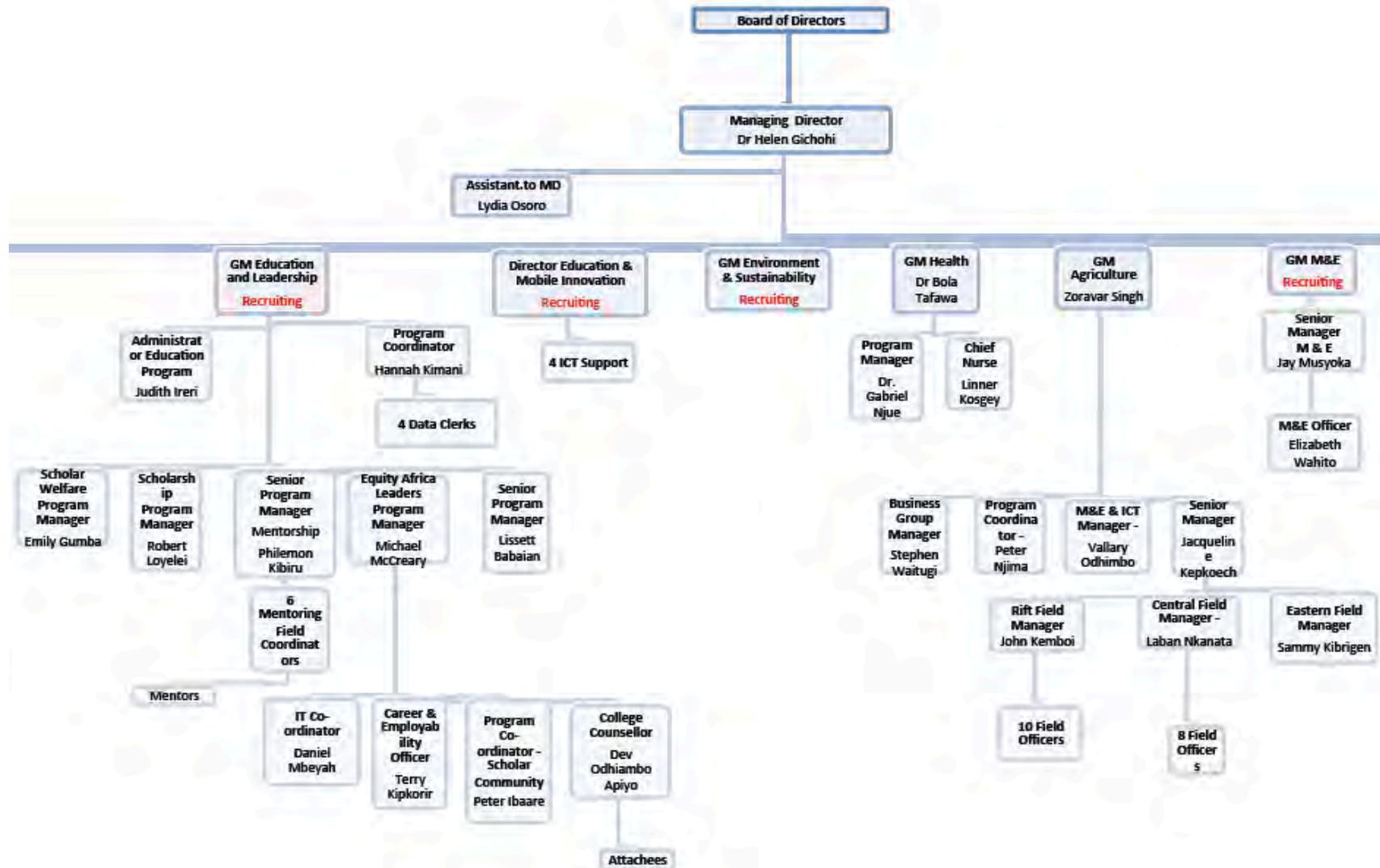
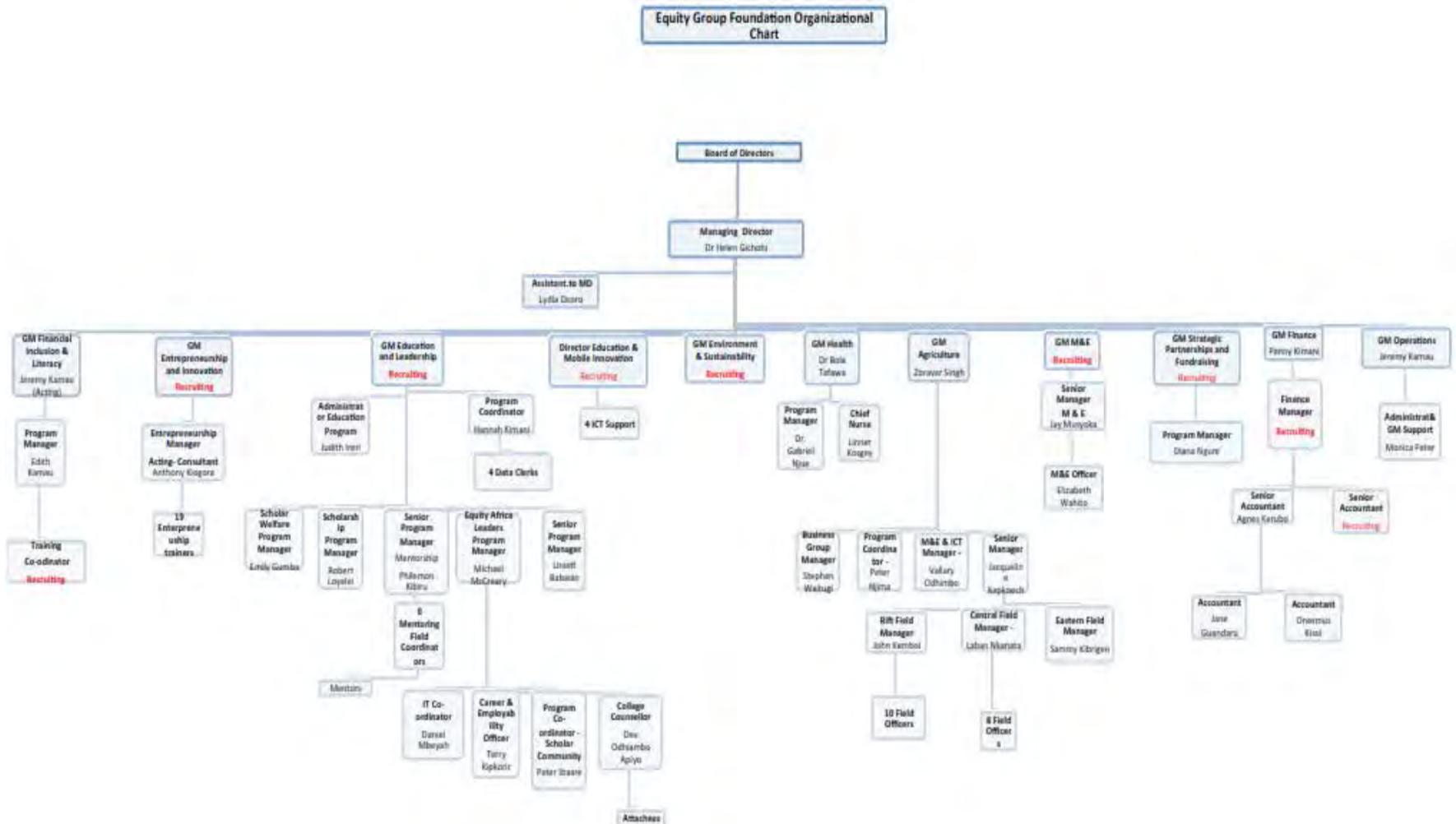


Figure 12: Complete Organogram



ANNEX 3: DETAILED TABLES

TABLE 1: RECOMMENDED DSSB COMPOSITION

The DSSB is composed of 11-13 members and is chaired by the district education officer (DEO) and coordinated by the Equity Bank branch manager(s) in that district. Local representative stakeholders on the board include:

1	District Education Officer(s) (Chair); County Education Director (sometimes)
2	Equity Bank Business Growth and Development Manager (BGDM or BM, secretary) and Wings to Fly Champion (technical, not a voting member);
3	Constituency Development Fund (CDF) representative
4	Social Services Representative;
5	Women's Representative;
6	Youth Representative
7	Kenya Primary Schools Head Association (KEPSHA);
8	Religious Leader(s);
9	County Administration;
10	2 Equity Bank Limited Agents (one male, one female);
11	Kenya Tea Development Authority (KTDA) representative (tea zones);
12	Northern Kenya Education Trust (NOKET) representative for North Eastern region

TABLE 2. OBSERVED DSSB COMPOSITION (PRESENT AT GROUP DISCUSSIONS)

	Nairobi	Isiolo	Meru	Kiambu	Kisumu	Homabay
REPRESENTATIVE DSSB COMPOSITION	Bank	Bank	Bank	Bank	Bank	Bank
	Bank Agency	Church	Bank Agency	Bank Agency	Bank Agency	Bank Agency
	National Govt	County Govt	CDF	CBO	Church	Church
		KEPSHA	Church	CDF	MOEST	County Women Reps.
		KESSHA	KEPSHA	Church		Dep. of Social Dev
		MOEST	Women's Org.	KEPSHA		KEPSHA
		Social Dev. Dept		MOEST		KUPPET
				Social Dev. Dept		MOEST
					NGO	

TABLE 3. SELECTION PRACTICES OF DSSBS REACHED

DSSB	TYPE	Members present	2014 No. of Applications	2014 No. of Shortlist	Number Scoring System	2014 No. of Interviews	2014 No. of Home Visits	2015 No. of Selected
Nairobi	Sub-County	5			None			12
Isiolo	County*	7	200	50	1-5	50	30	20
Meru	Sub-County (4 districts)	8	117	51	1 -100	51	24	15
Kiambu	Sub-County	8	124	70	None	39	16	15
Kisumu	County** (2 branch, 7 DEO)	5	1245		1-10	100	60	48
Homa Bay	Sub-County (5 districts)	12	428	50	None	50	20	15 (7/8)

* Isiolo is a County Branch in the sense that WTF uses the term meaning the only branch in the county and one with WTF responsibilities for all sub-counties (districts) in the county.

** Kisumu has a single DSSB to manage the allocation for two branches (e.g. 48 scholars selected in 2015 with 24 for each branch). It is the only DSSB in the whole county and has 7 DEOs sitting on the Board.

TABLE 4. SCHOLAR PLACEMENT

Type	No.	%
From student preferences they listed before the KCPE	111	74%
EGF asks for a vacancy for them and brings them here	28	19%
They are sometimes transferred in after being first admitted	3	2%
Don't Know	7	5%
No Response	1	1%
Total	150	100%

TABLE 5. FAIRNESS OF SELECTION PROCESS

Type	No.	%
Fair	122	81%
Not fair	15	10%
Don't Know	13	9%
Total	150	100%

TABLE 6. WTF STUDENTS' VULNERABILITY

Type	No.	%
Vulnerable or disadvantaged	72	48%
Not vulnerable or disadvantaged	70	47%
Don't Know	8	5%
Total	150	100%

TABLE 7 (A). MERU - WTF SCHOLARS 2010-2015: CENTRALIZING TENDENCY

Sub-county	2010	2011	2012	2013	2014	2015	G/Total	%age	Avg of remote districts
Imenti North	2	0	5	5	0	0	12	13.5%	
Meru Central	0	6	8	10	0	0	24	27.0%	
Tigania East (DSSB)	0	6	7	10	7	8	38	42.7%	
Tigania West	0	0	0	0	8	7	15	16.9%	
TOTAL	2	12	20	25	15	15	89		19.1%

TABLE 7 (B). ISIOLO - WTF SCHOLARS 2010-2015: CENTRALIZING TENDENCY

Sub-county	2010	2011	2012	2013	2014	2015	G/Total	%age	Avg of remote districts
Merti	0	0	1	2	2	2	13	12.3%	
Garbatulla	0	3	4	2	3	3	15	14.2%	
Central (DSSB)	2	9	15	23	17	12	78	73.6%	
TOTAL	2	12	20	27	22	17	106		8.8%

TABLE 7 (C). HOMA BAY - WTF SCHOLARS 2010-2015: CENTRALIZING TENDENCY

Sub-county	2010	2011	2012	2013	2014	2015	G/Total	%age	Avg of remote districts
Homa Bay (DSSB)		5	14	16	8		43	63.2%	
Ndhiwa		3	3	8	2		16	23.5%	
Rachuonyo North		3	2		3		8	11.8%	
Rachuonyo South				1			1	1.5%	
TOTAL	0	11	19	25	13	0	68		9.2%

TABLE 7 (D). KISUMU - WTF SCHOLARS 2010-2015: CENTRALIZING TENDENCY

Sub-county	2010	2011	2012	2013	2014	2015	G/Total	%age	Avg of remote districts
Kisumu East (DSSB)	1	3	3	16	11	3	37	27.4%	
Kisumu West		2	5	5	5	2	19	14.1%	
Kisumu Central	1	2	1	2	3	3	12	8.9%	
Muhoroni		2	3	5	3	6	19	14.1%	
Nyando		1	3	5	6	3	18	13.3%	
Nyakach		1	3	4	3	4	15	11.1%	
Seme		1	2	6	3	3	15	11.1%	
TOTAL	2	12	20	43	34	24	135		12.1%

TABLE 8 (A). SCHOLARSHIP PACKAGE ITEM RECEIVED

		Sex					
		Male		Female		Total	
Pocket Money (stipend)	Yes	194	100%	200	100%	394	100%
	No	0	0%	0	0%	0	0%
Schools fees (tuition and stipend) paid on my behalf	Yes	192	99%	200	100%	392	99%
	No	1	1%	0	0%	1	%
	Don't know	1	1%	0	0%	1	%
Transport Money	Yes	185	95%	198	99%	383	97%
	No	9	5%	2	1%	11	3%

TABLE 8 (B). TIMELY RECEIPT OF SCHOLARSHIP FEES PAID DIRECTLY TO THE SCHOOL

		Male		Female		Total	
With regard to the scholarship fees paid directly to the school, did the school receive fees paid on your behalf on a timely basis?	Yes	184	95%	189	95%	373	95%
	No	9	5%	10	5%	19	5%
	Don't know	1	1%	1	1%	2	1%
	No Response	0	0%	0	0%	0	0%

TABLE 8 (C). TIMELY RECEIPT OF SCHOLARSHIP PACKAGE ITEMS

		Male		Female		Total	
Thinking again about the scholarship package items you received personally, did you personally receive the items on a timely basis?	Yes	190	98%	200	100%	390	99%
	No	4	2%	0	0%	4	1%
	Don't know	0	0%	0	0%	0	0%
	No Response	0	0%	0	0%	0	0%

TABLE 9. POCKET MONEY SUFFICIENT

	Male		Female		Total	
	No.	%	No.	%	No.	%
Is the pocket money enough to cover the expenses that EGF intended it to cover?						
Yes	145	75%	151	76%	296	75%
No	49	25%	49	25%	98	25%
Don't Know	0	0%	0	0%	0	0%
No Response	0	0%	0	0%	0	0%

TABLE 10. SCHOOL FEES PAID ALL AT ONCE

Type	No.	%
Yes	129	86%
No	16	11%
Don't Know	5	3%
No Response	0	0%
Total	150	100%

TABLE 11. SCHOLAR DECILES

Scholar Deciles	Total	Male	Female	Total	Male	Female
1st	281	151	130	24%	27%	21%
2nd	221	108	113	19%	19%	18%
3rd	164	76	88	14%	14%	14%
4th	137	65	72	12%	12%	12%
5th	106	46	60	9%	8%	10%
6th	78	36	42	7%	6%	7%
7th	70	33	37	6%	6%	6%
8th	46	18	28	4%	3%	5%
9th	42	17	25	4%	3%	4%
10th	31	11	20	3%	2%	3%
Total	1176	561	615	100%	100%	100%

TABLE 12 (A). WTF MENTOR PROVIDED

DO YOU HAVE A MENTOR PROVIDED TO YOU BY THE WTF PROGRAM?	YES	MALE		FEMALE		TOTAL	
		Count	%	Count	%	Count	%
	YES	87	45%	63	32%	150	38%
	NO	106	55%	135	68%	241	61%
	DON'T KNOW	1	1%	2	1%	3	1%
	TOTAL	194	100%	200	100%	394	100%

TABLE 12 (B). WTF MENTOR PROVIDED

CURRENT FORM		Yes		No		Don't Know		Total	
		Count	%	Count	%	Count	%	Count	%
CURRENT FORM	2	3	2%	1	1%	0	0%	4	1%
	3	67	45%	156	65%	3	100%	226	57%
	4	80	53%	84	35%	0	0%	164	42%
	TOTAL	150	38%	241	61%	3	100%	394	100%

TABLE 13. WTF MENTOR WORKING OR STUDYING

Where is your mentor working or studying?	Male		Female		Total	
	Count	%	Count	%	Count	%
Equity Bank	21	24%	20	32%	41	27%
University Student	53	61%	35	56%	88	59%
Other	2	2%	2	3%	4	3%
Don't Know	11	13%	6	10%	17	11%

TABLE 14. DO YOU KNOW THE NAME OF YOUR MENTOR?

CURRENT FORM		Yes		No		Don't Know		Total	
		Count	%	Count	%	Count	%	Count	%
CURRENT FORM	2	2	2%	1	3%	0	0%	3	2%
	3	46	40%	20	61%	1	100%	67	45%
	4	68	59%	12	36%	0	0%	80	53%
	TOTAL	116	77.3%	33	22%	1	1%	150	100%

TABLE 15. EGF-PWC USAID OVC SCHOLAR LEVELS 2012

CLASS	FEMALE	MALE	TOTAL
FORM 2	10	12	22
FORM 3	2	2	4
FORM 4	56	72	128
YEAR 1	8	5	13
YEAR 2	21	31	52
YEAR 3	35	54	89
YEAR 4	58	122	180
TOTAL	190	298	488

TABLE 16. UTILITY OF MENTORING

USING A 5 POINT SCALE, WHERE 5 IS EXTREMELY USEFUL AND 1 IS NOT AT ALL USEFUL, PLEASE TELL ME HOW USEFUL THE MENTORING WAS TO YOU.		MALE		FEMALE		TOTAL	
	NOT USEFUL	1	1%	0	0%	1	1%
	SOMEWHAT USEFUL	2	2%	3	5%	5	3%
	USEFUL	6	7%	7	11%	13	9%
	VERY USEFUL	28	32%	20	32%	48	32%
	EXTREMELY USEFUL	49	56%	29	46%	78	52%
	DON'T KNOW	1	1%	2	3%	3	2%
	NO RESPONSE	0	0%	2	3%	2	1%
	TOTAL	87	100%	63	100%	150	100%

TABLE 17. NUMBER OF TIMES SCHOLAR SPOKE WITH MENTOR

		VALID N	MINIMUM	MAXIMUM	MEAN	MEDIAN
SEX	MALE	84	0.00	12.00	2.20	2.00
	FEMALE	61	0.00	10.00	1.44	1.00

TABLE 18. GROUP OR INDIVIDUAL MENTORING

		MALE		FEMALE		TOTAL	
WAS YOUR MENTORING IN A GROUP OR ALONE?	Group	56	88%	35	92%	91	89%
	Individual	8	13%	3	8%	11	11%
	Don't Know	0	0%	0	0%	0	0%
	No Response	0	0%	0	0%	0	0%

TABLE 19. SCHOOL STAFF COUNSELOR

Does the school have a staff counselor who can provide developmental and psychosocial counseling?	Yes	147	98%
	No	2	1%
	Don't Know	1	1%
	Total	150	100%

TABLE 20. RECEIVED NON-ACADEMIC COUNSELING, FROM WHOM

		Male		Female		Total	
From whom did you receive non-academic counseling?	School counselor	77	67%	101	73%	178	70%
	EGF counselor	9	8%	13	9%	22	9%
	Other	29	25%	25	18%	54	21%
	Total	115	100%	139	100%	254	100%

TABLE 21. USED CAREERS MASTER

Do students from your school regularly (i.e. termly) seek career counseling services?	Yes	140	93%
	No	10	7%
	Total	150	100%

TABLE 22(A). RECEIVED CAREER COUNSELING

		Male		Female		Total	
Have you ever received career counseling?	Yes	126	65%	146	73%	272	69%
	No	68	35%	54	27%	122	31%
	Don't Know	0	0%	0	0%	0	0%
	No Response	0	0%	0	0%	0	0%

TABLE 22(B). RECEIVED CAREER COUNSELING, FROM WHOM

		Male		Female		Total	
From whom did you receive career counseling?	School's career master	88	70%	87	60%	175	64%
	EGF mentor/counselor	31	25%	52	36%	83	31%
	Other	7	6%	7	5%	14	5%
	Total	126	100%	146	100%	272	100%

TABLE 23 (A). ATTENDED ANNUAL CONGRESS

		Male		Female		Total	
Have you attended the Annual Congress?	Yes	182	94%	195	98%	377	96%
	No	12	6%	5	3%	17	4%
	Total	194	100%	200	100%	394	100%

TABLE 23 (B). STUDENT ATTENDANCE AT 2014 ANNUAL CONGRESS

		Type	No.	%
In 2014 did you attend the Annual Congress?	Yes		159	42%
	No		223	58%
	Don't Know		0	0%
	Total		382	100%

TABLE 24. LEADERSHIP POSITIONS HELD IN SCHOOL

		Male		Female		Total	
Do you hold or have you held any leadership positions in the school?	Yes	134	69%	110	55%	244	62%
	No	60	31%	90	45%	150	38%
	Total	194	100%	200	100%	394	100%

TABLE 25. UTILITY OF WTF ON LEADERSHIP ACHIEVEMENTS

	Sex					
	Male		Female		Total	
Not useful	0	0%	1	1%	1	%
Somewhat useful	8	4%	1	1%	9	2%
Useful	29	15%	32	16%	61	15%
Very Useful	75	39%	80	40%	155	39%
Extremely Useful	82	42%	85	43%	167	42%
Don't Know	0	0%	0	0%	0	0%
No Response	0	0%	1	1%	1	%

TABLE 26. EFFECTIVENESS IN HELPING STUDENTS REACH POTENTIAL IN LEADERSHIP OPPORTUNITIES

	Type		No.	%
How would you assess the effectiveness of the WTF program in helping students reach their full potential leadership opportunities?	Very ineffective		2	1%
	Somewhat ineffective		6	4%
	Neutral		41	27%
	Somewhat effective		53	35%
	Very effective		47	31%
	Don't Know		1	1%
	Total		150	100%

TABLE 27. MOST FREQUENT RESPONSES ON WHAT SCHOLARS LEARNED FROM ANNUAL CONGRESS

	Male		Female		Total	
No response	12	6%	5	3%	17	4%
Mentorship, leadership skills, good study habits	117	60%	123	62%	240	61%
My dreams are valid regardless of where I come from	14	7%	10	5%	24	6%
How to overcome personal challenges	1	1%	0	0%	1	%
Being innovative, discipline, hard work.	17	8%	25	12%	42	10%
Giving back to the society, social life	1	1%	2	1%	3	1%
How to use the equity line	1	1%	0	0%	1	%
Setting goals and time management	4	2%	4	2%	8	2%
Getting motivation	20	10%	20	10%	40	10%
Making right choices in life, tips for success	7	4%	11	6%	18	5%
Total	194	100%	200	100%	394	100%

TABLE 28. MORE COMMUNICATIONS WITH EGF

	Type	No.	%
Would you like more communication with EGF/ WTF?	Yes	122	81%
	No	26	17%
	Don't Know	1	1%
	No Response	1	1%
	Total	150	100%

TABLE 29. ACADEMIC ACHIEVEMENT

	Type	Total	
On a scale of 1-5, how would you characterize the academic achievement of the WTF scholars in your school? (5= Far above average, and 1=Far below average)	1 – Far below average	0	0%
	2 – Below average	0	0%
	3 – Average	38	25%
	4 – Above average	73	49%
	5 – Far above average	38	25%
	Don't Know	0	0%
	No Response	1	1%
	Total	150	100%

TABLE 30 (A). LEADERSHIP DEVELOPMENT MATERIALS RECEIVED

		MALE		FEMALE		TOTAL	
HAVE YOU RECEIVED LEADERSHIP DEVELOPMENT MATERIALS?	Yes	98	51%	106	53%	204	52%
	No	96	49%	94	47%	190	48%
	Don't Know	0	0%	0	0%	0	0%
	No Response	0	0%	0	0%	0	0%

TABLE 30 (B). LEADERSHIP DEVELOPMENT MATERIALS- TYPE RECEIVED

		MALE		FEMALE		TOTAL	
WHICH LEADERSHIP MATERIALS HAVE YOU RECEIVED?	Printed study and information materials	77	79%	83	78%	160	41%
	Workbooks	21	21%	22	21%	43	11%
	Other	0	0%	1	1%	1	%
	Don't Know	0	0%	0	0%	0	0%
	No Response	0	0%	0	0%	0	0%

TABLE 31. SCHOLARSHIP PACKAGE ITEM

		ACADEMIC BOOKS		STATIONERY	
WHICH SCHOLARSHIP PACKAGE ITEMS HAVE WTF SCHOLARS RECEIVED?	Yes	119	79%	123	82%
	No	16	11%	6	4%
	Don't Know	14	9%	21	14%
	No Response	1	1%	0	0%
	Total	150	100%	150	100%

TABLE 32. ADEQUATE QUANTITY & QUALITY OF ITEMS

		ADEQUATE QUANTITY		ADEQUATE QUALITY	
IS THE PACKAGE ADEQUATE IN TERMS OF QUANTITY AND QUALITY?	Yes	132	88%	139	93%
	No	4	3%	1	1%
	Don't Know	14	9%	10	7%
	No Response	0	0%	0	0%
	Total	150	100%	150	100%

TABLE 33. ACCESS TO BOOKS

		TOTAL	
HAVE ALL THE WTF SCHOLARS RECEIVED OR DO THEY HAVE REGULAR ACCESS TO SCHOOL BOOKS AS PER THE MOEST GUIDELINES?	Yes	143	95%
	No	6	4%
	Don't Know	1	1%
	No Response	0	0%
	Total	150	100%

TABLE 34. ACCESS TO ALL THE REQUIRED BOOKS

		Male		Female		Total	
DO YOU HAVE OR HAVE ACCESS TO ALL THE BOOKS YOU NEED TO MEET SCHOOL REQUIREMENTS?	Yes	133	69%	128	64%	261	66%
	No	61	31%	72	36%	133	34%
	Don't Know	0	0%	0	0%	0	0%
	No Response	0	0%	0	0%	0	0%

TABLE 35. ACCESS TO ALL THE SUPPLEMENTAL BOOKS

		Male		Female		Total	
DO YOU HAVE OR HAVE ACCESS TO ALL THE SUPPLEMENTAL BOOKS?	Yes	86	44%	96	48%	182	46%
	No	108	56%	104	52%	212	54%
	Don't Know	0	0%	0	0%	0	0%
	No Response	0	0%	0	0%	0	0%

TABLE 36. GENDER EFFECT OF WTF

		Total	
ARE THE ACHIEVEMENTS MORE POSITIVE FOR BOYS OR FOR GIRLS?	Boys	4	15%
	Girls	21	81%
	Don't Know	0	0%
	No Response	1	4%
	Total	26	100%

TABLE 37: USAID 2012 COHORT PERFORMANCE PER TERM AT SCHOOL

Grades	A	A-	B+	B	B-	C+	C	C-	D+	D	D-	E	Didn't sit for exams	Missing	Total
Term 1 2012	154	263	301	201	121	44	20	5	0	0	0	1	20	6	1136
Term 2 2012	78	173	246	218	182	82	47	18	2	2	2	2	76	8	1136
Term 3 2012	43	116	211	220	190	138	80	31	10	6	2	4	46	39	1136
Term 1 2013	23	80	136	190	233	190	134	74	26	7	5	3	14	21	1,136
Term 2 2013	13	64	127	177	204	186	166	78	37	13	4	6	16	45	1,136
Term 3 2013	14	39	115	175	189	167	127	76	24	8	2	1	17	173	1127
Term 1 2014	5	34	66	152	216	221	163	104	43	13	6	2	14	97	1,136

TABLE 38 : 2013 COHORT PERFORMANCE PER TERM AT SCHOOL

Grades	A	A-	B+	B	B-	C+	C	C-	D+	D	D-	E	Did not sit for exams	Missing	Total
Term 1 2013	297	385	383	218	104	41	13	9	2	0	1	1	45	43	1,542
Term 2 2013	86	222	339	327	251	139	62	17	14	5	6	5	12	57	1,542
Term 3 2013	46	152	245	281	268	163	98	38	15	4	2	2	15	204	1533
Term 1 2014	16	61	169	272	293	248	196	65	51	20	8	3	17	123	1,542

ANNEX 4: EVALUATION METHODOLOGY AND WORKPLAN

Executive Summary

Poverty and effects of Human Immunodeficiency Virus/Acquired Immunodeficiency Syndrome (HIV/AIDS) rates are thought to contribute to a stagnant secondary school attainment rate among Kenyan students. The “Education Sector Policy for HIV and AIDS,” launched by the Kenyan Ministry of Education, Science and Technology (MOEST), emphasizes the need to ‘mobilize communities and support HIV infected and/or affected and commits the Government of Kenya (GOK) to collaborate with ...development partners... private sector and other stakeholders to address the needs of orphans and vulnerable children (OVC) and learners living with HIV/AIDS to enhance completion of their education’. In order to encourage educational institutions to assist children orphaned due to the HIV/AIDS pandemic in completing their education, and with the belief that such education will help reduce the risk of infection, the U.S. Government, through funding from the Presidents Emergency Plan for AIDS Relief (PEPFAR), funded the OVC Scholarship and Leadership Program (the Wings to Fly Program)⁹. The Wings to Fly (WtF) scholarship program is a public-private partnership between USAID, Equity Group Foundation (EGF), MasterCard Foundation (MCF), U.K. Department for International Development (UKaid), KfW Bankengruppe (KfW), and other private sponsors. The activity provides full scholarships that include tuition, room and board to enable academically gifted but economically disadvantaged and vulnerable children to pursue secondary and tertiary education. The selected students receive leadership training, career guidance, and personal mentoring to help them maximize their potential.

This external evaluation comes at the chronological mid-point of the Wings to Fly activity. It is a mid-term performance evaluation whose objectives are to help determine what activities are working well and why, and to make modifications and mid-course corrections, if necessary. The evaluation will provide relevant findings, conclusions, and recommendations that assist USAID and EGF to learn what is being accomplished, whether processes are geared toward reaching intended beneficiaries and how the activity can report adequately within the new USAID results framework.

The evaluation questions include:

1. How equitable was the process in informing and selecting vulnerable youth from geographically diverse areas to participate in the scholarship program?
2. What were the key elements of success and main challenges in providing financial and psychosocial support to vulnerable children?
3. As the activity continues, and in light of USAID's new results framework, what type of monitoring and reporting would best support regular assessment of achievement towards the mission's objective?

The evaluation will be conducted by a two person team, including one international team leader and one national team member. A local survey firm, Research Solutions Africa (RSA), was hired by MSI to

⁹ Statement of Objectives (SOO) for Wings to Fly Mid-term Evaluation

conduct a survey of USAID Wings to Fly scholars entering the program in 2012 as well as head teachers in schools with scholars. In addition to the survey, the evaluation will employ a mix of data collection methods including: desk review, key informant interviews, and group discussions. The evaluation team will speak with stakeholders at USAID, EGF, other sponsors, the selection boards, and EGF at the branch level. Qualitative and quantitative data generated during the evaluation will be analyzed using a mix of descriptive statistics, content analysis, and trend analysis.

I. Background Information

1.1 Identifying Information

1. Program: Education and Youth
2. Activity Title: OVC Scholarship and Leadership Program (Wings to Fly)
3. Award Number: AID-623-G-12-00001
4. Award Dates: November 10, 2011 to November 9, 2016
5. Funding: 26.4 million US
6. Implementing Organization: Equity Group Foundation
7. Contracting Officer's Representative (COR): Lucy Kithome

1.2 Activity Description

High poverty levels and effects of HIV/AIDS are some of the factors that bar Kenyan¹⁰ primary school graduates from joining secondary schools. The “Education Sector Policy for HIV and AIDS” launched by the Kenya MOEST in 2013 emphasizes the need to ‘mobilize communities and support HIV infected and/or affected’¹¹. The policy further commits the GOK to ‘collaborate with ...development partners... private sector and other stakeholders to address the needs of orphans and vulnerable children (OVC) and learners living with HIV/AIDS to enhance completion of their education’.

In order to encourage educational institutions to assist children orphaned due to the HIV/AIDS pandemic in completing their education, and with the belief that such education will help reduce the risk of infection, the U.S Government through funding from PEPFAR, awarded the OVC Scholarship and Leadership Program (the Wings to Fly Program)¹². The Wings to Fly scholarship program is a public-private partnership between USAID, EGF, MCF, UKaid, KfW and other partners. The activity provides full scholarships that include tuition, room and board to enable academically gifted but economically disadvantaged and vulnerable children to pursue secondary and tertiary education. The selected young people also receive leadership training, career guidance, and personal mentoring to help them maximize their potential.

¹⁰ According to the Wings to Fly SOO, despite increases in primary school enrollment, educational advancement has remained stagnant with only one in four youth of official secondary-school age accessing secondary school education.

¹¹ Education Sector Policy for HIV and AIDS, p.22

¹² SOO for Wings to Fly Mid-term Evaluation

The Wings to Fly activity is implemented by a prime partner, EGF and reaches scholars from across the country. It is an initiative led by Equity Bank who reached out to other donors for support. Current funding from all partners stands at \$128 million, of which USAID contributes 20.7 percent using PEPFAR funds, and as such is one of the lead donors. Overall, the Wings to Fly partnership is supporting 10,000 young Kenyans with access to a full secondary education by 2019.¹³ According to the activity description, USAID’s contribution of \$26.4 million aims to support 2,678 Wings to Fly scholars over a five year period; including 500¹⁴ scholars inherited from a previous scholarship program. The activity has no sub partners.

1.3 Development Context

Activity Objectives and Development Hypothesis

The Wings to Fly activity provides full scholarships that include tuition, room and board to academically gifted but economically disadvantaged and vulnerable¹⁵ children to pursue secondary and tertiary education. The selected young people also receive leadership training, career guidance, and personal mentoring to help them maximize their potential. It is theorized that if this support is given, then access to secondary and tertiary education for marginalized¹⁶ youth will be increased. This activity falls under development objective (DO) 2 of the Country Development Cooperation Strategy (CDCS) “*health and human capacity strengthened,*” Intermediate Result (IR) 2.2 “*increased use of quality educational services.*”

Per the July 2014 performance monitoring plan (PMP), EGF reports on twelve indicators which fall under two strategic objectives (SO): increased access to secondary education and improved leadership capabilities for OVC, and increased access to tertiary education by OVC. Wings to Fly reports on two indicators in the performance progress report (PPR): “*number of learners enrolled in secondary schools or equivalent non-school based settings with USG support, disaggregated by sex*” and “*number of individuals from underserved and/or disadvantaged groups accessing tertiary education programs.*”



¹³ 3,583 funded by MCF, 590 by UKaid and 350 by KfW, 12 by Vitol Foundation and 1,006 by other sponsors

¹⁴ This evaluation focuses on scholarship initiatives occurring within the award period starting November 2011.

¹⁵ The following selection criteria are used to define vulnerability: children who have lost one or both parents and have no guardian or sponsor to provide for their education, children whose parents are physically or mentally disabled and are unable to educate their children, children whose parents are living with HIV/AIDS or other chronic, debilitating illness and are unable to educate their children, children from families affected by natural disasters such as flooding, drought, and famine or civil conflict and are unable to educate their children, children who have suffered neglect and/or abandonment, children with parents living under extreme poverty and are unable to educate their children.

¹⁶ While the CDCS describes the target beneficiaries as “marginalized youth”, USAID and EGF activity documents utilize the term “vulnerable youth”.

Target Areas and Groups

One of the defining features of the Wings to Fly initiative is meant to be the transparency and inclusivity of the selection process. The program is designed to be gender and location balanced, and the application is open to any gifted student who comes from a financially disadvantaged background. The program targets high achieving yet needy (orphan or vulnerable) students from all districts in Kenya. Their scholastic achievement is assessed during student performance at the nationally administered Kenya Certificate of Primary Education Examinations (KCPE).

Scholarship application process

In order to reach students in each district EGF leverages its local presence to create an awareness of the program using various communication channels. This includes making announcements in public forums such as religious gatherings in churches and mosques; public barazas¹⁷ in the villages; use of mass media including radio; posters mounted in public places such as towns, market centers, academic institutions; as well as letters to key opinion leaders such as local administration religious leaders and head teachers of schools.

Selection is managed through a District¹⁸ Scholarship Selection Board (DSSB), which has been institutionalized and serves as an auxiliary organ of the EGF. Each board is made up of an odd number of local representative stakeholders including: heads of primary & secondary schools associations; district social development officers; religious leaders; the Constituency Development Fund (CDF) chair, local women's youth leaders; equity agent representatives, and civic administration. The board is mandated to ensure objectivity in the selection process, making it possible to verify applications through application criteria and a home visit also based on a uniform set of criteria.

1.4 Existing Information Sources

Information has been received from USAID and EGF; however, there are items that have been requested yet to be received. These include:

- Memorandum of Understanding and cooperative agreement between EGF/USAID;
- Student lists, including variables on gender, student name, branch name, class, form, school name, and school location (by inductee year if possible);
- PMPs with targets and actual values;
- Program Description;
- Annual work-plans;
- USAID trip reports;
- Termly¹⁹ progress reports;
- Workshop reports;

¹⁷ Barazas are community group meetings.

¹⁸ Districts according to EGF are geographic/ administrative units based on the 1998 Kenya government administrative boundaries.

¹⁹ In Kenya, the school year is divided into three terms. The reports prepared per term are referred to as "termly."

- Annual congress reports;
- Program brochures;
- Training DVD;
- Data on student applicants and selected scholars
- Detailed documentation on the application and vulnerability assessment process;
- Detailed documentation on the selection process including key stakeholders involvement *(partially received, however detailed communications on County selection quotas for 2014 and 2015 not yet received from EGF)*
- Previous evaluations of program;
- Complaints by students and head teachers;
- Detailed data on the communications/ announcements used to inform potential students *(not yet received from EGF);* and

Information not yet received was requested from EGF by MSI February 27, 2015.

2. Evaluation Rationale

2.1 Evaluation Purpose and Audience

This external evaluation comes at the chronological mid-point of the Wings to Fly activity. It is a mid-term evaluation whose objectives are to help determine what activities are working well and why, and to make modifications and mid-course corrections, if necessary. Donors are making decisions in the coming months about how the activity is performing so they can make better informed funding decisions. The evaluation should provide pertinent statistics, information and judgments that assist USAID and EGF to learn what is being accomplished, whether processes are geared toward reaching intended beneficiaries and how the activity can report adequately within the new USAID results framework.

2.2 Evaluation Audience

The audience for this evaluation is USAID/Kenya for the purpose of instituting necessary mid-course corrections. It will also be shared with the MOEST, MasterCard Foundation, UKaid, KfW, PEPFAR and EGF to assist them in making further funding and scale up decisions. Findings will be disseminated through preparation of a one-page factsheet by MSI and USAID arranged stakeholder workshops. As appropriate, USAID may share findings with other partners and stakeholders that are implementing or planning to implement scholarship programs as well as other private sector organizations that may be considering joining the program. Dissemination methods may include press releases, tailored reports, or workshops and should be planned in detail through a Wings to Fly evaluation dissemination strategy.

2.3 Evaluation Questions

All questions listed are important to achieving the purpose listed above.

1. How equitable²⁰ was the process in informing and selecting vulnerable youth from geographically diverse areas to participate in the scholarship program?

Using multiple methods, this question will assess whether the activity is reaching the intended OVC beneficiaries in geographically diverse areas. The evaluators will look at available EGF documentation on how the communications and outreach approach was managed to ensure wide coverage in 47 counties and 116 districts. Secondary data analysis will give us characteristics of applicants versus those selected. The evaluators will review the vulnerability assessment process, interview key stakeholders involved in the selection process, and hear from scholars and teachers. This mixed method approach will help to determine whether the process was effective in terms of ensuring equitable access to the scholarship activity.

2. What were the key elements of success and main challenges in providing financial and psychosocial²¹ support to vulnerable children?

To understand the key elements of success and main challenges, the evaluation team will review and compare intended versus actual results from activity and performance monitoring plans, coupled with key informant interviews (KII) and survey responses. This question will seek to understand students' access to secondary and tertiary education, had they not received EGF support. This question will help to understand whether all activity components are being implemented as planned and look at program outputs and outcome to date. This question also seeks to understand challenges and successes disaggregated by sex and respondent type. Measurement of program success will include scholar's academic performance/completion, efficiency in timing, stakeholder satisfaction and critiques; as well as participation in key program components such as mentorship/leadership. This will support any adjustments to strengthen the program for future years and follow-on iterations of the program.

3. As the activity continues, and in light of USAID's new results framework, what type of monitoring and reporting would best support regular assessment of achievement towards the mission's objective?

This question seeks to identify a monitoring approach that would best fit the new USAID/Kenya CDCS results framework. The question will review existing PMP monitoring data, along with other collected data and make conclusions and recommendations on activity level data that can support IR 2.2 "*increased use of quality educational services*". USAID and other donor activity managers will be interviewed on the types of information that would be most useful in monitoring progress and change for this type of program.

²⁰ Equitable defined as fair and impartial.

²¹ According to PEPFAR's Guidance for Orphans and Vulnerable Children Programming, psychosocial support aims to provide stable and affectionate environments for OVC's. This type of support may include interventions such as parent and family support programs, peer and social group intervention, mentorship programs and community caregiver support.

3. Evaluation Design, Methodology and Analysis

3.1 Evaluation Design

This evaluation design uses a mixed-method approach, covering a selection of counties in Kenya including KIIs and group discussions (GDs) with key stakeholders and a representative survey of scholars and head teachers. Instruments will be designed in order to answer the three evaluation questions and care will be taken to limit the number of questions asked in order to limit respondent burden.

A matrix for associating data collection and analysis methods with evaluation questions is provided in Table 2, Data Collection Methods and Analysis Methods for the Three Evaluation Questions and includes appropriate methodological choices and analytical approaches. Approved survey instruments are found in Annex D, KII and GD instruments can be found in Annex E.

3.2 Data Collection and Analysis Methods

This evaluation includes a blend of data collection and analysis methods. These include review and analysis of secondary sources, key informant interviews, group discussions, and a survey of scholars and head teachers. In terms of a desk review, the evaluation consultants will be responsible for reviewing activity documentation as provided by MSI/USAID and EGF. The evaluators will also be responsible for using online and print resources to inform answers to evaluation questions.

Key secondary sources include the following:

1. PMP target and actual reporting;
2. Memorandums of Understanding;
3. Program materials;
4. Progress reports, three per year;
5. Activity description;
6. Annual work-plans;
7. Information on selection board composition and training guides for selection boards;
8. Key fields from EGF database of applicants and scholars (which includes scholar bio-data as well as scholar performance data); and
9. Resources on best practices in similar activities including other Global Development Alliance (GDA), activities, or similar scholarship programs.

KIIs will be conducted with USAID activity managers, EGF leadership and program staff, branch managers involved in selection of scholars and mentoring of students as well as relevant MOEST actors. Other contributors to the program, such as the MasterCard Foundation and KfW will also be interviewed.

Group discussions with the DSSB selection board members in Isiolo, Meru, Nairobi, Kiambu, and Homa Bay will provide information on their knowledge and attitude towards the selection process, as well as examples of program successes and challenges. Group discussion locations were purposively selected, using information from USAID on locations that had and had not received complaints about the

selection process. Questions for the group discussion will be informed through a desk review. Group discussions will be facilitated by the evaluation team, with note-taking support from MSI and RSA.

A preliminary and illustrative list of KIIs and Group Discussions can be found in Table I. The final interview list may include additional relevant interviewees identified by evaluators and/or USAID during the detailed work-planning phase. Also, depending on interviewee availability, some interviews may not be feasible.

Table: Illustrative List of KIIs and GDs

KIIs	Group Discussions
EGF Chairman- Dr. James Mwangi, or designated responsible	6 Group discussions with DSSBs. (1 each in Isiolo, Meru, Nairobi, Kiambu and Homa Bay). Each discussion will have between 7-13 participants, depending on the size of the DSSB.
EGF Managing Director- Helen Gichoi, or designated responsible	
Acting EGF Education General Manager- Philemon Kibiru	
MOEST Director for Policy- Onesmus Kiminza Director of Field Services- Margaret Murage Director Secondary and Tertiary- Robert Masese Director Basic Education- Margaret Okemo Director of Quality Services- Mr. Mwinyipembe	
USAID activity manager- Lucy Kithomi USAID- OVC/PEPFAR- Rose Mokaya USAID- PEPFAR- Maurice Maina	
Master Card Foundation relevant staff- Ivy Mwai, Mastercard Programme Manager	
KfW relevant staff	
UKAID relevant staff	
EGF Branch Managers in Isiolo, Meru, Nairobi, Kiambu and Homa Bay (6 KIIs)	
Key staff from USAID OVC Implementing partners. These will be email and/ or phone interviews.	

In addition to the March 2015 qualitative interviews and group discussions a survey of secondary scholars, head teachers and EGF graduates was conducted by MSI/RSA starting January 19th to February 6th. Using a sample frame of 680 schools with over 2,500 USAID sponsored scholars, a nationally representative sample of USAID supported WtF scholars, head teachers and EGF graduates were

selected for interview. The sample frame was split into two strata, a) schools with fewer than 4 scholars (60 schools in which all WtF scholars were surveyed) and b) schools with 4 or more scholars (90 schools in which 3 WtF scholars were selected at random). In mixed schools, where possible, equal numbers of boys and girls were surveyed. The final selected sample included 390 secondary students and 150 head teachers from 150 schools. An additional 50 EGF graduates (males, females equally represented) were interviewed by phone interview using a contact list provided by EGF. These graduates were selected randomly and interviews were arranged based on respondent availability.

Survey results produced results at a confidence of at least 90% and a margin of error under 10% for all respondent groups. Additional details on the secondary scholar, head-teacher and graduate scholar survey’s final sample and key findings will be presented in the evaluation report. The results provide insight into the head teacher’s and scholar’s EGF experience, perceptions and attitudes towards the application and selection processes as well as their perception of program successes and challenges.

Information from the desk review, interviews, group discussions, and survey findings will be integrated using question by method matrices to facilitate comparisons in order to identify common trends and themes related to program application and selection, successes and challenges as well as possible suggestions for improved reporting. The survey, group discussions and interviews will allow researchers to examine the knowledge, attitudes and perceptions of students, head teachers, program managers and implementers, to identify divergent or convergent trends

Table: Data Collection Methods and Analysis Methods for the Three Evaluation Questions

Evaluation Question							
1) How equitable was the process in informing and selecting vulnerable youth from geographically diverse areas to participate in the scholarship program?							
Data Collection Methods	Secondary Data	KII	Mini-Survey	Group Discussions			
	X	X	X	X			
<p><i>Description of how methods chosen will generate the data needed to answer this question; why these methods were selected</i></p> <p>Secondary data from activity data collection (EGF Application Information Management System) will yield information such as the number of applicants and selected, their vulnerability characteristics, geographic location, gender and other characteristics used during the application and selection process. This data was selected as a source because it is available, relevant, and representative of the activity and provides key information on the activity’s direct beneficiaries. There will be no survey of applicants who were not selected.</p> <p>KIIs with key stakeholders such as EGF leadership, and program staff, branch managers directly involved in selection of scholars and mentoring of students and well as relevant MOEST actors will offer insight into their knowledge about the competitive Kenyan education system, and their perceptions of the strengths and limitations of the application and selection process. KIIs will yield narrative content which provides in depth insight to identify qualitative trends.</p> <p>GDs with selection board members from selected areas who are knowledgeable and comfortable enough with each other so they carry on a conversation guided by the evaluation team. GDs will allow for deep insight into the</p>							

knowledge and perceptions of selection boards, but at a lower cost than the KIIs. A mini-survey of Aphia-Plus program managers will be administered by email to understand the linkages between Aphia-Plus OVC programming and Wings to Fly.

Survey interviews with head teachers, students will allow for statistically representative reporting about the knowledge, perceptions and attitudes of scholars and head teachers.

Data Analysis Methods	Frequency Distribution	Cross-Tabs	Content Analysis	Comparison	Convergence / Divergence analysis	Mixed Method data integration
	X	X	X	X	X	

Description of how methods chosen will be used with the various types of data collected; why these methods were selected.

Frequency distributions and cross-tabulations will allow researchers to look into the applicant characteristics versus characteristics of the selected, and into gender differentials in terms of applicant's sex, KCPE scores, and location. These analysis methods are data driven and selected for analysis because they are relevant to the activity. Through EGF administrative data, some of the tables that can be generated include, but are not limited to: applicants by place of origin (county, EGF districts) (m/f), applicants by vulnerability categories (m/f), KCPE scores by applicants (m/f), KCPE scores per selected participants (m/f), and these scores per county and province.

Survey results will yield content for analysis and descriptive statistics on perceptions of program fairness, success and challenges (m/f), etc.

Examples of comparisons to be generated during a desk review (pending receipt of relevant information) include: Planned versus actual targets in PMP, comparison of number of males vs. females applicants, number of male/female applicants versus number of female/male selected.

Key themes and relevant content emerging during interviews and group discussions about knowledge, perceptions and attitudes, and sometimes practices of key stakeholders related to the application and selection process will be analyzed and allow for convergent/ divergent trends to be identified. Head teacher and student surveys will examine emerging trends about their experience, attitudes and perceptions related to the application and selection processes

A mixed method approach will contribute to developing the overall conclusions.

Evaluation Question

2) What were the key elements of success and main challenges in providing financial and psychosocial support to vulnerable children?

Data Collection Methods	Secondary Data	KII	Survey	Group Discussion
	X	X	X	X

Describe how methods chosen will generate the data needed to answer this question; why these methods were selected

Routinely reported secondary data and termly reporting from program implementers on key performance indicators will provide an overview of the program over time. Key informant interviews with and group discussions with stakeholders, as well as scholar and head teacher surveys will allow evaluators to understand their perceptions

of program success and challenges.

Data Analysis Methods	Frequency Distribution	Cross-Tabs	Content Analysis	Comparison			
	X	X	X	X			

Description of how methods chosen will be used with the various types of data collected; why these methods were selected.

Survey data will yield frequency distributions and cross tabulations revealing attitudes towards the program, perceptions of success and obstacles, as well as specific aspects of program experience of scholars (e.g. mentoring utilization, leadership involvement) and head teachers disaggregated by sex.

Regarding secondary data analysis, PMP performance indicators will be reviewed and actuals and targets compared.

In terms of content analysis and comparisons, perceptions of program success and obstacles will be compared between scholars, teachers, and activity staff. To identify gender differentials the following comparisons will be made: academic achievement of students (male vs. female), KCPE scores male vs. female, participation in leadership activities (male vs. female).

Evaluation Question

3) As the activity continues, and in light of USAID's new results framework, what type of monitoring and reporting would best support regular assessment of achievement towards the mission's objective?

Data Collection Methods	Secondary Data	KII	Survey	Group Discussion			
	X	X	X	X			

Describe how methods chosen will generate the data needed to answer this question; why these methods were selected

Review of the current WtF monitoring and reporting framework as compared to the USAID/Kenya CDCS reporting requirements will help in identifying reporting and monitoring gaps. KIIs with key stakeholders (EGF, USAID, MCF, etc.) will yield information on the types of reporting useful for management decisions during previous phases of the program, and will contribute in the selection of indicators moving forward. Group discussion responses will help to guide the formulation of indicators, both in terms of definition, but also data collection approach. Survey interviews with head teachers will also contribute to identifying monitoring and reporting solutions.

Data Analysis Methods	Frequency Distribution	Cross-Tabs	Comparison	Content Analysis	Mixed Method Data Integration		
	X	X	X	X	X		

Describe how methods chosen will be used with the various types of data collected; why these methods were selected.

Survey data will yield frequency distributions and cross tabulations revealing successes and challenges in effective project monitoring and reporting. Asking key stakeholders about their data collection and reporting process, their reporting needs, coupled with analysis of information gaps will yield conclusions and recommendations for improved monitoring and reporting.

Content analysis of perceptions and recommendations from program staff, head teachers, and beneficiaries will be compared in order to propose indicators to consider for an improved monitoring and reporting approach.

3.3 Gender

As per Automated Directives System (ADS) 203.3.1.5, gender will be considered when looking at all questions. Records on applicants and selected scholars will be disaggregated by sex, and survey results also disaggregated by sex. All evaluation questions will include data disaggregated by sex, and examine the gender differential in access as well as any differential in results and/or benefits.

Table: Evaluation Questions, Gender Data and Differentials

Evaluation Questions	Disaggregate by Sex (M/F)	Information on Gender Specific or Differential Effects Expected
How equitable was the process in informing and selecting vulnerable youth from geographically diverse areas to participate in the scholarship program?	Administrative data on applications and selected scholars will be disaggregated by sex. This includes: Number of applicants selected, compared to the number of applicants. (m/f) KCPE scores (m/f) Number of applicants (m/f) by EGF district, county of origin Scholar and head teacher perception of equity in the application and selection process.	Program design documents, administrative data, as well as the beneficiary survey will yield information on actual and perceived gender differentials in the application and selection process. This is an important question to examine because of the challenges in finding vulnerable girls who “make the mark.” Activity staff will be interviewed to understand how the differential results in KCPE achievement are used to design the quota system targeted to increase selection of girls.
What were the key elements of success and main challenges in providing financial and psychosocial support to vulnerable children?	Beneficiary perceptions will be disaggregated by sex Descriptive Stats: Academic achievement (m/f)	This will include performance monitoring data, as well as scholar/ head teacher and activity stakeholder perception as to whether there are differences in the way the activity supports and affects boys and girls. It is

	<p>Top achievers by sex, Leadership program participants (m/f)</p> <p>Drop-out frequency (m/f)</p> <p>Scholar and head teacher perception of differential treatment (m/f)</p>	<p>interesting to consider that per EGF, there are social pressures that emphasize male education rather than female education, and according to USAID, there is also a public perception that girls are favored at the expense of boys who are from vulnerable groups.</p>
<p>As the activity continues, and in light of USAID's new results framework, what type of monitoring and reporting would best support regular assessment of achievement towards the mission's objective?</p>	<p>If new indicators are recommended, evaluators to propose indicators that are sex-disaggregated.</p>	<p>Proposed indicators and reporting to include measurement of gender differentials.</p>

3.4 Methodological Strengths and Limitations

Strengths include the use of both quantitative and qualitative methods, constituting the mixed methods approach and including triangulation of evidence between data types and sources. The survey results will yield nationally representative data on WtF secondary scholars and head teachers, with a confidence of 90-95%.

There are a few remaining data requests from EGF, without which analysis will be limited to the information available. EGF has also indicated that their application is likely an underestimate of the total universe of applicants. Additionally, there was no existing baseline done of students at the onset of the program, which could be considered a limitation. In as much as possible, MSI/RSA made KII and GD arrangements directly with EG branch managers and DSSB members, however it was important that EGF/HQ participate in mobilization by corresponding with branch managers and encouraging participation. The expected presence of EGF branch staff at all DSSB group discussions could bias or inhibit participants remarks, consequently the evaluation team will pursue further questions with select DSSB members either by phone or in person after group discussions.

4. Evaluation Products

4.1 Deliverables

The following dates are illustrative as they are based on a start date of November 2014. Task Order approval on or before October 10 is important for a timely and successful implementation. In order to have adequate time for vetting and testing, survey, KII and GD instruments will be submitted to USAID in November in order for the survey instruments to be ready for the January 2015 survey and March 2015 qualitative interviews.

Deliverable	Responsible Party	Dates
Up to date contact information, and introduction to head teachers, equity agents, selection boards and other sponsors selected for interview. Contact information of relevant MOEST interviewees.	EGF/ USAID	November 7
All preliminary tools shared with USAID. USAID to vet with stakeholders.	MSI	November 12
USAID to issue a letter of introduction to the MOEST introducing MSI and highlighting the evaluation purpose in order for the MOEST to prepare a letter for head masters and county/ local officials.	USAID	November 20
USAID/ stakeholders comments/ approval of preliminary tools.	USAID	November 26
Survey instrument pre-testing and training development.	MSI/RSA	December 1-19
Five weekly reports provided weekly, during survey data collection.	MSI	January 23 January 30 February 6 March 6 March 13
Detailed methodology, workplan and all final instruments to USAID.	MSI	March 2
USAID to approve detailed methodology, workplan and final instruments	USAID	March 5
A half-day (morning) validation session with partners including MOEST, and EGF.	MSI	March 30
Presentation of findings to USAID/ partners	MSI	April 1
Draft report submitted	MSI	April 16
Comments from USAID on draft report	USAID	April 30
MSI/ Kenya respond to comments and provide final draft	USAID	May 7
USAID approval of final report (and notification of statement of differences)	USAID	May 21
MSI incorporates any statements of difference, if applicable with delivery of raw data on CD	MSI	May 28
USAID approval for DEC submission	USAID	May 31

A detailed breakdown of the process is listed on the next page.

Week 1	<p><u>Desk Review& Instrument Design</u> In order to initiate data collection, the consultants reviewed all available documents from their home base, and prepared preliminary instruments for USAID review. These initial findings have been presented to MSI as part of the Team Planning Meeting. Additional documents identified during fieldwork will be included in the desk review.</p>
Week 2 - 4	<p><u>Instruments shared with USAID</u> Instruments were shared with USAID for forwarding to key stakeholders.</p>
Week 4	<p><u>USAID and stakeholder comments on instruments back to MSI</u></p>
Week 3-10	<p><u>Survey tool pretesting, fieldwork planning and consent form distribution</u> Tools tested and detailed field work plans developed.</p>
Week 11 - 15	<p><u>Survey fieldwork</u> Survey interviews with scholars and head teachers using tested tools. Three weekly reports were shared with USAID during survey fieldwork.</p>
Week 17	<p><u>Team Planning Meeting (TPM)</u> Team planning meeting was held February 23-27, 2015.</p> <p>The outcomes of the team planning included:</p> <ul style="list-style-type: none"> • Presentation of the initial findings of the document review by evaluation question; • Clarification of team members' roles and responsibilities; • Establishment of a team atmosphere, share individual working styles, and agree on procedures for resolving differences of opinion; • Review of the final evaluation questions; • Review and finalization of the assignment timeline and share with USAID; • Development of data collection and analysis methods, instruments, tools, and guidelines; • Review and clarification of any logistical and administrative procedures for the assignment; • Development of a preliminary draft outline of the team's report; and • Assignment of drafting responsibilities for the final report.
Week 18	<p><u>Workplan and Methodology</u> During the TPM, the consultants finalized the detailed work plan including the methodology (evaluation design, tools) and schedule to be used in the evaluation.</p>
Weeks 18 - 20	<p><u>Qualitative Data Collection</u> During qualitative data collection, the evaluation team will present weekly reports to MSI. The report will discuss ongoing activities during the course of the evaluation fieldwork describing the process, any issues encountered, and relevant emerging findings by evaluation question.</p>
Week 20	<p><u>Validation session with partners</u> Preliminary findings, conclusions, recommendations shared with key stakeholders including EGF and MOEST</p>

Week 21 - 22	<u>Data Analysis/Presentation to USAID</u> The consultants will analyze both the quantitative and qualitative data in this week. An MSI-only workshop on mapping findings, conclusions and recommendations will also take place during this period. The consultant will present findings, conclusions and recommendations for all evaluation questions.
Week 23	<u>Report Writing</u>
Week 24	<u>Draft Evaluation Report to USAID</u> The written report should clearly describe findings, conclusions, and recommendations, fully supported by triangulated evidence.
Week 26	<u>USAID Comments due to MSI</u>
Week 27	<u>Final Evaluation Report to USAID</u> MSI responds to USAID comments and provides final evaluation report.
Week 28	<u>USAID Final Approval/ Statement of Differences</u> USAID approval of final report and notification of statement of differences, as appropriate.
Week 29	<u>Statement of Differences Incorporation</u> MSI to incorporate statement of differences into final report.
Week 30	<u>USAID approval for DEC</u>

The evaluation report will adhere to USAID Evaluation Policy and as such all raw quantitative data be shared with USAID. Note: Should additional substantive revisions/drafts be required from the evaluation team, additional LOE may be required.

4.2 Reporting Guidelines

The format for the evaluation report shall be as follows, and the report should be a maximum of 30 pages not including annexes or table of contents. The report format should be restricted to Microsoft products and 12-point font should be used throughout the body of the report, with 1” page margins. An electronic copy in MS Word shall be submitted. In addition, all quantitative data collected by the evaluation shall be provided to USAID in an electronic file in an easily readable format; organized and fully documented for use by those not fully familiar with the activity or the evaluation. If the report contains any potentially procurement or politically sensitive information, a second version report excluding this information shall be submitted (also electronically, in English). Below represents a guideline for the report structure.

- a. Table of Contents;
- b. **Executive Summary**—concisely states the most salient findings and recommendations (2 pgs.);
- c. **Evaluation Purpose and Evaluation Questions**—purpose, audience, and synopsis of task (2-4 pgs.);
- d. **Activity Background**—brief overview of development problem, USAID activity strategy and activities implemented to address the problem, and purpose of the evaluation (2 pgs.);
- e. **Evaluation Design, Methods, Limitations**—describes evaluation methods, including constraints and gaps (2 pgs.);

- f. **Findings/Conclusions/Recommendations**—4-7 pages for each evaluation question (12-22 pgs. total);
- g. **Annexes** that document the evaluation methods, schedules, interview lists and tables should be succinct, pertinent and readable. These include references to bibliographical documentation, meetings, interviews and group discussions.

The evaluation team should be aware that reporting for this evaluation must conform to USAID standards as set forth below and should be submitted using USAID’s evaluation report template guidance on structure and branding:

http://usaidlearninglab.org/sites/default/files/resource/files/USAID_Sample_Evaluation_Report_Template_Final.doc

5. Evaluation Team Composition

The evaluation team is composed of two evaluators, one international and one local. The team leader will be responsible for all aspects of the evaluation, supported by a local expert in the Kenyan educational system. The two-member team informed the survey, and will conduct all group discussions and key informant interviews, as well as analyze the data and write the report.

6. Evaluation Management

6.1 Logistics

MSI will assist in arranging meetings with key stakeholders identified prior to the initiation of field work. MSI will be responsible for arranging vehicle rental and drivers as needed for site visits around Nairobi and the field. MSI will also provide hotel arrangements, office space, internet access, printing and photocopying and will be responsible for all payments to vendors directly after team members arrive in country. MSI will be responsible for ensuring quality control of RSA on the survey activities.

EGF will introduce and provide contact information of head teachers, selection boards and branch managers as needed for fieldwork, as well as other development partners contributing to the Wings to Fly activity. RSA will support the mobilization of group discussions in Nairobi, Isiolo, Meru, Kiambu, Kisumu and Homa Bay.

USAID will provide contact information and introduction to MOEST officials.

6.2 Schedule

The process began with remote based document review and instrument development in order to produce survey, KII and GD instruments prior to fieldwork. Survey occurred between January 19 and February 11. Key informant interviews and group discussions are to be carried out in Isiolo, Meru, Kisumu, Homa Bay, Kiambu, and Nairobi over a period of approximately 2.5 weeks starting March 4. An initial findings presentation will be made during week 22 and the final report after revisions will be submitted in week 27. Exact scheduling and division of labor will be reviewed during the Team Planning Meeting and presented in the final Methodology and Workplan.

Annex A: Statement of Objectives

STATEMENT OF OBJECTIVES (S00) Under Contract AID-623-I-12-00001

Project Name: OVC Scholarship and Leadership Program (Wings to Fly)

Implementing Partner: Equity Group Foundation (EGF)

Task Order Number: TBD

Project COR/AOR: Lucy Kithome

Type of Evaluation: Mid-Term Performance Evaluation

Period to be evaluated: November 2011 to June 2014

Completed by: September 30, 2014

ATTACHMENTS:

1. **Memorandum of Understanding (MOU) between USAID & EQUITY**
2. **PWC on continuing students**
3. **PWC students lists as of November 2011**
4. **Branding and Marking plan**

A. BACKGROUND

In 2003, the Government of Kenya made primary school education free which has seen the enrollment rates in primary school almost double since then. Despite increased primary school enrollment, education advancement has been limited with only one to four youth of official secondary-school age accessing secondary school education. Education advancement has been greatly weakened as a result of AIDS related problems, foremost being a major increase in poverty levels and inability to pay school fees. In the “Education Sector Policy for HIV and AIDS” launched by the Kenya Ministry of Education, Science and Technology (MOEST) in 2013 it states that “it emphasizes the need to ‘mobilize communities support HIV infected and/or affected (p.22). The Policy further commits the Government of Kenya to ‘collaborate with ...development partners... private sector and other stakeholders to address the needs of OVC and learners living with HIV to enhance completion of their education’ (p. 22). Therefore, in order to encourage education institutions to assist children orphaned due to HIV/AIDS pandemic to complete their education, and with the belief that such education will help reduce the risk of infection, the U.S Government through funding from the Presidents Emergency Plan for AIDS Relief (PEPFAR), funded the OVC Scholarship and Leadership Program (the Wings to Fly Program).

The Economic Survey for 2014 shows that many children are not able to transition from primary to secondary school. For instance in 2013 there were 10.2 million children enrolled in primary school. At the same time there were only 2.1 million enrolled in secondary schools (Kenya: Economic Survey, 2014, p.11). This means that although secondary school enrollment has been increasing steadily, there is

still a big wastage and many children are not able to transition to secondary school. High poverty levels and effects of HIV/Aids are some of the factors that bar many primary school leavers from joining secondary schools.

The Wings to Fly scholarship program is a public-private partnership between USAID, Equity Group Foundation, Mastercard Foundation (MCF), UKaid, KfW and other partners. The project provides full scholarships that include tuition, room, and board to enable academically gifted but economically disadvantaged and vulnerable children to pursue secondary and tertiary education. The selected young people also receive leadership training, career guidance, and personal mentoring to help them maximize their potential. USAID's contribution of \$26.5 million supports 2,678 Wings to Fly scholars over a five year period; plus an additional 500 scholars inherited from a previous scholarship program. In total the USAID funding support 3100 scholars. Overall, the Wings to Fly partnership is supporting 8,219 young Kenyans with access to a full secondary education by 2019 (3,583 funded by MCF, 590 by UKAID and 350 by KfW, 12 by Vitol Foundation and 1,006 by others). The program is an initiative of Equity Bank who reached out to other partners to support the program. The current funding from all the partners stand at \$128m of which USAID contributes 20.7% using PEPFAR funds.

USAID is one of the lead donors for the Wings to Fly program and has utilized PEPFAR funds to support the program.

The Wings to Fly project is implemented by prime partner, Equity Group Foundation and reaches scholars from across the country. The project has no sub partners.

B. STATEMENT OF WORK

B.1. Evaluation Purpose

This evaluation will focus on only USAID funded scholars. The demand for provision of scholarships for orphans and vulnerable children is big and therefore it is important to investigate the effectiveness of the scholarship program through a mid-way evaluation in order to inform future decisions on future scholarship programs. The results of this evaluation will be useful to various entities. First, they will be utilized by the USAID/Kenya Office of Population and Health, to make key decisions on future funding for OVC scholarship programs. The Office of Education and Youth will utilize the results to inform decisions on whether to use basic education funds to fund scholarships for OVCs from conflict affected regions of this country, which is goal three of the USAID Global Education Strategy. Equity Group Foundation will use the results to improve implementation of the Wings to Fly Program in the second half of the project's life. Other private sector partners, such as MasterCard Foundation, UKAID and KfW, have shown interest in wanting to allocate more resources into the program. They will find the results of this evaluation useful in informing their future decisions. New partners who have recently shown interest in partnering in the program are interested in knowing how effective the program has been; what is working well and what needs to be improved. In particular the evaluation should investigate and inform on how well each the following components of the scholarship program are working:

- Selection Process;
- Scholarship component: tuition, room, board and provision of essential school commodities and upkeep
- Leadership Congress
- Mentoring
- Career guidance and counseling (Academic and Developmental)

B.2 Dissemination and Utilization Plan

The evaluation report will be shared with the Ministry of Education, Science and Technology (MoEST), MasterCard Foundation, DFID, KfW and Equity Group Foundation and will be disseminated through stakeholders' workshops. As appropriate, the findings may be shared with other partners and stakeholders that are implementing or planning to implement scholarship programs as well as other private sector organizations that may be considering joining the partnership.

B.3. Key Evaluation Questions

In developing the proposal/SOW, MSI shall present evaluation questions based on the following areas of interest for analysis and assessment of the Wings to Fly Program to date:

Relevance: Assess the extent to which the program interventions are meeting the needs of the targeted beneficiaries.

- How can the activity mainstream ethnic diversity, especially through the selection process? How can the activity ensure that it is reaching the intended OVC beneficiaries as opposed to benefiting the children of families who are not vulnerable?
- Is the program successfully reaching the intended participants, in terms of socio-demographic background, educational achievement, etc.?
- Are the program activities and interventions relevant and appropriate for these scholars? If not, how could they be improved?

Efficiency – Evaluate the relationship between the quantity, quality, and timeliness of program inputs as related to outputs and outcomes.

- Are all program components and activities being implemented as planned and according to the stated objectives?
- How is the project performing in terms of overall timeliness and cost efficiency?

Effectiveness: Measure the outputs and outcomes generated by the program to date in relation to the stated goals, objectives and desired results, and assess the quality of implementation.

- What are the key program outputs and outcomes to date, as related to the key indicators?
- What are the academic results of scholars? How are they performing comparatively, in terms of boys versus girls, the different kind of school placements (i.e., national, provincial and district; day schools versus boarding schools), etc.? What other factors seem to be influencing scholar performance?
- How is the process of implementation working, including the application, selection, and other support systems? What are the perspectives of key stakeholders regarding implementation processes?

Learning on best practices and program improvement: Capture key successes, best practices, lessons learnt, implementation challenges, constraints, strengths and weaknesses, and provide recommendations for improvement.

- What are the notable or unexpected achievements, challenges, best practices and lessons learnt from the programs?
- What specifically could be done differently in the next phase to enhance effectiveness, efficiency and learning?
- What is the state of the M&E systems and capacity of the project, and are there recommendations for improvement? Are current indicators appropriate and sufficient given project objectives, or are there other recommended indicators and measurement strategies that could be more informative to track going forward?
- What are the perspectives of key stakeholders regarding program effectiveness and outcomes?
- If additional funding is available, what are the best ways to scale up the program?

The team will also review monitoring data results and conduct appropriate levels of independent verification of these results. In this way, it will compare intended versus actual progress made towards achievement of declared results, explore lessons learned, and present findings and practical recommendations for improving program performance.

B.4. Operating Constraints

The Wings to Fly Program is implemented in government national schools from across the country. Some of the schools where our scholars study are in high security risk regions. MSI will review travel warnings and guidance from the US Embassy Regional Security Office (RSO) to visit some of these regions. For instance, North Eastern Regions and parts of Coast Region experience frequent violent extremist attacks. In some cases USAID will need to do a memo to inform the RSO of travel to these areas. Also it is important to note that field visits may be delayed in some regions especially when there is heightened insecurity.

It is worth noting that term 3 (Sept – Nov) is the shortest and the time when the Form 4 national examination (KCSE) occurs. Visiting schools will be restricted around this time and therefore would affect the evaluation exercise. Additionally, term 3 has been a period when more student strikes take place. Ideally, the data collection will take place in Sept and not beyond 1st week of October due KCSE preparations by secondary schools country wide.

B.5. Operational Considerations

MSI should be aware that once a proposal is received, it will be shared for peer review with USAID/Washington for a period of five days, after which some revision may be required before a task order is issued.

B.6. Participation

USAID staff and implementing partner staff do not intend to participate in this evaluation.

B.7. Standards

The task order proposal, including methods, and the final evaluation must be consistent with and meet the standards of USAID's Evaluation Policy

C. PERIOD AND PLACE OF PERFORMANCE

It is anticipated that the evaluation will be completed in approximately four-six weeks, commencing on or around August 30, 2014 up to October 30. In the course of those weeks, the evaluation team should analyze and assess the components of the Wings to Fly Program from start-up to present (November 2011 through August 2014).

A suggested evaluation schedule may include:

Pre-Fieldwork Preparation: Approximately a week to conduct a desk review of all relevant project documents provided by USAID/Kenya and EGF staff. Materials will include, but not be limited to, the original agreement document and modifications, quarterly and annual reports, annual work plans, portfolio reviews, project PMP with the results framework, M&E data and site visit monitoring reports. The team may also refine and/or construct analytic tools and guides for interviews and structured focus group discussion, during this time.

Field Work and Analysis: MSI should propose the work plan, travel schedule, and data collection instruments to USAID/Kenya and other relevant stakeholders. To ensure relevance, validity, and consistency of data collection methods across team members, two days may be spent field-testing the tools prior to the actual data collection. Meetings will also be held with the EGF staff to review additional materials and seek clarifications that may arise.

Each week of the fieldwork may be utilized in the following manner:

Week One: The evaluation team, working closely with USAID/Kenya, may organize for the introductory meetings with USAID/Kenya staff and EGF staff, developing the detailed methodology, clarifying roles of all evaluation team members, finalizing the work plan, and finishing research design and instruments. The team may prepare focus group discussion guides, test the instruments, and start data collection.

Data collection methods would potentially include document and systems review, surveys, focus group discussions, and key informant interviews.

Week Two: may involve data collection and analysis.

Week Three: may involve completing the analysis, conducting a debriefing, and drafting the report in the format delineated below.

Week Four: may involve power point presentation of the report, rewriting the final report and submitting to USAID.

D. DELIVERABLES

The final evaluation report will conform to the standards set forth in the 2011 USAID Evaluation Policy and will include lessons learned. In addition, a one page abstract of the findings/recommendations considered by the evaluation team to be most important for USAID senior managers to be aware of will be submitted with the final report. If the report contains any potentially procurement sensitive information, a second version report excluding this information shall be submitted (also electronically, in English).

All primary source data, both quantitative and qualitative, generated during the course of the evaluation shall be provided to USAID in an electronic file in an easily readable format; organized and fully documented for use by those not fully familiar with the activity or the evaluation. In addition, all background documents collected for this evaluation shall be provided to USAID on CDs, along with the final report.

Deliverables for this evaluation shall include, at a minimum:

- Detailed written evaluation design, methodology, and work plan
- Debriefing of findings prior to drafting the report, to USAID and to EGF staff
- Draft report and abstract
- Final report and abstract
- Power Point presentations to USAID, and Stakeholders

#	Illustrative Deliverables	Illustrative Due Dates
1	Initial meeting between AOR, MSI, relevant USAID personnel (M&E Advisor, Contracting Officer), and evaluation team key personnel to clarify roles and responsibilities, logistical issues, and timelines.	Within first few days of evaluation team arrival in Nairobi
2	Work plan submitted to USAID, including detailed methodologies for each evaluation question.	Within five days of initial meeting
3	Meeting with USAID on work plan where agreement is reached and approval provided (perhaps with changes).	Within five days of submission
4	USAID/Partner/Stakeholder Workshop (1/2 day) to review, refine and accept the work plan and tools	Before field work begins
5	Key Informant Interviews with USAID, development partners, private sector partners, MOEST, USAID OVC Implementing Partners and EGF project staff	On-going
6	Weekly Reports /Updates on progress to date, in person or via email as agreed at the initial meeting, including any issues or problems encountered	Weekly during data collection
7	Initial Analysis Report to present preliminary findings and conclusions of the evaluation to USAID/Kenya and key stakeholders	At end of data collection
8	Draft Evaluation Report for review	No later than 5 days after #7.
9	USAID Comments on Draft Report due to MSI	No later than 14 days

		after #8
10	Final Evaluation Report submitted to USAID along with all raw data, as stated above including Oral Debriefing	No later than 7 days after receiving comments from USAID
10	USAID Comments on or approval of Final Report due to MSI (and notification if statements of difference are expected)	No later than 10 calendar days after #9
11	Statement of Difference sent to MSI if applicable	Two weeks after #10
12	MSI to incorporate any statements of difference into final report (if applicable)	Three business days after #11
13	USAID approval for DEC submission	Two weeks after #12

Note: All days are calendar days, unless otherwise specified.

Attachments:

1. Memorandum of Understanding (MOU) between USAID & EQUITY
2. PWC on continuing students
3. PWC students lists as of November 2011
4. Branding and Marking plan

These documents will be uploaded to the MSI Drop Box.

Annex B: Getting to Answers

Evaluation Questions	Type of Answer/ Evidence Needed (Check one or more, as appropriate)		Methods for Data Collection		Sampling or Selection Approach,(if one is needed)	Data Analysis Methods
			Data Source(s)	Method		
1. How equitable was the process in informing and selecting vulnerable youth from geographically diverse areas to participate in the scholarship program?		Yes/No	Project records	Desk review	N/A	Descriptive statistics/ cross tabulations on applicants (e.g. place of origin, vulnerability, KCPE scores, sex)
	X	Description	Program Beneficiaries, and school head teachers	Survey		
	X	Comparison ²²				
	X	Explanation ²³				
		Selection Board	GD	Purposive sample of KII/ GD locations	Comparisons of applicants vs. selected	
		Key Stakeholders	KII			
2. What were the key elements of success and main challenges in providing financial and psychosocial support to		Yes/No	Activity records	Desk review	N/A	Descriptive statistics on academic achievement, program participation (male /female), by location, by vulnerability status
	X	Description	Program Beneficiaries, and school head teachers	Survey		
	X	Comparison				
	X	Explanation				
		Selection Board	GD			

²²Comparison – to baselines, plans/targets, or to other standards or norms

²³ Explanation – for questions that ask “why” or about the attribution of an effect to a specific intervention (causality)

Evaluation Questions	Type of Answer/ Evidence Needed (Check one or more, as appropriate)		Methods for Data Collection		Sampling or Selection Approach,(if one is needed)	Data Analysis Methods
			Data Source(s)	Method		
vulnerable children?			Key Stakeholders	KII	Purposive sample of KII/ GD locations	Content Analysis on perceptions of program success Mixed Method Analysis Comparisons of perceptions of success and challenges by different target group
3. As the activity continues, and in light of USAID's new results framework, what type of monitoring and reporting would best support regular assessment of achievement towards the mission's objective?		Yes/No	Current PMP, with values	Desk Review	Representative sample of head teachers	Content Analysis- Examination of existing reporting process as described by head teachers, and EGF staff.
	X	Description	Best Practices on M&E for OVC scholarship programs. USAID Kenya CDCS Key Stakeholders	KII Head Teacher Survey	Purposive sample KII of Branch Managers Key stakeholders such as other donors, program managers, MOEST	Divergent/ convergent trend analysis Comparisons of stakeholder perception on reporting practices and requirements Mixed Method Analysis
	X	Comparison				
	X	Explanation				

Annex C: Workplan

EVALUATION TITLE: Mid-term performance evaluation of Wings to Fly

DATES: November 3, 2014 – May 27, 2015

CONSULTANTS: Stuart Leigh and Edwin Ochieng

COR: Trisha Savage

Date	Location	Activity
November 2014		
3-11	Remote	Remote desk review, preliminary instrument development.
12	Nairobi	Scholar and headmaster instrument, KII and group discussion tool shared with USAID. USAID to vet with stakeholders.
26	Nairobi	USAID to review/ approve questionnaires.
3-14	Nairobi	Survey sample selection and field work-plan.
17-28	Remote/Nairobi	Guardian consent forms distributed to scholars.
December 2014		
1-10		Guardian consent forms distributed to scholars (continued).
1-19		Survey instrument pre-testing and training development.
January 2015		
14-16	Nairobi	Training of interviewers
17 Jan- 13 Feb	Kenya	Head teacher and survey mobilization and interviews.
February 2015		
20	Nairobi	Survey data and analytical tables to MSI
23-27	Nairobi	Team Planning Meeting (TPM). Detailed Methodology and Work-plan development, reporting plan
March 2015		
2	Nairobi	Detailed methodology, work-plan and all instruments to USAID.
3	Nairobi	Meeting with USAID on final methodology and workplan to USAID.
5	Nairobi	USAID to approve final methodology and workplan

	4-7	Nairobi	KII /GD Nairobi Fieldwork
	9-10	Isiolo	KII/GD Isiolo Fieldwork
	11	Meru	KII Meru Fieldwork
	12	Kiambu	KII/GD Kiambu Fieldwork
	13	Nairobi	Nairobi Follow-up and analysis
	16-18	Kisumu and Homa Bay	KII/GD Kisumu and Homa Bay Fieldwork
	23-27	Nairobi	Nairobi follow-up, analysis, writing
	30	Nairobi	Partner Validation workshop
April 2015			
	1	Nairobi	Presentation to USAID
	3-16	Nairobi	Report Drafting
	16	Nairobi	Draft report due to USAID
	30	Nairobi	USAID comments due to MSI
May 2015			
	7	Nairobi	MSI respond to Comments and provide final draft)
	21		USAID approval of Final report (and notification of statement of differences
	28	Nairobi	MSI to incorporate statement of difference into final report with delivery of raw data on CD.
	31	Nairobi	USAID approval for DEC

~ October 2014 ~						
◀ September						November ▶
Sun	Mon	Tue	Wed	Thu	Fri	Sat
			1	2	3	4
5	6	7	8	9	10 USAID/MSI Task Order Signed	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	Notes:

~ November 2014 ~						
◀ October						December ▶
Sun	Mon	Tue	Wed	Thu	Fri	Sat
						1
2	3 Desk review and remote instrument development Survey sample selection and field work-plan.	4 Desk review and remote instrument development	5 Desk review and remote instrument development	6 Desk review and remote instrument development	7 Desk review and remote instrument development	8
9	10 Desk review and remote instrument development	11 Desk review and remote instrument development	12 DELIVERABLE Preliminary GD, KII, and Survey tool to USAID	13	14	15
16	17 Begin distributing guardian consent forms to scholars.	18	19	20	21	22
23	24	25	26 USAID and partner comments on tool.	27	28	29
30	Notes:					

~ December 2014 ~						
◀ November						January ▶
Sun	Mon	Tue	Wed	Thu	Fri	Sat
	1 Survey instrument pre-testing and training development.	2	3	4	5	6
7	8	9	10 Consent forms delivered to USAID scholars.	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31	Notes:		

~ January 2015 ~						
◀ December						February ▶
Sun	Mon	Tue	Wed	Thu	Fri	Sat
				1	2	3
4	5	6	7	8	9	10
11	12	13	14 Training of interviewers	15 Training of interviewers	16	17 Head teacher and survey mobilization and interviews.
18	19 Survey fieldwork/ Interviews	20 Survey fieldwork/ interviews	21 Survey fieldwork/ interviews	22 Survey fieldwork/ interviews	23 DELIVERABLE Weekly report to USAID Survey fieldwork/ interviews	24
25	26 Survey fieldwork/ interviews	27 Survey fieldwork/ interviews	28 Survey fieldwork/ interviews	29 Survey fieldwork/ interviews	30 DELIVERABLE Weekly report to USAID Survey fieldwork/ interviews	31

~ February 2015 ~						
◀ January						March ▶
Sun	Mon	Tue	Wed	Thu	Fri	Sat
1	2 Survey fieldwork/ interviews	3 Survey fieldwork/ interviews	4 Survey fieldwork/ interviews	5 Survey fieldwork/ interviews	6 DELIVERABLE Weekly report to USAID Survey fieldwork/ interviews	7
8	9 Survey fieldwork/ interviews	10 Survey fieldwork/ interviews	11 Survey fieldwork/ interviews	12	13	14
15	16	17	18	19	20 Survey data to MSI	21
22 Evaluation team arrive in Nairobi	23 Team Planning meeting	24 Team Planning meeting	25 Team Planning meeting	26 Team Planning meeting	27 Team Planning meeting	28

~ March 2015 ~						
◀ February						April ▶
Sun	Mon	Tue	Wed	Thu	Fri	Sat
1	2 DELIVERABLE Revised methodology and work plan to USAID.	3 Meeting with USAID on revised methodology and work plan	4 Nairobi KII (MOEST)	5 Nairobi KII (EGF) DELIVERABLE USAID to approve methodology and work plan Nairobi KIIs (USAID, DFID)	6 DELIVERABLE Weekly report to USAID Nairobi group discussions KII with Mastercard	7 Preliminary analysis
8	9 KII in Isiolo	10 GD in Isiolo Travel to Meru	11 KII, GD in Meru. Travel to Nairobi	12 KII, GD in Kiambu	13 DELIVERABLE Weekly report to USAID Nairobi follow-up interviews	14 Preliminary Analysis
15	16 KII and GD in Kisumu	17 KII and GD in Homa Bay	18 Follow-up in Kisumu, return to Nairobi	19 Nairobi follow-up	20 Nairobi follow-up	21 Preliminary Analysis
22	23 Nairobi drafting and analysis	24 Nairobi drafting and analysis	25 Nairobi drafting and analysis	26 Nairobi drafting and analysis	27 Findings, Conclusions and Recommendations	28 Analysis and presentation
29	30 DELIVERABLE Partner validation meeting	31 Report writing	Notes:			

~ April 2015 ~						
◀ March						May ▶
Sun	Mon	Tue	Wed	Thu	Fri	Sat
			1 DELIVERABLE Presentation to USAID/ partners	2	3 Report writing	4 Report writing
5	6 Report writing	7 Report writing	8 Report writing	9 Report writing	10 Evaluation team return	11
12	13	14	15	16 DELIVERABLE Draft Report to USAID	17	18
19	20	21	22	23	24	25
26	27	28	29	30 DELIVERABLE USAID comments due to MSI	Notes:	

~ May 2015 ~						
◀ April						June ▶
Sun	Mon	Tue	Wed	Thu	Fri	Sat
					1	2
3	4	5	6	7 DELIVERABLE MSI/Kenya respond to comments and provide final draft.	8	9
10	11	12	13	14	15	16
17	18	19	20	21 DELIVERABLE USAID approval of final report (and notification of statement of differences)	22	23
24	25	26	27	28 DELIVERABLE MSI to incorporate statement of differences into final report with delivery of raw data on CD.	29	30
31 DELIVERABLE USAID approval for DEC	Notes:					

Annex D: Wings to Fly Survey Instruments

EGF / Wings to Fly Scholar Survey

RESPONDENT INFORMATION (PRECODED WITH STUDENT INFORMATION):

Questionnaire number:

EGF Student Code:

Respondent's name:

Mobile No.(s):

Sex:

Place of Usual Residence/ Origin (County/ Sub-county):

WtF Intake Year:

Current Form (i.e. 1, 2, 3, 4):

Age:

School Name:

School Code:

School Location:

(Town, sub-County, County)

INTERVIEWER INFORMATION:

Interviewer's name _____

I.D.# _____

Interview Date _____

Time interview began _____ Ended _____ Interview length _____

DECLARATION:

I declare that the respondent, whose name and address appear above, was unknown to me until the interview, and that this interview has been conducted within the MSRA Code of Conduct.

I confirm that before returning this questionnaire, I have checked that it meets with and was carried out in accordance with the requirements outlined in the

Interviewer signature.

SIGNED: _____

instructions supplied to me for this study.							
I understand that the information given to me during the interview must be kept confidential.							
<p>INTRODUCTION. <i>Please be sure to read the Introduction.</i></p> <p>Good morning/afternoon, my name is _____ from Research Solutions Africa, a leading research agency in Kenya. We are working with Management Systems International and USAID on a study to better understand how well the scholarship program did in having an equitable process, and what the key successes and challenges were.</p> <p>I'd like to ask your opinion about some things, and I'd like you to be honest with me (I don't want you to give me any compliments) so that we can help in planning for future work with scholarship programs. If you don't know an answer you can say you don't know. Could you spare approximately 30 minutes of your time to give me your opinion?</p> <table border="1" style="width: 100%; border-collapse: collapse; margin: 10px 0;"> <tr> <td style="width: 25%; padding: 2px;">YES</td> <td style="width: 25%; padding: 2px;">1</td> <td style="width: 50%; padding: 2px;">Continue</td> </tr> <tr> <td style="padding: 2px;">NO</td> <td style="padding: 2px;">2</td> <td style="padding: 2px;">Terminate</td> </tr> </table> <p>If Yes, state: Thank you for your valuable time and co-operation.</p>		YES	1	Continue	NO	2	Terminate
YES	1	Continue					
NO	2	Terminate					

Interviewer Instructions: Please note *instructions are in italics. If there are no skip instructions, or a "Don't Know or No Response" from scholars, proceed to the next question.*

Section I: Ensuring Equity

I.1 How did you learn about the Wings to Fly Scholarship program? *(Mark all that apply)*

How student heard about wings to fly	Code
Radio	1
TV	2
Newspaper	3
A friend	4
Baraza	5
The Internet	6
Churches/ mosques	7
Others specify	8
School (either teacher, head teacher, counsellor)	9
Non-Governmental Organization (NGO)	10
Don't Know	98
No Response	99

1.2 Where did you get your application?(Choose one)

Where student got application	Code
Equity Branch	1
School	2
A friend	3
A relative	4
Parent/ guardian	5
Teacher	6
Non-Governmental Organization (NGO)	7
Other	8
Don't Know	98
No Response	99

1.3 During the application process, there is a home visit. Do you remember the home visit?

Student remembering home visit	Code
Yes... <i>proceed to 1.4</i>	1
No... <i>skip to 1.6</i>	2
Don't Know	98
No Response	99

1.4 Who came for the home visit? (Mark all that apply)

Home visit person	Code
Equity Bank branch staff	1
District selection board member	2
Several district selection board members	3
Don't Know	98
No Response	99

1.5 What did the EGF team do during home visits?(Mark all that apply. Interviewer probe further by offering some of the other responses.)

Home visit details	Code
Looked at the house	1
Spoke to my parents/guardian	2
Looked at documents	3
Asked to see my belongings (for example: my school uniform, books and stationery)	4
Other	5
Don't Know	98
No Response	99

1.6. How were you informed that you were selected?(Mark all that apply Interviewer probe further by asking about any other ways for selection, and offering some of the other responses.)

How scholar was informed	Code
Home visit	1
Phone call	2
Email	3
Letter by post	4
Other	5
The Internet	6
Don't Know	98
No Response	99

1.7 Why do you think you were chosen/ selected?(Mark all that apply, Interviewer probe further by asking about any other reasons for selection and offering some of the other responses.)

Reason for being selected	Code
Poverty	1
Orphanhood	2
Grades	3
Chronic health condition in my family	4
HIV/AIDS in my family	5
Other	6
Don't Know	98
No Response	99

1.8 In your opinion, was the scholarship programme fair in the way it chose scholars?

Fairness of scholarship programme	Code
Yes...proceed to 1.9	1
No...skip to 1.10	2
Don't Know	98
No Response	99

1.9 IF 1.8 is YES, ASK what made the scholarship programme fair?

If Yes, what made it fair? <i>Interviewer: Below, note down reasons the scholar thought the program's selection process was fair.</i>	Text
--	------

1.10 IF 1.8 is NO, ASK what made the scholarship programme unfair?

If NO, what made it unfair?	Text
-----------------------------	------

Interviewer: Below, note down reasons the scholar thought the program's selection process was unfair.	
---	--

1.11 Is this school one of the schools you chose before you took the KCPE?

School Selection	Code
Yes...skip to 2.1	1
No...proceed to 1.12	2
Don't Know	98
No Response	99

1.12 If 1.11 is NO, ASK: if you did not finally join one of your selected schools, why is that?

Interviewer: Note down reasons the scholar did not end up joining one of the selected schools.	Text
--	------

Section 2. Key Successes/ Challenges

2.1 From this list of items in the scholarship package, tell me YES if you received the following item from EGF.(Mark all that apply)

Scholarship package item received	Yes
Pocket Money (stipend)	1
Schools fees (tuition and stipend) paid on my behalf	2
Stationery	4
Uniform	5
Transport Money	6
Set-books/ text-books	7
Shopping Hamper	8
Don't Know	98
No response	99

2.2 Thinking again about the scholarship package items you received personally, did you personally receive the items on a timely basis?

Timely receipt of scholarship package	Code
Yes...skip to 2.4	1

No... <i>proceed to 2.3</i>	2
Don't Know	98
No Response	99

2.3 With regard to the items you received late, which items were late?

Scholarship package item received late	Yes
Stipend or "pocket money"	1
Stationery	2
Uniform	3
Transport Money	4
Books or printed study materials	5
Shopping Hamper	6
Don't Know	98
No response	99

2.4 With regard to the scholarship fees paid directly to the school, did the school receive fees paid on your behalf on a timely basis?

Timely receipt of scholarship package by school	Code
Yes ... <i>skip to 2.6</i>	1
No... <i>proceed to 2.5</i>	2
Don't Know	98
No Response	99

2.5 With regard to the scholarship package provided directly to the school, which items were received late by the school?

Scholarship package item received late by school	Yes
Schools fees paid on my behalf (tuition, room/board)	1
Other	2
Don't Know	98
No Response	99

2.6 Is the pocket money enough to cover the expenses that EGF intended it to cover?

Pocket Money sufficient	Code
Yes	1
No	2

Don't Know	98
No Response	99

2.12 If 2.11 is YES, ASK: Which leadership materials have you received?

Leadership development materials- type received	Code
Printed study and information materials	1
Workbooks	2
Other	3
Don't Know	98
No Response	99

2.13 How frequent do you receive leadership materials?

Frequency of leadership material distribution	Code
Annually	1
Each Term	2
Occasionally	3
Don't Know	98
No Response	99

2.14 Do you have a mentor provided to you by the WtF program?

WtF Mentor provided	Code
Yes... <i>proceed to 2.15</i>	1
No... <i>skip to 2.23</i>	2
Don't Know	98
No Response	99

2.15 If 2.14 is Yes, ASK: where is your mentor working or studying?

WtF Mentor working or studying?	Code
Equity Bank	1
WtF Grad	2
University Student	3
Elementary School Head Teacher	4
Other	5
Don't Know	98
No Response	99

2.16 In 2014, how many times did you see or speak with your mentor?

Number of times scholar spoke with mentor	Code
Fill in Number of times _____	#

Don't Know	98
No response	99

2.17 Do you know the name of your mentor?(IF the student says YES have the student say the name and if he or she cannot then check NO.)

Mentor name	Code
Yes	1
No	2
No Response	99

2.18 Has your mentor ever visited you for a mentoring session at school?

Mentor visited school	Code
Yes	1
No	2
Don't Know	98
No Response	99

2.19 Was your mentoring in a group or alone?

Group or individual mentoring	Code
Group...skip to 2.20	1
Individual...skip to 2.21	2
Don't Know	98
No Response	99

2.20 If 2.19 is Group. ASK: Approximately how many other WtF scholars were with you during the mentoring session?

Number in group mentoring	Code
2-3 Students	1
4-5 Students	2
6-10 Students	3
11-20 Students	4
More than 20 Students	5
Don't Know	98
No Response	99

2.21 Using a 5 point scale, where 5 is extremely useful and 1 is not at all useful, please tell me how useful the mentoring was to you.

Utility of mentoring	Code
----------------------	------

Extremely useful	5
Very useful	4
Useful	3
Somewhat useful	2
Not useful	1
Don't know	98
No Response	99

2.22 Give me examples of how you benefited from the mentoring.

Interviewer: *Jot down the key phrases concerning benefits of mentoring.*

Don't Know	98
NO RESPONSE	99

2.23 What do you like most about the WtF program? Please use key words that describe what you like.

Interviewer: *Jot down the key phrases concerning what the scholar liked.*

Don't Know	98
NO RESPONSE	99

2.24 What do you like least about the WtF program?

Interviewer: *Jot down the key phrases concerning what the scholar disliked.*

Don't Know	98
NO RESPONSE	99

2.25 What would you like to see more of in the program?

Interviewer: <i>Jot down the key phrases about what the scholar wants to see more of in the program.</i>	
Don't Know	98
NO RESPONSE	99

2.26 Are you receiving the support you expected from WtF that you need to succeed in school?

Expectations and WtF support to succeed in school	Code
Yes... <i>skip to 2.28</i>	1
No... <i>proceed to 2.27</i>	2
Don't Know	98
No Response	99

2.27 If 2.26 is No, ASK: If not what is missing?

Interviewer: <i>Jot down the key phrases about what was missing from the programme.</i>	
Don't Know	98
NO RESPONSE	99

2.28 Do you hold or have you held any leadership positions in the school?

Leadership positions held in school	Code
Yes... <i>skip to 2.29</i>	1

No... <i>proceed to 2.30</i>	2
Don't Know	98
No Response	99

2.29 If so, which ones have you held? (Mark all that apply Interviewer be sure to probe further by offering some of the other responses.)

Leadership positions held	Code
School Captain or Head Boy/Girl	1
Assistant Captain	2
Club Prefect	3
Games Captain	4
Captain of a particular sport	5
Class monitor/ Class prefect/ Class secretary	6
Dormitory/ House Captain or House Prefect	7
Club Chair	8
Club Secretary	9
Club Treasurer	10
Other	11
Don't Know	98
No Response	99

2.30 Since you were admitted to the WtF program and started school, have your parents (or guardian) ever met with a member of the WtF District Scholar Selection Board (DSSB)?

Parents meeting the WtF, DSSB	Code
Yes	1
No	2
Don't Know	98
No Response	99

2.31 Has your parent or guardian ever visited you at school?

Parent or guardian visiting school?	Code
Yes... <i>proceed to 2.32</i>	1
No... <i>skip to 2.33</i>	2
Don't Know	98
No Response	99

2.32 If 2.31 is YES, ASK: If your parent or guardian has visited the school, how many times all together?

Number of times parents visited school?	Code
Number of times parents visited school. Interviewer put in	#

number _____	
Don't Know	98
No Response	99

2.33 Do you have or have access to all the books you need to meet school requirements?

Access to all the required books	Code
Yes	1
No	2
Don't Know	98
No Response	99

2.33 Do you have or have access to all the supplemental books?

Access to all supplemental books	Code
Yes	1
No	2
Don't Know	98
No Response	99

2.34 Have you ever received career counselling?

Received career counselling	Code
Yes... <i>proceed to 2.35</i>	1
No... <i>skip to 2.36</i>	2
Don't Know	98
No Response	99

2.35 From whom did you receive career counselling?

Received career counselling, from whom	Code
School's career master	1
School teacher	2
EGF mentor or counsellor	3
Other	4
Don't Know	98
No Response	99

2.36 Excluding the WtF mentor program have you ever received personal non-academic counselling?

Received non-academic counselling	Code
Yes... <i>proceed to 2.37</i>	1

No...skip to 2.38	2
Don't Know	98
No Response	99

2.37 If 2.36 is YES, ASK: From whom did you receive non-academic counselling?

Received non-academic counselling, from whom	Code
School counsellor	1
EGF counsellor	2
Family member	3
Other	4
Don't Know	98
No Response	99

2.38 What has happened to your peers back home who came from situations similar to yours but did not obtain a secondary school scholarship?

Life without WtF scholarship- peers	Code
Gone to a different Secondary School	1
Gone to this Secondary School	2
Not gone to Secondary school/ otherwise engaged	3
Other	4
Don't Know	98
No Response	99

2.39 If you had not received the WtF scholarship what do you think would have happened to you?

Life without WtF scholarship- self	Code
Gone to a different Secondary School	1
Gone to this Secondary School	2
Not gone to Secondary school	3
Other	4
Don't Know	98
No Response	99

2.40 Using a 5 point scale, where 5 is extremely useful and 1 is not at all useful, please tell me how useful the WtF scholarship program is on your academic achievements?

Utility of WtF on academic achievements	Code
Extremely Useful	5

Very Useful	4
Useful	3
Somewhat useful	2
Not useful	1
Don't Know	98
No Response	99

2.41 Using a 5 point scale, where 5 is extremely useful and 1 is not at all useful, please tell me how useful the WtF scholarship program is on your leadership achievements?

Utility of WtF on leadership achievements	Code
Extremely useful	5
Very useful	4
Useful	3
Somewhat useful	2
Not useful	1
Don't Know	98
No Response	99

2.42 Have you encountered major challenges or obstacles in succeeding at Secondary School so far?

Challenges in succeeding at secondary school	Code
Yes... <i>proceed to 2.43</i>	1
No... <i>skip to 2.47</i>	2
Don't Know	98
No Response	99

2.43 If 2.42 is YES, ASK: If so what were they?

Interviewer: <i>Jot down the key phrases about obstacles/ challenges in succeeding at secondary school.</i>	
Don't Know	98
NO RESPONSE	99

2.44 Have those challenges or obstacles been overcome or resolved?

Challenges resolved?	Code
Yes... <i>proceed to 2.45</i>	1
No... <i>skip to 2.46</i>	2

Don't Know	98
No Response	99

2.45 If 2.44 is YES ASK: How have the challenges/ obstacles been resolved?

Interviewer: *Jot down the key phrases about how the obstacles/ challenges have been resolved.*

Don't Know	98
NO RESPONSE	99

2.46 If 2.44 is NO ASK: Why have are there remaining obstacles/ challenges?

Interviewer: *Jot down the key phrases about remaining obstacles/ challenges?*

Don't Know	98
NO RESPONSE	99

2.47 Do you have any suggestions for improvement of the WtF programme?

Interviewer: *Jot down the key phrases concerning how to improve the WtF programme.*

Don't Know	98
NO RESPONSE	99

Communication with EGF

3.1 How many times this year, 2014, did you interact/ communicate with EGF/ WtF?

Number of Times Communicated with EGF?	Code
Interviewer put in number _____	#

None	2
Don't Know	98
No Response	99

3.2 What do you communicate about when you are in touch with EGF/ WtF program? (mark all that apply)

Communications topics	Code
Financial Matters	1
Academic Issues	2
Family issues	3
Other	5
Don't Know	98
No Response	99

3.3 Would you like more communication with EGF?

Like more communication with EGF	Code
Yes... <i>proceed to 3.4</i>	1
No... <i>skip to 3.5</i>	2
Don't Know	98
No Response	99

3.4 If yes to 3.3, what would you like to speak with EGF/WtF about?

Interviewer: <i>Jot down the key phrases concerning what the scholar would like to speak with EGF about.</i>	
Don't Know	98
NO RESPONSE	99

3.5 How does EGF/WtF communicate with you? (Mark all that apply Interviewer be sure to probe further by offering some of the other responses.)

Channels of communication	Code
Phone	1
Letter by post	2

Verbal message from school staff	3
Visit from Equity Branch staff	4
Visit from my mentor	5
Other	6
Don't Know	98
No Response	99

END OF INTERVIEW

Thank student for taking the time to participate in the interview process.

EGF / Wings to Fly Graduate Scholar Survey

RESPONDENT INFORMATION (PRECODED WITH STUDENT INFORMATION):

Questionnaire number:
EGF Student Code:
Respondent's name:
Mobile No.(s):
Sex:
Place of Usual Residence/ Origin (County/ Sub-county):
EGF/WtF Intake Year:
Age:
Current University/ Mid-level College Grade Level:
School Name/ Code:
School Location:
(Town, Sub-county, County)

INTERVIEWER INFORMATION:

Interviewer's name _____
I.D.# _____
Date of Interview _____
Time interview began _____ Ended _____ Interview length _____

DECLARATION:

I declare that the respondent, whose name and address appear above, was unknown to me until the interview, and that this interview has been conducted within the MSRA Code of Conduct.

I confirm that before returning this questionnaire, I have checked that it meets with and was carried out in accordance with the requirements outlined in the instructions supplied to me for this study.

I understand that the information given to me during the interview must be kept confidential.

Interviewer signature.

SIGNED: _____

INTRODUCTION:

Good morning/afternoon, my name is _____ from Research Solutions Africa, a leading research agency in Kenya. We are working with Management Systems International and USAID on a study to better understand how well the scholarship program did in having an equitable selection process, and what the key successes and challenges were.

I'd like to ask your opinion about some things, and I'd like you to be honest with me (I don't want you to give me any compliments) so that we can help in planning for future work with scholarship programs. If you don't know an answer you can say you don't know. Could you spare approximately 30 minutes of your time to give me your opinion?

YES	1	Continue
NO	2	Terminate

If Yes, state: Thank you for your valuable time and co-operation.

Interviewer Instructions: Please note *instructions are in italics. If there are no skip instructions, or a "Don't Know or No Response" from scholars, proceed to the next question.*

Section I: Ensuring Equity

I.1 What year did you graduate from High School?

Graduation year	Code
2009	1
2010	2
2011	3
2012	4
2013	5
2014	6
Don't Know	98
No Response	99

1.2 In what year did you become an Equity Group Foundation (EGF) Scholar?

EGF scholar	Code
2006	1
2007	2
2008	3
2009	4
2010	5
2011	6
Don't Know	98
No Response	99

1.3 What was your grade level the year you started receiving sponsorship from EGF?

Grade level when received sponsorship	Code
Form 1	1
Form 2	2
Form 3	3
Form 4	4
Mid-Level College	5
University	6
Don't Know	98
No Response	99

1.4 ONLY IF 1.3 = 1-4 In secondary school did you consider yourself a "Wings to Fly" Scholar, an EGF Scholar" or something else?

Type of scholar	Code
Wings to Fly	1
EGF	2
Other	3
Don't Know	98
No Response	99

1.5 What were the sources of support for your secondary school studies? (Mark all that apply)

Sources of support during secondary	Code
EGF	1
USAID	2
Price Waterhouse Coopers	3
UKAID	4
KfW Development Bank	5
MasterCard Foundation	6
Government of Kenya	7
Other NGO	8
Church	9

Parents	10
Other	11
Don't Know	98
No Response	99

1.6 Why do you think you were chosen/ selected?(Mark all that apply Interviewer probe further by asking about any reasons for selection and offering some of the other responses as examples.)

Reason for being selected	Code
Poverty	1
Orphanhood	2
Grades	3
Chronic health condition in my family	4
HIV/AIDS in my family	5
Other	6
Don't Know	98
No Response	99

1.7. In your opinion, was the EGF scholarship program fair in the way it chose scholars?

Fairness of selection process	Code
Yes...if yes skip to 1.8	1
No...if no skip to 1.9	2
Don't Know	98
No Response	99

1.8 IF 1.7 is YES ASK: what made the scholarship selection process fair?

<p>If Yes, what made it fair?</p> <p><i>Interviewer: Below, note down reasons the scholar thought the program was fair.</i></p> <p>Skip to Section 2</p>	Text
--	------

1.9 IF 1.7 is NO ASK: what made the scholarship selection process unfair?

<p>If NO, what made it unfair?</p> <p><i>Interviewer: Below, note down reasons the scholar thought the program was unfair.</i></p>	Text
--	------

Section 2. Key Successes/ Challenges

2.1 *ONLY IF the answer to 1.3 was Forms 1-4 ASK:* From this list of items that may have been in your EGF secondary school scholarship package, tell me YES if you received the following item from EGF. (Read all responses and mark all that apply)

Scholarship package item	Yes
Pocket money	1
School fees paid on my behalf (tuition and room and board)	2
Stationery	3
Uniform	4
Transport Money	5
Text books	6
Shopping Hamper	7
Don't Know	98
No response	99

2.2 *ONLY IF the answer to 1.3 was Forms 1-4 ASK:* Thinking again about the EGF secondary school scholarship package items you received personally, did you personally receive the items on a timely basis?

Timely receipt of scholarship package	Code
Yes... <i>proceed to 2.3</i>	1
No... <i>skip to 2.4</i>	2
Don't Know	98
No Response	99

2.3 With regard to the items you received late, which items were late?

Scholarship package item	Yes
Pocket Money/ Stipend	1
Stationery	2
Uniform	3
Transport Money	4
Books or printed study materials	5
Shopping Hamper	6
Don't Know	98
No response	99

2.4 ONLY IF the answer to 1.3 was Forms 1-4 ASK: With regard to the EGF secondary school scholarship package, did the school receive fees paid on your behalf on a timely basis?

Timely receipt of secondary scholarship package	Code
Yes ... <i>skip to 2.6</i>	1
No... <i>proceed to 2.5</i>	2
Don't Know	98
No Response	99

2.7 From this list of items in the EGF University or college scholarship package, tell me "YES" if you received the following item from EGF. (Read all responses, and mark all that apply)

University/ College scholarship package item	Yes
Stipend or pocket money	1
Stationery	3
Transport Money	4
Shopping Hamper	5
Books or study materials	6
Room and board money paid directly to me	7
Other	8
Don't Know	98
No Response	99

2.7 From this list of items that may have been in your EGF University or college scholarship package, tell me "YES" if your college or university received the following item from EGF. (Mark all that apply)

University/ college scholarship package item	Yes
School fees paid on my behalf (tuition and room and board)	1
Other	2
Don't Know	98
No Response	99

2.8 With regard to the EGF college/secondary school scholarship package, did the school receive fees paid on your behalf on a timely basis?

Timely receipt of secondary scholarship package	Code
Yes	1
No	2
Don't Know	98
No Response	99

2.9 Is the pocket money enough to cover the expenses that EGF intended it to cover?

Pocket money sufficient	Code
Yes	1
No	2
Don't Know	98
No Response	99

2.10 Do you currently have a mentor provided to you by EGF?

Current Mentor	Code
Yes	1
No	2
Don't Know	98
No Response	99

2.11 Did you ever have a mentor provided to you by EGF?

Past Mentor	Code
Yes	1
No... <i>skip to 2.17</i>	2
Don't Know	98
No Response	99

2.12 If you ever had a mentor was your mentoring done in a group or alone?

Mentorship in Group or Alone	Code
In group... <i>proceed to 2.13</i>	1
Alone... <i>skip to 2.14</i>	2
Don't Know	98
No Response	99

2.13 If 2.12 is Group. ASK: Approximately how many other scholars were with you during the mentoring session?

Number in group mentoring	Code
2-3 Students	1
4-5 Students	2
6-10 Students	3
11-20 Students	4
More than 20 Students	5
Don't Know	98
No Response	99

2.14 In 2014 or in the last year that you had an EGF mentor?

Number of times scholar spoke with mentor	Code
Fill in Number of times _____	# _____
Don't Know	98
No response	99

2.15 Using a 5 point scale, where 5 is extremely useful and 1 is not at all useful, please tell me how useful the mentoring was to you.

Utility of mentoring	Code
Extremely Useful	5
Very Useful	4
Useful	3
Somewhat useful	2
Not useful	1
Don't Know	98
No Response	99

2.16 Give me examples of how you benefited from the mentoring.

Interviewer: <i>Jot down the key phrases concerning benefits of mentoring.</i>	
Don't Know	98
NO RESPONSE	99

2.17 ONLY IF the answer to 1.3 was Forms 1-4 ASK: When you were in the EGF Secondary School Scholarship Programme, did you hold any leadership positions in the school?

Leadership in secondary schools	Code
Yes... <i>skip to 2.18</i>	1
No... <i>proceed to 2.19</i>	2
Don't Know	98
No Response	99

2.18 ONLY if 2.17 is YES ASK: If so, which ones have you held? (Mark all that apply. Interviewer probe further by mentioning some other communications topics.)

Leadership positions held	Code
School Captain or Head Boy/Girl	1
Assistant Captain	2
Club Prefect	3
Games Captain	4
Captain of a particular sport	5
Class monitor/ Class prefect/ Class secretary	6
Dormitory / House Captain or Prefect	7
Club Chair	8
Club Secretary	9
Club Treasurer	10
Other	11
Don't Know	98
No Response	99

2.19 In College or University have you, or do you now hold any leadership positions?

Leadership in College/ University	Code
Yes... <i>proceed to 2.20</i>	1
No... <i>skip to 2.21</i>	2
Don't Know	98
No Response	99

2.20 What leadership positions have you held?

Interviewer: *Jot down the leadership positions mentioned.*

Don't Know	98
NO RESPONSE	99

2.21 *ONLY IF the answer to 1.3 was Forms 1-4 ASK:* When you were in the **EGF secondary school scholarship program** did you have or have access to the books you needed to meet school requirements?

Access to all the required books	Code
Yes	1
No	2
Don't Know	98
No Response	99

2.22 Whilst in college/university have you had access to the books or learning resources you've needed to meet college/university requirements?

Access to all the required books	Code
Yes	1
No	2
Don't Know	98
No Response	99

2.23 Have you ever received career counselling?

Received career counselling	Code
Yes... <i>proceed to 2.24</i>	1
No... <i>skip to 2.25</i>	2
Don't Know	98
No Response	99

2.24 *If 2.23 = Yes ASK:* From whom did you receive career counselling?

Received career counselling, from whom	Code
Career master at my secondary school	1
Career counsellor at my college/university	2
Career counsellor provided by EGF	3
Mentor provided by EGF	4
Other	5
Don't Know	98
No Response	99

2.25 Have you ever received personal non-academic counselling?

Received non-academic counselling	Code
Yes... <i>proceed to 2.26</i>	1
No... <i>skip to 2.27</i>	2
Don't Know	98
No Response	99

2.26 If 2.25 is YES ASK: From whom did you receive non-academic counselling?

Received non-academic counselling, from whom	Code
Counsellor at secondary school	1
Counsellor at college/university	2
Counsellor provided by EGF	3
Mentor provided by EGF	4
Other	5
Don't Know	98
No Response	99

2.27 Have you heard of the Equity Africa Leaders Programme?

Heard of Equity Africa Leaders Programme	Code
Yes... <i>proceed to 2.28</i>	1
No... <i>skip to 2.30</i>	2
Don't Know	98
No Response	99

2.28 Are you a member of the Equity Africa Leaders Programme?

Member of Equity Africa Leaders Programme	Code
Yes	1
No	2
Don't Know	98
No Response	99

2.29 Do you know anybody that is a member of the Equity Africa Leaders Programme?

Know others in Equity Africa Leaders Programme	Code
Yes	1
No	2
Don't Know	98
No Response	99

2.30 Are you a member of any EGF/ WtF alumni association?

Member of alumni association	Code
Yes	1
No	2
Don't Know	98
No Response	99

2.31 Has EGF/WtF informed you about the creation of an alumni association for EGF and/or Wings to Fly Scholars?

Knowledge of alumni association	Code
Yes	1
No	2
Don't Know	98
No Response	99

2.32 After graduating from secondary school if you did not go directly college or university or have not yet done so, what support or service has EGF provided to you- either now or in the past?

Interviewer: *Jot down the support and services EGF provided to the scholar during a possible gap year.*

Don't Know	98
NO RESPONSE	99

2.33 Have you ever been offered internship employment at an Equity Bank Branch?

Internship employment	Code
Yes	1
No	2
Don't Know	98
No Response	99

2.34 Were you able to find employment in the period between secondary school and college/ University?

Employment	Code
Yes	1
No...skip to 2.37	2
Don't Know	98
No Response	99

2.35 If 2.34=YES ASK: What type of employment were you able to find?

Employment type	Code
Paid employment	1
Paid internship	2
Unpaid internship	3
Don't Know	98
No Response	99

2.36 In what sector was the employment?

Employment sector	Code
Agriculture	1
Mining	2
Manufacturing	3
Construction	4
Trade	5
Transport	6
Information Technology	7
Finance/ Banking	8
Education	9
Health	10
Tourism	11
Paid internship	12
Unpaid internship	13
Don't Know	98
No Response	99

2.37 Using a 5 point scale, where 5 is extremely useful and 1 is not at all useful, please tell me how useful the EGF scholarship program is in promoting your academic achievements?

Utility of WtF on academic achievements	Code
Extremely Useful	5
Very Useful	4
Useful	3
Somewhat useful	2
Not useful	1
Don't Know	98
No Response	99

2.38 Using a 5 point scale, where 5 is extremely useful and 1 is not at all useful, please tell me how useful the EGF scholarship program is on your leadership achievements?

Utility of WtF on leadership achievements	Code
Extremely useful	5
Very Useful	4
Useful	3
Somewhat useful	2
Not useful	1
Don't Know	98
No Response	99

2.39 What is the main challenge you have faced in succeeding in your academic life?

Interviewer: *Jot down the key challenge the scholar faces in succeeding in academic life.*

Don't Know	98
NO RESPONSE	99

2.40 What is the main challenge you have faced in developing your leadership skills?

Interviewer: *Jot down the key challenge the scholar faces in developing leadership skills.*

Don't Know	98
NO RESPONSE	99

2.41 What do you like most about the EGF Scholarship programme? Please use key words that describe what you like most.

Interviewer: *Jot down the key phrases concerning what the scholar liked.*

Don't Know	98
NO RESPONSE	99

2.42 What do you like least about the EGF Scholarship programme? Please use key words that describe what you did not like

Interviewer: *Jot down the key phrases concerning what the scholar disliked.*

Don't Know	98
NO RESPONSE	99

2.43 What would you like to see more of in the EGF Scholarship programme?

Interviewer: *Jot down the key phrases about what the scholar wants to see more of in the program.*

Don't Know	98
NO RESPONSE	99

2.44 Do you have any suggestions on how to improve the EGF programme?

Interviewer: *Jot down the key phrases concerning how to improve the EGF programme.*

Don't Know	98
NO RESPONSE	99

2.45 Do you know your class rank in your last academic year? If so, what was your position?

Class Rank	Code
<i>Interviewer put in students class ranking</i>	#
None	2
Don't Know	98
No Response	99

2.46 How many students were in that same class that year?

Number of students in the class	Code
<i>Interviewer put in number of students in class</i>	#
None	2
Don't Know	98
No Response	99

Communication with EGF

3.1 How many times did you communicate with EGF in 2014?

Number of times communicated with EGF?	Code
Number of communicated with EGF. <i>Interviewer put in number _____</i>	#
None	2
Don't Know	98
No Response	99

3.2 What do you communicate about when you are in touch with EGF/ W2F program? (Mark all that apply. *Interviewer probe further by mentioning some other communications topics.*)

Communications topics?	Code
Financial Matters	1
Academic Issues	2
Family issues	3
Other Specify _____	5
Don't Know	98
No Response	99

3.3 Would you like more communication with EGF?

More communication with EGF?	Code
Yes, proceed to 3.4	1
No, skip to 3.5	2
Don't Know	98
No Response	99

3.4 If YES to 3.3, ASK: what would you like to speak with EGF about?

Interviewer: <i>Jot down the key phrases concerning what the scholar would like to speak with EGF about.</i>	
Don't Know	98
NO RESPONSE	99

3.5 How does EGF/WtF communicate with you? (Mark all that apply)

Channels of Communication	Code
Phone	1
Letter	2
Verbal message from school staff	3
Visit from Equity Branch staff	4
Visit from my mentor	5
Other	6
Don't Know	98
No Response	99

END OF INTERVIEW

Thank student for taking the time to participate in the interview process.

Wings to Fly Head Teacher Survey

RESPONDENT INFORMATION (PRECODED WITH HEAD TEACHER INFORMATION):

Questionnaire number _____
School Name: _____
School Code: _____
School Location: _____
(Town, sub-County, County)
Sex: _____
Respondent's name _____
Mobile No.(s) _____

INTERVIEWER INFORMATION:

Interviewer's name _____
I.D.# _____
Interview Date: _____
Time interview began _____ Ended _____ Interview length _____

DECLARATION:

I declare that the respondent, whose name and address appear above, was unknown to me until the interview, and that this interview has been conducted within the MSRA Code of Conduct.

I confirm that before returning this questionnaire, I have checked that it meets with and was carried out in accordance with the requirements outlined in the instructions supplied to me for this study.

I understand that the information given to me during the interview must be kept confidential.

Interviewer signature.

SIGNED: _____

INTRODUCTION:

Good morning/afternoon, my name is _____ from Research Solutions Africa, a leading research agency in Kenya. We are working with Management Systems International and USAID on a study to better understand how well the scholarship programme did in having an equitable process, and what the key successes and challenges were.

I'd like to ask your opinion about some things, and I'd like you to be honest with me (I don't want you to give me any compliments) so that we can help in planning for future work with scholarship programmes. If you don't know an answer you can say you don't know. Could you spare approximately 30 minutes of your time to give me your opinion?

YES	1	Continue
NO	2	Terminate

If Yes, state: Thank you for your valuable time and co-operation.

Interviewer Instructions: Please note *instructions are in italics. If there is "No Response" from scholars, proceed to the next question.*

A. Data Request

Before we start with the survey questions, we would like to request information from your school records.

A.1 Have you ever heard of the Wings to Fly Scholarship Programme?

Heard of WtF	Code
Yes	1
No... <i>Interviewer: End Survey</i>	2
Don't Know	98
No Response	99

A.2 Based on the school records and wings to fly communications how many Wings to Fly Scholars attended in 2014?

Number WtF boys/girls	Code
Number of WtF Girls Interviewer note down the total number of WtF girl scholars	#
Number of WtF Boys Interviewer note down the total number of WtF boy scholars	#
Total Number of Students Interviewer note down the total number of WtF students	#
Don't Know	98
No response	99

A.3 For the following 2014 EGF/WtF students, please provide us with their class ranking out of the total number of students.

Student name	Student Rank/ Class total
<i>Example: M. Kimani, Male</i>	<i>23/45</i>

Section I: Ensuring Equity

I.1 How did you learn about the Wings to Fly Scholarship programme? (Mark all that apply)

Where they heard of WtF	Code
Radio	1
TV	2
Newspaper	3
A friend	4
Baraza	5
A WtF student	6
The Internet	7
Churches/ mosques	8
Don't Know	9
Equity Bank Staff	10
MOEST Staff	11
MOEST Written Communications	12
Others	13
Don't know	98
No Response	99

I.2 Where do potential scholars obtain their WtF application form? Please tell us three of the most common places potential scholars get their application form. (Mark three)

Where to obtain application form	Code
Equity Bank Branch	1
School	2
A friend	3
A relative	4
Parent/ guardian	5
Teacher	6
Other	7
Don't Know	98
No Response	99

1.3 In your opinion do all the potential scholars receive EGF scholarship announcements on time?

Scholarship announcements	Code
Yes	1
No	2
Don't Know	98
No Response	99

1.4 How can EGF improve the visibility and timeliness of announcements about the WtF scholarship for deserving students who are either especially vulnerable, disadvantaged, or whose families may be affected by HIV/AIDS?

Interviewer: <i>Dot down the key phrases in response to improving visibility of announcements.</i>	
Don't Know	98
NO RESPONSE	99

1.5 How is it decided that WtF students are placed in your school?

Scholar placement	Code
From student preferences they listed before the KCPE	1
EGF asks for a vacancy for them and brings them here	2
They are sometimes transferred in after being first admitted to another school	3
Don't Know	98
No Response	99

1.6 In your opinion, was the scholarship programme fair in the way it chose scholars?

Fairness of scholarship programme	Code
Yes... <i>proceed to 1.8</i>	1
No... <i>skip to 1.9</i>	2
Don't Know	98
No Response	99

1.7 If 1.6= Yes, ASK what made it fair?

<p>Interviewer: <i>Below, note down reasons the head teacher thought the programme was fair.</i></p> <p><i>Skip to 1.10</i></p>	Text
---	------

1.8 If 1.6 =NO, ASK what made it unfair?

<i>Interviewer: Below, note down reasons the head teacher thought the programme was unfair.</i>	Text
---	------

1.9 Other than academic performance on the KCPE, what are the most frequent reasons the scholars in your school are selected? (Mark all that apply)

Reason for being selected	Code
Poverty	1
Orphan hood	2
Family living with HIV	3
Other chronic medical condition in family	4
Special needs or disability	5
Conflict or disaster victim	6
Abandoned or neglected by family	7
Victim of domestic abuse	8
Gender	9
Other	10
Don't Know	98
No Response	99

1.10 Do you think in general the WtF scholars are more vulnerable or from more disadvantaged backgrounds than other students here?

WtF student vulnerability	Code
Yes	1
No	2
Don't Know	98
No Response	99

1.11 As far as you have heard, has anybody provided feedback about the WtF selection process?

Feedback about selection process	Code
Yes... <i>proceed to 1.12</i>	1
No... <i>skip to Section 2</i>	2
Don't Know	98
No Response	99

1.12 If 1.12= YES ASK: From whom was the complaint about the selection process?

Who provided feedback about the selection process?	Code
Student	1
Parent	2
Other	3
Don't Know	98
No Response	99

1.13 Was the feedback good (positive) or bad (negative)

Feedback	Code
Good/ positive	1
Bad/ negative	2
Other	3
Don't Know	98
No Response	99

1.14 What were the issues mentioned in the feedback provided about the selection process?

<i>Interviewer: Below, note down issues mentioned in feedback about selection process.</i>	Text
--	------

Section 2. Key Successes/ Challenges

2.1 Has anyone provided feedback to you about how the WtF programme works after students are admitted?

Provided feedback about programme	Code
Yes... <i>proceed to 2.2</i>	1
No... <i>skip to 2.5</i>	2
Don't Know	98
No Response	99

2.2 If 2.1 is YES ASK, Who provided feedback about the programme?

Who provided feedback about programme?	Code
Student	1
Parent	2
Other	3
Don't Know	98
No Response	99

2.3 Was the feedback about the programme good (positive) or negative (bad)?

Feedback positive or negative?	Code
Good (positive)	1
Bad (negative)	2
Other	3
Don't Know	98
No Response	99

2.4 What were the issues mentioned in feedback about programme?

<i>Interviewer: Below, note down issues mentioned in complaint about admissions.</i>	Text
Don't Know	98
No Response	99

2.5 As far as you know, from the following list of scholarship items, tell me yes if scholars in your school received the following item from EGF. (Read All)

Scholarship package item	Yes
School fees (tuition and room and board)	1
Stipend (pocket money)	2
Transportation fees	3
Stationery	4
Academic books	5
Leadership curriculum materials	6
Don't Know	98
No response	99

2.6 What other scholarship items if any, did the scholars in your school receive from EGF?

<i>Interviewer: Below, note down other items mentioned by the head teacher.</i>	Text
Don't Know	98
No Response	99

2.7 Is the package adequate in terms of quality?

Quality of items	Code
Yes... <i>skip to 2.9</i>	1
No... <i>proceed to 2.8</i>	2
Don't Know	98
No Response	99

2.8 If 2.7=NO ASK Please tell us why the package was not adequate in terms of quality? (Interviewer probe by mentioning the package items)

<i>Interviewer: Below, note down problems with quality</i>	Text
Don't Know	98
No Response	99

2.9 Is the package adequate in terms of quantity?

Quantity of items	Code
Yes... <i>skip to 2.11</i>	1
No... <i>proceed to 2.10</i>	2
Don't Know	98
No Response	99

2.10 If 2.9=NO ASK: Please tell us why the package was not adequate in terms of quantity.

<i>Interviewer: Below, note down problems with quantity.</i>	Text
Don't Know	98
No Response	99

2.11 Are school fees all paid at once?

School fees paid at once	Code
Yes	1
No	2
Don't Know	98
No Response	99

2.12 Do scholarship items arrive on a timely basis?

Scholarship items timely	Code
Yes	1
No	2
Don't Know	98
No Response	99

2.13 Have all the WtF scholars received or do they have regular access to school books as per the MOEST guidelines?

Access to books	Code
Yes	1
No	2
Don't Know	98
No Response	99

2.14 Are you aware of the leadership mentoring component of the WtF programme?

Leadership mentoring	Code
Yes	1
No...skip to 2.16	2
Don't Know	98
No Response	99

2.15 If yes, give me examples of how you perceive WtF scholars to have benefited from the Leadership Mentoring activities.

Interviewer: <i>Jot down the key phrases concerning benefits of leadership mentoring.</i>	
Don't Know	98
NO RESPONSE	99

2.16 What do you like most about the WtF programme? Please use key words that describe what you like.

Interviewer: <i>Jot down the key phrases concerning what the scholar liked.</i>	
Don't Know	98
NO RESPONSE	99

2.17 What is the main challenge WtF scholars have faced in succeeding in their academic lives?

Interviewer: <i>Jot down the key phrases concerning what challenges scholars face in academic success.</i>	
Don't Know	98
NO RESPONSE	99

2.18 What is the main challenge WtF scholars have faced in developing their leadership skills?

Interviewer: <i>Jot down the key phrases concerning what challenges scholars face in developing leadership skills</i>	
Don't Know	98
NO RESPONSE	99

2.19 Does the school have a staff counsellor who can provide developmental and psychosocial counselling?

School staff counsellor	Code
Yes... <i>proceed to 2.20</i>	1
No... <i>skip to 2.21</i>	2
Don't Know	98
No Response	99

2.20 What is the procedure in providing counselling?

Process in providing counselling	Code
Counsellor identifies need	1
Students invited to seek help if needed	2
Both	3
Don't Know	98
No Response	99

2.21 Have there been times that WtF scholars have needed developmental and psychosocial counselling?

WtF student needing counselling	Code
Yes	1
No	2
Don't Know	98
No Response	99

2.22 Was it provided in a timely manner?

Timeliness in provision of counselling	Code
Yes	1
No	2
Don't Know	98
No Response	99

2.23 Does the school have a careers master who provides career counselling?

Careers master	Code
Yes, <i>proceed to 2.24</i>	1
No, <i>skip to 2.25</i>	2
Don't Know	98
No Response	99

2.24 If 2.23 = Yes ASK: Do students from your school regularly (ie. Termly) seek career counselling services?

Used Careers master	Code
Yes	1
No	2
Don't Know	98
No Response	99

2.25 On a scale of 1-5, how would you assess the effectiveness of the WtF programme in helping students reach their full potential in secondary school academics? (5= very effective, and 1=very ineffective)

Effectiveness in helping students reach academic potential	Code
Very effective	5
Somewhat effective	4
Neither effective or ineffective	3
Somewhat ineffective	2
Very ineffective	1
Don't Know	98
No Response	99

2.26 On a scale of 1-5, how would you assess the effectiveness of the WtF programme in helping students reach their full potential in terms of leadership opportunities? (5= very effective, and 1=very ineffective)

Effectiveness in helping students reach leadership opportunities	Code
Very effective	5
Somewhat effective	4
Neither effective or ineffective	3
Somewhat ineffective	2
Very ineffective	1
Don't Know	98
No Response	99

2.27 On a scale of 1-5, how would you characterize the academic achievement of the WtF scholars in your school? (5= Far above average, and 1=Far below average)

Academic achievement	Code
Far above average	5
Above average	4
Average	3
Below average	2
Far below average	1
Don't Know	98
No Response	99

2.28 As far as you can tell, do you see any differences in achievement between WtF girls as compared to WtF boys? (Achievement can include grades, retention, drop-out, completion, etc)

Gender differentials	Code
Yes... <i>proceed to 2.29</i>	1
No... <i>skip to 2.31</i>	2
Don't Know	98
No Response	99

2.29 If 2.28 is YES, ASK: Are the achievements more positive for boys or for girls?

Gender differentials	Code
Boys	1
Girls	2
Don't Know	98
No Response	99

2.30 Can you tell us why you think there is a difference between the effect on girls vs. the effect on boys? (Possible Probe: Can you give some evidence)

Interviewer: <i>Jot down the key phrases about why the programme effect is different for boys/ girls.</i>	
Don't Know	98
NO RESPONSE	99

2.31 Do you have any other suggestions for improving the implementation of WtF?

Interviewer: <i>Jot down the key phrases about what the head teacher wants to be improved in the programme.</i>	
Don't Know	98
NO RESPONSE	99

Communication with EGF

3.1 How many times did you and EGF/WtF communicate in 2014?

Number of times communicated with WtF	Code
<i>Interviewer note down the total number of times EGF/WtF communicated with the head teacher</i>	#
None...skip to 3.3	0
Don't Know	98
No response	99

3.2 How does EGF/WtF communicate with you? (mark all that apply)

Channels of Communication	Code
Phone	1
Letter	2
Verbal message from school staff	3
Visit from Equity Branch staff	4
Visit from my mentor	5
Other	6
Don't Know	98
No Response	99

3.3 What do you communicate about when you are in touch with EGF/WtF? (choose all that apply)

Reasons communicating with EGF	Code
Financial issues	1
Scholar behaviour	2
Mentoring of WtF scholars	3
WtF meetings	4
Grades and report cards	5
Trainings	6
Other	7
Don't Know	98
No Response	99

3.4 Do you know the name of the person would you contact at the WtF program if you have a financial issue related to a WtF scholar?

EGF contact person for financial issues	Code
Yes <i>Interviewer ask for the person's name/ title for verification.</i>	1
No	2
No name, but have a contact list.	3
Don't Know	98
No Response	99

3.5 Do you know the name of the person you would contact at the WtF program if you have an academic issue related to a WtF scholar?

EGF contact person for academic issues	Code
Yes <i>Interviewer ask for the person's name/ title for verification.</i>	1
No	2
No name, but have a contact list.	3
Don't Know	98
No Response	99

3.6 Do you know the name of the person you would contact at the WtF program if you have an psychosocial issue related to a WtF scholar?

EGF contact person for psychosocial issues	Code
Yes <i>Interviewer ask for the person's name/ title for verification.</i>	1
No	2
No name, but have a contact list.	3
Don't Know	98
No Response	99

3.7 Are there any difficulties with communicating with the WtF programme?

Challenges communicating with WtF	Code
Yes... <i>skip to 3.7</i>	1
No... <i>skip to 3.8</i>	2
Don't Know	98
No Response	99

3.8 IF 3.6= YES, ASK: What are the difficulties in communicating with EGF/ WtF?

<i>Interviewer: Jot down the key phrases about what the challenges communicating with EGF are.</i>	
Don't Know	98
NO RESPONSE	99

3.9 Would you like more communication with EGF/ WtF?

More communications with EGF?	Code
Yes... <i>skip to 3.9</i>	1
No... <i>END INTERVIEW</i>	2
Don't Know	98
No Response	99

3.10 IF 3.8=YES ASK: What topic would you like to communicate with EGF about?

Interviewer: <i>Jot down the key phrases about what the head teacher would like to communicate with EGF/WtF about.</i>	
Don't Know	98
NO RESPONSE	99

END OF INTERVIEW

Thank the head teacher for taking the time to participate in the interview process.

Annex E: Wings to Fly KII and GD tools

Questions for APHIA+ COPs

Please reply by email by Thursday night March 12

USAID – Wings To Fly - Mid-term Evaluation

Reply to: sleigh64@aol.com

Introduction

Hello. My name is Stuart Leigh and I am writing to ask a few questions about the Equity Group Foundation's Wings to Fly (WtF) scholarship program for secondary school OVC scholars. I am an independent consultant hired to lead a mid-term evaluation of the WtF activity for one of its funders, USAID. This requires getting feedback from participants, program and school staff, members of District Scholar Selection Boards, and others. Below are questions about particular topics related to the WtF scholar selection process, program successes and challenges, and reporting and monitoring processes. In order for us to be able, if needed, to contact you to clarify certain answers, we ask that you provide your contact information. The information and answers you give will be stored safely for the duration of the activity and then will be kept until at least 2015 for the purposes of preparing reports to the activity sponsor. Your participation is completely voluntary. You are free to not answer any question with which you are not comfortable. **If you have any questions about this request for information, you may contact me at 0716 894 658, or contact my evaluation partner, Edwin Ochieng, 0720 808 857. Please be as complete with your responses as possible. Please be sure to reply to this email by March 12; and be sure to attach this MSWord document file (with your completed answers) to that email. Send it to sleigh64@aol.com. Thanks!**

PLEASE ENTER YOUR RESPONSES IN THE SPACES BELOW in MSWord. The cells will expand to accommodate your complete answer.

BIO DATA

Your Name:

Date:

Organization:

Title:

Duration at post:

Duration involved with or aware of operations of the

Wings To Fly (WtF) program:

Office phone:

Personal mobile:

QUESTIONS

APHIA+ RESPONSES

Background:

- b1 Please describe your interactions, if any, with the Wings To Fly (WtF) scholarship program.
- b2 What is your office's current involvement with the WtF program?
- b3 Who in Kenya is the lead person for negotiating / planning APHIA linkages with Equity Group Foundation and -the WtF program?
- b4 What does APHIA-plus do in the way of providing scholarships or educational assistance for OVCs? Do you have an elementary or secondary program or both?

Eval. Q 1: Ensuring Equity

- 1.1 At one time APHIA+ identified some of its scholarship recipients to be absorbed into the WtF scholarship program. What were the original criteria for these children to be admitted to the APHIA plus education support program?
- 1.2 For 2013 USAID specified that 500 APHIA+ scholarship recipients should be absorbed into the WtF program. Do you know what criteria were used to select these APHIA+ students to be considered for admission to the WtF program?
- 1.3 How many APHIA+ supported students from your region were offered to WtF for consideration to be brought into the WtF activity?
- 1.4 How many APHIA+ supported students from your region were actually selected to become WtF scholars?

- 1.5 Approximately how many or what percentage of the children admitted to WtF from your regional APHIA+ program were infected with or affected by HIV in their family? (OVCs as per the PEPFAR definitions - see below**)
- 1.6 Has anyone from APHIA in your region been asked to sit on a WtF District Selection Committee or WtF District Scholar Selection Board (DSSB) for purposes of assessing the vulnerability of applicant **orphans and vulnerable children (OVCs)**? If Yes, were you that person, and If not can you provide contact information for an APHIA-plus person who did sit on a WtF DSSB?
- 1.7 Are you familiar at all with the WtF scholar selection process? If no go to question 1.8.
- 1.8 Are you aware of any difficulties or problems WtF has had in managing the scholar selection process? If yes, what kind of difficulties were they?
- 1.9 Do you think that the selection process been administered fairly? If no, in what way(s) has it been unfair?
- 1.10 Are you aware of any complaints about the WtF scholar selection, If so, what is the nature of these?
- 1.11 In your judgment is the WtF program providing equitable and appropriate treatment for OVC girls as well as boys? If no, please describe in what way it is not equitable.

Eval. Q 2: Key Successes / Challenges

- 2.1 What have been the most notable successes of the WtF program?

- 2.2 What have been the most notable and problematic challenges?
- 2.3 Does your APHIA-plus regional office currently have a scholarship program to support vulnerable children (OVCs) at either primary or secondary level? If so, how does the WtF program compare and contrast with it?
- 2.4 Are you aware of the *mentoring* component of the WtF program? If Yes, what does it consist of and how effective do you think it has been?
- 2.5 Are you aware of the *leadership* component of the WtF program? If Yes, what does it consist of and how effective do you think it has been?
- 2.6 Have any of your staff been invited to attend a WtF workshop either as an observer, presenter, trainer or in some other capacity? If yes, in what capacity and approximately when did this workshop take place?
- 2.7 Is the NASCOP approved *Healthy Choices for a Better Future* curriculum used in your regional APHIA+ area? If so by what training agencies and for which audiences?
- 2.8 OVCs may have special psychosocial problems. Are most secondary schools staffed in such a way as to be able to adequately address these problems?
- 2.9 Are you aware of any psycho-social counseling assistance provided by EGF to WtF OVC scholars, some of whom have special vulnerabilities? If yes, what does it consist of? How effective do you think it has been?

- 2.10 How have the WtF OVCs performed in secondary school compared to other similar OVCs who are able to attend secondary schools by other means?
- 2.11 Does APHIA+ keep in contact with the families of the students it formerly supported who have been absorbed into the WtF program?
- 2.12 Have issues ever been raised, that are NOT RELATED to concerns about fairness in selection of WtF scholars, but rather are about other WtF activities, policies, or services. (For example how scholars get along once they are in school, or how EGF deals with financial payments, or how it communicates with schools, how it schedules activities, or the quality of its trainings, or the mentoring program, or reporting it may require, or anything else?)

What if anything would you like to see done differently in the WtF program?

Eval. Q 3: Reporting and M&E

- 3.1 Has anyone from WtF been in touch with your APHIA+ regional staff to provide occasional updated information about the progress of the scholars that came from your APHIA program?
- 3.2 Do your APHIA+ office and WtF have ongoing or occasional communications? If so, typically what are the subjects of these communications?
- 3.3 Have you ever communicated with the WtF program staff on any issue? If so what issue(s)?

- 3.4 If there are APHIA+ representatives on DSSBs, do they report on the WtF program to APHIA+?
- 3.5 Does Equity Group Foundation or the WtF program provide written reports to APHIA+ about the program? If so, in what form and how often do they do so?
- 3.6 Do you feel that the APHIA+ is getting all the information it needs or wants about the WtF program and its OVC scholars? For example, for purposes of following up on former APHIA+ supported students.
- 3.7 Are there ways in which communications between APHIA and WtF need to be improved? If yes, what might they be
- 3.8 Do you have anything to recommend?

**** PEPFAR OVC Definitions**

2012 “Children who have lost a parent to HIV/AIDS, who are otherwise directly affected by the disease, or who live in areas of high HIV prevalence and may be vulnerable to the disease or its socioeconomic effects.” ... "In addition the Hyde-Lantos Act stipulates the need in “areas of higher HIV/AIDS prevalence, to promote a community-based approach to vulnerability, maximizing community input into determining which children participate.”

p.20 PEPFAR: GUIDANCE FOR ORPHANS AND VULNERABLE CHILDREN PROGRAMMING July 2012

2011 PEPFAR defines an orphan as a child, 0–17 years old, who has lost one or both parents to HIV/AIDS. A vulnerable child is defined as one, 0–17 years old, who is more vulnerable because he or she is HIV positive; lives without adequate adult support; lives outside of family care; or is marginalized, stigmatized, or discriminated against.

p. 1 Audit Of USAID/Kenya’s Assistance To Orphans And Other Vulnerable Children, Nov. 10, 2011

2009 OVC - Children made vulnerable due to HIV (<18 years old) including children who have lost one or both parents to AIDS, who live in households made increasingly vulnerable because of HIV/AIDS. (e.g. In high prevalence communities, all children may be affected due to break down in community support, loss of teachers, or other social support as a result of HIV epidemic.) HIV+ children (<18 years old) are included under PLWHA.

p. 196, PEPFAR: Next Generation Indicators Reference Guide, (Eligible Populations Key), 2009

Annex F: Criteria to Ensure the Quality of the Evaluation Report

APPENDIX I CRITERIA TO ENSURE THE QUALITY OF THE EVALUATION REPORT

- The evaluation report should represent a thoughtful, well-researched and well organized effort to objectively evaluate what worked in the project, what did not and why.
- Evaluation reports shall address all evaluation questions included in the scope of work.
- The evaluation report should include the scope of work as an annex. All modifications to the scope of work, whether in technical requirements, evaluation questions, evaluation team composition, methodology or timeline need to be agreed upon in writing by the technical officer.
- Evaluation methodology shall be explained in detail and all tools used in conducting the evaluation such as questionnaires, checklists and discussion guides will be included in an Annex in the final report.
- Evaluation findings will assess outcomes and impact on males and females.
- Limitations to the evaluation shall be disclosed in the report, with particular attention to the limitations associated with the evaluation methodology (selection bias, recall bias, unobservable differences between comparator groups, etc.).
- Evaluation findings should be presented as analyzed facts, evidence and data and not based on anecdotes, hearsay or the compilation of people's opinions. Findings should be specific, concise and supported by strong quantitative or qualitative evidence.
- Sources of information need to be properly identified and listed in an annex.
- Recommendations need to be supported by a specific set of findings.
- Recommendations should be action-oriented, practical and specific, with defined responsibility for the action.

Annex G: Evaluation Team Member CVs

Stuart Leigh – Evaluation Team Leader

Summary

Mr. Leigh has over 25 years of experience in program design and implementation, management and monitoring and evaluation for a wide-variety of education and training programs in multiple developing countries and for various donors. As evaluation team leader in 2013 for MSI, Mr. Leigh conducted an evaluation of USAID's Teacher Education and Professional Development activity in Kenya. In 2012 Mr. Leigh served as a team leader and conducted an evaluation of USAID's major basic education effort in Southern Sudan, the Southern Sudan Interactive Radio Instruction activity. In 2010, Mr. Leigh acted as the senior technical specialist for an evaluation of the USAID-funded Technology Tools for Teaching and Training Project in India, during which he assessed applied educational radio, video, and computer-based systems and their impacts. From 2004-2008, he was an integral part of the creation of the Public-Private (GDA) Real World Alliance in the Philippines and as chief of party led its Improving English Language Teaching and Learning in Mindanao project designed to train teachers and students using Real World English: Tuning in to Language and Culture multi-media resources in schools, universities, community learning centers and via radio.

Education

B.A., Psychology, University of Pennsylvania, 1973

Experience

Real World Foundation, Inc., United States, Executive Director, July 2003 – present

- Co-designer and manager of \$1.6M. Asthma Free School Zone public health project funded by New York City Department of Health and Mental Hygiene, New York City Department of Transportation, and others.
- Oversaw activities of a staff of 3-4 full time workers designing extensive environmental health education materials and conducting trainings for school staff, students and community members in over 200 New York City schools. Developed and managed a multi-year evaluation sub-contract with the Environmental and Occupational Health Sciences department of the Urban Public Health Program at Hunter College to conduct a pre-post intervention air quality evaluation study at multiple Asthma Free School Zone sites (July 2003 to June 2012).
- Managed a separate air quality evaluation study at 10 locations in lower Manhattan with support from Con Edison (October 2008 to October 2009).

Management Systems International, Kenya, Evaluation Team Leader, Jan. – March 2013

- Oversaw evaluation implementation and delivery of quality and timely work products and deliverables for the Teacher Education and Professional Development (TEPD) activity, inclusive of a major HIV/AIDS education component and the Accelerating 21st Century Education (ACE) educational technology activity.
- Established roles, responsibilities and tasks of team members.
- Worked with colleagues and stakeholders to develop performance measures and data collection systems.
- Ensured the collection of high quality data for analysis and preparation of periodic reports.

ANNEX 5: DETAILED FINAL EVALUATION METHODS & LIMITATIONS

Evaluation Methods

This evaluation draws on a mixed-methods approach, using both qualitative and quantitative techniques that include desk review, key informant interviews (KIIs) and group discussions (GDs) with key stakeholders and a representative survey of scholars and head teachers. The design triangulates evidence across data types and sources, with survey results yielding statistically representative data.

Data Collection

Desk review: The evaluation team reviewed activity documentation provided by the Kenya Support Project (KSP), USAID and EGF and a range of online and print resources. Key secondary sources include:

1. Program and activity descriptions, grant agreements and amendments;
2. Annual work-plans;
3. PMPs with targets and actual reporting;
4. Memoranda of understanding (MOUs);
5. Program materials;
6. Periodic (quarterly and/or per term) progress reports;
7. Information on DSSB composition and DSSB training guides;
8. EGF research and consultancy reports;
9. Key fields from EGF database of applicants and scholars (e.g., scholar bio-data, performance data);
and

Resources on best practices in similar activities, including other Global Development Alliance (GDA) activities or similar mentoring or scholarship programs.

Key Informant Interviews: Seven structured questionnaires were developed to probe issues related to the three evaluation questions: six KII questionnaires for EGF Central Management, Equity Branch WtF Teams, MOEST, APHIAplus, USAID and other sponsors; and a seventh for APHIAplus Chiefs of Party (COP) for use by email. Forty-one KIIs were conducted with individuals such as the EGF managing director, acting EGF Education general manager, Equity African Leaders Program (EALP) program manager, USAID activity managers, MasterCard Foundation program manager of the Scholars Program, KfW programs manager, Adam Smith International (a DFID subcontractor) representative, key staff from USAID staff (WtF agreement officer's representative [AOR], OVC implementing partner APHIAplus AOR and PEPFAR coordinator), six APHIAplus COPs, MOEST staff (directors at the headquarters, a county director of education (CDE), DEOs and a head teacher), EGF branch managers and WtF champions in Isiolo, Meru, Nairobi, Kiambu and Homa Bay, and others. Detailed notes from each KII are captured in an Excel spreadsheet.

Group Discussions: Structured questionnaire was designed for the GDs, which were held with EGF implementing staff, WtF implementing EB staff and DSSB members in Isiolo, Meru, Nairobi, Kiambu, Kisumu and Homa Bay to provide insight on the selection processes in addition to DSSB members' and bank staff's perceptions of program successes and challenges. Study sites were chosen to include both

locations where USAID has received complaints about the application and selection process and those where no complaints have been received. The evaluation team facilitated the GDs with note-taking supported by Research Solutions Africa (RSA) using a structured guide with relevant themes.

The KIIs and GDs provided information regarding the activity's overall design, WtF management structure, program service delivery features, selection criteria of the PWC Scholarship Program OVCs, how EGF allocated USAID supported scholarships geographically, the application process, advertising, the DSSB formation process, proportion of WtF scholars who are orphans and/or HIV-affected, the most notable WtF program successes and leading challenges in managing the WtF program, etc.

Survey Development and Implementation: Three survey instruments (Annex 4) were developed by the evaluation team leader and coded for field use. They were designed to probe issues related to WtF's main service patterns. All three survey tools instruments (attached as Annex 4) were coded for use in the field by MSI staff in association with RSA.

The tools were tested Dec. 10 - 13, 2015. Training for 25 research assistants was conducted on Jan. 19-20, 2015 and involved use of tools and mock interviews. The survey was conducted from Jan. 21 - Feb. 5, 2015. The average ratio of supervisors to enumerators was 1:5. In order to ensure data quality, the team leaders did back-checks and accompaniments. Cumulative 50% of the interviews were spot-checked or accompanied, with at least 20% back-checks. Sit-in interviews were conducted to ensure that interviewers were asking the questions as required and also recording information correctly. MSI staff attended also attended the training and pre-test to ensure quality.

The final survey reached: 392 USAID scholar beneficiaries; 150 Head teachers in the secondary schools those same USAID scholars attend; and 50 Graduates of the EGF (PWC) OVC Scholarship Program from the 2011 cohort of PWC OVC secondary scholars and/or older PWC OVCs who were in mid-level colleges or universities in 2011 and have now graduated.²⁴

Sample Design: The evaluation used representative sample design to select the students, and from a sample frame of 680 schools, selected 150 schools and head teachers to be surveyed. Survey results produced results at a confidence level of at least 90 percent and a margin of error under five percent for scholars and under 10 percent for head teachers. The team used purposive sampling to select GD locations and key stakeholders such as other donors, program managers and MOEST staff for KIIs. In addition, the team gathered secondary local data about particular districts, branches and DSSBs in the six locations selected for GDs and KIIs, allowing an abbreviated Case Study approach as well.

²⁴ As it happened, among the 51 graduates surveyed with this instrument, only one student had been among the secondary scholars. The 50 others were all from the tertiary and university groups. This reflects a finding of this evaluation that EGF has few if any strategies to stay in touch with secondary school graduates. EGF informed MSI as they assisted RSA in identifying the potential survey respondents that they were unable to locate more secondary graduates.

Table 1: Respondents Reached for All Data Collection Methods

Organization/Category	Method	Number
Equity Group Foundation Leadership	KII	1
Equity Group Foundation Program Staff	KII, GD	2
Equity Group Foundation Program Staff	GD	6
Equity Bank (BGDM)	KII	6
WtF Field Team	GD	12
DSSBs	GD	53
USAID	KII	3
MOEST	KII	11
Partners (MCF, DfID, KfW, APHIAplus (6),)	KII	9
Secondary Students	Survey	394 (194m, 200f)
Graduates: EGF (PWC) OVC program	Survey	51 (26m, 25f)
Head Teachers	Survey	150
TOTAL		698

Data Analysis

As with data collection, the evaluation used a range of data analysis techniques on data such as test scores, demographic information, survey and KII responses, etc. Quantitative analysis included: frequency distributions depicted in tables, histograms or bar charts, to visually organize and display WtF scholar data; cross tabs to show the relationship between two or more survey questions providing a side-by-side comparison of different respondent groups' (scholars and head teachers) answers to survey questions; and trend analysis to identify patterns, especially in the EGF's Education Management Information System (EMIS) data, regarding change over time and with the maturation and development of the activity (e.g., number of scholars selected and performance in exams).

In addition, the team used a range of qualitative analyses. Planned versus actual comparison between program descriptions, work plans, PMP targets and periodic performance data informed examination of WtF performance relative to overall activity compliance and timely fulfillment of proposed activities (e.g., fee payment, stipend disbursement, mentoring, guidance and counseling and leadership training). Pattern/content analysis of KII and GD data enabled assessment of response similarities and differences among respondents, institutional levels (e.g., EGF, donors and MOEST) and sites (i.e., the locations reached: Nairobi, Isiolo, Meru, Kiambu, Kisumu and Homa Bay). The team also noted significant convergences and divergences in responses. After field visits, the team conducted follow-up interviews in person and by phone and email to resolve the conflict among significant divergent findings in the reporting of facts, perceptions or opinions (e.g., between EGF and the branches).

Using a mixed-methods approach, data from various methods (the survey, KII and GDs) have been integrated to arrive at findings. This triangulation process involved convergence/divergence analysis for examining data from different methods and levels.

Limitations

There was a potential for respondent bias since program beneficiaries were being interviewed. Tools were developed with probing questions to offset this. EGF's EMIS data on districts where scholars went to school and resided at the time of their application was highly inaccurate with district names different from any real districts. The absence of clean district-level EMIS data was a major impediment to fine-grained analysis of the WtF geography. County data was available, however, which allowed the evaluators to create provincial analyses to address particular requirements of USAID's support for WtF.

A request was made to the Kenya National Exams Council (KNEC) for data that never arrived, making one important calculation impossible. The data requested would have documented, by district, the number of Standard 8 students taking the 2013 KCPE coming from 1) DSSB/EB districts and 2) "remote districts" (districts other than those in which "their" DSSB and WtF-coordinating EB branch are located) to compare the ratio of those two numbers to the ratio of the number of WtF scholarships awarded from those same districts. The "centralizing tendency," or tendency to select more scholars from one district than another, that became apparent in the DSSB/EB districts relative to the remote districts they serve may be less pronounced when viewed relative to districts' Standard 8 population distributions.

ANNEX 6: LIST OF INFORMATION SOURCES

- Academic Model Providing Access to Healthcare - Fact Sheet, USAID, August
- Action Memorandum for the Acting Mission Director, Dwaine Lee, USAID-Kenya, November 21, 2011
- Action Memorandum for the Mission Director and Due Diligence Report, Dwaine Lee - USAID- Kenya June 23, 2011
- Action Memorandum for the Mission Director, Dwaine Lee t USAID- Kenyat January 30, 2013
- Amendment to the Grant Agreement with Equity Group Foundation: OVC Scholarship and Leadership Program Award No. AID-623-G-12-00001, USAID-Kenya
- Annual Performance Report FY 2014, as of September 30, 2014, EGF
- Audit Of USAID/Kenya's Assistance To Orphans and Other Vulnerable Children, Audit Report No. 4-615-12-002-P, Office of Inspector General, Pretoria, South Africa, November 10, 2011
- Country Development Cooperation Strategy 2014-18, USAID, May 2014
- Education Sector Policy on HIV and Aids, Second Edition, Ministry of Education, Science and Technology, Kenya, 2013
- Equity Group Foundation 'Wings To Fly' Scholars Satisfaction Survey Report, Education and Leadership Program, EGF, April 2012
- Equity Group Foundation Education and Leadership Program Performance Monitoring Plan (Revised), June 2014
- Equity Group Foundation Education and Leadership Program Performance Monitoring Plan June 2014 (updated July 31, 2014 Actual and Target)
- Equity Group Foundation Wings to Fly Program Performance Monitoring Plan, April 2012
- Grant Agreement OVC Scholarship Program with Equity Group Foundation Award No. AID-623-G-12-00001, USAID, December 11, 2011
- Guidance For Orphans and Vulnerable Children Programming, The U.S. President's Emergency Plan for AIDS Relief (PEPFAR), July 2012
- Investing in Secondary School Education & Leadership Development for Kenyan Youth, EGF.
- Kenya - Operational Plan Report - FY 2011, PEPFAR
- Kenya HIV Prevention Intervention Assessment Tool. Ministry of Public Health and Sanitation

National AIDS and STI Control Program, First Edition, 2012

Kenya Operational Plan Report FY 2013, PEPFAR

Leadership Congress Evaluation Report 2012, compiled by Ngotho Kinyua

Leadership Survey Report on DFID sponsored Scholars 2014, Equity Group Foundation Education Pillar, Jay Musyoka and Elizabeth Wahito, December 2014

Memorandum of Understanding between USAID and EBL and EGF, July 16, 2012

Mentor Training Handout, EGF

Mentoring as a Symbiotic Relationship, EGF

Modification of Assistance, signed Sunil Xavier, USAID July 3, 2013

National Education Sector Development Plan, Volume One: Basic Education Programme Rationale and Approach, 2013/2014 – 2017/2018 Draft for Consultation 31 January 2014, MOEST, Kenya

Next Generation Indicators Reference Guide, Version 1.1, PEPFAR, August 2009

Oldonyiro Resilience Assessment Summary, Conducted 12th-17th, May 2012

Pledge By The Principal Secretary At The Second Global Partnership For Education (GPE) Replenishment Conference Held At The Eu Headquarters, Brussels, Belgium on 25th to 26th June, 2014, Republic of Kenya, Ministry of Education, Science and Technology, State Department of Education

Policy, Procedures, Standards & Practices Manual Equity Group Foundation, Dr. B. Kairu December 9, 2013

Positive Living For A Brighter Future II, For adolescents aged 13 to 17 years Facilitators' Manual, The Aids Fonds, Netherlands and the Belgian Development Cooperation

Progress Report for Term 2: Administration of Orphans and Vulnerable Children (OVC) Scholarship Programme (USAID), August 4, 2011

Report of the Task Force on Secondary School Fees 2014, Towards Free and Compulsory Quality Basic Education in Kenya, Chaired by Hon. Dr. Kilemi Mwiria, MOEST, August 26, 2014

School-Based Mentoring Michael Karcher, Ed.D., Ph.D., University of Texas at San Antonio, & Carla Herrera, Ph.D., Public/Private Ventures

Selection Process Satisfaction and Baseline Survey Report, compiled by Ngotho Kinyua

USAID Kenya (OVC Scholarship and Leadership Program), USAID

Wings To Fly 2012 December Workshop Report, 14th December 2012

Wings to Fly Booklet - Transforming Africa Through Education Scholarships and Leadership Mentoring, EGF

Wings to Fly Mentoring Training Slide, EGF

Wings to Fly Scholars Selection Manual 2015, EGF

EGF – WtF Workplans

2012 Workplan Narrative Final Revision, EGF, June 5, 2012

2012 Workplan USAID, EGF (Excel)

2013 Workplan Narrative, EGF

2014 Workplan Narrative, EGF

2014 Workplan Revised, EGF (Excel)

2014 Workplan USAID, EGF (Excel)

EGF WtF Progress Reports:

2012 03 30 USAID Q1 Quarter Report, EGF

2012 06 30 USAID Q2 M&E Report - Education Report Quarter 2 2012 (USAID) Revised, EGF

2012 06 30 USAID Q2 Mentoring report 2012 Revised, EGF

2012 06 30 USAID Q2 Quarte Report, EGF

2012 12 31 USAID Q4 Quarter Report, EGF

2013 06 30 USAID Q2 2013 Quarter Report, EGF

2013 09 30 USAID Q3 Mentoring Report, EGF

2013 09 30 USAID Q3 Quarter 2013 Report, EGF

2013 12 USAID Q4 Appendix III-Mentoring Report, EGF

2013 12 31 USAID Q4 Quarter Report, EGF

2014 03 31 USAID Q1 Quarter Report, EGF

Q4 Mentoring Report Summary, EGF

2012 Career And Leadership December Workshop Evaluation Report

2013 Leadership Congress Evaluation Report Wings to Fly Program, John N. Kinyua, April 25, 2014

2013 Wings to Fly Selection Process Assessment Draft Report

USAID Trip Reports:

2012 05 25 USAID Trip Report Monitoring Report – EGF Western Nyanza Trip With Photos

2012 06 29 USAID Trip Report - Education and Youth (EDY) OVC Scholar Trip, June 25-29, Revised July 16, 2012

2012 10 12 USAID Trip Report – OVC Scholars Coast Trip Oct 8-12 ,2012

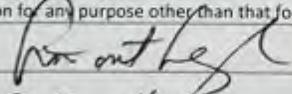
2013 02 12 USAID Trip Report - OVC Scholar Interviews-Kajiado

ANNEX 7: SIGNED CONFLICT OF INTEREST FORMS

Disclosure of Conflict of Interest for USAID Evaluation Team Members

Name	Stuart Leigh
Title	Executive Director
Organization	Real World Productions, Inc.
Evaluation Position?	<input checked="" type="checkbox"/> Team Leader <input type="checkbox"/> Team member
Evaluation Award Number (contract or other instrument)	
USAID Project(s) Evaluated (Include project name(s), implementer name(s) and award number(s), if applicable)	OVC Scholarship and Leadership Program (Wings to Fly)
I have real or potential conflicts of interest to disclose.	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
If yes answered above, I disclose the following facts: <small>Real or potential conflicts of interest may include, but are not limited to:</small> <ol style="list-style-type: none"> 1. Close family member who is an employee of the USAID operating unit managing the project(s) being evaluated or the implementing organization(s) whose project(s) are being evaluated. 2. Financial interest that is direct, or is significant though indirect, in the implementing organization(s) whose projects are being evaluated or in the outcome of the evaluation. 3. Current or previous direct or significant though indirect experience with the project(s) being evaluated, including involvement in the project design or previous iterations of the project. 4. Current or previous work experience or seeking employment with the USAID operating unit managing the evaluation or the implementing organization(s) whose project(s) are being evaluated. 5. Current or previous work experience with an organization that may be seen as an industry competitor with the implementing organization(s) whose project(s) are being evaluated. 6. Preconceived ideas toward individuals, groups, organizations, or objectives of the particular projects and organizations being evaluated that could bias the evaluation. 	<p>I do not feel I have any conflict of interest, however</p> <p>4) If MSI is considered a USAID operating unit I do have prior experience leading evaluations for MSI South Sudan and MSI Kenya. I have also evaluated a project for MSI-Kenya and USAID (TEPD - 2013) on which one or more of the current USAID education staff were also involved.</p>

I certify (1) that I have completed this disclosure form fully and to the best of my ability and (2) that I will update this disclosure form promptly if relevant circumstances change. If I gain access to proprietary information of other companies, then I agree to protect their information from unauthorized use or disclosure for as long as it remains proprietary and refrain from using the information for any purpose other than that for which it was furnished.

Signature	
Date	8.13.14

Disclosure of Conflict of Interest for USAID Evaluation Team Members

Name	EDWIN OCHIENG
Title	MR
Organization	Management Systems International
Evaluation Position?	<input type="checkbox"/> am Leader <input checked="" type="checkbox"/> am member
Evaluation Award Number(contract or other instrument)	
USAID Project(s) Evaluated(Include project name(s), implementer name(s) and award number(s), if applicable)	OVC Scholarship and Leadership Program (Wings to Fly)
I have real or potential conflicts of interest to disclose.	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
If yes answered above, I disclose the following facts: <i>Real or potential conflicts of interest may include, but are not limited to:</i> 1. Close family member who is an employee of the USAID operating unit managing the project(s) being evaluated or the implementing organization(s) whose project(s) are being evaluated. 2. Financial interest that is direct, or is significant though indirect, in the implementing organization(s) whose projects are being evaluated or in the outcome of the evaluation. 3. Current or previous direct or significant though indirect experience with the project(s) being evaluated, including involvement in the project design or previous iterations of the project. 4. Current or previous work experience or seeking employment with the USAID operating unit managing the evaluation or the implementing organization(s) whose project(s) are being evaluated. 5. Current or previous work experience with an organization that may be seen as an industry competitor with the implementing organization(s) whose project(s) are being evaluated. 6. Preconceived ideas toward individuals, groups, organizations, or objectives of the particular projects and organizations being evaluated that could bias the evaluation.	

I certify (1) that I have completed this disclosure form fully and to the best of my ability and (2) that I will update this disclosure form promptly if relevant circumstances change. If I gain access to proprietary information of other companies, then I agree to protect their information from unauthorized use or disclosure for as long as it remains proprietary and refrain from using the information for any purpose other than that for which it was furnished.

Signature	
Date	August 14 th , 2014

ANNEX 8: WINGS TO FLY PMP PERFORMANCE MONITORING INDICATORS AND DATA COLLECTION PLAN

Performance Monitoring Indicators

The Education and leadership program have identified performance monitoring and evaluation indicators that are used to gauge the progress of the program over the program period. For effective monitoring, data collection is effected with the corresponding indicators. The plan for data collection is highlighted giving an overview of how data is collected as activities are implemented.

Quantitative Performance Indicators table:

Strategic Objective I: Increased access to secondary education and improved leadership capabilities for the OVC											
Intermediate Result 1.1: Scholars access and successfully complete secondary education											
Number*	Indicator	Yr1		Yr2		Yr3		Yr4		Yr5	
		Target	Actual	Target	Target	Actual	Target	Target	Actual	Target	Actual
Sub IR 1.1.1: Scholars receive mentoring support											
1.1.1.1	Number of scholars visited at least three times per year	1,136	1,136	2,678	2,678	2,678	2,678	2,678	2,678	1,542	TBD
1.1.1.2	Number of scholars assigned mentors	1,136	1,136	2,678	2,678	2,678	2,678	2,678	2,678	1,542	TBD
Sub IR 1.1.2: Scholars access secondary education											
1.1.2.1	Number of scholars graduating from secondary schools	Nil	Nil	Nil	Nil	Nil	Nil	1,136	TBD	1,542	TBD
1.1.2.2	Number of scholars attending school	1,136	1,136	2,678	2,678	2,678	2,678	2,678	2,678	2,678	2,678
Sub IR 1.1.3: Number of scholarship recipients											
1.1.3.1	Number of scholars awarded scholarship per year	1,136	1,136	1,542	1,542	Nil	Nil	TBD	TBD	TBD	TBD
Intermediate Result 1.2: Scholars hold leadership positions and participate in co-curricular activities at school											
Sub IR 1.2.1: Scholars gain knowledge and leadership skill and are inspired to be leaders											

1.2.1.1	Number holding leadership positions in school and/or participating in co-curricular activities in their schools (50% of the total number of scholars)	1,136	644	1,339	754	1,339	812	1,339	TBD	771	TBD
Sub IR 1.2.2: Scholars participate in leadership congress											
1.2.2.1	Number of scholars participating in leadership congress	1,136	1,136	2,678	2,678	2,678	2,678	2,678	2,678	1,542	1,542
1.2.2.2	Number of leadership congress forums organized	1	1	1	1	1	1	1	TBD	1	TBD
Sub IR 1.2.3: Scholars participate in regional DSSB mentoring sessions											
1.2.3.1	Number of scholars participating in regional DSSB mentoring sessions	N/A	N/A	N/A	N/A	2,678		2,678	TBD	1,542	TBD
1.2.3.2	Number of DSSB mentoring sessions organized	Nil	Nil	Nil	Nil	1	1	1	TBD	1	TBD
Strategic Objective 2: Increase access to tertiary education by OVC											
Intermediate Result 2.1: OVC complete tertiary education											
Sub IR 2.1.1: Scholars are awarded scholarship to join tertiary institutions											
2.1.1.1	Number of scholars awarded scholarship to join tertiary institutions to pursue higher education	N/A									
2.1.1.2	Number of scholars completing tertiary education	N/A									

Table 2. Data Collection Plan by Area of Program Activities for secondary school scholarship holders

Indicator type	Indicator definition	Target	Disaggregation	Data collection schedule	Data collection tool/data source	Data collection considerations
I. Access to Education						
USG Indicator Number of OVC' s served by an OVC program (PEPFAR C5.4.D)	Number of secondary school scholarship beneficiaries	2,678	Gender	Quarterly	Scholar files Program progress report	Data quality to be adhered to
Number of scholars receiving psychosocial support (PEPFAR C5.6.D)	1.1. No. of mentorship visits carried out	per term per scholar	None	Continuous	Termly mentoring report	Validity and reliability of data
	1.2. Number of scholars attached to a mentor	2,678	Gender	Continuous	Termly mentoring report	Validity and reliability of data
Access to education EGF Output/outcome indicators	1.3. Number of scholars who attend/admitted to secondary school	2,678	Gender	Annually	School admission letters	Data quality to be adhered to
	1.4. Number of scholars who complete/graduate from secondary education	2,678	Gender	Continuously during the program period	School leaving certificate KCSE result slip	Validity of data to be adhered to
Leadership	1.5. Number of leadership conferences held	1 per year	None	Once following each congress	Program progress report	Validity and reliability of data
	1.6. Number of scholars participating in leadership congress	All scholars in the program in the subject year	Gender	Annual	Program progress report	Validity of data

Table 3. Data Collection Plan by Area of Program Activities for university and college students

Indicator type	Indicator definition	Target	Disaggregation	Data collection schedule	Data collection tool/data source	Data collection considerations
2. Access to Education						
USG Indicator Number of OVC' s served by an OVC program for tertiary education (PEPFAR C5.4.D)	Number of individuals from underserved and/or disadvantaged groups accessing tertiary education	152	Gender	Quarterly	Scholar files Program progress report	Data quality to be adhered to
Access to education EGF Output/outcome indicators	1.7. Number of scholars who complete/graduate from college or university	152	Gender	Continuously during the program period	Copy of graduation certificate	Validity of data to be adhered to

Table 4: Quantitative Outcome Indicators and Data Collection Overview

Component	Outcome Indicator	Method	Frequency	Target	Data collection considerations
Access to Education for the OVC	1 Scholarship recipients admitted to secondary schools	Scholars database	Annually	95%	
	2 Scholarship recipients admitted to tertiary institutions	Scholars database	Annually	152	
Leadership and social transformation	1.3 Scholarship recipients who take on leadership roles in school	Surveys, secondary data	Annually	50%	Sample
Mentorship	Number of scholars satisfied with the mentoring activities	Survey Performance database	Annually	80%	Sample
Scholarship program	Number of scholars satisfied with the scholarship program	Survey	Annually	80%	Sample

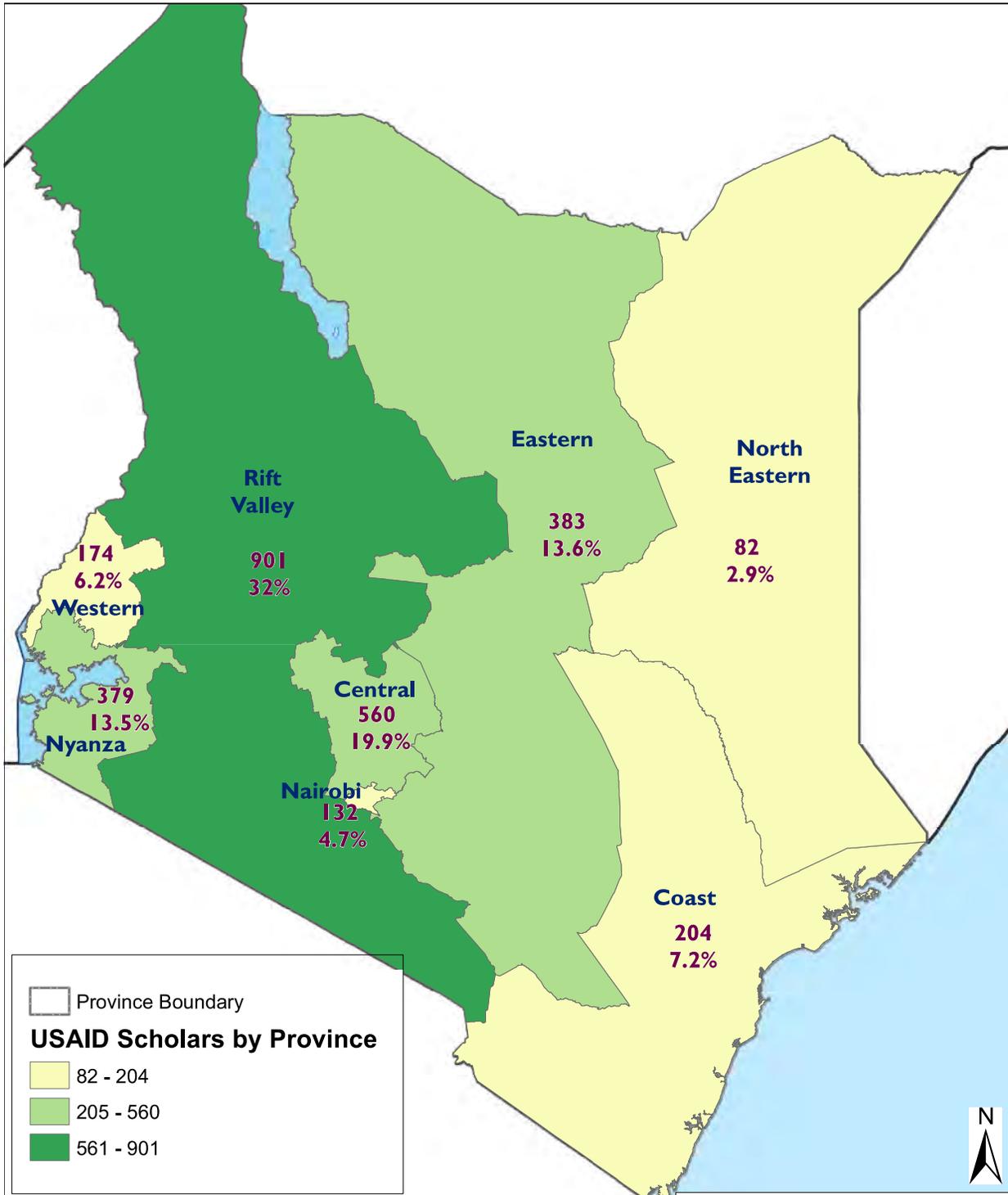
ANNEX 9: MAPS



ALL Wings To Fly Scholars per Province

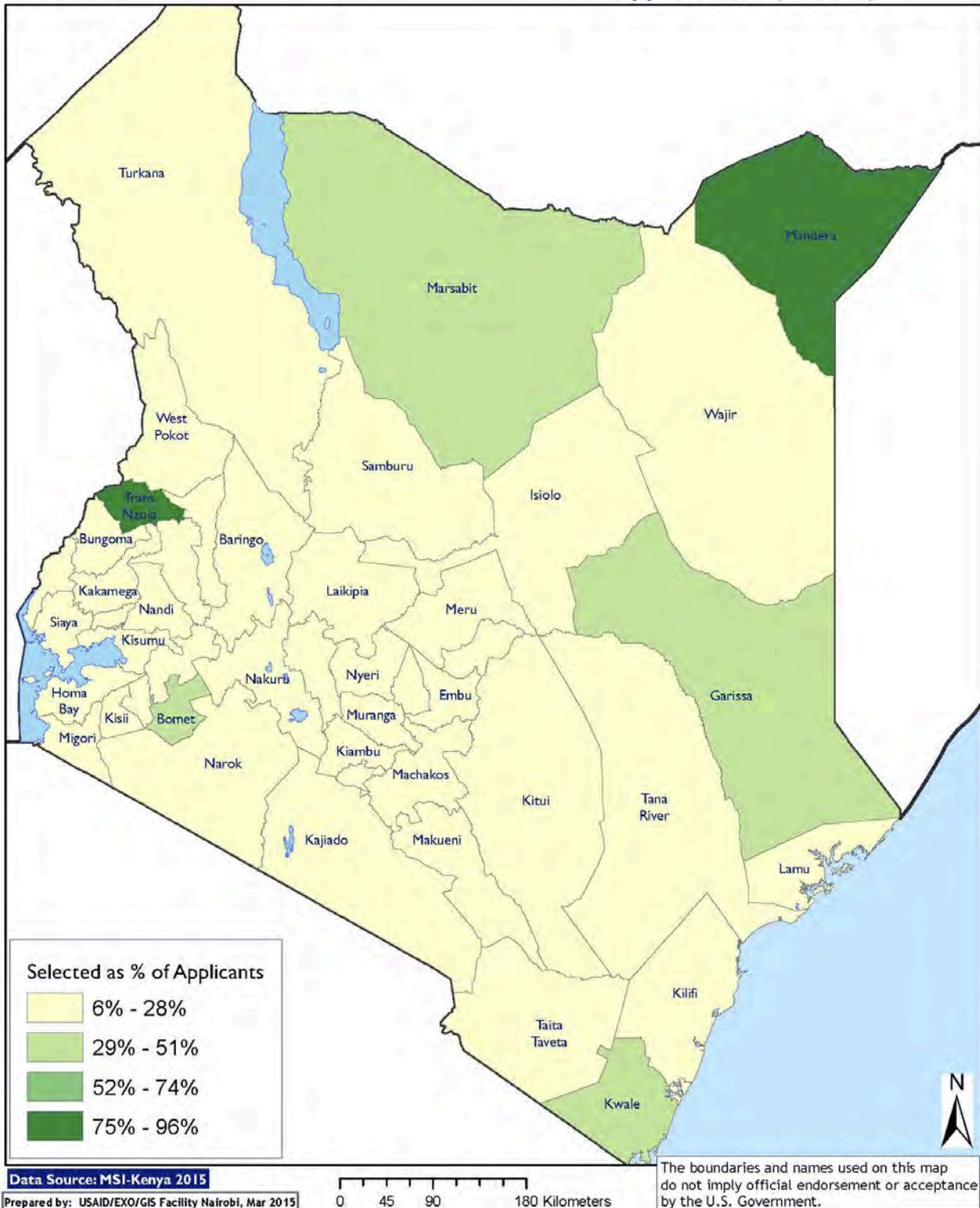


USAID Wings To Fly Scholars per Province

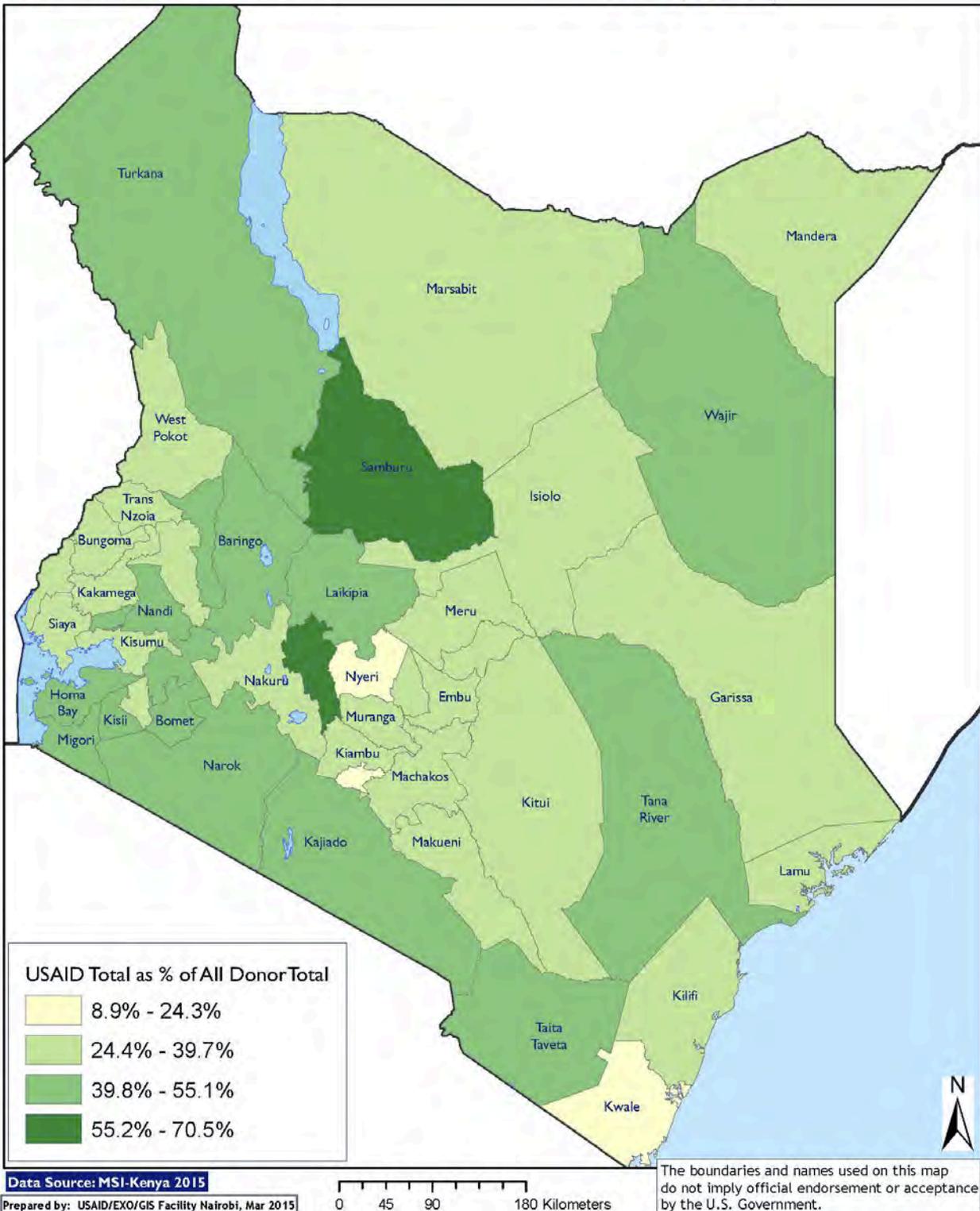


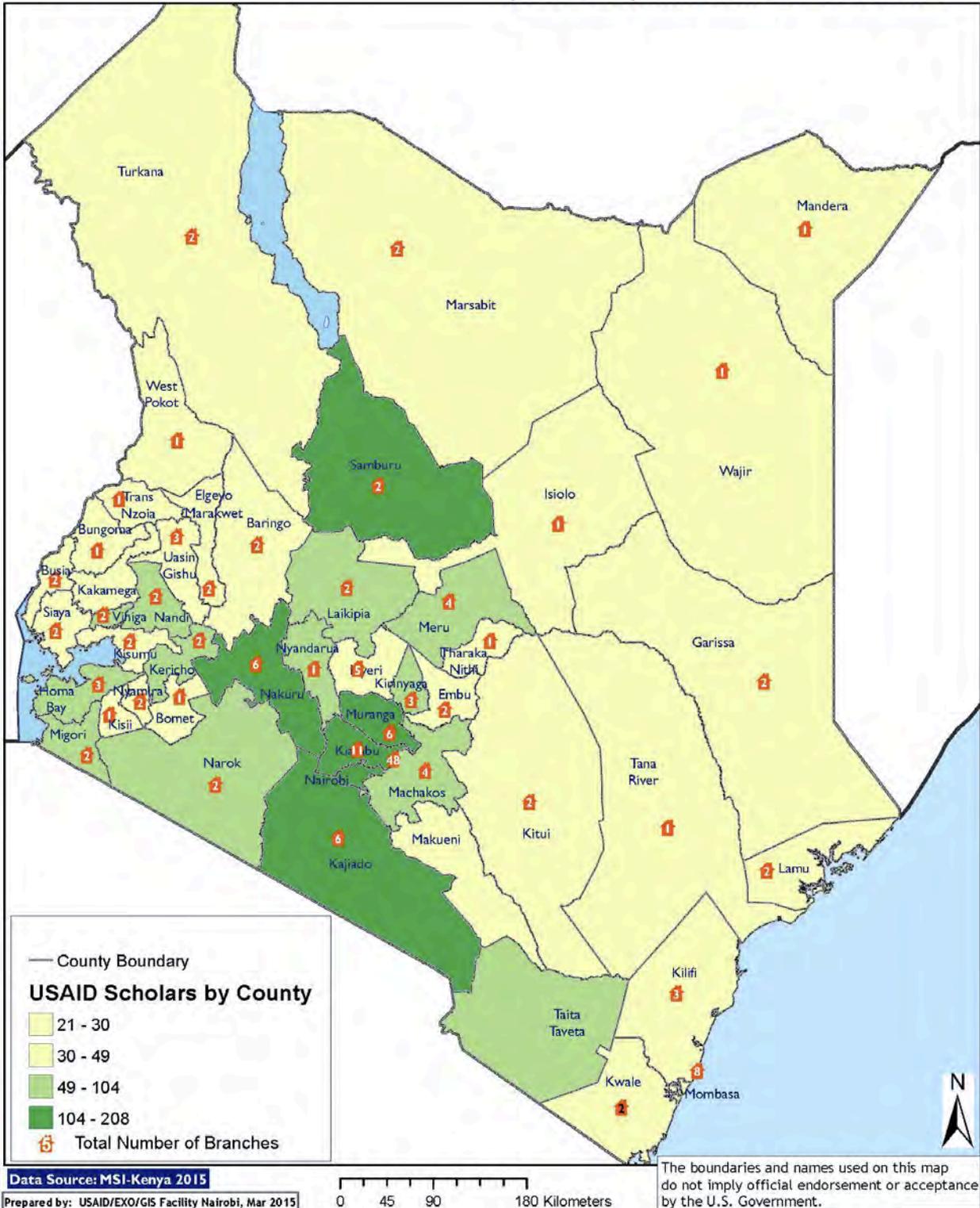
and names used on this map do not imply official endorsement or acceptance by the U.S. Government.

Wings to Fly 2014 Selected as Percentage of Applications by County



Wings to Fly USAID Scholars as a Percentage of Total by County





ANNEX 10: DSSB MEMBER LETTER FROM EGF FOR APHIAPLUS MEMBER

19th December, 2014

THE COORDINATOR,

FAMILY LIFE EDUCATION PROGRAMME,(APHIA PLUS)

Dear. JOSEPH OCHIENO

RE: 2015 WINGS TO FLY SECONDARY SCHOOL SCHOLARSHIPS

I send you warm greetings on behalf of the Board of Directors, Equity Group Foundation and the Equity Bank team. I am pleased to inform you that in 2015, the *Wings to Fly* program will offer 2,000 comprehensive high school scholarships to needy pupils excelling in the 2014 Kenya Certificate of Primary Education (KCPE) from every sub county where Equity Bank has a branch. This is part of our secondary school comprehensive scholarship initiative which targets to assist ten thousand (10,000) deserving students by the year 2015. *Wings to Fly* Program is an initiative of Equity Group Foundation and The MasterCard Foundation with support of UKaid, USAID and KfW.

We request you to kindly advise all the 2014 KCPE Candidates and their parents and guardians who come from humble backgrounds and are financially needy to collect the scholarships application forms at nearest Equity Bank branch or Equity Bank Agents and apply for the scholarship as soon as the 2014 KCPE results are announced.

The minimum marks for eligibility for candidates is **350** except for the few districts where the DSSB may lower the cut off points as guided by the Kenya National Examinations Council (KNEC) if it is established that the KCPE standards were low and that going by this cut off may exclude deserving applicants. Upon release of KCPE results, applicants should present themselves to the nearest Equity Bank Branch or Equity Agent with their KCPE result slips and a letter of introduction from their respective head teachers confirming their results to be issued with the Scholarships Application forms. All applications must be returned or submitted to Equity Branch or Agent by **5th January 2015**. Kindly advise all that only children coming from financially constrained backgrounds who will attain the cut - off marks indicated above, and who, without the scholarship would not be able to join form one will be eligible to apply.

Candidates with backgrounds falling under the following broad categories should particularly be encouraged to apply:

- a. Children who have lost one or both parents and have no relative or guardian or sponsor to provide for their secondary education.
- b. Children whose parents are physically or mentally challenged and are unable to educate their children and have no relative or guardian or sponsor to provide for their secondary education.
- c. Children whose parents are living with HIV/AIDS or other chronic debilitating illness and are

unable to educate their children and have no relative or guardian or sponsor to provide for their secondary education.

d. Children from families affected by natural disasters such as flooding, drought, and famine or civil conflict and are unable to educate their children and have no relative or guardian or sponsor to provide for their secondary education.

e. Children who have suffered neglect and/or abandonment and have no relative or guardian or sponsor to provide for their secondary education.

f. Children with parents living under extreme poverty and have no relative or guardian or sponsor to provide for their secondary education.

Shortlisted students will be invited for interviews which will be conducted by the Equity Group Foundation District Scholarship Selection Board (DSSB). The DSSB comprises of relevant key personalities in the district and is chaired by the District Education Officer (DEO) and coordinated by Equity Branch Manager.

We truly value your role as a partner in this process especially in ensuring a fair selection process by assisting in the communication of this information to the parents and candidates in your area of jurisdiction and to the general public as this is the only way of ensuring that the most deserving of our children get these scholarships.

We are confident that we shall continue to nurture this partnership for the benefit of the people we serve and particularly the children of this country. Indeed, education is a fundamental pillar towards social economic empowerment and in the realization of our country's Vision 2030.

Once again, on behalf of the Board of Directors, we thank you for continued support to Equity Bank and the Equity Group Foundation.

Lastly, allow me to wish you and your members a Merry Christmas and a happy and prosperous 2015.

Yours faithfully,

Dr. James Mwangi, CBS

Managing Director & CEO, Equity Bank Group &

Executive Chairman, Equity Group Foundation

ANNEX 11: MENTORING POLICY PROCEDURES AND STANDARDS- KAIRU



12 KAIRU - MENTORING POLICY DOC (3).pdf

ANNEX 12: WINGS TO FLY 2015 MEDIA PLAN



17 Wings to Fly
Media Plan.xls

ANNEX 13: WINGS TO FLY SCHOLARS SELECTION MANUAL



13 Wings to Fly
Scholars Selection Ma

ANNEX 14: WTF SELECTION REQUIREMENTS 2012 - 2015

2015 WINGS TO FLY SELECTION, INDUCTION AND COMMISSIONING:

The selection process of the 2015 *Wings to Fly* class is already underway and the final selection of the scholars will be on January 15, 2015 when successful applicants will be notified by the DSSBs. Scholars will then report to Moi Kasarani Sports Complex on Sunday, 18th January 2015 for a three day induction program which will be followed by the Commissioning of the 2015 class and the official launch of Phase 2 of the program.

The 2015 selection targets 1,991 scholars with sponsorship as tabulated below: -

Partner	Boys	Girls	Total	Selection Districts/Counties
MCF	640	640	1280	All
MCF-D	4	4	8	All
KfW (Girls: Boys=3:2)	244	366	610	Kisumu, Nairobi, Nakuru and Mombasa
Individual	15	15	30	All
EBLE	63	0	63	All
Total	966 (49%)	1,025 (51%)	1,991	

This year MasterCard Foundation, MasterCard Foundation Directors' Grant, individual partners shall be selecting an equal number of boys & girls from all the districts, whilst KfW will select from the urban counties of Kisumu, Nakuru, Nairobi and Mombasa with 2/3 of the beneficiaries being girls.

The selection will be done by **116** districts.

Below is a summary of scholar distribution by the various DSSBs:

	DSSBs	No. Of Beneficiaries For Each	Total	Boys	Girls
County DSSBs	13	20	260	8	12
DSSB's selecting KfW Districts	19	24	456	10	14
Other DSSBs	84	15	1,260	8	7
Total DSSBs	116		1,976	966	1,010
		Unallocated/Available Slots (girls)	(15)	(0)	(15)

Below is a list of County DSSBs:

County DSSBs		
County	Branches	DSSB
Bomet	Bomet	Bomet
Bungoma	Bungoma	Bungoma East
Isiolo	Isiolo	Isiolo
Kisii	Kisii	Kisii Central
Makueni	Wote	Makueni
Mandera	Mandera	Mandera Central
Samburu	Maralal	Samburu Central
Tana River	Hola	Tana River
Tharaka Nithi	Chuka	Meru South
Transzoia	Kitale	Transzoia West
Turkana	Lodwar	Turkana Central
Wajir	Wajir	Wajir East
West Pokot	Kapenguria	West Pokot

Below is a list of KfW districts DSSBs:

KfW District DSSBs		
County	Branches	DSSB
Kisumu	Kisumu	Kisumu 2
Kisumu	Kisumu	Kisumu 1
Mombasa	Kengeleni, Nyali	Kisauni
Mombasa	Mombasa Digo ; Moi Avenue, Mombasa Supreme	Mombasa
Mombasa	Changamwe	Changamwe
Nairobi	Kasarani , Kariobangi, Githurai, Ridgeways, Ku Sub Branch	Kasarani
Nairobi	Moi Ave, Tom Mboya, Kimathi, Mama Ngina, Harambee, Knut, Otc, City Hall, Tea Room, Kahawa House, Kenyatta Avenue, Kenyatta Avenue Supreme	Starehe
Nairobi	Westlands, Westlands Prestige, Kangemi, Yayah, Lavington	Westlands
Nairobi	Kawangware, Kilimani, Kilimani Supreme	Dagoretti
Nairobi	Buruburu, Enterprise Road, Industrial Area	Makadara
Nairobi	Ruai	Njiru
Nairobi	Gikomba, Eastleigh, Ngara,	Kamukunji
Nairobi	Donholm, Kayole, Embakasi, JKIA	Embakasi
Nairobi	Mayfair Supreme, Mombasa Rd, Fourways, Community, Community Corporate, Equity Center, Kibera, Nairobi West Branch, Karen	Lang'ata
Nakuru	Naivasha	Naivasha
Nakuru	Nakuru Gatehouse	Nakuru 1
Nakuru	Molo	Molo
Nakuru	Nakuru Kenyatta, Nakuru Westside Mall	Nakuru 2
Nakuru	Gilgil	Gilgil

2014 Wings to Fly Selection:

The *Wings to Fly* scholarship program is targeting to select **2,006** scholars in 2014. The following partners will be participating:

Partner	Boys	Girls	Total	Selection Districts/Counties
MCF	500	500	1,000	All
EBLE	500	500	1,000	All
MCF-D	1	2	3	All
INDIVIDUALS	1	2	3	All
Total	1,002	1,004	2,006	

Both MasterCard Foundation and Equity Bank will be selecting scholars from all districts and an equal number of boys and girls.

The selection will be done by **116** districts and over **159** branches. Each DSSB will select approximately **15** scholars and each county branch will select **25** scholars.

Below is a summary of scholar distribution by the various DSSBs:

	DSSBs	No. Of Beneficiaries For Each	Total
County DSSBs	13	25	325
Other DSSBs	103	15	1,545
Total DSSBs	116		1,870
		Unallocated/Available Slots (girls)	-137

Below is a list of County DSSBs:

County DSSBs		
County	Branches	DSSB
Bomet	Bomet	Bomet
Bungoma	Bungoma	Bungoma East
Isiolo	Isiolo	Isiolo
Kisii	Kisii	Kisii Central
Makueni	Wote	Makueni
Mandera	Mandera	Mandera Central
Samburu	Maralal	Samburu Central
Tana River	Hola	Tana River
Tharaka Nithi	Chuka	Meru South
Transzoia	Kitale	Transzoia West
Turkana	Lodwar	Turkana Central
Wajir	Wajir	Wajir East
West Pokot	Kapenguria	West Pokot

2013 Wings to Fly Selection:

The *Wings to Fly* scholarship program is targeting to select **2,909** scholars in 2013. The following partners will be participating:

Partner	Boys	Girls	Total	Selection Districts/Counties
KFW	140	210	350	Kisumu, Nairobi, Nakuru and Mombasa
MCF	500	500	1000	All
MCF-D		3	3	All
USAID	521	521	1042	All
USAID Aphia Plus	250	250	500	OVC Aphia Plus Program
Individual	7	7	14	All
Grand Total	1,418	1,491	2909	

This year MasterCard Foundation, MasterCard Foundation Directors' Grant, USAID and individual partners shall be selecting from all the districts, whilst KfW will select from the urban counties of Kisumu, Nakuru, Nairobi and Mombasa with 2/3 of the beneficiaries being girls.

The selection will be done by **114** districts and over **133** branches. Each DSSB will select approximately **26** scholars; **13** boys and **13** girls.

2012 Wings to Fly Selection:

The *Wings to Fly* scholarship program is targeting to select **2,144** scholars in 2012. The following partners will be participating:

Partner	Boys	Girls	Total	Selection Districts/Counties
MCF	500	500	1000	All
MCF-D	2	2	4	All
USAID	568	568	1136	All
Individual	2	2	4	All
Grand Total	1,072	1,072	2,144	

This year MasterCard Foundation, MasterCard Foundation Directors' Grant, USAID and individual partners will be selecting scholars from all districts and an equal number of boys and girls.

The selection will be done by **108** districts and over **137** branches. Each DSSB will select approximately **20** scholars; **10** boys and **10** girls.

ANNEX 15: CONSTITUENCY BURSARY ALLOCATION FORMULA



15a CBF
DISBURSEMENT FOR!

ANNEX 16: SECONDARY BURSARIES-SIMILAR POPULATIONS-DIFFERENT POVERTY INDICES



ANNEX 17: WINGS TO FLY BUDGETS AND SPENDING 2013-2014

(From available Quarterly and Annual Reports)

	Budget	Actual	Variance	Rate
Q1 2014 (to 3/31/14)				
Scholarships	\$1,776,570	\$1,259,547	\$517,023	
Leader Mentor	\$16,895	\$346	\$16,549	
Documentation	\$8,507	\$694	\$7,813	
M&E	\$34,344	\$494	\$33,850	
Personnel	\$118,726	\$54,803	\$63,923	
Total	\$1,955,042	\$1,315,884	\$639,158	67%
Q2 2014 (to 6/30/14)				
Scholarships	\$1,315,140	\$866,592	\$448,548	
Leader Mentor	\$16,895	\$9,899	\$6,996	
Documentation	\$8,507	\$481	\$8,026	
M&E	\$34,344	\$3,091	\$31,253	
Personnel	\$142,471	\$63,869	\$78,602	
Total	\$1,517,357	\$943,932	\$573,425	62%
15 Month (10/01/13 to 12/31/14)		(to 9/30/14)		
Scholarships	\$4,196,285	\$2,825,675	\$1,370,610	
Leader Mentor	1027185	\$233,743	\$793,442	
Documentation	\$49,468	\$3,485	\$45,983	
M&E	\$218,592	\$14,617	\$203,975	
Personnel	\$510,522	\$243,508	\$267,014	
Program Audit	\$22,550	\$26,060	-\$3,510	
Other		\$57	-\$57	
Total	\$6,024,602	\$3,347,145	\$2,677,457	56%

ANNEX 18: WtF MATERIALS PACKAGE USAGE AND SUFFICIENCY

WtF Materials Package Usage and Sufficiency

52% of the scholars received leadership development materials comprising mostly printed study and information materials (41%) and workbooks (11%) (Table 36 a, b).

82% of Head Teachers reported scholars receive stationary and 79% reported they received academic books (Table 37).

Branch Champions noted that it can be a great deal of work providing many students with their materials and even with shopping with them on the same day or two each term.

Head Teachers say the materials package is adequate in terms of quality (93%) and quantity (88%) (Table 38). They also say the items arrive timely (Figure 8). They also report that students have regular access to the books they need as per MOEST guidelines (95%) (Table 39).

Students were not so positive about their access to needed books with 66% saying that they did have necessary access and 34% saying they did not have such access (Table 40).

Students are also required to have “set books” for literature courses and WtF provides these.

Regarding supplemental books 46% said they had adequate access and 54% said they did not (Table 41). When asked the same question, two students in Kisumu indicated that though they did not have the books themselves, the books needed were in the library and accessible.

ANNEX 19: TERTIARY AND UNIVERSITY GRADUATES

Tertiary and University Graduates (from earlier Price Waterhouse Coopers activity):

WTF has not generally tracked the post tertiary and post university experience or employment of the 339 tertiary and university students from the PWC OVC cohort. None of these 339 students appear in the EGF database. EGF reports that all of them have now successfully finished their course of study except for 9 who are doing extended professional training in medicine and law. As reported in EGF's 4th Quarter Report for 2013, 22 of the 2012 university graduates sent their CVs to EGF and EGF was assisting them to get employment at the bank.

A survey of 51 (26m/25f) of these tertiary (5) and university level (46) students was conducted. 41 respondents reported their year of graduation from secondary school and 39 of the 41 graduated from secondary in 2009 (Table 39), before the Wings To Fly program began. The reasons the 51 respondents gave for having been selected for a scholarship were similar to responses from WTF students: poverty (63), orphan-hood (57%) and grades (69%). Health conditions (4%) and HIV in my family (2%) were also similar to those of secondary students (Table 40). All had their school fees paid by EGF but with about a third of them reporting that fees were sometimes paid late (Tables 41, 42). None of them currently have a mentor provided by EGF while six of them (all male) had at some time had EGF group mentoring (4) or individual mentoring (2) (Table 43). Three of the six assessed the utility of the mentoring they received as only somewhat useful (2 on a 5 point scale) (Table 44).

During the period between secondary graduation and college 37 of the 51 respondents (71%) had no support at all from EGF (Table 45). During that period 34 (67%) did not find any employment while 17 (33%) did find employment. Eight of these 17 found paid employment, 5 found a paid internship, and 4 found an unpaid internship (Table 46) .

Of the 51 respondents 24 (15m/9f) (47%) reported having specific leadership positions in college or university (Table 47).

43 of the 51 respondents (84%) reported having adequate access to the books and learning resources needed for college or university study (Table 48). 17 of them (33%) availed themselves of career counseling and all of these 17 received such counseling from a counselor at the college or university (Tables 49, 50). 8 of these 17 had additional career counseling from others including 2 who had some assistance from a counselor or mentor provided by EGF.

They state that the main challenge they have faced in succeeding in academic life is limited academic resources and upkeep and school fees prior to EGF's support (43%). The next most common challenge cited was "not having a mentor to guide me on better career paths" (10%). (Table 51)

43 of the respondents (84%) judged the EGF scholarship to be very useful or extremely useful in promoting their academic achievements. (Table 52). However, 16% of them did not like the fact that there is no follow up with beneficiaries after they graduate. (Table 53). 42 of them (82%) would like more communication with EGF and the most frequently subject they would like to communicate about is the way forward after college or university (Tables 54, 55).

Tables 39-55 follow:

**TABLE 39. EGF (PWC) GRADUATES:
YEAR OF HIGH SCHOOL GRADUATION**

		Male		Female		Total	
	2009	20	77%	19	76%	39	76%
	2010	0	0%	0	0%	0	0%
	2011	1	4%	0	0%	1	2%
	2012	0	0%	0	0%	0	0%
	2013	0	0%	0	0%	0	0%
	2014	1	4%	0	0%	1	2%
	Don't Know	3	12%	1	4%	4	8%
	No Response	1	4%	5	20%	6	12%

TABLE 40. EGF (PWC) GRADUATES: REASON FOR SELECTION

		Male		Female		Total	
Why do you think you were chosen/selected?	Poverty	17	65%	15	60%	32	63%
	Orphanhood	15	58%	14	56%	29	57%
	Grades	17	65%	18	72%	35	69%
	Chronic health condition in my family	1	4%	1	4%	2	4%
	HIV/AIDS in my family	0	0%	1	4%	1	2%
	Other	4	15%	3	12%	7	14%
	Don't Know	0	0%	0	0%	0	0%
	No Response	0	0%	0	0%	0	0%

TABLE 41. EGF (PWC) GRADUATES: GRADUATE SCHOLARSHIP PACKAGE RECEIVED BY ACADEMIC INSTITUTION

		Male		Female		Total	
From this list of items that may have been in your EGF University or college scholarship package tell me if your college or university received the following item from EGF	School fees paid on my behalf	26	100%	25	100%	51	100%
	Other	8	31%	4	16%	12	24%

TABLE 42. EGF (PWC) GRADUATES: GRADUATE SCHOLARSHIP PACKAGE RECEIVED ON TIMELY BASIS

		Male		Female		Total	
With regard to the EGF college/secondary school scholarship package, did the school receive fees paid on your behalf on a timely basis?	Yes	12	46%	19	76%	31	61%
	No	13	50%	5	20%	18	35%
	Don't Know	1	4%	1	4%	2	4%
	No Response	0	0%	0	0%	0	0%
Total		26	100%	25	100%	51	100%

TABLE 43 (A). EGF (PWC) GRADUATES: WTF MENTOR PROVIDED

		Male		Female		Total	
Do you currently have a mentor provided to you by EGF?	Yes	0	0%	0	0%	0	0%
	No	26	100%	25	100%	51	100%
	Total	26	100%	25	100%	51	100%

TABLE 43 (B). EGF (PWC) GRADUATES: GROUP OR INDIVIDUAL MENTORING

		Male		Female		Total	
If you ever had a mentor was your mentoring done in a group or alone?	In group	4	67%	0	0%	4	67%
	Alone	2	33%	0	0%	2	33%

TABLE 44. EGF (PWC) GRADUATES: UTILITY OF MENTORING

		Male		Female		Total	
Using a 5-point scale, please tell me how useful the mentoring was to you.	Not useful	0	0%	0	0%	0	0%
	Somewhat useful	3	50%	0	0%	3	50%
	Useful	1	17%	0	0%	1	17%
	Very Useful	1	17%	0	0%	1	17%
	Extremely Useful	1	17%	0	0%	1	17%
	Total	6	100%	0	0%	6	100%

TABLE 45. EGF (PWC) GRADUATES: MOST FREQUENT TYPE OF SUPPORT EGF PROVIDED GRADUATE SCHOLARS DURING A POSSIBLE GAP YEAR

	Type	No.	%
		After graduating from secondary school if you did not go directly college or university or have not yet done so, what support or service has EGF provided to you- either now or in the past?	No response
	Paid my college full fees and provided my upkeep	3	6%
	No support at all	37	71%
	School accommodation for only six months	1	2%
	Provided for my school fee	4	8%
	EGF has given me a job	1	2%
	Connected to a US fellowship program	1	2%
	Total	51	100%

TABLE 46 (A). EGF (PWC) GRADUATES: EMPLOYMENT

		Male		Female		Total	
Were you able to find employment in the period between secondary school and college/ university?	Yes	9	35%	8	32%	17	33%
	No	17	65%	17	68%	34	67%
	Total	26	100%	25	100%	51	100%

TABLE 46 (B). EGF (PWC) GRADUATES: EMPLOYMENT TYPE

		Male		Female		Total	
What type of employment were you able to find?	Paid employment	4	44%	4	50%	8	47%
	Paid internship	2	22%	3	38%	5	29%
	Unpaid internship	3	33%	1	13%	4	24%
	Don't Know	0	0%	0	0%	0	0%
	No Response	0	0%	0	0%	0	0%

TABLE 47. EGF (PWC) GRADUATES: LEADERSHIP POSITIONS HELD IN COLLEGE/ UNIVERSITY

		Male		Female		Total	
In college or university have you, or do you now, hold any leadership positions?	Yes	15	58%	9	36%	24	47%
	No	11	42%	16	64%	27	53%
	Don't Know	0	0%	0	0%	0	0%
	No Response	0	0%	0	0%	0	0%

TABLE 48. EGF (PWC) GRADUATES: ACCESS TO ALL THE REQUIRED BOOKS

		Male		Female		Total	
Whilst in college/university have you had access to the books or learning resources you've needed to meet college/university requirements?	Yes	19	73%	24	96%	43	84%
	No	7	27%	1	4%	8	16%
	Total	26	100%	25	100%	51	100%

TABLE 49. EGF (PWC) GRADUATES: RECEIVED CAREER COUNSELING

		Male		Female		Total	
Have you ever received career counseling?	Yes	10	38%	7	28%	17	33%
	No	16	62%	18	72%	34	67%
	Total	26	100%	25	100%	51	100%

TABLE 50. EGF (PWC) GRADUATES: RECEIVED CAREER COUNSELING, FROM WHOM

		Male		Female		Total	
From whom did you receive career counseling?	Career master at my secondary school	3	30%	0	0%	3	17%
	Career counselor at my college/university	9	90%	8	100%	17	94%
	Career counselor provided by EGF	1	10%	0	0%	1	6%
	Mentor provided by EGF	1	10%	0	0%	1	6%
	Other	2	20%	1	13%	3	17%
	Don't Know	0	0%	0	0%	0	0%
	No Response	0	0%	0	0%	0	0%

TABLE 51. EGF (PWC) GRADUATES: MOST FREQUENT CHALLENGES GRADUATE SCHOLARS FACE IN SUCCEEDING IN ACADEMIC LIFE

	Male		Female		Total	
Limited academic and upkeep resources	10	38%	6	24%	16	31%
Poverty	1	4%	0	0%	1	2%
Family Issues	1	4%	0	0%	1	2%
inadequate accommodation space within school thus long distance walking consumed much of my time	1	4%	1	4%	2	2%
Meeting the assignment deadline	1	4%	0	0%	1	2%
Delayed fee payment and Inadequate stipend	1	4%	2	8%	3	6%
None	1	4%	5	20%	6	12%
Did not have a mentor to guide me on better career paths	2	8%	3	12%	5	10%
Transport money to school and stipend was not enough	2	8%	0	0%	2	2%
School fee was a problem before EGF came in to assist	3	12%	3	12%	6	12%
Hostels were too far and the upkeep money was not enough to fully cater for the needs	0	0%	1	4%	1	2%
School fee and getting a job after campus was a problem	3	12%	3	12%	6	12%
Psychological Instability	0	0%	1	4%	1	2%
Total	26	100%	25	100%	51	98%

TABLE 52. EGF (PWC) GRADUATES: UTILITY OF WTF ON ACADEMIC ACHIEVEMENTS

		Male		Female		Total	
How useful the EGF scholarship program is in promoting your academic achievements?	Not useful	1	4%	0	0%	1	2%
	Somewhat useful	1	4%	0	0%	1	2%
	Useful	4	15%	2	8%	6	12%
	Very Useful	6	23%	7	28%	13	25%
	Extremely Useful	14	54%	16	64%	30	59%
	Total	26	100%	25	100%	51	100%

TABLE 53. EGF (PWC) GRADUATES: MOST FREQUENTLY MENTIONED DESIRES FOR THE PROGRAM

		Male		Female		Total	
What would you like to see more of in the EGF Scholarship program?	The program should bring together all beneficiaries and their sponsors to know one another	0	0%	2	8%	2	4%
	The selection process should be more transparent to the public	2	8%	0	0%	2	4%
	The program should support non-academic programs	1	4%	0	0%	1	2%
	Offer life skill programs to students	1	4%	0	0%	1	2%
	Improve on the communication process	0	0%	1	4%	1	2%
	Partner with Learning institutions to get fair accommodation	0	0%	1	4%	1	2%
	Nothing	0	0%	1	4%	1	2%
	Increase the upkeep money	2	8%	3	12%	5	10%
	More mentorship and exposure	2	8%	4	16%	6	12%
	Involve the beneficiaries in most important aspects of the program such as planning	0	0%	1	4%	1	2%
	Follow-ups should be done most frequently with beneficiaries	1	4%	0	0%	1	2%
	Support more needy people in future	5	19%	3	12%	8	16%
	Follow-ups should be done even after beneficiaries graduating	4	15%	4	16%	8	16%
	Timely payment of fee/packages	1	4%	1	4%	2	4%
	Should consider both average and bright needy students	3	12%	0	0%	3	6%
	The program should allow transfer from one college to another if need be	1	4%	0	0%	1	2%
	The sponsorship should be given upto the masters level	2	8%	1	4%	3	6%
Beneficiaries should be absorbed in the Job market after graduating	1	4%	3	12%	4	8%	
Total	26	100%	25	100%	51	100%	

TABLE 54. EGF (PWC) GRADUATES: MORE COMMUNICATION WITH EGF

		Male		Female		Total	
Would you like more communication with EGF?	Yes	21	81%	21	84%	42	82%
	No	3	12%	4	16%	7	14%
	Don't Know	1	4%	0	0%	1	2%
	No Response	1	4%	0	0%	1	2%
	Total	26	100%	25	100%	51	100%

TABLE 55. EGF (PWC) GRADUATES: MOST FREQUENT TOPICS STUDENT WOULD LIKE TO DISCUSS WITH EGF/WTF

		Male		Female		Total	
What would you like to speak with EGF about?	No response	5	19%	4	16%	9	18%
	Way forward after college/University	7	27%	3	12%	10	20%
	Updates on leadership programs	3	12%	3	12%	6	12%
	Let them know our views and appreciation	0	0%	2	8%	2	4%
	Look for job opportunities available	1	4%	6	24%	7	14%
	Incorporated in the EGF program	3	12%	5	20%	8	16%
	Contribute on how to Improve the scholarship program	4	15%	1	4%	5	10%
	Updates on the scholarship program	2	8%	0	0%	2	4%
	Networking for beneficiaries	0	0%	1	4%	1	2%
	Academic Issues	1	4%	0	0%	1	2%
Total	26	100%	25	100%	51	100%	

ANNEX 20: EXTERNAL INTEREST IN ENHANCED REPORTING

(Below are quotations and summary notes from conversations with stakeholders.)

MOEST (National): *“MOEST would like to see WtF send more info on the beneficiaries, e.g. the names, numbers, amount of monies given, etc. for planning and coordination purposes. This may be going on at the District level but they do not report WtF matters to MOEST head office.”* (Robert Masese, Director of Secondary and Tertiary Education)

DSSBs: As members of the MOEST the DEOs who chair the DSSBs as well as other members would like more information on the progress of the scholars they help select.

APHIAplus: APHIAplus keeps in contact with the families of the students it formerly supported who have been absorbed into the WtF program: *“since they are still enrolled in the (APHIA) activity, and their households are monitored alongside others. Having no direct relationship between the two activities (WtF, APHIA) is a clear lost opportunity for synergy, feedback and experiential learning which would ultimately feed into a stronger more focused program. Lack of direct communication / relationship between WtF and the service delivery partners (APHIAs) leaves room for speculation in the communities as they do not speak in one voice.”* (Ruth Odhiambo, COP APHIA-Rift)

Five of the six APHIA COPs agreed that they were not getting all the information they need or want about the WtF program and its OVC scholars - for example, for purposes of following up on former APHIA+ supported students. Each had ideas to improve communications that might be taken on board in this PEPFAR funded activity, among them:

“Joint review forums, joint selection and vetting Yes. Both activities deal with education support to most vulnerable children, there is a need to enhance communication because this will even help WtF get list of already identified vulnerable children.” APHIA-Western

“There is need to have formal communication between APHIA and WtF on selection of beneficiaries as well as regular updates. We would also like to be involved in the selection process.” APHIA-Imarisha

“We feel as Ampathplus that we should be part of the process since we are major stakeholders in this. .. WtF should be able to leverage on what other stakeholders have in place like community health volunteers for follow up and assessment. WtF staff should interact more with stakeholders on ground and stop working in silos.” APHIA-Ampath

“We could have forums to share how the programmes could add value into each other and even form virtual or real working groups.” APHIA-Nairobi - Coast

Schools: Surveys indicate that communication between EGF (branches) and Head Teachers could be improved: *“We may need discipline reports other than the academic performance report forms, also scholar attendance would be good to have, and health.”* (BGDM)

Parents / Guardians:

APHIA has expressed interest in taking more active collaborative role in cooperation with WtF and continuing its normal visiting of homes of HIV-affected scholars. If more closely allied with and informed by the program they could act as an informal or formal bridge from WtF to the households of HIV-affected WtF scholars.

ANNEX 21: WTF MENTORING DESIGN

WtF MENTORSHIP DESIGN DOCUMENT

MENTORSHIP DESIGN

Mentorship Pillars: This mentorship focuses on four pillars of a scholar’s holistic development:

1. Encouraging academic excellence
2. Developing a value-centred life
3. Developing the scholar into a transformative leader
4. Empowering the scholar to embrace a culture of giving back

This following is a detailed description of the specific topics and activities under each of the four pillars, to assist the mentor accomplish the objectives of the program.

Encouraging Academic Excellence

The WtF program is first and foremost an academic program and therefore the first pillar of our mentorship program is to support the scholars to achieve their full potential academically. Under this pillar these are the topics to be covered during the group mentorship sessions:

Topic	Detailed subtopics	Suggested activities	Time allowance
Transitioning	<ul style="list-style-type: none"> • primary to secondary school • one level to another 	<ul style="list-style-type: none"> • round table experience sharing • use older students' experiences 	
Goal setting	<ul style="list-style-type: none"> • Success & failure • steps in goal setting, • SWOT analysis • prioritizing, • self-monitoring 	<ul style="list-style-type: none"> • Goal setting exercises 	
Study habits	<ul style="list-style-type: none"> • time tabling • work space • note taking skills • monitoring own understanding • timings • rest 	<ul style="list-style-type: none"> • leverage on students own experiences • practical strategies for studying better • use of older students 	
Engagement with school life	Positive attitude towards: <ul style="list-style-type: none"> • school • school work • caring about your school & other students • school property • activities & functions 	<ul style="list-style-type: none"> • use handout provided by EGF 	
Teamwork	<ul style="list-style-type: none"> • Cooperation • collaboration skills • group work 	<ul style="list-style-type: none"> • watch National Geographic “migratory birds” 	
Personal organization	<ul style="list-style-type: none"> • time management, • punctuality, 	<ul style="list-style-type: none"> • mentors personal experiences form the 	

	<ul style="list-style-type: none"> • attendance • sharing 	basis of discussion	
Attention to quality	<ul style="list-style-type: none"> • minimizing mistakes • clarity • fluency 	<ul style="list-style-type: none"> • play the game of most costly mistakes 	

Developing a Value-Centered Life

The following topics will be covered under this pillar:

Topic	Detailed subtopics	Suggested activities	Time allowance
Self-awareness skills	Developing confidence in self and others: <ul style="list-style-type: none"> • Self-concept, • self-esteem, • self-confidence, • assertiveness as opposed to aggressiveness 	<ul style="list-style-type: none"> • watch research video “monkey see monkey do” • my body • beauty • attractiveness • saying “no” 	
Developing personal values	<ul style="list-style-type: none"> • Honesty, • integrity, • respect, • restraint • responsibility 	<ul style="list-style-type: none"> • discuss chapter 6 of the constitution 	
Universal ethical and moral principles	<ul style="list-style-type: none"> • Equality • social justice • fairness 	<ul style="list-style-type: none"> • moral dilemmas 	
Servant leadership	<ul style="list-style-type: none"> • Service ahead of entitlement • service to mankind • to God 	<ul style="list-style-type: none"> • case study of Paul 	
Character development	<ul style="list-style-type: none"> • “Why all these rules?” • Personal and social competence, 	<ul style="list-style-type: none"> • etiquette • social graces • common decency 	
Health & wellness:	Physical <ul style="list-style-type: none"> • sexual behaviour • substance abuse • physical exercises • eating habits Psychological and Emotional health <ul style="list-style-type: none"> • peer relationships, • loneliness, • stress management, • money matters 	Open discussions on: <ul style="list-style-type: none"> • dating • parties • alcohol • drugs • obesity • lifestyle disease • junk food • friends • family 	

Developing into a transformative leader

The third pillar involves a number of specific attitudes and actions and they will be covered through the following topics:

Topic	Detailed subtopics	Suggested activities	Time allowance
Effective communication	<ul style="list-style-type: none"> • active listening • speaking to be understood • persuasion • negotiation • problem solving, 	<ul style="list-style-type: none"> • Watch Patrick Awuah’s Tedtalk • role play for barriers to communication • interviews • talk shows 	

	<ul style="list-style-type: none"> • writing with clarity 		
Critical & creative thinking skills	<ul style="list-style-type: none"> • open mindedness • questioning skills • evaluation • synthesis • innovation • lateral thinking 	<ul style="list-style-type: none"> • Watch Sir Ken Robinson's animation "paradigm shift" 	
Initiative and enterprise	<ul style="list-style-type: none"> • solution-driven attitude 	<ul style="list-style-type: none"> • 	
Planning	<ul style="list-style-type: none"> • Setting objectives • Developing alternative plans • Foreseeing challenges 	<ul style="list-style-type: none"> • Career planning exercises 	
Organizing and motivating others	<ul style="list-style-type: none"> • ability to attract people to self • persuading people behind an idea 	<ul style="list-style-type: none"> • exploring opportunities in class and school leadership 	
Risk taking	<ul style="list-style-type: none"> • Can-do-attitude • Confidence in self • Courage to move out of one's comfort zone 	<ul style="list-style-type: none"> • Connect with community service 	
Becoming a life-long learner	<ul style="list-style-type: none"> • Selecting good books • Applying principles to life 	<ul style="list-style-type: none"> • Start a reading club among scholars 	
Global Mindedness	<p>Healthy relations & comfort dealing with people of different groups</p> <ul style="list-style-type: none"> • Ethnic • Cultural • Religious • Social Economic group 	<ul style="list-style-type: none"> • Stereotypes • Biases • Media influence through comedies 	

Embracing a Culture of Giving Back

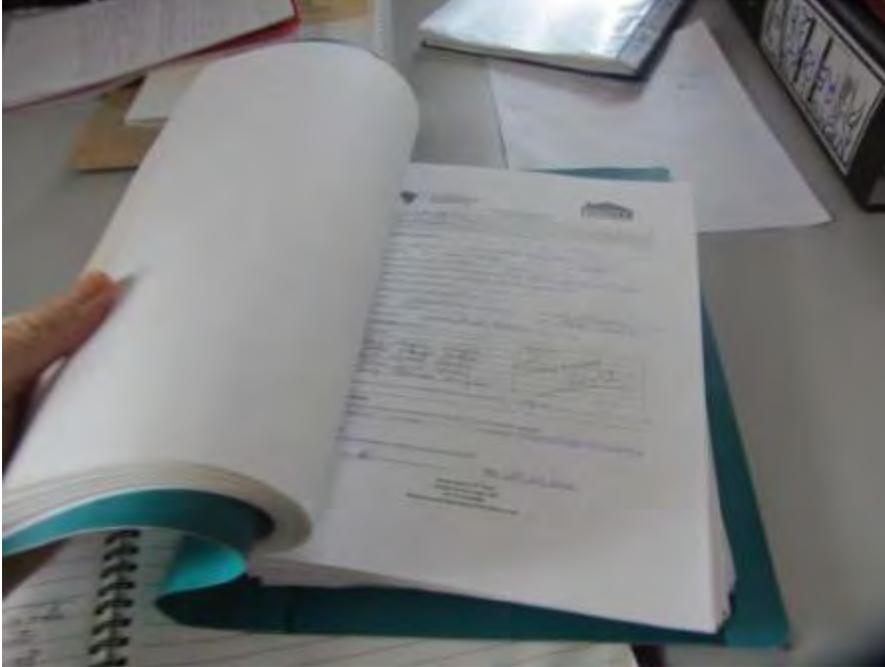
These topics are covered in order to increase the scholars' understanding and ability to give back:

Topic	Detailed sub-topics	Suggested activities	Time allowance
Community service	Concepts of: <ul style="list-style-type: none"> • Charity • Philanthropy • Poverty & marginality • Equality & social justice • Duties & obligations • human rights & dignity 	<ul style="list-style-type: none"> • watch short movie "one step at a time" 	
Stewardship	<ul style="list-style-type: none"> • Gifts & talents • Time • Finances 	<ul style="list-style-type: none"> • Developing lists of gifts & talents 	
Environmental awareness	<ul style="list-style-type: none"> • Sharing the globe in a sustainable manner 	Case study of Wangari Maathai	
Case Studies	The goal is to make scholars aware of charities around them which they can identify with or even participate	<ul style="list-style-type: none"> • IB students Aga Khan Academy • Manu Chandaria • Dr. Kamau of Ahadi Trust • Mother Teresa • Mji wa Huruma 	

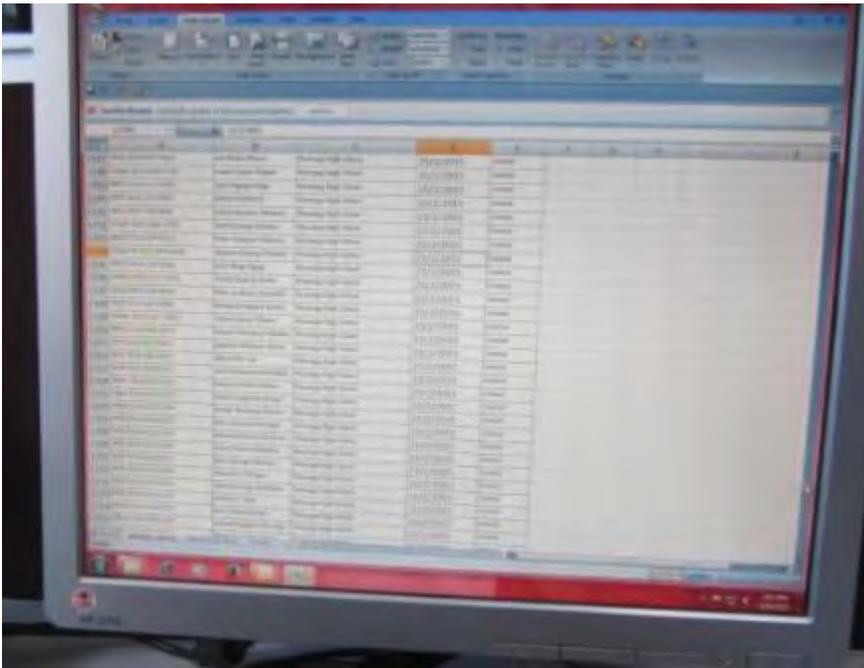
These pillars will be addressed progressively as scholars move through the four-year secondary school cycle. In addition, developing these concepts, attitudes, skills and competencies will be incremental and continuous as specific aspects in each pillar interact with those of another to cause a natural and accelerated achievement of the program's overall goals. For instance a scholar who succeeds academically (pillar 1) is likely develop a strong sense of self-worth (in pillar 2) and will most likely feel confident to take responsibility (pillar 3) to contribute to those around him/her (pillar 4).

ANNEX 22: PHOTOS

A. Mentor Progress Forms – EGF Head Office

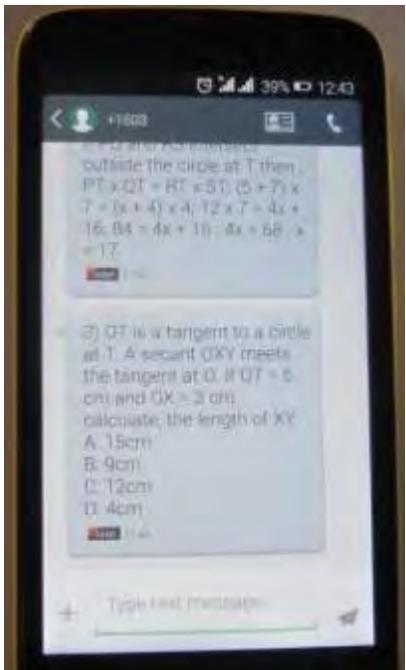


B. Mentor Database (Excel) of School Visits by Scholar by Date



Name	Cell	Email	Company	Signature
101				
102				
103				
104				
105				
106				
107				
108				
109				
110				
111				
112				
113				
114				
115				
116				
117				
118				
119				
120				
121				
122				
123				
124				
125				
126				
127				
128				
129				
130				
131				
132				
133				
134				
135				
136				
137				
138				
139				
140				
141				
142				
143				
144				
145				
146				
147				
148				
149				
150				
151				
152				
153				
154				
155				
156				
157				
158				
159				
160				
161				
162				
163				
164				
165				
166				
167				
168				
169				
170				
171				
172				
173				
174				
175				
176				
177				
178				
179				
180				
181				
182				
183				
184				
185				
186				
187				
188				
189				
190				
191				
192				
193				
194				
195				
196				
197				
198				
199				
200				

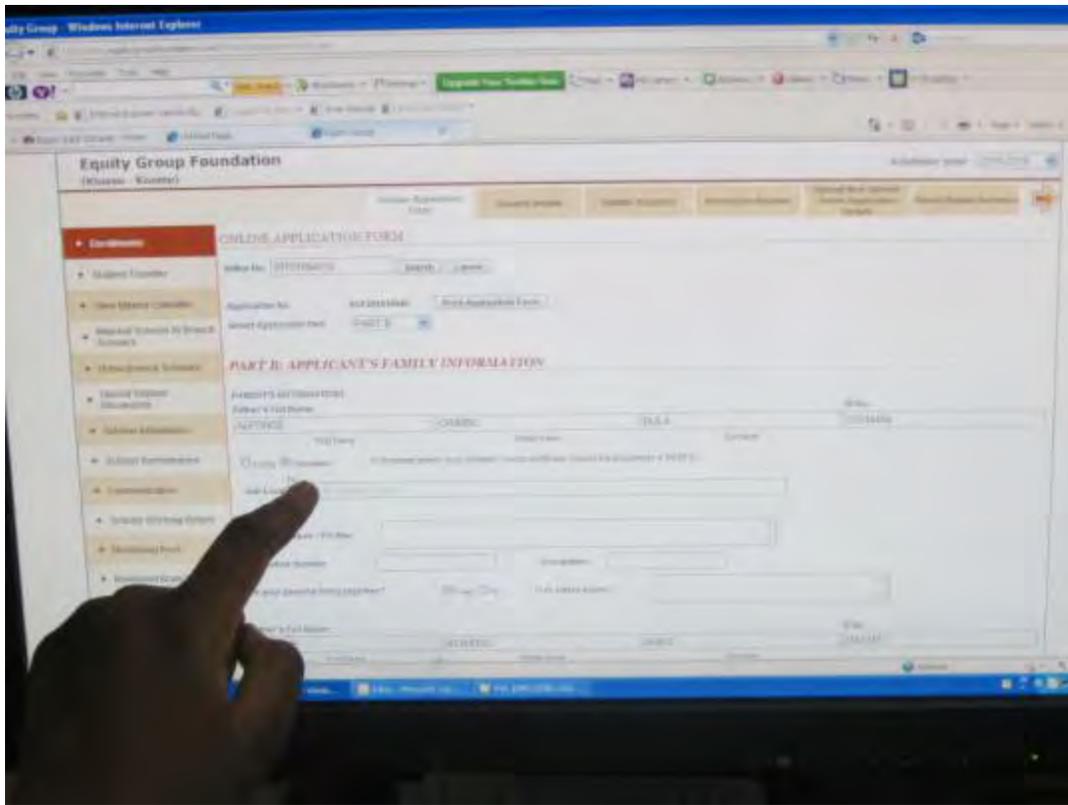
E. "Wings To Fly Learning" SMS Quiz on EGF M&E Staff Smartphone



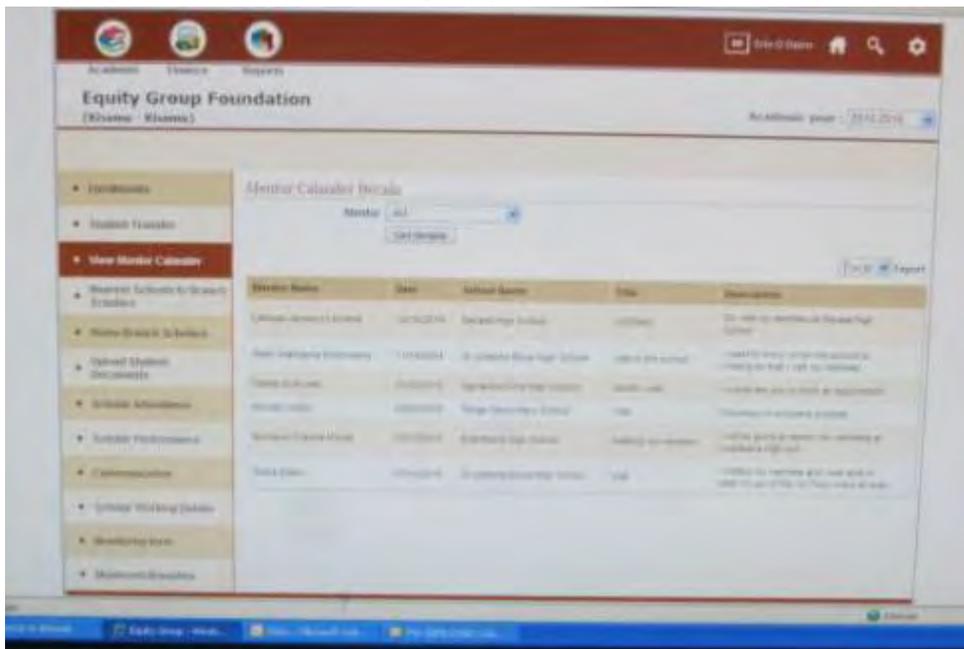
F. "Wings To Fly Learning" USB Content (Videos)



G. Equity Branch WtF Data Interface (writable Applicant/Selected section)

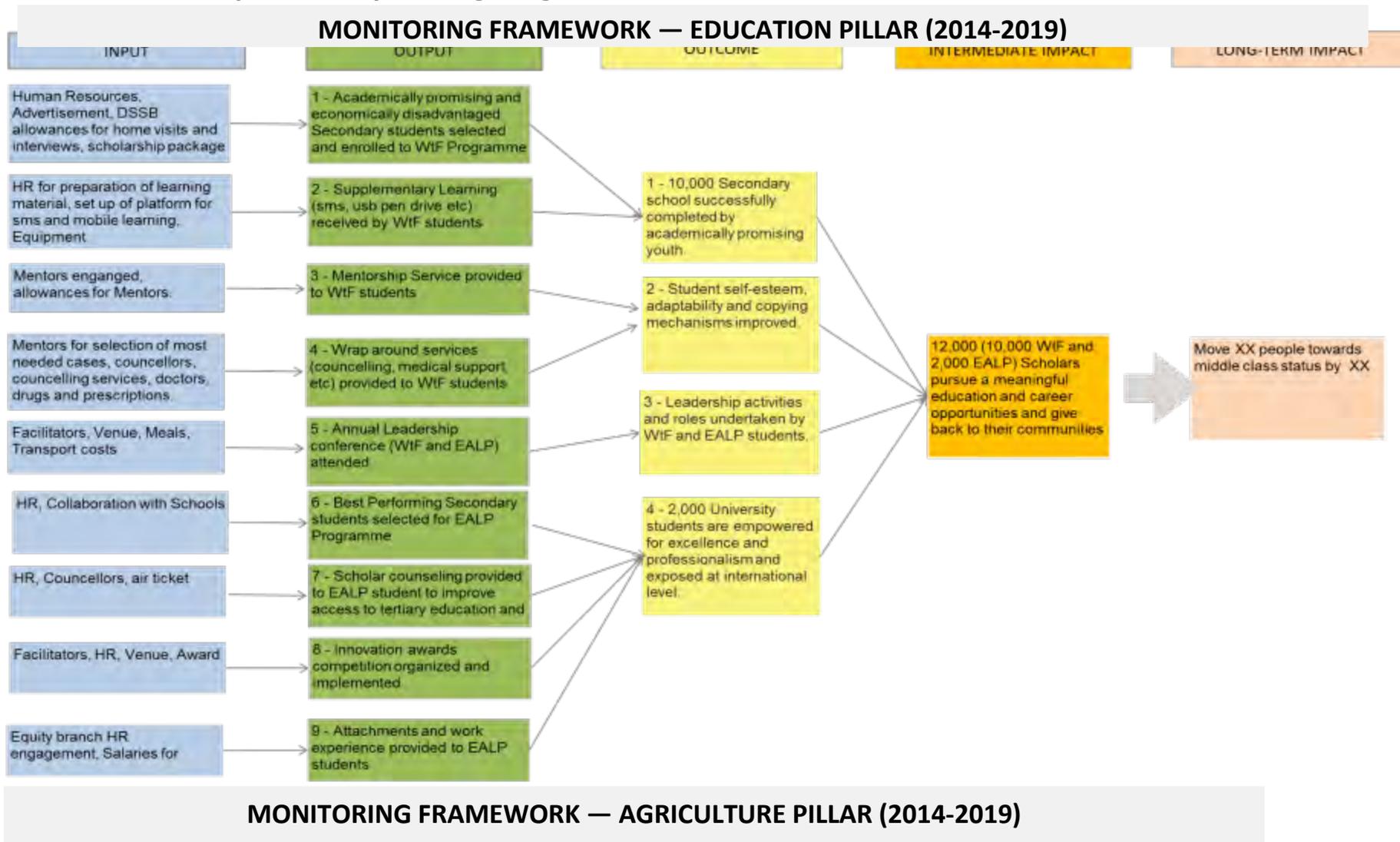


H. Equity Branch WtF Data Interface (read only mentor section)



ANNEX 23: M&E ROADMAP – KIMETRICA_ EGF V 2 – EDUCATION

Annex 2 – EGF Pillar Specific Theory of Change Diagrams



Annex 3 – KPIs and M&E Framework for each Pillar

Monitoring Framework – Education Pillar

Performance Indicators	Indicator type (output, outcome Impact)	Disaggregated by:	Data Collection Method	Responsibility	Frequency	Data Source	Target Values
1 - Number of WtF/EALP students who received recognition of excellence, honor, distinguished achievements at community/country and international level	Impact	Gender	(consider applicability of this indicator)		Random	Media, word of mouth	To discuss if relevant since hard to capture
2 - % of students from WtF and EALP who are employed by Equity Group.	Intermediate Impact	WtF/EALP, Gender	Equity Bank captures this data during recruitment process and provides full list to EGF every year.	M&E GM	Every year	Form for Equity Group	TBD
3 - % of ex WtF/AELP students who are part of networks or stayed in touch with people in the program.	Intermediate Impact	WtF/EALP, Gender	Students are tracked through Equitel number, personal contact or through parents/relative's tel. number. Use email if suitable. Sample selected through proportionate sampling methodology according to distribution per County	M&E GM	Every year for those who completed secondary school 4 years earlier.	Form 4 years Career & give back	TBD
4 - % of cases through which ex WtF/AELP students leverage from the networks (i.e. CEO of company employs graduates who studies abroad).	Intermediate Impact	WtF/EALP, Gender	Same as above	M&E GM	Every year for those who completed secondary school 4 years earlier.	Form 4 years Career & give back	TBD

Performance Indicators	Indicator type (output, outcome Impact)	Disaggregated by:	Data Collection Method	Responsibility	Frequency	Data Source	Target Values
5 - % of WtF students who gives back to communities/country/society. <ul style="list-style-type: none"> - who donate to WtF program; - who came back after studying abroad; - who is a successful entrepreneur; - entrepreneurs providing employment. - who is involved in social entrepreneurship - who is doing volunteering activities - who is involved and provides time and resources at communities/country level - Assisting other students in schooling 	Intermediate Impact	Gender, County	Same as above	M&E GM	Every year for those who completed secondary school 4 years earlier.	Form 4 years Career & give back	TBD
6 - Career Tracking for AELP students (% out of total) <ul style="list-style-type: none"> -Amount of time took to get first job - Type of position currently held - Salary Level - Plan to join MsC studies. 	Intermediate Impact	Gender, County	Students are tracked through Equitel number, personal contact or through email. Sample selected through proportionate sampling methodology according to distribution per County	M&E GM	Every year for those who completed EALP 5 years earlier.	Form to be developed	TDB
7 - Career Tracking for WtF students (%) <ul style="list-style-type: none"> - successfully completed Tertiary Education - successfully completed TVET studies and in which field. - studied TVET and university gainfully employed. - self employed still in business and flourishing, with employers - employees who advanced in their career. -unemployed 	Intermediate Impact	Gender, County	Students are tracked through Equitel number, personal contact or through parents/relative's tel. number. Use email if suitable. Sample selected through proportionate sampling methodology according to distribution per	M&E GM	Every year for those who completed secondary school 4 years earlier.	Form 4 years Career & give back	TBD

Performance Indicators	Indicator type (output, outcome Impact)	Disaggregated by:	Data Collection Method	Responsibility	Frequency	Data Source	Target Values
			County				
8 - Immediate post-secondary studies opportunities for WtF Students (in %) -EALP -Private University -TVET (Technical Vocational Education Training) -Work (self/employed) -unemployed	Intermediate Impact	Gender, County	Same as above	M&E GM	Every year for WtF Students who completed secondary school 4 months earlier	Form 4 months after secondary school	EALP+Private University+TVET = 90%
9 - % of student with registered business (EALP)	Intermediate Impact	Gender, County	Same as above	M&E GM	Every year for those who completed EALP 5 years earlier.	Form to be developed	TBD
10 - % of students who completed secondary studies - WtF	Outcome I	Gender, County, Donor, Type of School (national, county, district, private, day school)	All Students' Report Forms are sent to Nairobi HQs by Branch Champions and data entered in Nairobi	M&E GM	Annually	EGF Annual Form	95%
11 - % of students who dropped out/delayed completion - WtF	Outcome I	Gender, County, Donor, Type of School (national, county, district, private, day school), Reason for Drop Out	Info collected by Branch Champions on yearly basis when attending Forum with DSSB in April. Info sent to Nairobi through Tablet/PC	Branch Champion	Annually	Champion Annual Assessment	5%
12 - % of students obtaining Grade B and above in KCSE – WtF	Outcome I	Gender, County, Donor, Type of School (national, county, district, private, day school).	Students' Results are sent to Nairobi HQs by Branch Champions and data entered in	M&E GM	Annually	EGF Annual Form	80%

Performance Indicators	Indicator type (output, outcome Impact)	Disaggregated by:	Data Collection Method	Responsibility	Frequency	Data Source	Target Values
			Nairobi.				
13 - Average mean KCSE grade by cohort/total - WtF	Outcome 1	Gender, County, Donor, Type of School (national, county, district, private, day school)	Students' Results sent to Nairobi HQs by Branch Champions, data entered in Nairobi. Average KCSE grade calculated for all WtF students who completed secondary school and for those completed in the current year.	M&E GM	Annually	EGF Annual Form	B+
14 - % of students with at least 90% of school attendance	Outcome 2	Gender, -Donor, Reason for not attending	Branch champions ask teachers and pupil and report. Ask at beginning and middle of term.	Branch Champion	Termly	Champion Termly Assessment Form	100%
15 - % of students with disciplinary issues (suspended/expelled etc) from high School – WtF	Outcome 2	Gender, Donor, County, Type of School (national, county, district, private, day school)	Info collected by Branch Champions on yearly basis when attending Forum with DSSB in April. Info sent to Nairobi through Tablet/PC	Branch Champion	Termly	Champion Termly Assessment	Max 2%
16 - % of students with disciplinary issues in Branches during attachment. (EALP)	Outcome 2	Gender, Donor, County	Info collected by the Branch officer supervising each student through PC/Tablet and sent to Nairobi.	Branch Supervisors	Annually	Form to be developed	Max 2%
17 - % of counseled students who goes back to school - WtF	Outcome 2	Gender, Donor, County	Info collected on termly basis by Mentor Coordinator. Info	Mentor Coordinator	Termly	Mentoring Coordinator Termly Form	At least 60%

Performance Indicators	Indicator type (output, outcome Impact)	Disaggregated by:	Data Collection Method	Responsibility	Frequency	Data Source	Target Values
			collected through PC or form sent to Nairobi office.				
18 - % of students who maintained a healthy level of self esteem	Outcome 2	Gender, Donor, County	Info collected by M&E staff during the Annual Leadership Conference through Form.	M&E GM	Annually	EGF Annual Form	80%
19 - % of students having a school leadership role (Prefect, captain etc) WtF	Outcome 3	Gender, Donor, County	Info collected by Branch Champions on yearly basis when attending Forum with DSSB in April. Info sent to Nairobi through Tablet/PC	Branch Champion	Annually	Champion Annual Assessment Form	20%
20 - % of students having a community leadership role and activities – WtF	Outcome 3	Gender, Donor, County	Info collected by Branch Champions on yearly basis when attending Forum with DSSB in April. Info sent to Nairobi through Tablet/PC	Branch Champion	Annually	Champion Annual Assessment Form	20%
21 - % of EALP students mentoring WtF	Outcome 3	Gender	EALP provide the list to M&E team	M&E GM	Annually	Mentor's contracts, List from EALP	80%
22 - % of students who successfully completed university studies (EALP)	Outcome 4	Gender, KCSE grade, Faculty, International/domestic	Students are tracked through Equitel number, personal contact or through parents/relative's tel. number. Use email if suitable. Sample selected through	M&E GM	Every year for those who completed EALP 5 years earlier.	Form to be developed	100%

Performance Indicators	Indicator type (output, outcome Impact)	Disaggregated by:	Data Collection Method	Responsibility	Frequency	Data Source	Target Values
			proportionate sampling methodology according to distribution per County				
23 - % of students who completed university on time (1 year in addition to course duration) EALP	Outcome 4	Gender, KCSE grade, Faculty, International/domestic	Same as above	M&E GM	Every year for those who completed EALP 5 years earlier.	Form to be developed	95%
24 - % of students who graduated with honors (2 nd level and above) EALP	Outcome 4	Gender, KCSE grade, Faculty, International/domestic	Same as above	M&E GM	Every year for those who completed EALP 5 years earlier.	Form to be developed	80%
25 - % of students who completed at least one attachment during break time outside Equity by end of studies (EALP)	Outcome 4	Gender, County	Track sample students through email	EALP Personnel liaise with M&E GM	Annually	Form to be developed	50%
26 - % of students who receive professional certifications (CPA, CPS, Microsoft etc) 2 years after end of secondary studies EALP	Outcome 4	Gender, County	Track sample students through email. Copy of certificate to be provided.	EALP Personnel liaise with M&E GM	Annually for those who completed Secondary Studies 2 years earlier	Form to be developed	50%
27 - % of students passing professional skill exam (EALP)	Outcome 4	Gender, County	Evaluation carried out before and after internship for every cohort of student.	EALP Personnel liaise with M&E GM	Annually	Evaluation Form	90%
28 - No. of applicants to WtF program, short-listed applicants and home visits(WtF)	Output I	Gender, Branch	WtF scholars selection procedure	Branch Champion	Annually	Applicants Form, Interview Form and Home visit Form (improved)	No target but actual numbers captured and monitored
29 – Number of short-listed applicants receiving scholarship from branches or	Output I	Gender, Branch	Branch Champion report on	Branch Champion	Annually	Applicants Receiving	No target but actual

Performance Indicators	Indicator type (output, outcome Impact)	Disaggregated by:	Data Collection Method	Responsibility	Frequency	Data Source	Target Values
individuals			scholarship received by branch or individuals through form at yearly basis			Scholarship from Branches or Individuals Form	numbers captured and monitored
30 - No. of students enrolled and receiving scholarship (WtF)	Output 1	Gender, School County, Branch, Donor	Scholars finally selected by DSSB through Home Visit Form Info sent to Nairobi through Tablet/PC	Branch Champion	Annually	Home visit Form (improved)	2,000 per year
31 - % of students who transit (F1-F4)	Output 1	Gender, School County, Branch, Co-hort, Donor	Info collected by Branch Champions on yearly basis when attending Forum with DSSB in April. Info sent to Nairobi through Tablet/PC	Branch Champion	Annually	Champion Annual Assessment Form	95%
32 - % of students using supplementary learning (sms, usb pen drive etc) WtF	Output 2	Gender, School County, Type of Schools, Frequency of usage, Type of supplementary learning (sms or usb), reason for not using	Info collected by the Branch Champion during the middle of the term. Data captured in tablet offline and sent to Nairobi.	Branch Champion	Termly	Champion Termly Assessment Form	90%
33 - % of students having an assigned mentor	Output 3	Gender, -Donor	Data captured by Mentor Coordinator on termly basis.	Mentor Coordinator	Termly	Mentoring Coordinator Termly Form	100%
34 - % of students who received at least 1 visit per term by the assigned mentor	Output 3	Gender, Donor	Data captured by Mentor Coordinator on termly basis.	Mentor Coordinator	Termly	Mentoring Coordinator Termly Form	100%

Performance Indicators	Indicator type (output, outcome Impact)	Disaggregated by:	Data Collection Method	Responsibility	Frequency	Data Source	Target Values
35 - Number of students who received counseling/medical support (WtF)	Output 4	Gender, Donor, Type of School, Type of Disease	Data captured by Mentor Coordinator on termly basis.	Mentor Coordinator	Termly	Mentoring Coordinator Termly Form	No target but actual numbers captured and monitored
36 - % of scholars who attended the leadership congress annually (EALP & WtF)	Output 5	Gender, WtF/EALP, Donor	Info collected by M&E staff during the Annual Leadership Conference through Form.	M&E GM	Annually	EGF Annual Form	WtF: 100% EALP: 75%
37 - No. of students selected into the EALP Programme	Output 6	Gender, County	EALP Selection process	Education GM	Annually	Database	400
38 - % of students going through scholar counseling (EALP)	Output 7	Gender, County	Record of attendance list capturing the Student who received Scholar counseling..	EALP Personnel liaise with M&E GM	Annually	Form to be developed	400
39 - % of students going to study abroad (graduate + undergraduate) EALP	Output 7	Gender, County	EALP personnel provide the list to M&E Department through form	EALP Personnel liaise with M&E GM	Annually	Form to be developed	15%
40 - % of students going abroad for attachments/trainings etc (EALP)	Output 7	Gender, County	EALP personnel provide the list to M&E Department through form	EALP Personnel liaise with M&E GM	Annually	Form to be developed	5%
41 - Number of students who applied for the innovation award competition EALP	Output 8	Gender, County	Application forms entered in M&E database	EALP Personnel liaise with M&E GM	Annually	Application Forms	100
42 - % of students who gets every year internship with Equity Bank (EALP)	Output 9	Gender, County	List submitted by each Internship Supervisor in each Branch.	Branch Supervisor	Annually	Data base	100% (400)

ANNEX 24: PERFORMANCE INDICATOR REFERENCE SHEET 11-14

Performance Indicator Reference Sheet

#2 - Performance Indicator Reference Sheet
<p>USAID Strategic Objective: Access to Education</p> <p>EGF Strategic Objective I: To Increase access of secondary education to bright needy students</p> <p>Intermediate Result I: Increased education access for OVCs</p> <p>FA Indicator: Number of learners enrolled in secondary schools or equivalent non-school based settings with USG support (Basic Education)3.2.1-15</p> <p>EGF Program Indicator 1.4: Number of scholars who are already in secondary school</p>
DESCRIPTION
Precise Definition(s): Number of scholars actively in the program
Unit of Measure: Number
Disaggregated by: Gender and class
Justification/Management Utility: This indicator captures the proportion of scholar who are attending school or are actively in the program
PLAN FOR DATA ACQUISITION BY USAID
Data Collection Method: Staff at EGF will collect this information from school termly reports (submission of report cards or any other report indicating that the scholar was in school during a term), Attendance list to District Selection Board mentoring sessions
Method of Acquisition by USAID: EGF Quarterly and annual reports
Data Sources: Scholarship award letters School report cards, , District Selection Boards mentoring attendance list
Frequency/Timing of Data Acquisition: Quarterly and annual by EGF
Estimated Cost of Data Acquisition: Low cost, part of EGF monitoring data collection activities
Responsible Individual(s) at USAID: Lucy Kithome

DATA QUALITY ISSUES
Date of Initial Data Quality Assessment: 2012
Known Data Limitations and Significance (if any): None Actions Taken or Planned to Address Data Limitations: N/A
Date of Future Data Quality Assessments: November, 2017 Procedures for Future Data Quality Assessments: Manual verification of report cards for authenticity
PLAN FOR DATA ANALYSIS, REVIEW, & REPORTING
Data Analysis: Data analyzed on a quarterly basis by the program and M&E team
Presentation of Data: Table showing number of scholars actively in school disaggregated by gender Review of Data: Quarterly review of data by M&E team, EGF team Reporting of Data: Will be reported every quarter in the EGF quarterly reports
OTHER NOTES
Notes on Baselines/Target: Baseline value is 0. Target 2,830 Location of Data Storage: EGF management information system
THIS SHEET LAST UPDATED ON: November 10, 2014

#3 - Performance Indicator Reference Sheet

USAID Strategic Objective: OVC Access to Education

EGF Strategic Objective 2: To Increase access to tertiary education by OVC

Intermediate Result 1: Increased education access

FA Indicator: 3.2.1-41 Number of individuals from underserved and/or disadvantaged groups accessing tertiary education (Basic education)

EGF Program Indicator 1.4: Number of scholars admitted to university or college

DESCRIPTION

Precise Definition(s): Number of scholars from underserved and/or disadvantaged groups awarded scholarship to join university or colleges to pursue higher education

Unit of Measure: Number

Disaggregated by: Gender

Justification/Management Utility: This indicator capture the number of scholars awarded scholarship to join pursue higher education

PLAN FOR DATA ACQUISITION BY USAID

Data Collection Method: Staff at EGF will collect this information from EGF's scholars' database

Method of Acquisition by USAID: EGF Quarterly Reports

Data Sources: Scholarship award letters

Frequency/Timing of Data Acquisition: Quarterly by EGF

Estimated Cost of Data Acquisition: Low cost, part of EGF monitoring data collection activities

Responsible Individual(s) at USAID: Lucy Kithome

DATA QUALITY ISSUES

Date of Initial Data Quality Assessment: 2012

Known Data Limitations and Significance (if any): None

Actions Taken or Planned to Address Data Limitations: N/A

Date of Future Data Quality Assessments: November 2017
Procedures for Future Data Quality Assessments: Manual verification of scholars records
PLAN FOR DATA ANALYSIS, REVIEW, & REPORTING
Data Analysis: Data analyzed on a quarterly basis
Presentation of Data: Table showing number of scholars in universities or colleges disaggregated by gender
Review of Data: Annual review of data by M&E team and Program staff
Reporting of Data: Reported quarterly by EGF
OTHER NOTES
Notes on Baselines/Target: Baseline value is 0. Target 2678
Location of Data Storage: EGF management information system
THIS SHEET LAST UPDATED ON: November 10, 2014

#4 - Performance Indicator Reference Sheet
USAID Strategic Objective: OVC Access to Education
EGF Strategic Objective I: Increased Access to secondary education and leadership development for the OVC
Intermediate Result I.I: Scholars access mentoring
EGF Program Indicator I.I.I.I: Number of scholars visited by their mentors at least three time per year
DESCRIPTION
Precise Definition(s): Number of scholars who are attached to a mentor and are mentored (visited by their mentor) at least once per term
Unit of Measure: Number
Disaggregated by: Gender
Justification/Management Utility: This indicator captures the number of scholars who are attached to a mentor and are mentored at least once per term by their mentors through USG supported activities

PLAN FOR DATA ACQUISITION BY USAID
Data Collection Method: Staff at EGF Education and Leadership program will collect this information from mentoring reports
Method of Acquisition by USAID: EGF Quarterly Reports Data Sources: Mentoring reports
Frequency/Timing of Data Acquisition: Quarterly by EGF Estimated Cost of Data Acquisition: Low cost, part of EGF monitoring data collection activities
Responsible Individual(s) at USAID: Lucy Kithome
DATA QUALITY ISSUES
Date of Initial Data Quality Assessment: 2012 Known Data Limitations and Significance (if any): None
Actions Taken or Planned to Address Data Limitations: N/A
Date of Future Data Quality Assessments: November, 2017 Procedures for Future Data Quality Assessments: Manual verification of mentoring reports
PLAN FOR DATA ANALYSIS, REVIEW, & REPORTING
Data Analysis: Data analyzed on a quarterly basis by EGF Presentation of Data: Table showing number of scholars attached to a mentor and have been mentored at least once per-term
Review of Data: Quarterly review of data by EGF Reporting of Data: Data will be reported every quarter in the EGF quarterly reports
OTHER NOTES
Notes on Baselines/Target: Baseline value is 0. Target 2,678 Location of Data Storage: EGF management information system
THIS SHEET LAST UPDATED ON: November 10, 2014

#5 - Performance Indicator Reference Sheet

USAID Strategic Objective: OVC Access to Education

EGF Strategic Objective I: Increased access to secondary education and leadership development for the OVC

Intermediate Result 1.2.1: Scholars hold leadership positions/roles and participate in co-curricular activities in school

EGF Program Indicator 1.2.1.1: Number of scholars who hold leadership position in school and /or participate in co-curricular activities in school

DESCRIPTION

Precise Definition(s): This indicator measures the number of scholars who hold leadership position in school and/or participate in co-curricular activities as a result of participating in leadership congress or any other leadership development forum organized by the program

Unit of Measure: Number

Disaggregated by: Gender

Justification/Management Utility: This indicator capture the number of scholars who hold leadership position as a result of USG supported activities

PLAN FOR DATA ACQUISITION BY USAID

Data Collection Method: Staff at EGF Education and Leadership program will collect this information through completion of leadership congress registration forms by scholars.

Method of Acquisition by USAID: EGF Quarterly Reports

Data Sources: Registration forms

Frequency/Timing of Data Acquisition: Annually by EGF

Estimated Cost of Data Acquisition: Low cost, part of EGF monitoring data collection activities

Responsible Individual(s) at USAID: Lucy Kithome

DATA QUALITY ISSUES

Date of Initial Data Quality Assessment: 2012

Known Data Limitations and Significance (if any): None

Actions Taken or Planned to Address Data Limitations: N/A

Date of Future Data Quality Assessments: November 2017
Procedures for Future Data Quality Assessments: Manual verification of registration and attendance records in the database
PLAN FOR DATA ANALYSIS, REVIEW, & REPORTING
Data Analysis: Data analyzed on an annual basis by the program and M&E team
Presentation of Data: Table showing number of scholars who attend the leadership congress disaggregated by gender
Review of Data: Annually review of data by program and M&E team
Reporting of Data: Data will be reported in every third quarter EGF quarterly reports
OTHER NOTES
Notes on Baselines/Target: Baseline value is 0. Target 70% of 2,678
Location of Data Storage: EGF management information system
THIS SHEET LAST UPDATED ON: November 10, 2014

#6 - Performance Indicator Reference Sheet

<p>USAID Strategic Objective: OVC Access to Education</p> <p>EGF Strategic Objective I: Increased access to secondary education and leadership development for the OVC</p> <p>Intermediate Result 1.2: Attendance of Annual Education and Leadership Congress</p> <p>EGF Program Indicator 1.2.3.1: Number of scholars who participate in Annual Education and Leadership Congress</p>
DESCRIPTION
<p>Precise Definition(s): Number of scholars who participating in Annual Education and Leadership Congress organized by EGF members annually (measure from 2013 onwards)</p> <p>Unit of Measure: Number</p> <p>Disaggregated by: Gender</p> <p>Justification/Management Utility: This indicator capture the number of scholars participating in DSSB mentoring sessions organized USG supported activities</p>

PLAN FOR DATA ACQUISITION BY USAID
Data Collection Method: Staff at EGF will collect this information DSSB mentoring session attendance sheet
Method of Acquisition by USAID: EGF Quarterly Reports
Data Sources: Mentoring session attendance sheet
Frequency/Timing of Data Acquisition: Annually by EGF
Estimated Cost of Data Acquisition: Low cost, part of EGF monitoring data collection activities
Responsible Individual(s) at USAID: Lucy Kithome
DATA QUALITY ISSUES
Date of Initial Data Quality Assessment: 2012
Known Data Limitations and Significance (if any): None
Actions Taken or Planned to Address Data Limitations: N/A
Date of Future Data Quality Assessments: November 2017
Procedures for Future Data Quality Assessments: Manual verification of attendance sheets
PLAN FOR DATA ANALYSIS, REVIEW, & REPORTING
Data Analysis: Data analyzed on an annual basis by EGF
Presentation of Data: Table showing number of scholars participating in Annual Education and Leadership Congress disaggregated by gender, class and region
Review of Data: Annual review of data by program and M&E team
Reporting of Data: Data will be reported every third quarter in the EGF quarterly reports
OTHER NOTES
Notes on Baselines/Target: Baseline value is 0. Target is 2678
Location of Data Storage: EGF management information system
THIS SHEET LAST UPDATED ON: November 10, 2014

#6 - Performance Indicator Reference Sheet

USAID Strategic Objective: OVC Access to Education

EGF Strategic Objective I: Increased access to secondary education and leadership development for the OVC

Intermediate Result 1.2: Scholars attend DSSB forums

EGF Program Indicator 1.2.3.1: Number of scholars who participate in DSSB mentoring sessions

DESCRIPTION

Precise Definition(s): Number of scholars who participating in mentoring sessions organized by DSSB members at least once per year (measure from 2013 onwards)

Unit of Measure: Number

Disaggregated by: Gender

Justification/Management Utility: This indicator capture the number of scholars participating in DSSB mentoring sessions organized through USG supported activities

PLAN FOR DATA ACQUISITION BY USAID

Data Collection Method: Staff at EGF will collect this information DSSB mentoring session attendance sheet

Method of Acquisition by USAID: EGF Quarterly Reports

Data Sources: Mentoring session attendance sheet

Frequency/Timing of Data Acquisition: Annually by EGF

Estimated Cost of Data Acquisition: Low cost, part of EGF monitoring data collection activities

Responsible Individual(s) at USAID: Lucy Kithome

DATA QUALITY ISSUES

Date of Initial Data Quality Assessment: 2012

Known Data Limitations and Significance (if any): None

Actions Taken or Planned to Address Data Limitations: N/A

Date of Future Data Quality Assessments: November 2017

Procedures for Future Data Quality Assessments: Manual verification of attendance sheets

PLAN FOR DATA ANALYSIS, REVIEW, & REPORTING

Data Analysis: Data analyzed on an annual basis by EGF

Presentation of Data: Table showing number of scholars participating in DSSB mentoring sessions disaggregated by gender, class and region

Review of Data: Annual review of data by program and M&E team

Reporting of Data: Data will be reported every third quarter in the EGF quarterly reports

OTHER NOTES

Notes on Baselines/Target: Baseline value is 0. Target is 2678

Location of Data Storage: EGF management information system

THIS SHEET LAST UPDATED ON: November 10, 2014

ANNEX 25: PMP ACTIVITY INDICATORS AND CORRESPONDING PIRS

Current (07/31/14) PMP Activity Level Indicators and Corresponding PIRS (updated 11/10/14) with Comments & Other Suggested Indicator Text

Current PMP	PMP activity level indicators (7/31/2014) Comments are related to the appropriateness of these current indicators through 11/09/16 and beyond	Corresponding PIRS # and Definition (PIRS updated 11/10/14) or Comment or Other Suggested Indicator Text
SO 1:	Increased access to secondary education and improved leadership capabilities for OVC	EGF SO 1: Increased access to secondary education and improved leadership capabilities for OVC
IR 1.1:	Scholars access and successfully complete secondary education	
Sub IR 1.1.1:	Scholars receive mentoring support	
	Number of scholars visited at least three times per year Comment: <i>Appropriate but not being captured in database yet, mentoring database need to be adapted to easily summarize activity by term and by mentoring type (school-based visits, DSSB)</i>	PIRS#4 - Identical to PMP indicator text Comment: Tightening of this definition in the PIRS appears to have already happened: Number of scholars who are attached to a mentor and are mentored (visited by their mentor)
	Number of scholars assigned mentors Comment: <i>Appropriate but assignment is easily done in software and not sufficient to indicate current service to scholars.</i>	Suggested Text: <i>“Number of scholars assigned an active mentor and who have been visited by that mentor.”</i>
Sub IR 1.1.2:	Scholars access secondary education	
	Number of scholars graduating from secondary schools Comment: <i>Appropriate after first USAIDs graduate 12/2015</i>	
	Number of scholars attending school Comment: <i>Appropriate & measurable through presentation of report forms by scholars at bank branches each term</i>	PIRS#2. – Number of scholars who are already in secondary school
Sub IR 1.1.3:	Number of scholarship recipients	
	Number of scholars awarded scholarship per year	

	Comment: <i>Appropriate only if new USAID scholarships awarded</i>	
IR 1.2:	Scholars hold leadership positions and participate in co-curricular activities at school	
Sub IR 1.2.1:	Scholars gain knowledge and leadership skill and are inspired to be leaders	
	Number holding leadership positions in school and/or participating in co-curricular activities in their school (50% of total no. of scholars) Comment: <i>Appropriate but current data not captured</i>	PIRS#5 - Number of scholars who hold leadership positions in school and/or participating in co-curricular activities in school
Sub IR 1.2.2:	Scholars participate in leadership congress	(There are two PIRS sheets labeled #6 so we use 6A and 6B)
	Number of scholars participating in leadership congress Comment: <i>Appropriate</i>	PIRS#6A - Number of scholars who participate in Annual Education and Leadership Congress Comment: The justification section for this PIRS is from another PIRS and needs to be rewritten.
	Number of leadership congress forums organized Comment: <i>Appropriate</i>	
Sub IR 1.2.3:	Scholars participate in regional DSSB mentoring sessions	
	Number of scholars participating in DSSB mentoring sessions Comment: <i>Appropriate</i>	PIRS#6B – Identical to PMP indicator text
	Number of DSSB mentoring sessions organized Comment: <i>Appropriate if this is measuring the total of all the 116 DSSBs who are actually producing such a session during any holiday (April, December)</i>	
SO 2:	Increase access to tertiary education by OVC	EGF SO2: To increase access to tertiary education by OVC
IR 2.1	OVC complete tertiary education	
Sub IR 2.1.1:	Scholars are awarded scholarship to join tertiary institutions	

	<p>Number of scholars awarded scholarship to join tertiary institutions to pursue higher education Comment: <i>Appropriate retrospectively for final reporting on 339 PWC OVCs in tertiary and university in 2011.</i></p>	<p>PIRS #3- Number of individuals from underserved an/or disadvantaged groups accessing tertiary education (higher education) Suggested Text: Use PIRS text for both PMP and PIRS Comment: <i>Could be very useful in assessing value over time of WtF by tracking the future education activities of WtF graduates by the new WtF Alumni Association, possibly also with assistance from the Alumni Association or EGF (referrals, facilitating HELB loans, etc.)</i></p>
	<p>Number of scholars completing tertiary education Comment: <i>Appropriate only retrospectively for 339 PWC OVCs</i></p>	
Additional Indicators May be Developed		
	<p>Further indicators may be developed related to 1) refinements or new areas of emphasis as noted in the Conclusions (e.g., the number of WtF graduates receiving college and career counseling in the year after graduation; the number applying for entry to an institution of higher education; the number of WtF graduates placed in internships in the year after graduation), or 2) activity areas now surfacing and called for by DO2's Sub IR 2.2.2 and 2.2.3 (e.g., indicators related to county government participation in providing additional scholarships, demonstrated private and public leverage, "community ownership", civic institutional capacity developed, training provided, collaboration with MOEST on such activities as workshops on guidance and mentoring, etc.).</p>	

U.S. Agency for International Development
1300 Pennsylvania Avenue, NW
Washington, DC 20523