Department for Evaluation

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Evaluation of Norad's use of knowledge in portfolio management

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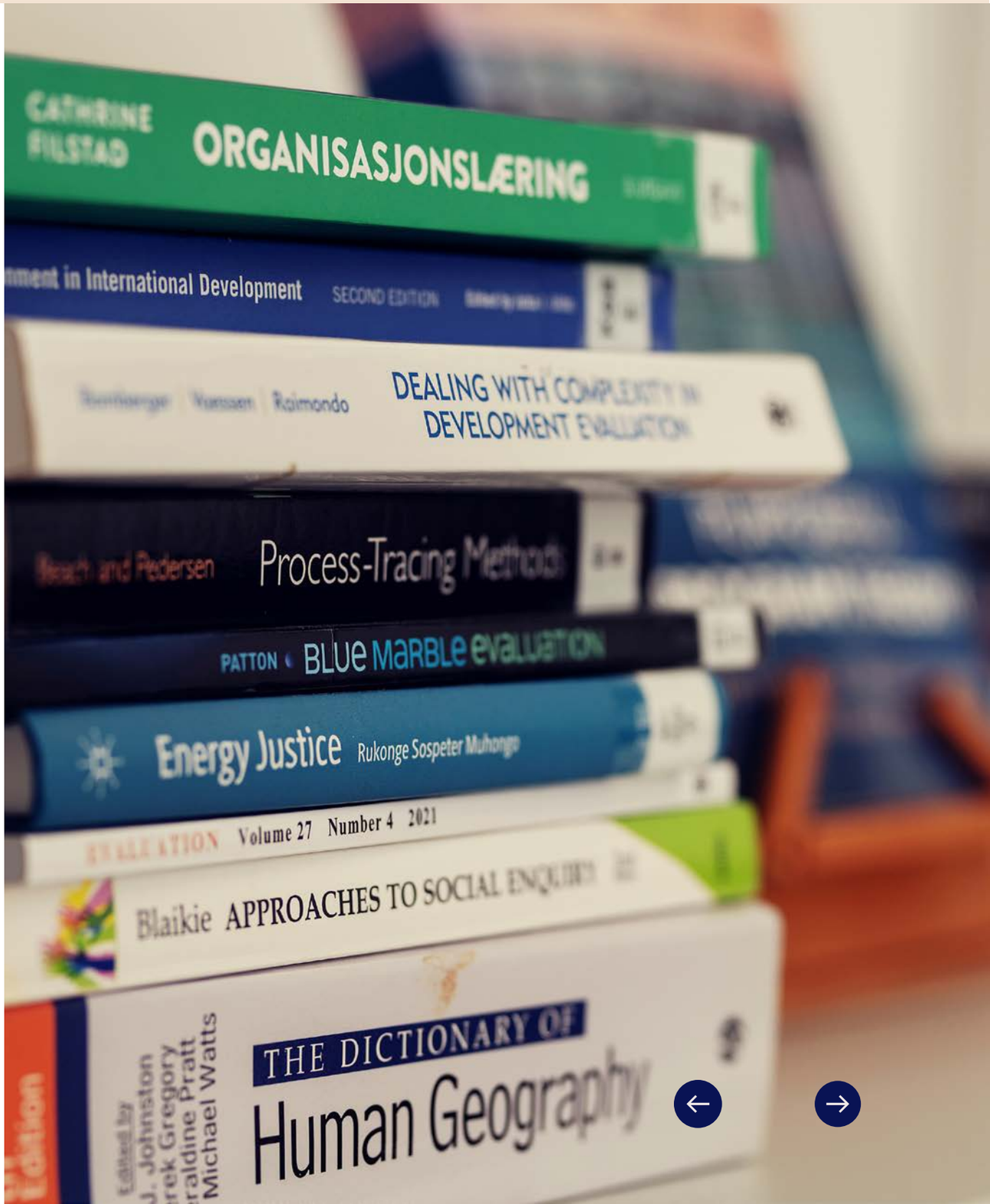

Foreword

Over the past 20 years, the Norwegian aid administration has undergone several reforms to improve the management of development assistance and to satisfy the increasing demands for documentation of, and management by, results.

Previous evaluations initiated by the Department for Evaluation have found weaknesses in the Norwegian aid administration's approach to results-based management, which has been found to focus more on reporting and accountability than on the organisation's ability to use results-information and other types of knowledge for management purposes and learning.

To comply with the increasing demands for results-orientation, and as a response to these findings, Norad has introduced several institutional changes since 2019, and has opted to move towards knowledge-based portfolio management. The latter includes setting up portfolios broadly organised by the sustainable development goals, a portfolio council and secretariat, the introduction of portfolio coordinators, and the provision of training and leadership support.

Knowledge-based portfolio management can improve the results of Norwegian development assistance if the aid administration's use of knowledge leads to better designed and implemented portfolios. This evaluation aims to feed into this effort.

We believe the evaluation provides important lessons for the aid administration to ensure knowledge-based portfolio management, and hope that it will be used to further improve Norad's work in this respect.

The evaluation was carried out by Itad in collaboration with the Chr. Michelsen Institute (CMI).

We are grateful to Jostein Askim, Professor in Political Science at the University of Oslo, who has been external advisor to the Department for Evaluation, Norad's staff and management for their participation in the evaluation, and the team for a job well done.

Oslo, 4 July 2024

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Agriculture for Development	AfD
Avdeling for Metode og Resultater (Department for Quality Assurance)	AMOR
Chr. Michelsen Institute	CMI
Development Assistance Committee	DAC
Agency for Public and Financial Management	DFØ
Evaluation Question	EQ
European Union	EU
International Centre for Asset Recovery	ICAR
International Centre for Tax and Development	ICTD
Illicit Financial Flows	IFF
International Monetary Fund	IMF
International Non-Governmental Organisation	INGO
Monitoring and Evaluation	M&E
Monitoring, Evaluation and Learning	MEL
Norwegian Ministry of Foreign Affairs	MFA
Multilateral Organisation Performance Assessment Network	MOPAN
Midterm Review	MTR
Non-Governmental Organisation	NGO
Norwegian International Climate and Forest Initiative	NICFI
Norwegian Agency for Development Cooperation	Norad
Official Development Assistance	ODA
Organisation for Economic Co-operation and Development	OECD
Portfolio-Dash	P-Dash
Results-Based Management	RBM
Sustainable Development Goal	SDG
Sexual and Reproductive Health and Rights	SRHR
Theory of Change	ToC
Terms of Reference	ToR
United Nations	UN
United Nations Development Programme	UNDP
United Nations Office on Drugs and Crime	UNODC
World Food Programme	WFP
World Health Organization	WHO

Executive summary

Over the past decade, the Norwegian Agency for Development Cooperation (Norad) has been on a journey to improve its use of evidence and other forms of knowledge in development cooperation. Norad first, in line with central government requirements, moved towards a results-based management model, and then sought to develop a portfolio-based approach to managing its work.

This has taken place in a context of considerable shifts in how aid is managed and disbursed, with increasing grant making responsibility transferred from the Norwegian Ministry of Foreign Affairs (MFA) to Norad. During this time, Norad became responsible for an increasing proportion of the aid budget, but without a proportionate increase in staffing. Both MFA and Norad have therefore prioritised the integration of knowledge into portfolio management, leveraging knowledge to support best use of funds and facilitate more strategic approach to management. Norad formally introduced this knowledge-based model of portfolio management in 2022, with 13 portfolios that control somewhat less than half of Norad's total budget. By organising resources according to portfolios, Norad hopes to apply existing knowledge and generate new data and insights more strategically, leading to better decision making and development results.

Throughout this process, Norad's Department for Evaluation has commissioned several evaluations and studies to take stock of progress and suggest ways of moving forward. This evaluation is part of this series. Its primary purpose is to provide early insights on the introduction of knowledge-based portfolio management, offer insights on what is working well and less well, and provide recommendations for adaptation and course correction.

The evaluation team mapped out how Norad's approach to knowledge-based portfolio management was intended to improve the quality of grant management and ultimately development results – and collected data to investigate whether key underlying assumptions were present. The team used case studies of the Governance and Public Finance and Food Security portfolio and a wider review of the other 11 portfolios to explore the extent to which knowledge is being used in portfolio management, whether key enablers of knowledge use are in place, and the extent to which the expected outcomes from knowledge-based portfolio management are likely to be realised.

This evaluation

The evaluation has three objectives:

1. Describe the current guidelines, set-up and practices in relation to knowledge-based portfolio management.
2. Identify strengths and weaknesses in the existing set-up for and practice of knowledge-based portfolio management.
3. Provide actionable recommendations that support further improvements in Norad's approach to and use of knowledge in portfolio management.

The overall goal of the evaluation is "to provide evaluative evidence about the extent to which the approach to use of knowledge is likely to improve the quality of Norad's portfolio management, and ultimately contribute to better development results."[1]

1 Terms of Reference, p. 2

For the purposes of the evaluation, we defined knowledge broadly, including knowledge from research; results data from monitoring, evaluation and other sources; and professional knowledge, which includes practical experience and other insights. It includes both explicit (documented) knowledge and tacit knowledge which resides in people's minds.

Based on this definition, recent literature and practice, and Norad's own model of portfolio management, we developed a theory of how establishing knowledge-based portfolio management is intended to lead to improved results from development assistance. The logic of the theory is as follows:

***IF** Norad effectively establishes knowledge-based portfolio management **AND** there is an enabling environment for knowledge-based portfolio management **AND** knowledge is effectively used in how portfolios are managed, **THEN** portfolios will be better designed and implemented **AND** more likely to achieve their objectives, **LEADING TO** improved results in Norwegian development assistance.*

We first set out Norad's interventions to establish knowledge-based portfolio management (new systems, processes and structures, resource mobilisation, leadership attention, training and guidance, and support). We then made explicit the key assumptions about the enabling environment, and about how knowledge is being used through the portfolio management cycle, including a focus on different types of knowledge. We also acknowledged clearly in our theory the complexity of achieving improved development results. Only parts of this process are within Norad's control. Implementation and achieving goals are both dependent on other actors and contexts, such as partners. Improved results from development assistance are even further outside Norad's sphere of influence, with multiple external factors at play.

The evaluation drew on evidence from both primary and secondary sources. Secondary sources included a detailed document review and an assessment of key portfolio management tools and relevant literature. Primary sources included 57 interviews with stakeholders from Norad, MFA, embassies, the Norwegian Agency for Public and Financial Management, and five portfolio partners. Four validation workshops were held with portfolio teams, Norad's senior management team, and the team of portfolio coordinators to discuss emerging findings, validate conclusions and develop recommendations.

Limits to the scope and purpose of the report

This evaluation is focused on knowledge use and how this is guiding management. It does not consider the quality of portfolios themselves or how likely they are to achieve their goals. Additionally, because the move to embed knowledge use in portfolio management is still in the early stages, this evaluation cannot test the extent to which these efforts impacts development results. We do, however, comment on the likelihood of the reform trajectory leading to improved results, based on the early progress made.

Key conclusions

EQ1: To what extent and how is knowledge being used in Norad's portfolio management?

Conclusion 1: Across all portfolios, knowledge is being used in a more consistent way in portfolios management. This has been enabled by new systems and processes and by consistent leadership. However, knowledge use is not embedded in all stages of the portfolio management cycle. This is partly because Norad is still in the early stages of the change process. It is also because of the absence of key building blocks, notably operational plans for how the portfolio's knowledge needs will be identified, addressed and resourced. Norad is only two years into the roll-out of knowledge-based portfolio management, but there are early signals that knowledge is being used more systematically. The process of developing theories of change has enabled most portfolios to build a robust problem analysis, drawing on research and professional knowledge. Key management tools, the theory of change and knowledge plan, are in place across all portfolios, though their quality and utility varies. Across portfolios, theories of change are of higher quality than knowledge plans, as teams had a

better understanding of their purpose and were able to invest more time in their development. This means that most portfolios have articulated their overall goals and a theory of how they intend to reach them, but have not yet developed a realistic plan for collecting knowledge to support their management. Knowledge plans need work to develop them into useful and implementable tools, particularly in terms of supporting portfolio-level monitoring and evaluation and in setting out a resourcing plan. Some teams have gone beyond knowledge use in establishing their portfolio theory, and have started to make decisions about partners and interventions based on knowledge.

Conclusion 2: Knowledge-based portfolio management will work best if a plurality of knowledge is used. Currently, results knowledge from monitoring and evaluations is used less than professional and research knowledge. There have been efforts to improve the former, which show encouraging results. To date when making decisions about their portfolios, teams have tended to draw on professional and research more than on results knowledge from monitoring, evaluation and other sources which give information about how partners' work is progressing. There are several reasons for this. Professional knowledge is easy for teams to access and interpret. Similarly, many teams keep up to date with the latest research, often through partners that are funded to conduct research. Results knowledge is used less frequently because the quality of partner results evidence is perceived to be variable and, as discussed above, portfolios do not have clear plans in place for monitoring progress. Efforts to strengthen partners' use of evaluations are encouraging and could improve this situation, as would incorporating monitoring and evaluation into knowledge plans.

EQ2: To what extent, how and why are Norad's portfolio set-up and practices and the wider environment conducive to the use of knowledge in portfolio management?

Conclusion 3: The reality of knowledge use in Norad is more complex than the current model of portfolio management implies, particularly in terms of the assumption that portfolios can routinely select between partners and interventions. The high proportion of multilateral funding, and Norad's role as an agency delivering on political priorities, mean that the organisation needs to think about knowledge use differently. Acknowledging this and adjusting expectations of how portfolios can realistically use knowledge will lead to a more effective management model. More work is needed to implement the guidance which states that knowledge should be used to *influence* and *steer* partners in line with portfolio objectives, to ensure balance in the portfolio at global assistance, and to *provide* technical assistance to MFA. This is a much longer-term endeavour than simply using knowledge to inform a funding decision. Ultimately, portfolio management will support teams to feed more robust knowledge into crucial partnerships and provide more consistent, evidence-based advice and guidance.

Conclusion 4: Leadership support to knowledge-based portfolio management has been crucial to getting it to this point. Portfolio teams now need space to own and drive the knowledge agenda in order for the new practices to become embedded across the organisation. Senior leadership has been crucial in progressing portfolio management to this point. They have set the vision and created the drive for the reforms to happen. However, because of their strong support, the reforms are seen by some as a top-down management agenda. Senior leadership has recognised this already to some extent and has provided teams with greater flexibility in managing their portfolios. This has helped teams take more ownership of core management processes.

Conclusion 5: Although some additional staffing resources have been mobilised to support the knowledge-based portfolio management agenda, they are insufficient to achieve its objectives. Portfolio coordinators are stretched thinly, and wider teams are struggling to engage effectively in core portfolio management tasks. Norad's Knowledge Department offers some support, but is spread too thinly to provide this to all 13 portfolios. Although consultancy budget has been used to mitigate this issue to some extent, there is increasing pressure on this relatively small allocation provided to Norad

because of the general push to lower consultancy expenditure across government. All of these factors have resulted in some key tasks not being undertaken well enough, or not being undertaken at all.

Conclusion 6: Portfolios that include agreements managed by other Sections face a significantly more complex task in using knowledge. Norad needs to either address these structural complexities or think about a less ambitious, more tailored form of knowledge-based portfolio management for these portfolios. In these cases, the portfolio coordinator needs to work across multiple Sections and Departments, trying to influence others to ensure that decisions reflect the portfolio goals. Effective management becomes very challenging with such limited control of resources.

EQ3: To what extent and how is the use of knowledge in current portfolio management likely to result in improved results of Norwegian development assistance?

Conclusion 7: Currently, portfolios have variable potential to achieve improved development results through knowledge-based portfolio management because they do not all currently have the right enabling conditions in place. Ultimately, it will take time to for knowledge-based portfolio management to become Norad's de facto management model. Given how early it is in the roll-out, and the fact that enabling factors are present to varying degrees across Norad and individual teams, it is no surprise that knowledge use varies from portfolio to portfolio. This means that the likelihood that portfolio management will lead to improved development results is also highly variable at this stage.

Recommendations

EQ4: What are the main lessons and recommendations for further improvement in knowledge-based portfolio management in Norad?

Resourcing

Recommendation 1: Norad should initially focus its available staff and consultancy resources on fewer priority portfolios, which receive more targeted support in the short term. Portfolios could be prioritised by political priorities, comparative advantage, budget allocation, or the structural underpinnings of a portfolio.

- **Increase time allocation for portfolio coordinators** to ensure knowledge management tasks are completed consistently.
- **Allocate consultancy budget to address portfolio knowledge needs.** This should be consolidated and used more strategically, with priority portfolios allocated more resources.
- **Provide more Knowledge Department support.** Focusing their support on priority portfolios would increase the value of their offering.

Portfolio M&E

Recommendation 2: Norad should improve its capacity to implement portfolio-level M&E. Portfolios do not yet have portfolio-level M&E in place. This poses a significant barrier to knowledge use.

- **Build team skills in portfolio M&E** to support teams to assess the progress of their portfolio.
- **Include a portfolio M&E approach in knowledge plans.** Knowledge plans should include concrete plans for implementing portfolio-level M&E through diverse, robust evaluation methods.
- **Resource portfolio M&E adequately.** The M&E approach outlined in the knowledge plan needs realistic resourcing, either through consultancy or funding for portfolio-level evaluations.

Portfolio management structures

Recommendation 3: Norad should identify and address siloes affecting portfolios that work across departments and sections. Portfolios that work across multiple departments and sections face additional barriers in managing agreements linked to their portfolios because of how lines of responsibility and decision making are structured.

- **Provide portfolio coordinators with a clear mandate.** Currently, portfolio coordinators do not have an official mandate to influence decisions outside their own section.

Norad's role in achieving portfolio outcomes

Recommendation 4: Norad should ensure that all portfolios identify the different channels through which Norad contributes to portfolio objectives. The reality of knowledge use is more complex than Norad's current practice allows for. Most portfolios do not clearly articulate their different contributions to change.

- **Ensure that portfolio theories of change delineate different aspects of Norad's role**, including them as interventions in portfolio ToCs and as a core part of the overall logic of the portfolio's work.
- **Support teams to implement the existing guidance.** Further Knowledge Department support would help ensure that practice is more in line with the guidance.

Photo: **Martha Haukaas** | Norad

1

Introduction

For many years the Norwegian aid administration has been on a journey to improve its use of evidence and other forms of knowledge in development cooperation. During this time, The Department for Evaluation has initiated several evaluations and studies that have taken stock of progress and suggested ways of moving forward. These have included evaluations of the application of results-based management (RBM), the quality and use of decentralised evaluations, and the approach to portfolio management. Each of these evaluations and studies has highlighted problems and challenges, and they also point to the knowledge agenda gaining momentum within the aid administration. This evaluation is part of this series.

The Norwegian Ministry of Foreign Affairs (MFA) is increasingly delegating responsibility for aid management and disbursement to the Norwegian Agency for Development Cooperation (Norad), Norway's key subsidiary aid agency. MFA and Norad have prioritised the integration of knowledge into portfolio management, a strategic shift intended to leverage existing knowledge and generate new insights. Norad hopes that by organising its resources according to portfolios, it can apply existing knowledge and generate new data and insights more strategically, leading to better decision making and development results. This evaluation seeks to provide early insights on the introduction of knowledge-based portfolio management, offer insights on what is working well and less well, and provide recommendations for adaptation and course correction.

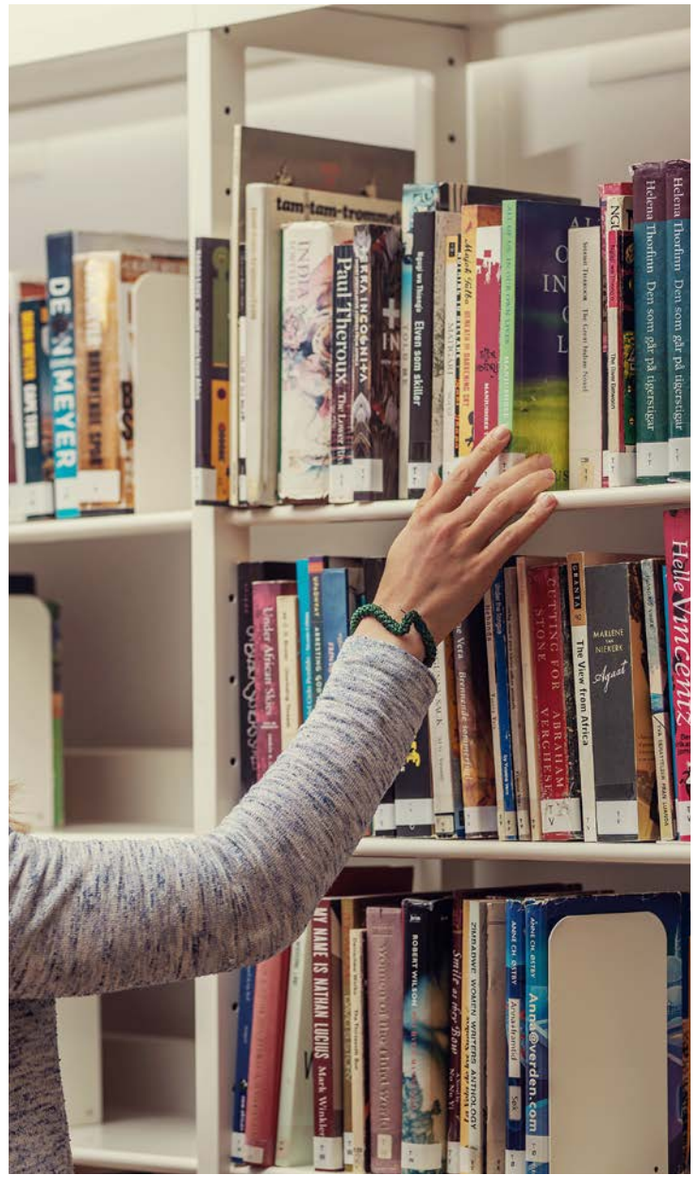


Photo: **Nadia Frantsen**

1.1 Evaluation purpose, objectives and questions

The **purpose of the evaluation** is "to provide evaluative evidence about the extent to which the approach to use of knowledge is likely to improve the quality of Norad's portfolio management, and ultimately contribute to better development results."[2]

It has three **evaluation objectives**:

1. Describe the current guidelines, set-up and practices in relation to knowledge-based portfolio management.
2. Identify strengths and weaknesses in the existing set-up for and practice of knowledge-based portfolio management.
3. Provide actionable recommendations that support further improvements in Norad's approach to and use of knowledge in portfolio management.

The evaluation is built around four **evaluation questions (EQs)**:

1. To what extent and how is knowledge being used in Norad's portfolio management?
2. To what extent, how and why are Norad's portfolio set-up and practices and the wider environment conducive to the use of knowledge in portfolio management?
3. To what extent and how is the use of knowledge in current portfolio management likely to result in improved results of Norwegian development assistance?
4. What are the main lessons and recommendations for further improvement in knowledge-based portfolio management in Norad?

To answer these questions, the evaluation was structured around a **theory of how knowledge use in portfolio management can lead to improved Norwegian development assistance** (henceforth the evaluation theory of knowledge use in portfolio management). We developed this theory with Norad stakeholders. It looked at whether key enablers of knowledge use are in place, the extent to which knowledge is being used in portfolio management, and the extent to which the expected outcomes from knowledge-based portfolio management are being realised. The report provides emerging evidence of how this theory is playing out in practice.

The **primary audiences** for the evaluation are senior management within Norad, key stakeholders within the Ministry of Foreign Affairs, portfolio management teams, the Knowledge Department, the Grant Management Systems Section and the Change Hub. Secondary audiences are Norad staff, partners and the wider public.

2 Terms of Reference, p. 2.

1.2 Report structure

The report has six sections. Section 2 provides background to portfolio management and the knowledge agenda. Section 3 outlines an overview of our methodology. Section 4 presents the main findings from the evaluation, structured according to the theory of change (ToC). Section 5 presents our conclusions. Section 6 details the recommendations from the evaluation. Annexes 1–7 include the evaluation Terms of Reference, a list of stakeholders interviewed, a list of documents and literature reviewed, the assessment criteria for theories of changes and knowledge plans, Norad's approach to portfolio management, two case studies and the emerging findings from the theory of change and knowledge plan assessment.[3]

3 Annexes 5-7 include case study reports, interview topic guides and the Norad portfolio management cycle in a separate document.

BOX 1:

Clarification of key concepts used in the report

Knowledge. In the evaluation it is understood broadly and includes knowledge from research; results data from monitoring, evaluation and other sources; and professional knowledge, which includes practical experience and other insights. It includes both explicit (documented) knowledge and tacit knowledge which resides in people's minds.

Learning. A process through which knowledge, competencies and attitudes are acquired through study, experience, or being taught or trained. It is a process which happens at individual and organisational levels. Organisational learning involves developing a culture where norms and beliefs support and encourage staff to seek out and learn from evidence (monitoring and reporting data, evaluations and research), generated internally and by external actors, on what works and what does not, and to take action based on this.[4]

Portfolio. A collection of measures which are designed to contribute to achieving specific high-level objectives in Norwegian foreign and development policy and are based on a common underlying logic.[5]

Portfolio management. The practices and procedures used to design, plan, organise and coordinate a collection of interventions, grants and initiatives towards the effective and efficient delivery of specific development assistance objectives. It involves setting overall portfolio objectives and strategy, aligning resources towards these, and then using evidence to oversee and coordinate grants and initiatives, monitor overall progress, learn and adapt, and report.[6]

Theory of change (ToC). An evolving explanation of how and why an intervention contributes to change. A ToC details the causal chain between interventions and outcomes and the underlying preconditions and assumptions. It is both a product (a diagram) and an ongoing process of reflection and learning about how change is happening in practice.[7]

Portfolio theories of change. This is the overarching theory of change for the portfolio. It is used to bring coherence to a portfolio of interventions linked by a thematic, sectoral or geographic focus. It allows for better, more strategic coordination of the interventions, grants and initiatives within the portfolio by clarifying their common underlying logic and identifying their collective contribution to high-level Norwegian foreign and development policy objectives.

4 Department for Evaluation (2018) Ten Steps to Create a Results and Learning Environment.

5 (2021) Konsept: Porteføljestyring, Prosjekt Forbedring, Oslo: Norad.

6 Department for Evaluation (2020b) Evaluation of the Norwegian Aid Administration's Approach to Portfolio Management (2/20), Oslo: Norad: https://www.norad.no/en/toolspublications/publications/2020/evaluation-of-the-norwegian-aid-administrations-approach-to-portfolio-management/

7 Our definition of 'theory of change' is based on Vogel's (2012) definition. Key to this definition is that we are interested in the causal chain between a set of interventions and the changes it is understood to contribute to. It is often argued that a ToC is about how change is supposed to happen in relation to a certain problem in response to a range of contributory forces and factors; in contrast, a theory of action explains how a specific set of interventions is expected to contribute to the outcomes articulated in the ToC. In practice we do not find this distinction particularly helpful. Our understanding of 'theory of change' combines these two concepts.

2

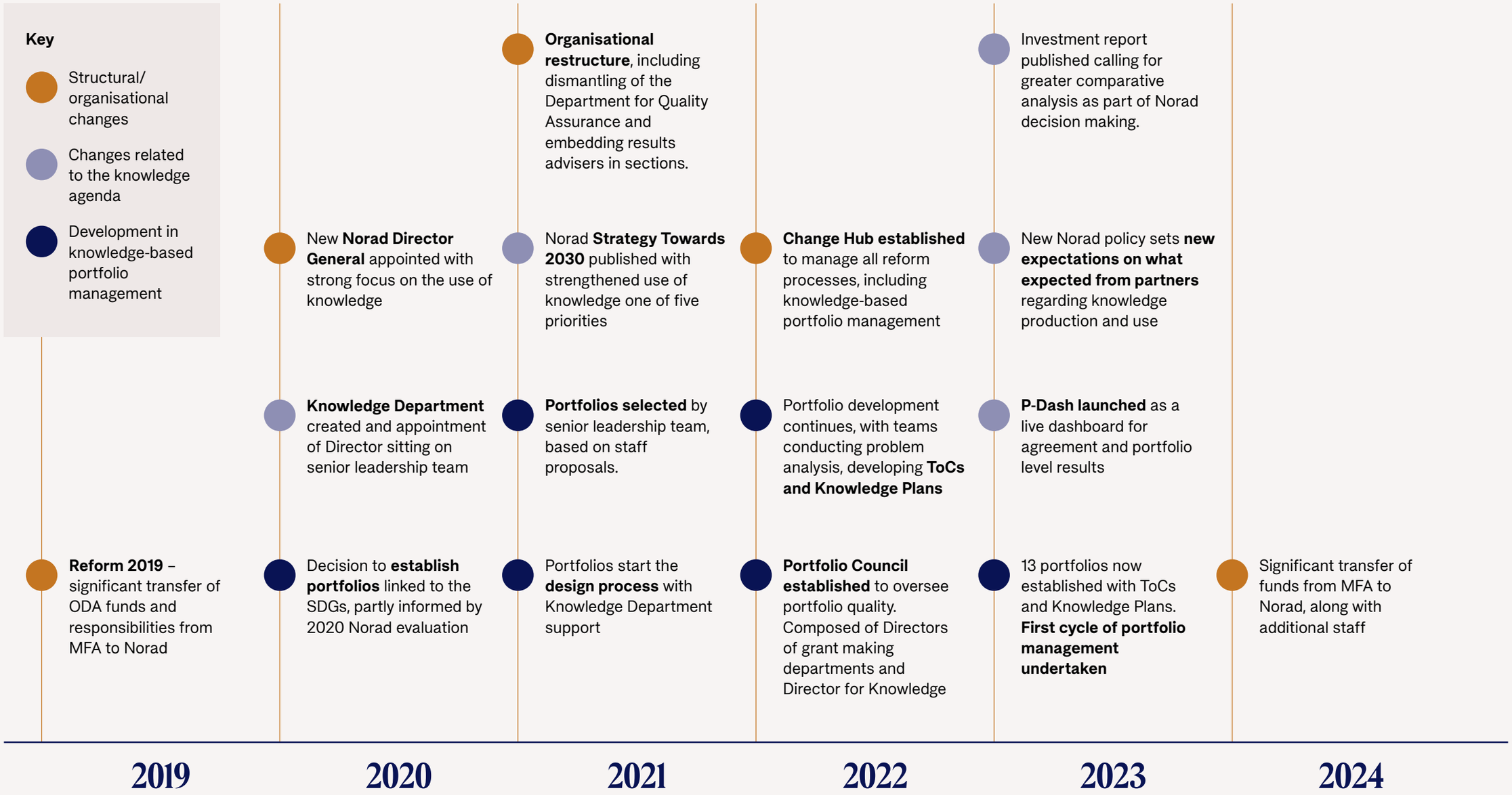
Background

This section describes the context for the evaluation of use of knowledge in portfolio management. It starts with an overview of recent developments in how Norwegian aid is managed (section 2.1), and in the results agenda (section 2.2) more broadly. It concludes with an overview of the introduction of portfolio management to Norad and of knowledge use in the portfolio management cycle (section 2.3). Figure 1 shows the overall timeline of the change process.

Photo: **Nadia Frantsen**

FIGURE 1

Timeline of the change process[8]



8 Abbreviations used in this figure: ODA – official development assistance; P-Dash – Portfolio-Dash; SDG: Sustainable Development Goal.

2.1 Norad and the management of Norwegian aid

Since 2000 there has been a fivefold increase in the Norwegian aid budget,[9] with several changes in institutional responsibility for the funds. There has been a major transfer of grant management responsibilities from Ministry of Foreign Affairs to Norad, called 'Reform 2019'. By December 2023, Norad was managing well over half of the NOK 55 billion aid budget, including NOK 7.5 billion earmarked for Ukraine.[10] The number of Norad staff managing aid remained fairly constant (around 270) throughout these changes.

A further transfer of responsibility from Ministry of Foreign Affairs will take effect from mid-2024, with Norad taking control of most humanitarian aid funds.[11] This will give Norad responsibility for the bulk of Norwegian aid. Staff posts will support this expansion. Embassy-managed projects will likely be funded through regional budget chapter posts. Ministry of Foreign Affairs will retain control of some multilateral core funding to organisations, of peace and reconciliation efforts, and of disbursements through other ministries and directorates.[12]

The government and Ministry of Foreign Affairs have launched several initiatives which directly or indirectly address the challenge of managing an expanding budget with limited staff resources. Institutional and staff capacity were insufficient to manage the increased budget through traditional bilateral channels. More than 60% of the aid budget is now disbursed to multilateral organisations.[13] In addition, since 2013 Norad has concentrated aid disbursement by more than halving the number of contracts it manages, on the premise that fewer, larger contracts were easier to manage. There have been efforts to reduce the number of recipient countries.[14] Finally, in 2019 the detailed Grant Management Assistant manual was introduced to standardise management across Ministry of Foreign Affairs, Norad and the embassies.[15]

9 The budget increased from NOK 11 billion in 2000 to NOK 55 billion in 2022.

10 This was a result of the negotiations between the political parties behind the 2019 government coalition. In this government platform it was agreed to significantly strengthen Norad through transfer of functions from MFA. See also Elling Tjønneland (2022) 'Norwegian development aid: a paradigm shift in the making?', Forum for Development Studies 49(3): 373–98 for an overview of the changing role of Norad, with p. 385 referencing the major changes in Norad in 2019. Norad's annual reports provide data on Norad's grant management responsibilities and staff resources. See Norad (2023) Årsrapport 2022, Oslo: Norad.

11 See the press release from the Ministry of Foreign Affairs (2023) 'Tydeligere arbeidsdeling mellom UD og Norad': https://www.regjeringen.no/no/aktuelt/tydeligere-arbeidsdeling-mellom-ud-og-norad/id2992248/

12 For example disbursements related to refugees in Norway, policing in international peacekeeping missions, and funding to the Research Council.

13 See also the discussion of these issues in a paper co-authored by Norad's 2015–19 Director General Jon Lomøy; Bu, C. and Lomøy, J. (2022) Utfordringer og dilemmaer i norsk multilateral bistand, Oslo, Tankesmien Agenda (Agenda Notat 1/2022). Data on bilateral and multilateral aid for each of the Nordic countries is also available from OECD (2023) 'Development Co-operation Profiles': https://www.oecd-ilibrary.org/sites/9b77239a-en/index.html?itemId=/content/component/5e331623-en&_csp_=b14d4f60505d057b456dd1730d8fcea3&itemIGO=oecd&itemContentType=chapter#chapter-d1e7549-cffc027d77. See also the discussion below of the reorganisation of and centralisation of Norwegian aid.

14 See more on the concentration efforts in Norad Department for Evaluation (2020) Evaluation of Norway's Aid Concentration, Oslo: Norad.

15 The Grant Management Assistant is, from 2019, a digital tool only available on the MFA/Norad internal web. This manual also includes as annexes Grant Scheme Rules, which provides detailed prescriptions for disbursements. This may include also details with regard to channels and recipients.

In August 2024 a further organisational restructuring will occur, entrusting Norad with the oversight of budget allocations for humanitarian aid within its portfolios. This realignment aims to strengthen the nexus between Norad's existing responsibilities in development aid and humanitarian assistance. Consequently, this restructuring will introduce new budgetary allocations for portfolios relevant to humanitarian aid, necessitating adjustments and potentially merging some portfolios to optimise operational efficiency.[16]

Photo: **Martha Haukaas** | Norad

16 NO21, NO22, NO23, NO24, NO28, NO29.

2.2 The results agenda

In parallel with these changes came calls for better evidence on the results of Norwegian aid. This was partly because of an international focus on results-based development assistance, seen in the Paris Declaration on Aid Effectiveness (2005) and the Accra Agenda for Action (2008). Domestic concerns about public expenditure lent weight to this agenda. Rules and procedures for Norwegian public sector management increasingly called for better use of results data in allocation and disbursement of public funds, including in the Agency for Public and Financial Management (DFØ) guidelines for institutionalising use of results in public spending decisions.[17]

Several reviews and evaluations have identified shortcomings in managing for results in the aid administration. Reports to Parliament from the Office of the Norwegian Auditor General, as well as OECD's Development Assistance Committee (DAC)[18] peer reviews, have suggested that most aspects of the aid administration's planning for, measurement and assessment of, and learning from results have been falling short. Reports commissioned by the Department for Evaluation in Norad in 2017, 2019 and 2021 identified similar challenges.[19]

Common themes in the evaluation findings include a lack of shared understanding across the organisation of the new management approaches being introduced. This led to a lack of shared vision about the intended results of the change. This was reflected at portfolio level within Norad, with portfolio teams lacking a sense of collective purpose for the partnerships and interventions being implemented. The other weakness identified was tracking and analysis of high-level impacts and progress, whether at portfolio or organisational level – a fundamental step in results-based management.[20] Improvements in results-based management have continued to be high on the agenda in the dialogue between the Ministry of Foreign Affairs and Norad, with Norad mandated to develop improved approaches by the end of 2022.[21]

17 The DFØ is an agency of the Ministry of Finance. See the most recent version of the manual ("utredningsinstruksen"): DFØ (2018) Guidance notes on the instructions for official studies, Oslo: Norwegian Government Agency for Financial Management (DFØ). Note that disbursements from the aid budget (and other disbursements abroad) are exempted from these prescriptions.

18 OECD-DAC: Organisation for Economic Co-operation and Development's Development Assistance Committee.

19 See Department for Evaluation (2017) The Quality of Reviews and Decentralised Evaluations in Norwegian Development Cooperation, (Report 1/2017), Oslo: Norad; Department of Evaluation (2020) Quality Assessment of Decentralised Evaluations in Norwegian Development Cooperation (2018–2019), (Report 6/20), Oslo: Norad; and Department for Evaluation (2021) Quality Assessment of Decentralised Evaluations in Norwegian Development Cooperation (2019-2020), Oslo: Norad.

20 See OECD (2019) OECD Development Cooperation Peer Reviews: Norway 2019, Paris: OECD Publishing, p. 6; and Norad (2018) Evaluation of the Norwegian Aid Administration's Practice of Results-Based Management, Oslo, The Department for Evaluation at Norad (Report 4/2018). Note that this report and the 2017 report on decentralised evaluation (see above) were done by Itad/Chr. Michelsen Institute (CMI).

21 All appropriation letters are available from the MFA website: https://www.regjeringen.no/no/dep/ud/org/virksomheter_ud/etater_ud/rapport_tildeling/id749659/?expand=factbox2543967.

2.3 Knowledge-based portfolio management

Following 'Reform 2019', Norad sought to address the above challenges and to fulfil its new and expanded mandate, first with a major organisation restructure, completed in 2021. Grant managing departments and sections were reorganised along thematic lines, closely corresponding to relevant Sustainable Development Goals (SDGs). This was done in preparation for the introduction of thematic portfolios, which Norad now uses to manage its partnerships in a knowledge-based way. Norad continued to receive funding according to chapter posts, however. These are budgetary boundaries defined by Ministry of Foreign Affairs, who report against them to Parliament. These budget allocations do not always align with portfolios – some portfolios combine parts of several chapter posts, and others have main control of one large chapter post.[22]

In addition to this restructure of thematic work, staff and functions belonging to the previous Department for Quality Assurance were decentralised to the three grant managing departments, with legal, finance and result managers now based in each of these departments. The new and smaller Section for Grant Management Systems was charged with the development of standards, methods, manuals and staff e-learning modules. A new Knowledge Department was also established, responsible for systematic knowledge management, aid statistics and analysis.

This reorganisation was followed at the end of 2021 by Norad's *Strategy Towards 2030*.[23] One of its five strategic priorities was to "strengthen and systematise the development, sharing and use of knowledge within Norad", kickstarting further change to embed knowledge use in grant management.[24] The Director General established a small temporary unit, the Change Hub, to manage the process, with help from the Knowledge Department and the Section for Grant Management Systems. This was intended to lead to a sharpening and strengthening of portfolio management. By the end of 2022, eight portfolios had been established, increasing to 13 by the end of 2023. In addition (and outside the scope of this evaluation), 2023 saw the establishment of a large, geographically defined portfolio on Ukraine.

The Change Hub facilitated the establishment of portfolios by assisting the portfolio coordinators and their teams in producing various documents, including scoping, mapping, literature reviews and partner analysis. The Knowledge Department provided additional resources. The Knowledge Department also developed a portfolio dashboard, P-Dash, to monitor progress and aid grant management decisions at the portfolio level. Additionally, Norad has developed tools, guides and e-learning resources to support staff in implementing portfolio management. Figure 2 gives an overview of Norad's approach to portfolio management (the portfolio management cycle), with fuller details included in annex 6.

22 See also MFA (2021) Evaluering av porteføljestyring i norsk tilskuddsforvaltning. Oppfølging. Når anvender vi porteføljestyring? memo til assisterende utenriksråd, 28.01.2021 2020, Saksnr 204700-3 (unpublished memo, 3 pages). These issues were also highlighted in interviews with numerous key informants.

23 See Norad (2021) Norad's strategy towards 2030, Oslo: Norad.

24 See Norad (2021) Norad's strategy towards 2030, Oslo: Norad, p. 20.

FIGURE 2

Norad's approach to portfolio management

Step 0: Map, define and decide on the ambition	Delineate thematic focus using existing knowledge and outline scope of recommended portfolio
Step 1: Develop strategic portfolio goals	Conduct full problem analysis based on review of knowledge and develop ToC grounded in best available knowledge
Step 2: Plan for portfolio-level follow-up, evaluation and learning	Develop portfolio knowledge plan to manage ongoing learning needs from ToC, and allocate resources to address learning needs
Step 3: Choose interventions and partners	Draw on knowledge base to inform selection and ensure country context is taken account
Step 4: Manage and coordinate interventions and partners	Facilitate flow knowledge across portfolio, act on synergies and avoid overlaps
Step 5: Conduct analysis of portfolios	Conduct portfolio analysis, assess progress against overall portfolio goals, and make decisions about course correction

Beyond this, there are two additional measures which have implications for the use of knowledge in portfolio management. The first emphasises knowledge utilisation by grant recipients, and was introduced as policy from July 2023.[25] This is mainly, but not solely, operationalised in the support to big Norwegian non-governmental organisations (NGOs), emphasising strategic partnerships, introducing new grant scheme rules, and offering incubator workshops to train NGOs in planning and executing impact evaluations.[26] The second responded to recommendations on management and grant making made in 2023 by an Ministry of Foreign Affairs-appointed Expert Group on Aid.[27] They recommended drawing on the Norwegian central government investment guidelines ("Instruction for official studies" or "utredningsinstruksen") to make aid decisions based on a cost-effectiveness analysis. Norad is considering whether to pilot this within portfolios and whether these measures are relevant to aid management.

This evaluation therefore focuses on a reform agenda which incorporates different change processes, and which has involved organisation-level incremental changes in knowledge use over a period of time. Our evaluation design acknowledges the complexity this adds, and also addresses the purpose of considering how knowledge is used, what contextual factors are at play, and how likely it is that knowledge-based portfolio management will lead to improved management and, eventually, results. Section 3 sets out in more detail the methodology used.

25 See Norad (2023) Norad's expectations for knowledge utilisation by grant recipients and opportunities for funding knowledge generation and evaluation. Memo 20.09.2023 (Official English translation of a policy document prepared by the Knowledge Department and approved by Norad leadership in July).

26 The guidelines from Norad, as well as MFA's new grant scheme rule in relation to this, are available from the Norad website: https://www.norad.no/en/front/toolspublications/norads-strategic-partnerships-with-civil-society-organisations/. Norad commissioned staff from CMI and 3ie to deliver the training: https://www.norad.no/en/aktuelt/nyheter/2023/invitation-to-impact-evaluation-incubator-2023/.

27 See MFA (2023) Investing in a common future: A new framework for development policy, Oslo: MFA: https://www.regjeringen.no/en/dokumenter/investing-in-a-common-future/id2977341/. The instruction to Norad is found in the 27 June appropriation letter (supplementary appropriation letter No 4, 2023, Task 29c).

3

Methodology

3.1 Design

Our evaluation was based on three complementary **approaches**:

1. **theory-based**: structured around testing a theory of how knowledge use in portfolio management is likely to lead to improved Norwegian development assistance (see Figure 3);
2. **formative**: providing actionable learning and recommendations to Norad on how best to embed knowledge in portfolio management as its change process continues;
3. **utilisation-focused**: engaging the primary users of the evaluation throughout, to ensure they have ownership of the process and the findings, lessons and recommendations.

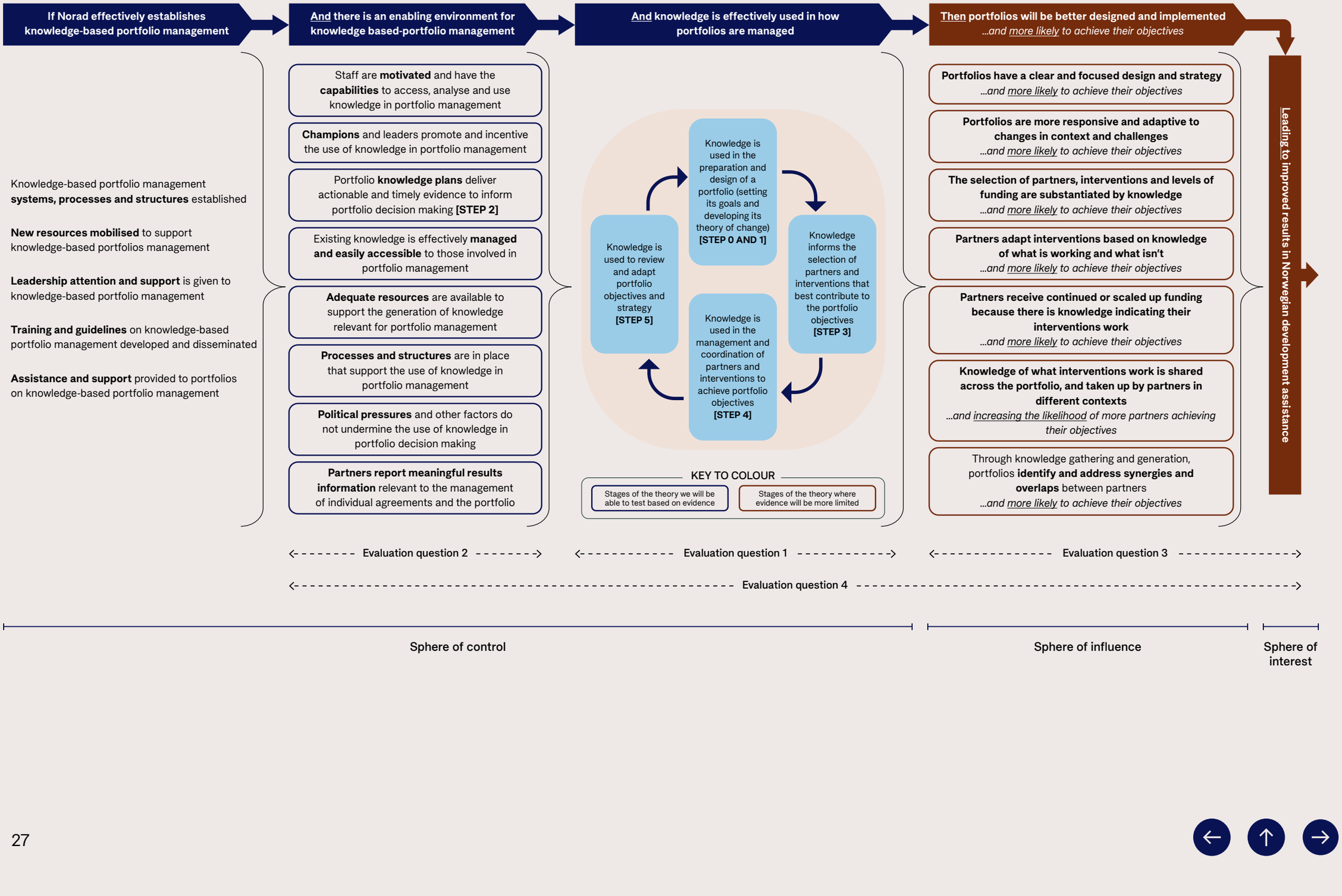
There is some debate in the literature on the boundaries and characteristics of a theory-based evaluation approach. We define it as an approach in which the evaluation design and application are explicitly guided by a theory about how a programme leads to change.

In this specific evaluation we used literature, documentation, and previous evaluations to set out a theory of how establishing knowledge use in portfolio management is intended to lead to improved Norwegian development assistance. The theory is shown in Figure 3, and its logic can be summarised as follows:

- IF Norad effectively established knowledge-based portfolio management...
- ...AND there is an enabling environment for knowledge-based portfolio management...
- ...AND knowledge is effectively used in how portfolios are managed...
- ...THEN portfolios will be better designed and implemented...AND more likely to contribute to their objectives...
- ...LEADING to improved development results in Norwegian development assistance.

FIGURE 3

Evaluation theory of knowledge use in portfolio management



We used this theory as a framework to address each of the evaluation questions (EQs). We first summarised the key components of the intervention being evaluated – Norad's introduction of knowledge-based portfolio management. We then considered the enabling environment – the contextual and structural factors which the literature suggests have an important influence on the use of knowledge in portfolio management.[28] The common factors are set out on the left-hand side of Figure 3. This allowed us to address EQ2: 'To what extent, how and why are Norad's portfolio set-up and practices and the wider environment conducive to the use of knowledge in portfolio management?'

We then looked at the model of portfolio management set out in Norad's own guidance to consider how, and how effectively, knowledge is currently used to manage portfolios. These steps are set out in the central section of Figure 3. This allowed us to answer EQ1: 'To what extent and how is knowledge being used in Norad's portfolio management?' Both these aspects of the theory relate to elements within Norad's sphere of control – elements where Norad can expect to effect change.[29]

The final part of the theory relates to how improved knowledge use leads to improved implementation and, eventually, better development assistance. Based on literature and Norad's internal guidance,[30] we developed a set of hypotheses about how this happens – the pathways which lead from better knowledge use to improved results (see the pink section of Figure 3). These change processes are within Norad's sphere of influence, rather than control, since effecting change becomes more dependent on other actors and contexts, such as partners.

Norad's change process is in its early stages, so it was not possible to collect evidence of any changes in results. We did, however, look at the emerging evidence to consider EQ3: 'To what extent and how is the use of knowledge in current portfolio management likely to result in improved results of Norwegian development assistance?' This final goal of achieving improved results is within Norad's sphere of interest. Norad's contribution is one among a complex web of contextual factors affecting the likelihood of improved results.

Throughout this process, we ensured we applied this approach in a formative and utilisation-focused way. We are aware that the change process within Norad is still in the early stages, and therefore designed and implemented the evaluation in a way that ensured actionable learning and recommendations and engaged key stakeholders throughout. This allowed us to address EQ4: 'What are the main lessons and recommendations for further improvement in knowledge-based portfolio management in Norad?'

28 Itad (2017) How to institutionalise evidence informed policy making: rapid literature review for the International Decision Making Support Initiative, Brighton: Itad; Itad (2016) How can capacity development promote evidence informed policy making: literature review for the building capacity to use evidence programme, Brighton: Itad; INASP (2013) What's the evidence on evidence informed decision making, Oxford: INASP; Urban Institute (2021) Improving evidence-based policymaking: a review, Washington, US; OECD (2021) Building capacity for evidence-informed policy-making, OECD Public Governance Reviews, Paris: OECD; Itad (2021) 'A literature review on RBM and evidence informed policy making', included in Itad (2017) Final inception report: evaluation of the Norwegian aid administration's practice of results based management, Brighton: Itad.

29 Spheres of control, interest and influence in theories of change are adapted from outcome mapping evaluation techniques, and from frameworks for understanding policy chance processes. See Earl, S., Carden, F., & Smutylo, T. (2001). Outcome mapping: Building learning and reflection into development programs. IDRC, Ottawa, ON, CA. and Paul F. Steinberg; Understanding Policy Change in Developing Countries: The Spheres of Influence Framework. Global Environmental Politics 2003; 3 (1): 11–32. doi: https://doi.org/10.1162/152638003763336365

30 Portfolio Management Guide and Guide to Portfolio Analysis. Department for Evaluation (2020) Evaluation of the Norwegian Aid Administration's Approach to Portfolio Management, Oslo: Norad; INASP (2013) What's the evidence on evidence informed decision making, Oxford: INASP; Urban Institute (2021) Improving evidence-based policymaking: a review, Washington, US; OECD (2021) Building capacity for evidence-informed policy-making, OECD Public Governance Reviews, Paris: OECD; Itad (2021) 'A literature review on RBM and evidence informed policy making'.

In applying the approach outlined, knowledge is understood broadly and includes knowledge from research, monitoring, evaluation and other sources, including practical experience, professional knowledge and other insights. Portfolio management works best when teams combine all of these to inform decision making. Professional knowledge, gained from years of working in a sector, can support quick decision making when needed, but it can be biased. Research and evaluative knowledge can help bring together evidence from a wide range of contexts or answer key operational questions. Monitoring knowledge can provide insights into how well interventions and portfolios are working.

← Photo: **Synnøve Aasland** | Norad

3.2 Implementation

We implemented this approach through the four modules, set out in Table 1.

TABLE 1

The four modules

Module	Purpose	Outputs	EQs	Data sources
1: Mapping of knowledge-based portfolio management systems, processes and support	To build an in-depth, up-to-date understanding of Norad's portfolio management structures and systems, including a clear picture of lines of responsibility for developing and embedding knowledge use.	Timeline of reform process; mapping of Norad structures	EQ1; EQ2	Norad documentation; interviews with Norad stakeholders
2: Two deep dive case studies on the use of knowledge in portfolio management	To assess the use of knowledge in two case study portfolios – 'Food Security' and 'Governance and Public Finance'.	Two case studies with assessments of portfolio ToCs and knowledge plans; evidence coded against EQs	EQ1; EQ2	Norad documentation; interviews with Norad stakeholders and external partners; validation workshops
3: Assessing the applicability of the case study findings to other portfolios	To build a broad picture of knowledge use across all Norad's portfolios, using a light-touch version of the case study process.	Eleven assessments of portfolio ToCs and knowledge plans with cover note summarising overall emerging themes; evidence coded against EQs	EQ1; EQ2	Norad documentation; interviews with Norad stakeholders
4: Analysis, synthesis and reporting and dissemination	To bring together evidence from modules 1–3, reviewing and analysing the whole evidence base, drawing out key conclusions and recommendations in a concise final report for dissemination.	Final report	EQ1; EQ2; EQ3; EQ4	Validation workshops

3.3 Data collection

Our main data sources were documentation and interview data. Some documentation was publicly available, and Norad internal documents were shared securely on a designated area of Norad's Sharepoint. We also reviewed a download of information from Norad's newly established P-Dash.

We designed an interview process to ensure accuracy and transparency. We obtained full informed consent for participation, and we obtained permission to record from interviewees, ensuring that we maintained anonymity and confidentiality. We then used recording to produce transcripts of interviews to ensure accuracy. Where we have used quotes in this report, we obtained permission from informants, provided the quotes to them to check for accuracy, offering context where requested, and removed the quotes where permission was not given.

Table 2 gives an overview of the numbers of interviewee for each module. Of these, the majority were conducted in English (36/57) and remotely (43/57).

TABLE 2

Overview of interviews conducted

Stakeholder type	Total interviews
Module 1: Mapping structures and reform processes	**7**
Module 2: Deep dive case studies	**23**
Module 3: Light-touch review of 11 portfolios	**22**
Module 4: Analysis and synthesis	**5**
Whole evaluation	**57**

3.4 Analysis

In each module, we first coded evidence from all data sources against the evaluation questions (EQs) and developed emerging findings.

We then used these as an opportunity for feedback and/or validation from relevant Norad stakeholders, ensuring that the utilisation-focused formative approach was maintained throughout. In module 1 this involved checking in with our evaluation touchpoints. For module 2 we held two validation workshops to talk through findings with the two case study portfolio teams. We also ensured they had a chance to review and comment on their case study.[31]
In module 3, after carrying out a light-touch review of the remaining 11 portfolios, we produced an assessment of each portfolio's theory of change and knowledge plan, based on documentation and interview data (referred to as 'the wider portfolio review' throughout the report). Our process for this assessment is set out in section 3.5. We held a feedback workshop with portfolio coordinators to discuss themes in the assessment findings. Portfolio coordinators and Section Heads also had an opportunity to comment on their assessments. After submitting the draft report in module 4, we held meetings with Norad's management group, key Knowledge Department stakeholders and portfolio coordinators, to present and sense check conclusions and co-create possible recommendations.

31 Final versions of these case studies are included in annex 6.

Photo: **Marte Lid** | Norad

3.5 Portfolio theory of change and knowledge plan assessment

We conducted an assessment of portfolio theories of change and knowledge plans as part of the evaluation, because both are key tools in knowledge-based portfolio management. We developed criteria for assessing each portfolio based on our understanding and experience of what makes an effective theory of change and knowledge plan. Our work assesses both the process of developing the theory of change and knowledge plan and the final products themselves, based on our understanding of the relevant literature.[32] The criteria used are set out in Table 3.

TABLE 3

Theory of change and knowledge plan criteria

Theory of change criteria	Knowledge plan criteria
Testable: Steps are described in a way that can be verified. The causal links/pathway between the stated events are clear and testable.	**Aligned:** The plan should be closely aligned with the overall strategic objectives of the portfolio and broader organisational goals.
Complete: The chain of events connects the intervention to the ultimate impact and includes Norad's role/interventions.	**Comprehensive:** The plan should cover all major aspects of the portfolio, including but not limited to monitoring progress, context and results, identifying and closing knowledge gaps, and future directions of the portfolio.
Explained: Assumptions are explicit in, and relevant to, the theory.	**Prioritised:** The plan should clearly set out and prioritise the portfolio's knowledge needs.
Justified: Theory is based on existing knowledge, and this knowledge supports the chain of events.	**Blended:** Both qualitative insights (e.g. from case studies, interviews, narratives, experience) and quantitative data (e.g. SDGs, standard indicators) are included for a more rounded understanding.
Realistic: The chain of events connecting the intervention to the ultimate impact is logical and realistic.	**Collaborative:** The plan involves contributions from different, relevant stakeholders – including (where appropriate) beneficiary groups, partners and donors – to ensure relevance and applicability.
Owned: Those who are implementing the theory have been involved in its development.	**Complete:** Each learning question in the plan should specify how the question will be answered, who is responsible, the timeline, and what learning outcome the question will contribute to.
Operationalisable: The theory has been operationalised through implementation.	**Realistic:** The timelines for answering learning questions should be realistic, and learning outcomes to which the questions contribute should be feasible.
	Adaptive: The plan includes a clear mechanism for regular reviews and updates to ensure the plan remains responsive to changing conditions and needs.
	Resourced: Resources required for implementing the plan, including financial and human resources, are clearly documented and are sufficient for implementing the plan effectively.

32 A list of references can be found in annex 7.

We then used the following steps to conduct the assessment. A fuller description of the process, along with emerging findings, can be found in annex 7.

1. **Data collection:** Quality assessors reviewed data sources against criteria, including document reviews and interviews with portfolio leaders and team members. In addition to the theories of change and knowledge plans themselves, we used key documents such as problem analyses, literature reviews and concept notes.
2. **Scoring:** Assessors wrote narrative responses for each criterion, explaining how documents met the criteria. Examples were used to justify judgements, and awards were scored on the rating scale below.

1	2	3	4	5
Not evident	Slightly evident	Moderately evident	Highly evident	Fully evident

3. **Pilot assessment:** Assessors completed a pilot assessment for the same portfolio. The team leader reviewed assessments, discussed disagreements, and made final adjustments to criteria based on experience.
4. **Assessment:** Assessors completed assessments for the entire portfolio, spot-checking each other's work for consistency and feedback.
5. **Peer review and calibration:** Assessors peer-reviewed sample assessments. The team reviewed draft assessments, conducted moderation and calibration meetings, and adjusted scoring and narratives as needed.

3.6 Ethical considerations

We developed a clear ethical protocol in the inception report, which we followed throughout the evaluation.

Our main ethical concerns were confidentiality, anonymity and data security. We ensured confidentiality for key informants, giving them space to express their perspective freely. We used a clear protocol for obtaining informed consent, and ensured that interviewees understood how their data was to be used. Interview transcripts were stored on Itad's Teams without access for Norad staff or for the Department for Evaluation. We have anonymised all interview data carefully, particularly when referencing or quoting in this report. Data security was also of paramount importance. We worked with the Department for Evaluation to set up a specific area on Norad's Teams channel to store all Norad internal documents. We used Itad's Teams to store all remaining data securely, in line with Itad's standards.

Photo: **Nadia Frantsen**

3.7 Limitations

We note the following limitations to the evaluation which should be taken into account.

Focus on knowledge use. The evaluation was focused on the use of knowledge and the extent to which this is being incorporated into management. We have therefore not conducted an in-depth assessment of the portfolios themselves or of the quality of management. We therefore do not draw any conclusions about how likely they are to achieve their overall objectives.

Scope for in-depth review of all portfolios. The evaluation scope did not allow us to conduct a full analysis of every portfolio or to explore the Department for the Nansen Support Programme for Ukraine's work. Although we have used standardised tools and have given portfolio teams opportunities to comment on our emerging findings, there remains a difference between the degree of evidence for our findings about the two case studies (at least nine interviews for each portfolio) and that for the remaining 11 portfolios (a maximum of two interviews for each portfolio, and much more limited document review).

Limitations in the evidence base. In three light-touch portfolio reviews, it was not possible to obtain a second interview, owing to staff availability. This limits the data and, inevitably, lends weight to the perspective of a single person. A further limitation was that there was no scope to review P-Dash and other reporting data in depth. Agreement-level data was therefore not included in the evidence base.

Current status of the reform process. Because the move to embed knowledge use in portfolio management is still in the early stages, this evaluation cannot test the extent to which this impacts development results (see the pink section of Figure 3). We do, however, comment on the likelihood of the reform trajectory leading to improved results, based on the early progress made.

4

Findings

This section details the findings from the evaluation. They are structured around the evaluation theory of knowledge use in portfolio management.

In section 4.1 we present our findings on the extent to which there is an enabling environment for knowledge-based portfolio management in Norad; this answers EQ2. Section 4.2 examines the extent to which knowledge is currently being used in portfolio management, answering EQ1. Section 4.3 considers whether, based on the previous findings, the likely benefits of portfolio management are likely to be realised and lead to better development results; this addresses EQ3.

For each step in the theory, alongside the detailed findings we have also made an overall judgement, based on the evidence, of how well it is being achieved. This gives a snapshot of progress against each of the enablers, steps of the portfolio management cycle and pathways to improved results, as laid out in the evaluation theory of knowledge use in portfolio management. Each element is rated and colour-coded to indicate how evident it is within Norad's practice. Table 4 shows the rating scale and Table 5 shows the overview of progress.

TABLE 4

Rating scale

Not evident	Slightly evident	Moderately evident	Highly evident	Fully evident
There is no evidence of this element, even in the planning stages.	There is evidence of early progress towards the element – either initial planning, some piloting, or early signs.	There is evidence across multiple teams in the organisation of this element being introduced or in the early stages of implementation.	There is strong evidence across the majority of teams that this element is being implemented consistently.	There is strong evidence that this element is fully embedded in practice across the organisation.

TABLE 5

Overview of progress against evaluation theory of knowledge use in portfolio management

Enablers		Ratings
IF there is an enabling environment for knowledge-based portfolio management...	Staff have the motivation and skills to access, appraise and use knowledge in portfolio management	Moderately evident
	Through both communication and action, senior leaders champion the use of evidence	Highly evident
	Plans are in place for when and how knowledge is going to be collected and made available	Slightly evident
	Existing knowledge is well curated and easily accessible to staff involved in portfolio management	Slightly evident
	Adequate resources are available to support generation and use of knowledge	Slightly evident
	The processes and structures of portfolio management support and incentivise knowledge use	Moderately evident
	Political pressures do not undermine the use of knowledge in portfolio decision making	Moderately evident
	The results information reported by partners is appropriate and relevant to the management of the portfolio	Slightly evident
Steps in portfolio management cycle		
AND knowledge is effectively used in how portfolios are managed...	Knowledge is used in the preparation and design of the portfolio	Highly evident
	Knowledge informs the selection of partners and interventions that best contribute to the portfolio objectives	Moderately evident
	Knowledge is used in the management and coordination of partners and interventions to achieve portfolio objectives	Slightly evident
	Knowledge is used to review and adapt portfolio objectives and strategy	Slightly evident
Pathways to improved results		
THEN portfolios will be better designed and implemented and more likely to achieve their objectives...	Portfolios have a clearer and more focused design	Moderately evident
	Portfolios are more responsive and adaptive to changes, challenges and opportunities	Slightly evident
	Funding is allocated to partners and interventions that have the best chance of success	Slightly evident
	Partners are incentivised to adapt interventions based on knowledge of what is working and what isn't	Not evident
	Partners with clear evidence of delivering effective work receive continued or scaled-up funding	Not evident
	Knowledge of what interventions work is shared across the portfolio and taken up by partners in different contexts	Not evident
	Portfolios identify and address synergies and overlaps between partners	Slightly evident

4.1 To what extent is there an enabling environment for knowledge-based portfolio management in Norad?

In this section we detail our findings related to the enabling environment. It is structured around the eight enablers in the ToC. We first give a rating and an overall assessment of each enabler, then follow up with more detailed findings. This section addresses evaluation question two (EQ2).[33]

4.1.1 Assumption: Staff have the motivation and skills to access, appraise and use knowledge in portfolio management

For staff to practice knowledge-based portfolio management, they need the skills and motivation to access, appraise and use knowledge. This section explores the degree to which these are currently present across portfolios.

33 'To what extent, how and why are Norad's portfolio set-up and practices and the wider enabling environment conducive to the use of knowledge in portfolio management?'

Moderately evident

There is good evidence that portfolio teams have the skills to access knowledge but do not consistently assess the relative strength of different knowledge sources when making decisions. Teams also lack knowledge and skills in portfolio-level monitoring and evaluation (M&E). Most team members seem motivated to use knowledge in portfolio management, although challenges in the initial roll-out have contributed to a lack of motivation among a minority. The overall judgement is therefore that this enabler is moderately evident.

Portfolios have demonstrated skills in accessing knowledge effectively. It was clear from case studies and the wider portfolio review that teams are familiar with the evidence base in their sector. They have accessed this through a range of channels: many tapped into partner knowledge and research;[34] some used their relationships with donors[35] and relevant researchers;[36] others conduct extensive desk-based knowledge reviews.[37] There is awareness of the different types of knowledge – professional, research, and results – and the need to combine these. The Knowledge Department and external consultants[38] provided support to portfolios.

However, it is not clear whether portfolios are also skilled in appraising different types of knowledge when making decisions. It is difficult to come to a definitive judgement on whether staff are skilled in weighing up the relative quality and robustness of different types of knowledge. We did not see evidence of this practice in our two deep dive case studies or in our lighter-touch reviews of the remaining 11 portfolios. However, the available evidence indicates that teams are not systematically assessing knowledge quality or robustness. Lack of time means that team members tend instead to rely on a few trusted knowledge sources and types when they address a knowledge gap.

34 NO26, NO27, NO19.
35 NO26, NO16.
36 NO35, NO25, NO02.
37 NO30, NO31.

38 NO21.

Most portfolios seem comfortable using knowledge in the selection of partners, although there is a lack of clarity on using knowledge to shape long-term strategic relationships. As is discussed in detail in section 4.2.2, the wider portfolio review showed that a growing number of portfolios use knowledge to select partners and interventions. Portfolio teams have well-developed skills in this area and have reached out to the Knowledge Department for support where needed.[39] Portfolios are, however, constrained by relevant political and budget priorities, which has implications for selection of channels (e.g. multilateral, NGOs or Norwegian public sector institutions) and sometimes for selection of specific partners. Teams are therefore considering how to use knowledge to shape and influence partnerships strategically in a way that aligns with the portfolio goals. Portfolio teams had mixed views on how to do this effectively. Some interviewees felt it was not possible; others saw it as an important part of portfolio management, albeit a challenging and lengthy process.

Most teams have identified M&E at portfolio level as a skills gap. Interview data showed that teams are struggling in this area,[40] and many have requested support from the Knowledge Department. This skills gap is the main reason why the majority of portfolios do not currently have a strategy for monitoring portfolio-level progress and results (see section 4.1.3).

Motivation for knowledge-based portfolio management is a more mixed story. Although Norad's leadership show clear support for the approach, the wider portfolio review shows that the motivation of portfolio teams varies. Among senior leadership there is good motivation for knowledge-based portfolio management and good understanding of the purpose and value of the agenda. This includes the Norad Senior Management Team, Section Heads and most portfolio coordinators. Motivation within portfolio teams is more mixed, with at least half of the portfolios reporting challenges.

"To portfolio coordinators and Section Heads, the concepts of portfolio management have been introduced really well. We haven't managed to sell it more widely. There's been better selling and engagement with leadership."[41]

Portfolio management remains a new concept in Norad; building motivation across the organisation takes time. For example, teams that used a portfolio approach before the formal introduction of knowledge-based portfolio management tended not to have motivation issues.[42] Additionally, some team members have been demotivated by the number and extent of change processes implemented within the organisation in the last four years. They therefore tend to perceive knowledge-based portfolio management as a further disruption to their roles and as additional work "on top of the day job", even where they broadly agree with the rationale for the change.[43] Finally, interview data demonstrated that there is some frustration with the initial introduction of knowledge-based portfolios. The unclear expectations and rigid approach employed dented enthusiasm among some teams. These points are elaborated further in section 4.1.2.

39 We use the term 'portfolio team' to mean the portfolio coordinator, the Section Head, any advisers managing portfolio agreements and, in some cases, the policy director.

40 NO38, NO35, NO27, NO26, NO16, NO20, NO21.

41 NO17.

42 Clean Energy, Forests, Governance and Public Finance, RHE NO33, Oceans, Climate Change Adaptation.

43 NO17, NO19, NO49.

4.1.2 Assumption: Through both communication and action, senior leaders champion the use of knowledge

Leadership support for any reform is key to its success. Active championing by leaders signals its importance to staff. Championing is most powerful when it involves consistent messaging and actions that reinforce that messaging. This section explores the extent to which senior leaders have been champions of knowledge-based portfolio management.

Highly evident

The evidence clearly showed that there has been consistent leadership from senior management for knowledge-based portfolio management in Norad through both ongoing communication and reinforcing actions. Teams would have appreciated greater clarity on expectations and engagement with challenges. At portfolio level, Directors, Section Heads and portfolio coordinators have shown strong leadership and support for the reform process.

Senior management has provided consistent leadership on knowledge-based portfolio management and has held a clear vision for the organisation. The reform timeline, case studies and wider portfolio review all confirmed that the agenda has been driven from the top of the organisation. It has been championed by senior leadership, particularly the Director General, who have been consistent in communicating its importance and also making the necessary structural changes (e.g. creation of the Knowledge Department and Portfolio Council[44]) to enable and reinforce this. This leadership has been crucial to getting the organisation to where it is in the reform process.

However, portfolio teams would have appreciated senior management providing greater clarity on expectations and more engagement in the practical challenges teams were facing. Interview data made it clear that during the early stages of the portfolio roll-out, teams would have appreciated more consistent direction on how knowledge was intended to shape the portfolios. There were some unfortunate shifts in expectations, such as teams being asked to remove assumptions from the theories of change after they had been drafted. This caused some confusion.[45] Similarly, stakeholders wanted more practical engagement from senior leadership, particularly the Portfolio Council in understanding how to apply the new concepts in each portfolio and in addressing the resulting challenges.[46] Although there was frustration that these concerns were not being heard at first, the wider portfolio review showed that senior management have subsequently allowed teams more flexibility to frame portfolios and develop theories of change (see section 4.2.1).

Support and leadership from Section Heads has been crucial to providing the space and authorising environment for teams to access and use knowledge. Portfolio coordinators are key to moving forward portfolio thinking and practice. However, to be effective they need support, backing and direction from the Section Head.[47] Case studies and the wider portfolio review confirmed that there has been consistent leadership at this level across portfolios. The case studies, in particular, underlined that Section Heads who are engaged with the process create an environment which enables team members to dedicate and protect time to focus on understanding, reflecting and analysing knowledge.[48]

44 The Portfolio Council is composed of Norad's senior management and is the top-level governance body for portfolios. Its mandate is to advise and give approval at key milestones within the portfolio management process (e.g. establishing a portfolio, approving its high level theory).
45 NO22, NO23, NO24, NO30, NO33, NO38.
46 NO22, NO23, NO24, NO56.
47 NO01, NO56, NO48, NO28, NO29, NO28.
48 NO30, NO01.

Although top-down leadership has enabled the reforms to progress to this point, future success will require bottom-up ownership. This will be an important consideration for Norad moving forward. What emerges from the evidence is a sense, at least in some parts of Norad, that knowledge-based portfolio management is a new set of bureaucratic requirements that teams need to deliver against. In the wider portfolio review, it became clear that this manifests in different ways: teams developing knowledge plans because "they had to",[49] or producing a theory of change to fit "management requirements" but then using a different one for strategic thinking.[50] This risks undermining the reforms. Ultimately, portfolio management will only be a success if teams see its value and use tools such as theories of change and knowledge plans to contribute to better delivery. Giving teams increased flexibility to frame and develop their portfolios has been an important step towards bottom-up ownership.

49 NO17.
50 NO28.

"When these processes started, they were driven and mandated centrally. We now need to start owning the process and products. That's what will make them stick."[51]

4.1.3 Assumption: Plans are in place for when and how knowledge is going to be collected and made available, e.g. knowledge plans

Knowledge needs to be gathered and analysed in order to be an effective input into decision making. An important enabler of portfolio management is therefore a knowledge plan – a key deliverable in Norad's portfolio management cycle. This sets out a portfolio's knowledge needs in the form of questions, with detail on what knowledge is needed to answer them, who is going to collect it, when and how. We draw on our assessment of portfolio knowledge plans in this section. An overview of the assessment is available in annex 7. This section details the extent to which these plans are in place and their quality and utility.

51 NO31.

Slightly evident

There was little evidence that workable plans are in place to support knowledge use. Across portfolios, knowledge plans are in place but they are not well developed, understood or owned. Although plans broadly speak to portfolio theories of change and attempt to prioritise questions, most lack vital details on resourcing (e.g. how they are going to be implemented) and on monitoring portfolio-level progress and results. The overall judgement is therefore that this enabler is slightly evident. Portfolios recognise these weaknesses, and the Knowledge Department is providing tailored support to teams to improve them.

"The knowledge plan became a forgotten document. We did it because we had to. On top of everything else it was just another thing. Now we are starting to see the value of it."[52]

52 NO17.

Knowledge plans are typically not well developed, understood or owned by teams. However, there are signs that this is changing, with teams investing time to make them a more effective management tool. The wider portfolio review found that currently, few plans are developed enough to serve as a management tool. Interview data made it clear that teams have found it hard to engage, partly because of lack of time[53] and partly because of a lack of understanding of the plan's purpose.[54] Recognising this, teams are now focused on improving them with Knowledge Department support.[55]

A notable gap across knowledge plans is that they are not underpinned by a resourcing plan. This raises questions about how they will be implemented. Gathering and analysing the data needed to plug knowledge gaps takes time and resources. Any quality knowledge plan needs to have clarity on these details. Without it, the plan risks being a wish list rather than an implementable tool for managing the portfolio. The wider portfolio review found that few portfolios currently provide this detail. Teams have already raised concerns addressing this, given the constraints around staff resourcing in Norad and also given current efforts to reduce consultancy spend across all government departments. Teams currently deploy consultancy resources to address knowledge needs that the team itself has no capacity for.[56] See section 4.1.5 for further discussion.

The wider portfolio review showed that knowledge plans also lack important detail on portfolio M&E. Knowledge plans should detail how insights from ongoing partner reporting can be supplemented and strengthened to test assumptions in the theory of change and plug gaps in knowledge. To date, only three portfolios have started to consider this, largely because teams are unsure how it should be done. Questions were raised around how to synthesise results across a diverse portfolio,[57] how to assess complex change processes in a meaningful way,[58] how to handle challenges of attribution,[59] whether and how to use common indicators, and how to assess difficult to measure issues such as advocacy and influencing. These are all common considerations when approaching portfolio-level M&E, and provide further emphasis to the skills gap around portfolio monitoring, evaluation and learning (MEL) outlined in section 4.1.8.

Three portfolios have more developed plans for portfolio-level M&E and are considering portfolio and country evaluations as a way of supplementing partner reporting. Although most portfolios have yet to think through tracking portfolio-level progress, the wider portfolio review found three portfolios that have advanced further. They are considering using evaluations to supplement partner reporting[60] by conducting periodic evaluations either of the entire portfolio or of specific components. This is a valuable approach. Unlike agreement-level reporting or evaluations, portfolio evaluations can look at how partners are working together, the additionality of Norad's role as a convener, advocate, etc., and help tell the portfolio-level story. The Forest Portfolio, for example, is embedding indicators and questions from their knowledge plan in the terms of reference of partner midterm reviews (decentralised evaluations[61]). This will provide comparable evidence across partners and contexts that can then be synthesised to provide an overall view of portfolio results and progress. The Research and Higher Education Portfolio is planning to conduct portfolio-wide evaluations to supplement agreement-level mid-term reviews to build a picture of portfolio-level results.

An alternative approach being developed is to focus on priority countries, as found in the Governance and Public Finance case study. There is an inherent challenge in tracking a portfolio with global scope when results manifest primarily at country level.

53 NO16.
54 NO01.
55 NO31, NO38.
56 NO21, NO22, NO23, NO24, NO38.
57 NO26, NO16, NO17, NO31, NO01.
58 NO26, NO28, NO29.
59 NO20.
60 NO31, NO30, NO20, NO19, NO05.
61 Decentralised evaluations are evaluations commissioned by the aid administration and its partners. These are separate from the centralised evaluations commissioned by the independent Department for Evaluation. Mid-term reviews and end-reviews are examples of decentralised evaluations.

Recognising this, some portfolios, such as Governance and Public Finance, are considering developing theories of change for selected countries based on evidence at country level against each of the portfolio outcomes (see section 4.2.4 for further discussion).

4.1.4 Assumption: Existing knowledge is well curated and easily accessible to staff involved in portfolio management

The curation of knowledge is a key element of supporting its use. As Norad builds its understanding of what works across different issues, it needs a way of storing this information so that it can be easily accessed. This section discusses the extent to which such systems are in place.

Slightly evident

To date, portfolios have captured knowledge through key documents produced as part of the portfolio management process, such as the problem and portfolio analyses. These are familiar to those involved in the portfolio design process, but not necessarily to new staff. If these documents are not kept up to date, their value may be eroded. There is also no centralised system for cross-portfolio knowledge curation. This element is therefore rated slightly evident.

Portfolios have brought together knowledge in several key documents. These serve as reference points for the team and for those who were involved in their development. It is unclear how they will be kept up to date and signposted to new team members. The wider portfolio review confirmed that teams conducted a problem analysis as part of the development of portfolios. This brought together knowledge to develop the portfolio theory of change, typically based on research and professional knowledge. This represents the team's 'repository' for portfolio knowledge. Although this approach may work for those who were involved in the original theory of change process and are familiar with the document, there is a risk that as staff change and the team's knowledge base grows, the document will have decreasing value.

This issue is compounded by the lack of a centralised knowledge management system in Norad. This is challenging given the diversity of issues that Norad supports. Currently there is no platform that brings together knowledge of all types from across portfolios and makes it accessible to all of Norad. This erodes the potential value of knowledge and runs the risk of portfolios duplicating others' work in cross-cutting areas. Other studies have pointed to similar issues.[62]

62 Norad (2020) Quality Review of Decentralised Evaluations in Norwegian Development Cooperation (2018-2019).

4.1.5 Assumption: Adequate resources are available to support the generation and use of knowledge necessary for portfolio management

Using knowledge in decision making takes time. Knowledge needs to be found, understood, appraised, and analysed before being used. Effective resourcing is integral to this and can take different forms: additional staff, freeing up the time of existing staff, or consultancy support. This section details whether there has been adequate resourcing of knowledge-based management to date.

Slightly evident

Additional resources have been made available to support portfolio management. Portfolio coordinators have been created and play a central role in enabling knowledge use. Many, however, struggle with the demands of the role and navigating their mandate. Portfolio teams more widely also report struggling with the new demands of the portfolio approach. Although consultancy support has been used to bolster capacity and access specialist knowledge and skills, this may be limited in the future. The Knowledge Department provides valuable on-demand advice but lacks capacity for 13 portfolios. There is hence only slight evidence that adequate resources are in place.

In establishing portfolios, Norad created the role; portfolio coordinator. Portfolio coordinators are an important resource and have been crucial in the early phases of the roll-out. However, many have struggled with the scope of the role. Portfolio coordinators play a crucial role in management. The case studies and wider portfolio review confirmed that they have led on core tasks such as defining portfolio scope, producing key documents, facilitating theory of change - and knowledge plan development, and conducting the portfolio analysis. Although interview data showed that portfolio coordinators are broadly positive about the new role, there are concerns around the scope of the job and the time needed to undertake all the required tasks, particularly when the wider team is struggling to prioritise them.[63] Building small teams around the portfolio coordinators to share core portfolio management tasks has been one way of managing this.[64]

63 NO16, NO35, NO25, NO38.
64 NO01, NO02, NO48, NO56.

"It's unclear what my mandate is to bring people together. If I'm coordinating across lots of sections, can I say I need to be in other section meetings where partners and issues concerning the portfolio are being discussed? Norad is still quite siloed and hierarchical. This makes my role in holding the portfolio much more challenging. Coordinators need a clear mandate.[65]*"*

Portfolio coordinators who manage across several sections have also raised challenges around their mandate. As is discussed further in section 4.1.6, several portfolios span multiple sections, and sometimes also departments. The wider portfolio review and Food Security case study show that this creates challenges for portfolio management,[66] because portfolio coordinators must coordinate across multiple sections and budget lines, negotiating and influencing peers they have no formal control over. In these situations, understandably, portfolio coordinators have raised questions about their mandate to convene people, participate in budget meetings in other teams and, ultimately, shape decisions they are not accountable for. In these more complex portfolios, support to the portfolio coordinator from the Section Head is even more important.

65 NO27.

In addition to the capacity crunch experienced by portfolio coordinators, teams have struggled to find the time to dedicate to portfolio management. Portfolio coordinators need buy-in and support from grant managers and advisors in the wider team for portfolio management to be successful. They hold the relationship with partners and have the technical knowledge. Although all portfolios have struggled, to some degree, with protecting the time for portfolio management, the wider portfolio review and the case studies show that some have experienced particular barriers. These include the need to disburse a sudden influx of funds quickly,[67] high staff turnover, covering additional workload,[68] and lack of motivation leading to management being deprioritised.[69]

66 NO27, NO16, NO01, NO21.
67 NO42.
68 NO18.
69 NO22, NO23.

In all cases, the impact was the same: it crowded out time for teams to commit to portfolio management tasks.

"Our biggest challenge is resourcing. We haven't been able to develop a deep enough understanding of knowledge because we don't have the internal capacity and are limited on the external resources we can use."[70]

The Knowledge Department has been a valued resource to portfolios, supporting them in key tasks. However, providing support across 13 portfolios means their capacity is stretched. During the early stages of the reform process, the Change Hub, with help from the Knowledge Department and the Section for Grant Management Systems, was the key driver and support function for much of the roll-out of portfolio management. The reform timeline, mapping exercise and wider portfolio review confirmed that the Change Hub was a freestanding central delivery unit within Norad, with links to all parts of the organisation. Portfolio management sprints managed by the Change Hub drew on team members from the Department for Partnerships and Shared Prosperity, the Department for Human Development, the Department for Climate and Environment, the Department for Operation Management and the Knowledge Department. This created confusion around its role vis-à-vis the Knowledge Department. Now, with the Change Hub closed, this is much clearer. Overall, Knowledge Department support to apply concepts and address skills gaps has been highly valued by portfolios. There is also a sense from interview data that support has become more tailored and responsive over time as templates and tools have become less rigid.[71] The deep dive support that is currently being provided to each portfolio reflects this approach.[72] Continuing this level of support to 13 portfolios with the small Knowledge Department team will be challenging.

There are questions about the level of external resources that will be available to support portfolio management in the future. Although many tasks associated with portfolio management need to be conducted within teams, some can be contracted out. For example, many teams used external consultants in the design of the portfolios to conduct knowledge reviews in specific areas[73] or to support in the facilitation of theory of change or portfolio analysis processes, as evidenced in the wider portfolio review.[74] This allowed portfolios to access specialised knowledge and skills and/or manage internal capacity constraints. These same teams expressed concern in interviews around how the government-wide reduction in consultancy spend would impact this in the future. Ministry of Foreign Affairs' budget allocations to Norad for consultancy services have been significantly cut in the period under review.[75]

70 NO55.

71 NO17, NO30, NO27, NO26.

72 The Knowledge Hub is providing focused support to each portfolio, helping them to address what teams see as the key gaps in their knowledge base, knowledge plans and ToCs.

73 NO16.

74 NO37, NO28, NO21, NO38, CMI (2022) Theory of Change (TOC), Knowledge Gaps and Factual Issues.

75 NO01, NO08, NO21, NO22, NO23, NO24, NO38.

4.1.6 Assumption: The processes, systems and structures of portfolio management support and incentivise the use of knowledge

Appropriate systems and processes, tools and templates are essential to supporting and incentivising knowledge use. They need to be clear and high-quality and add value for users. Portfolio structures also need to be conducive, providing sufficient autonomy to allow teams to use knowledge in their management. This section explores both of these issues.

Moderately evident

Norad has some helpful portfolio management processes and structures in place, but they are not fully embedded, and some structures still pose barriers to knowledge use. There is clear direction on when and how knowledge should be used. Tools and templates have been produced to support this. Although useful, they suffered from being too rigidly applied in the early stages of the portfolio approach and did not provide sufficient clarity on what 'good enough' looked like in theories of changeand knowledge plans. Likewise, the Portfolio Council is a welcome sounding board and quality assurance mechanism, but to add value it needs to provide more detailed feedback to teams. The structure of portfolios significantly impacts their ability to make knowledge-informed decisions, specifically how aligned they are to a Section, the level of control they have over agreements, the proportion of multilateral funding, and the timing of the funding cycle. This enabler is therefore only moderately evident.

System and processes for portfolio management

The portfolio management cycle provides a clear system and processes for when and how knowledge should be used. As outlined in section 2, Norad's portfolio management cycle details a series of steps. Guidance has been produced on what each step means in practice and how knowledge should be used. Together this has provided important direction and a common system for the entire organisation. It is the framework that teams are using to build and implement their portfolios. Teams reported in case studies and the wider portfolio review that it has created space for discussion and use knowledge in ways that would otherwise not have happened[76] (see section 4.2.1).

"The goal initially was to have a very standardised approach. But there was the realisation that there needed to be flexibility. Portfolios need space to do things in ways that made sense to them. There needs to be experimentation. The downside is that you lose the read across the portfolios, but the upside is that the process is owned more by teams."[77]

The guidance on portfolio theories of change was initially too rigidly applied. However, interview data shows that it has evolved and that a more flexible approach has now been adopted. With the introduction of portfolio management, there was an ambition for a simple, standard approach across portfolios. To enable this, each portfolio was asked to produce a one-page theory of change visual and a two-page accompanying narrative. The hope was that this would aid clear communication and allow for comparison between portfolios. As teams started to design their portfolios, this standardisation became problematic.[78] Teams wanted to adopt slightly different framings for their portfolios or reflect the complexity of the portfolio in fuller terms than the templates allowed. Some teams became frustrated by the standardised templates. This added to the sense that the theories of change were being developed for management, as discussed in section 4.1.1. However, importantly, this feedback was listened to, and more flexibility was

76 NO26.

77 NO48.

78 NO28, NO29, NO17.

introduced to allow for greater tailoring to portfolios.[79]

The lack of guidance on the expected quality of key portfolio management documents has meant that teams have been unsure what is good enough for portfolios to move forward.

> ***"We can't allow perfect to stand in the way of progress...We are worried that Norad is going to make the process bureaucratic. Things aren't perfect. We could work on our theory of change some more. But at this point it wouldn't make a huge difference to what we do. We want to get going with it. We can adapt as we go along."***[80]

When the templates for theories of change and knowledge plans were rolled out, details were not included of what 'good' or 'good enough' looked like.[81] This has been recognised as a gap, and the Knowledge Department has sought to plug it with the recent introduction of quality checklists for portfolio theories of change and knowledge plans.[82] The wider portfolio review showed that although teams appreciate this, there are mixed feelings about its utility at this point in the process. Some are of the view that the current version of portfolio theories of change and knowledge plans are not good enough and need to be improved before teams progress.[83] Others think portfolios should move forward and adapt them as they go along.[84] Although theories of change still need work (see our assessment of them in section 4.2.1), the process has sharpened thinking, and the documents give sufficient direction to start moving forward. Moreover, for many portfolios, because of funding cycles and the long-term nature of partnerships, there is not sufficient scope to shift things drastically in the short term (see section 4.2.2). Continuing to strive for too high a quality at this point risks getting in the way of the momentum that is building in teams and feeding the perception among some that portfolio management is a bureaucratic exercise.

A Portfolio Council was established to oversee portfolios and provide overall quality assurance. During the initial stage of the roll-out of portfolio management, portfolios would have liked it to play a more engaged and critical role, but it has struggled with time and capacity. A decision was taken to form a Portfolio Council composed of the directors of all grant making departments and the Director of the Knowledge Department. Its mandate was, broadly, to oversee portfolio quality and approve changes to portfolio strategy. All theories of change and knowledge plans were submitted to the Council for review, feedback and final sign-off. Although this sounding board added value, interviewees felt the Council needed more critical engagement in the portfolios in order to offer more detailed feedback.[85] Some also felt that the Council was not always open to discussing points of difference or contention.[86] The challenge the Portfolio Council faced was one of time and specific thematic knowledge. The Portfolio Council is drawn from the senior leadership team, and members therefore lacked time to engage fully. They also did not have detailed knowledge of all the sectors covered in the 13 portfolios. These challenges have already been recognised, and a Secretariat has been put in place that will guide and support the Council in its work, preparing background materials for meetings, following up on actions, and providing advice.

79 NO28, NO29, NO17.
80 NO33.
81 NO28, NO29.
82 NO48.
83 NO47, NO55, NO56, NO60.
84 NO33, NO48, NO01, NO26, NO20, NO35, NO05, NO27.
85 NO01, NO22, NO23, NO24.
86 NO22.

The bi-weekly portfolio coordinators meeting has been a valued source of peer support and learning. Portfolio coordinators across the board reported finding the space for peer support and sharing highly valuable,[87] particularly because some portfolios had been working with portfolio thinking for some time and could therefore offer valuable tips and guidance to others.

Portfolio management structures

The internal structure of a portfolio has a significant bearing on the space for knowledge-based decision making. It is more straightforward when a portfolio has control over a majority of agreements than when agreements are spread across multiple sections. Portfolios bring together many different agreements to enable the management of them in a joined-up and coordinated way. The degree to which agreements sit in one Section or are spread across multiple Sections has a significant bearing on the scope for strategic knowledge-based portfolio management.[88]

Broadly, portfolios fall into one of two categories:

1. **Portfolios that have a large degree of control over their partnerships.** Here, the portfolio effectively mirrors the Section where they are housed and where the portfolio coordinator works. Six portfolios fall into this category.[89]
2. **Portfolios that have significant proportion of agreements managed in other Sections.** In these portfolios, the portfolio management covers several sections and sometimes several departments. For example, there are agreements included in the Civic Space Portfolio in the climate and forests section, the section for human rights, and the Section for Governance and Transparency. Portfolios in this category require more complex coordination and negotiation across Sections than those in the first category.[90]

"Other agreements go through other sections. We can try to influence, but they hold the main responsibilities for those agreements. We don't have control over financing – everything we get is pre-decided. That makes the degree of freedom to work, and shift resources, very limited. That's our main obstacle to portfolio management."[91]

For portfolios described in point 2 above, it is more challenging to make knowledge-based decisions, because the portfolio does not own all the agreements and must influence others to shift who and what is funded. If the conditions are right, i.e. all Section Heads are aligned with the portfolio objectives and the portfolio coordinator has the time (and the support of their Section Head) and the mandate to work across teams, knowledge-based portfolio management is possible. However, the wider portfolio reviews found that there is not currently a clear mandate for portfolio coordinators to influence decision making in other Sections; portfolio coordinators reported being unsure whether they are 'allowed' to do this.[92] This complicates the task of ensuring that decisions are based on knowledge relevant to portfolio goals.

87 NO16, NO21, NO27, NO17.
88 NO55.
89 Governance and Public Finance, Oceans, Education, Higher Education and Research, Health Systems Strengthening, Clean Energy.
90 SRHR, Civic Space, Climate Change Adaptation, Forests, Decent Work, Social Safety Nets, Food Security.
91 NO36.
92 NO16, NO18, NO21, NO27.

Portfolios bring together existing work and partnerships, which are on varying funding cycles. For some teams, this has limited the scope for knowledge-based decisions in the immediate term. Portfolios were not created from scratch; they bring together a wide range of existing programmes, initiatives and agreements. Each of these was at a different point in its funding cycle when the portfolio was formed. Some portfolios may have inherited agreements that are midway through a five-year funding cycle, and others may have been at the start of the cycle. This shapes when decisions about what and how to fund can be made, and for many teams it means that, at least in the immediate term, there is not much scope to use knowledge in funding decisions.[93] This challenge was captured well in the following stakeholder's comment: "The largest challenge is that interventions started before the portfolio was established. This means there is a mismatch between some large agreements and the portfolio. We can't solve this quickly or on our own."[94]

The high proportion of funding disbursed through multilateral and other prioritised channels also put constraints on portfolio management and ability to select and shape interventions. The wider portfolio review and case studies confirmed that the majority of portfolios have a large share of funding channelled to multilateral agencies. Some are also disbursing through Norwegian public sector institutions. The long-standing Norwegian political commitment to support the multilateral system means that these funding relationships are established and will continue to form a core part of portfolio work.[95] Norad's knowledge-based portfolio management model assumes that knowledge can be used to select partners and interventions (Step 3). In these instances, portfolio leaders spoke of leveraging knowledge and using Norway's positions on boards and committees to influence multilaterals, rather than selecting between multilateral agencies to fund.[96] They also spoke of this as a much longer-term endeavour, requiring influencing skills and coordination with other donors,[97] and needing to "be honest about what is possible in these situations".[98] Interviewees raised similar issues about long-term strategic partnerships with international and Norwegian NGOs and the need to use knowledge to advise, influence and steer them.[99]

93 NO16, NO28, NO29, NO55, NO28.
94 NO28.
95 NO16, NO22, NO23, NO24, NO31, NO21, NO38.
96 NO28, NO29, NO23, NO24.
97 NO16, NO31, NO21.
98 NO23.
99 NO38.

4.1.7 Assumption: Political pressures do not undermine the use of knowledge in portfolio decision making

An assumption of knowledge-based portfolio management is that knowledge is one of the main contributors to decision making and that other factors, such as political priorities, do not dominate planning and implementation of aid interventions. Although there will always be budget priorities and political influence in any agency under a ministry, the space left for knowledge to shape operational policy, planning and implementation is key. This section presents our finding in relation to this.

Moderately evident

Portfolios reported being shaped by political priorities to varying degrees. Those working on issues considered to be political priorities have felt this influence most. This has involved government and Ministry of Foreign Affairs and Ministry of Climate and Environment direction beyond setting strategy and goals, extending to the use of channels and who and what to fund. This limits the space for Norad to use knowledge. Recent structural shifts in the relationship between the Ministry of Foreign Affairs and Norad will help manage these tensions in the future. Because there are political pressures for many portfolios but these pressures do not necessarily undermine decision making, this element is rated as moderately evident.

Some portfolios have experienced more political direction from the Ministry of Foreign Affairs and the Ministry of Climate and Environment than others. This constrains their capacity to use knowledge according to Norad's current model of knowledge-based portfolio management. Norad and the sections managing the portfolio receive instructions, budget priorities and guidelines for how it should be disbursed. This is typically through grant scheme rules for the relevant budget chapter, appropriation letters and various forms of dialogue. The wider portfolio review found that for some this has implied strong engagement by MFA. This is most strongly evident in the case of the Food Security Portfolio, which received much additional funding in response to the new food strategy and the impact of the Ukraine war on food security in Africa. Several portfolios – e.g. Governance and Public Finance, Clean Energy and Food Security – will manage funds through Norwegian public sector institutions based on budget priorities from the Ministry of Foreign Affairs. The Forests Portfolio delivers parts of the Ministry of Climate and Environment -designed and funded Norwegian International Climate and Forest Initiative (NICFI).[100] In these instances, portfolios were constrained in their ability to use knowledge to shape their work in line with the assumptions in Norad's model of knowledge-based portfolio management.

100 NO43.

There is limited, early evidence that this may also offer opportunities for Norad to feed knowledge back to the Ministry of Foreign Affairs to support evidence-based policymaking. The wider portfolio review found one portfolio, further advanced with their thinking, that felt they would be better equipped to respond to political pressures to change course now that they have a clear vision for their portfolio, supported by a robust knowledge base. They felt that they would have a clearer sense of how to accommodate any new political directives while still working towards key knowledge-based portfolio goals.[101]

The 2024 transitioning of grant management from the Ministry of Foreign Affairs to Norad may help future management of these challenges. From mid-2024 Norad will assume grant management responsibility for most aid related to humanitarian and stabilisation support. This will give Norad management responsibility for the bulk of Norwegian aid. Underpinning this shift is the understanding that the Ministry of Foreign Affairs sets political priorities and goals and Norad determines how best to achieve them.[102] This transfer of operational responsibilities may be an enabler of knowledge-based portfolio management, because it creates a clearer distinction of roles, and in a sense protects the space Norad has to leverage knowledge in in selecting and shaping interventions.

101 NO28, NO29.
102 NO53, NO35.

4.1.8 Assumption: The results information reported by partners is appropriate and relevant to the management of the portfolio

Monitoring progress towards goals is central to portfolio management. Results knowledge helps identify if the portfolio is heading in the right direction and informs learning and adaptation. High-quality, relevant partner results data is an important element of this; it provides the foundation for understanding what the portfolio is achieving. Although we were not able to undertake a comprehensive quality assessment of partner results data, we were able to explore views on the robustness and relevance of the partner data for managing portfolios and the Norad-wide efforts under way to strengthen this. This section discusses our findings in relation to this.

Slightly evident

Partner results information is reported to be of variable quality. This has been acknowledged, and there are now nascent efforts to integrate knowledge more into the selection and shaping of interventions, and to encourage planning and budgeting of strategy evaluation among partners. Because portfolios have not developed M&E plans, there is little clarity on how relevant partner results data is for portfolio management. This element is therefore only slightly evident.

Portfolio teams have a mixed view as to whether partners are producing useful, robust evidence on the impact of their Norad-funded work. Currently, case studies and the wider portfolio review found that grant managers rely on agreement-level annual reports, evaluations, including reviews to judge whether partners are achieving results. We heard that the robustness of this evidence is variable.[103] In particular, several interviewees pointed to the need to improve the quality of grant midterm and end reviews. This aligns with previous studies that have drawn the same conclusion.[104] Grant managers supplement this results knowledge with more informal insights gained from partner meetings and field visits and from reviews and evaluations undertaken by other donor agencies.

"We want partners to have knowledge generation and use as an outcome in their grant agreements. We want them to programme for it."[105]

The need for strengthening partner results data has been acknowledged by Norad, and there has been a push to improve it. In recognition of the importance of partner results data, and the fact that past studies have pointed to this as an area of weakness,[106] there has been a concerted effort to strengthen this. Most notably, documentation showed that in 2023 Norad set out new expectations for some its partners, especially NGOs, when it comes to knowledge generation.[107] This includes strengthening requirements to present a robust knowledge base as part of applications and in calls for proposals and requiring partners to plan for and conduct high-quality and appropriately resourced evaluations during implementation. To support this, the Knowledge Department has facilitated training workshops on impact evaluation for interested Norwegian NGOs.

There is a perception that the push for partners to improve knowledge generation, particularly evaluation, is skewed towards a particular methodological approach: randomised control trials and quasi-experimental designs. Some team members reported concerns that other forms of knowledge, such as qualitative research and evaluations, professional and experiential knowledge, would not be accorded enough significance.

There is less certainty among portfolios around how to work with multilaterals to align their results reporting to the portfolio. As discussed above, a large share of funding goes to multilateral organisations. In these cases, portfolios rely on agencies' annual reports against their strategy, strategic evaluations and reports to governing bodies, and external assessments such as Multilateral Organisation Performance Assessment Network (MOPAN).[108] Some portfolios are looking at how they can work with other donors and the multilateral agencies to use evaluations that serve donor needs, alongside supporting learning and improvement in the initiatives.[109] Given the percentage of funds going to multilaterals, this is an important area for further consideration. More importantly, the role of Norwegian funding varies greatly between multilateral agencies. Norway may have a strong influence in some agencies (e.g. the global health funds) and much less in others where they are a small contributor (such as multilaterals within food security).

In the absence of portfolio M&E plans, it is difficult to know whether partner results information is appropriate or relevant to portfolio management. As discussed in section 4.1.3, very few portfolios

103 NO20, NO47, NO16, NO35.
104 Quality Assessments of Decentralized Evaluations on Norwegian Development Cooperation (2019 – 2020).
105 NO47.
106 Norad (2014) Can We Demonstrate the Difference Norwegian Aid Makes?; Norad (2018) Evaluation of the Norwegian Aid Administration's Practices of Results Based Management; Norad (2020) Evaluation of the Norwegian Aid Administration's Approach to Portfolio Management.
107 'Norad's expectations for knowledge utilisation by grant recipients and opportunities for funding knowledge generation and evaluation'.
108 The Multilateral Organisation Performance Assessment Network (MOPAN) assesses all multilateral bodies every five years against a standard framework.
109 NO17, NO26.

have an M&E plan in place. Good practice would be to incorporate this into the knowledge plan. As such, they do not have clarity on what evidence they need to monitor progress or on how they will assess Norad's contribution. Without this, portfolios cannot really say whether partner results reporting is appropriate yet or whether portfolios will need to supplement insights from partner reporting with additional data collection and evaluation.

The portfolio dashboard is a tool that has been developed to capture progress at grant and portfolio levels. Although valuable, it is not yet developed enough to provide comprehensive results information. P-Dash is a tool for portfolios to bring together knowledge at agreement level and to assess progress towards grant objectives. Grant managers are expected to use partner grant reports, reviews and evaluations to make a judgement on progress, using a scale from 1 to 4. They also assess the agreement's contribution to the portfolio. The intention is for portfolios to take these assessments and make judgements on progress against portfolio objectives. The roll-out of this tool is still at an early stage, and teams have only just started to use it, so its utility is not yet clear from case study or wider portfolio review evidence.

Photo: **Nadia Frantsen**

4.2 To what extent, how and why is knowledge being used in portfolio management?

This section details the extent to which, and how, knowledge is being used in the design and implementation of the 13 portfolios.

It provides the evidence to answer EQ1.[110] It is structured around Norad's portfolio management cycle and aligns with the theory we are testing through the evaluation. Section 4.2.1 covers how knowledge is used in the selection and design of portfolios (Steps 0 and 1 of the portfolio management cycle), section 4.2.2 covers how knowledge is used in the selection of partners and interventions (Step 3), section 4.2.3 covers how knowledge is used in the coordination of partners (Step 4), and section 4.2.4 covers the use of knowledge to review and adapt portfolio objectives (Step 5).[111] Throughout the section, we draw on the insights from section 4.1 to help explain our findings. At the end of 4.2.1, we also include a text box (Box 2) which presents the results from our quality assessment of portfolio ToCs. This goes beyond the use of knowledge in portfolio management and speaks to the general quality of the ToCs as a management tool.

110 The Multilateral Organisation Performance Assessment Network (MOPAN) assesses all multilateral bodies every five years against a standard framework.

111 Step 2 in the portfolio management cycle is covered under section 4.1.3. Step 2 is focused on the development of a robust knowledge plan that includes a strategy for portfolio M&E.

4.2.1 Assumption: Knowledge is used in the selection and design of a portfolio

The section looks at how knowledge informed the decision to select the current group of 13 portfolios and the decision about the portfolios' design. It covers the first two steps in Norad's portfolio management cycle: mapping and defining the level of ambition of the portfolio and setting the portfolio goals and theories of change. We have grouped them together because they both relate to portfolio design. Across both steps, the expectation is that knowledge is consulted and used to inform framing the problem, scoping the portfolio, the problem analysis, and the portfolio theory of change.

Highly evident

Knowledge was not the primary factor in deciding which portfolios should be established. This was shaped by political priorities and the existing internal structures and agreements in Norad. This aligns with findings in sections 4.1.6 and 4.1.7. To a large degree, knowledge was consulted and used in the design of portfolios and the development of theories of change. However, there was not necessarily balance between types of knowledge, nor was there structure and transparency around how knowledge was appraised and combined, or consistency in the depth of knowledge reviews that have been undertaken. Both skills and capacity constraints contributed to this. This echoes the findings in sections 4.1.1 and 4.1.4. However, since knowledge was consistently demonstrably used in the selection and design of portfolios, this element is highly evident.

The use of knowledge in selecting portfolios

Knowledge has not been the primary factor in deciding which portfolios Norad should establish to organise and manage their work. Instead, Norad has made pragmatic decisions based on their internal structures, partnerships and agreements. Internally, there was a process for Sections to suggest portfolios to senior management. These selections tended to be based on existing programmes of work.[112] The Governance and Transparency Section, for instance, already ran programmes in Tax for Development, anti-corruption, and public financial management. The case study showed that after some discussion, the team felt confident in the synergies between these areas and included them all in a single Governance and Public Finance Portfolio.[113]

Also, the wider portfolio review found that several Sections had already either begun to approach their work in a holistic way before the formal introduction of portfolios or had experience of applying a portfolio approach to aspects of their work. They therefore used the formal introduction of portfolios as a way to develop their existing work further.[114] When employing the current portfolio coordinator, the Higher Education and Research team made developing a portfolio approach a core part of the job description. This means that their portfolio strategy was already well advanced by the time Norad moved to portfolio management, rather than being determined by a strategic review of knowledge when this process began.[115] Likewise, the Health Systems Strengthening Portfolio had existing experience of managing its work as a portfolio, as had the Oceans Portfolio through its marine litter and microplastics programme.

The wider portfolio review established that political priorities also influenced the extent to which portfolios were chosen based on knowledge. Climate change adaptation, the forest and climate initiative, social safety nets, food security and sexual and reproductive health and rights (SRHR) are all political priorities for the Norwegian government and its development aid policy. Norad's senior management therefore decided to set up portfolios to be able to respond to these and manage the funding allocated in these areas.[116] In two specific cases, Norad is required to deliver on a particular strategy, framework or initiative (as discussed in section 4.1.7). The Forests and Food Security portfolios were both created to answer these requirements.

The use of knowledge in designing portfolios

Knowledge has been a key determinant of setting the scope, goals and theories of change for portfolios. Every portfolio analysed knowledge from a range of sources to develop a knowledge base. This has then been used to shape the content and scope of the portfolio. Across all 13 portfolios in the wider portfolio review, we found good evidence to indicate that portfolios are based on a foundation of knowledge, which teams have used to shape their portfolio goals and theory. In our theory of change assessment, for example, we judged that in nine out of the 13 portfolios it was 'highly' or 'fully' evident that the theory was underpinned by evidence, largely drawn from research and professional knowledge. Most portfolio teams have undertaken a desk-based review of relevant knowledge, guided by their professional knowledge of their sector, to inform a problem analysis.[117] This was an organisation-level requirement in establishing portfolios, and teams received support from the Knowledge Department and the Portfolio Council to guide this process.[118] Teams have then

112 NO01, NO02, NO03, NO04, NO05, NO06, NO17, NO21, NO30, NO31, NO33.
113 NO01, NO02, NO03, NO04, NO05, NO06; Annex 10 DRAFT Governance and Public Finance TOC 2 pager english 31.10.2022.pdf; Governance and Public Finance Portfolio Review 2023 20231212.pdf.
114 NO17, NO28, NO29, NO30, NO31, NO33.
115 NO30, NO33.
116 NO16, NO21, NO35, NO38.
117 Civic Space knowledge overview; Civic Space actor and power analysis; Endringsteori Energiporteføljen 2022-09-2; ToC climate change adaptation; Decent work and job creation portfolio ToC; Education portfolio problem analysis; Food security Kunnskapsgrunnlag problembeskrivelse og satsingsområder; Forests portfolio knowledge base of the theory of change; Forests knowledge base synthesis report; Governance and Public Finance Theory of change knowledge base; Theory of Change_higher education and research_problem statement; Helsesystemstyrking - portefølje 0 notat; Oceans portfolio problem analysis; SSN portefølje avgrensning (29 august 2022); SRHR ToC utkast tankekart.
118 NO07, NO08, NO16, NO17, NO19, NO25, NO27, NO31.

synthesised their review into a knowledge base, pulling out key themes and lines of evidence. In some cases, the team has produced this document themselves; others have commissioned external consultants.[119]

We were not able to assess the comprehensiveness or relevance of the knowledge bases used; however, some stakeholders indicated that because of capacity constraints, it may not be as extensive as it should be. We could not assess whether all relevant studies in an area were covered and adequately appraised as part of a knowledge review. Many portfolios indicated a good awareness of relevant research, and pointed to using meta-studies that brought together and assessed the existing knowledge base in an area. However, there were concerns that knowledge reviews lacked depth and may have missed important research, or may not have interrogated the existing research sufficiently.[120] Several factors were put forward as possible contributors to this, including capacity constraints faced by portfolio teams, particularly portfolio coordinators and possible skills gaps (see findings in sections 4.1.1, 4.1.4 and 4.1.5).

Professional knowledge and experience, and research from academic and grey literature, are the strongest components of the knowledge base used by teams to establish their portfolios. Both case studies and the wider portfolio review clearly confirmed that teams' professional knowledge and experience is an important pillar of the knowledge base. Staff take pride in developing a deep understanding of their sector, and Norad has a wealth of expertise to draw on as a result.[121] There is real value in this experience and skill, and as a result the portfolio knowledge bases are grounded in the current reality of their sectors. Portfolios also draw on a good range of academic and grey literature from a range of sources, including peer-reviewed journals, multilateral and global partners, other bilateral donors, sector-specific non-governmental organisations (NGOs) and international NGOs (INGOs), research institutes and think tanks.[122] Many portfolios have involved their partners in developing the portfolio knowledge base, sometimes through their knowledge products and sometimes through informal dialogue during the process.[123]

There is, however, scope for more rigour in how knowledge from different sources, particularly teams' professional knowledge, is appraised and combined. This is an area for further skills development. Interview data confirmed that there has been much debate in Norad around the value and role of professional knowledge – or, as some have termed it, tacit knowledge – since the introduction of knowledge-based portfolio management.[124] As discussed above, it plays an important role. When a decision needs to be made quickly and knowledge is incomplete, it is indispensable. However, the risk with professional knowledge is that it is implicit and often not explained. Staff guidelines through the Grant Management Assistant and template and the formal 'Decision Document'[125] will only partly facilitate the formal use of professional knowledge.[126] Moving forward, it will be important to develop staff skills to do this and to create an environment where this is incentivised. This speaks to the findings in sections 4.1.1 and 4.1.4 that there remain gaps in staff skills around accessing and appraising knowledge, and continued improvements to portfolio processes and structures, that incentivise the right behaviours (see sections 4.1.2 and 4.1.6).

119 NO01, NO05, NO21, NO25, NO38.
120 NO20, NO17, NO31, NO56.
121 NO03, NO04, NO06, NO11, NO12, NO13, NO14, NO15, NO16, NO17, NO18, NO20, NO21, NO22, NO23, NO24, NO25, NO26, NO8, NO29, NO30, NO31, NO33, NO35, NO36, NO38, NO39, NO44, NO46.
122 Civic Space knowledge overview; Civic Space actor and power analysis; Endringsteori Energiporteføljen 2022-09-2; ToC climate change adaptation; Decent work and job creation portfolio ToC; Education portfolio problem analysis; Food security Kunnskapsgrunnlag problembeskrivelse og satsingsområder; Forests portfolio knowledge base of the theory of change; Forests knowledge base synthesis report; Governance and Public Finance Theory of change knowledge base; Theory of Change_higher education and research_problem statement; Helsesystemstyrking - portefølje 0 notat; Oceans portfolio problem analysis; SSN portefølje avgrensning (29 august 2022); SRHR ToC utkast tankekart.
123 NO01, NO06, NO11, NO12, NO14, NO30, NO33.
124 NO53, NO56, NO42, NO47, NO55.
125 In Norwegian: 'beslutningsdokument'.
126 NO47, NO53.

"Professional knowledge is important. It shouldn't be discarded. But how do you challenge the biases inherent in it? You need to articulate what your professional judgement is and what it is drawn from. The thinking needs to be put down so it can be challenged. We need people to be open and feel safe to do this."[127]

Knowledge from the global South is lacking across portfolio knowledge bases, as are results and evaluative data. The case studies and wider portfolio review found limited evidence of knowledge generated by people and/or organisations located in the global South in portfolio knowledge bases.[128] Only the Higher Education and Research team has been intentional in seeking out and including knowledge from the global South when developing their portfolio theory of change.[129] Interview data showed that some portfolio teams are aware of this as a gap, and pointed to their limited time as the reason why it has not been done already.[130] This should be a priority area for Norad to address as an organisation in order to make their knowledge base richer and more contextual. Results data and evaluative evidence were also less evident in knowledge bases. Although there were examples of portfolios using evaluations as key sources of knowledge to shape the portfolio,[131] many portfolios did not. This speaks to the findings in section 4.1.8 around the quality of partner reporting.

127 NO47.

128 We looked at the sources referenced to see which organisations and institutions were represented. There was a strong bias towards global North sources.

129 NO30, NO33; Theory of Change_higher education and research_ problem statement.

130 NO01, NO04, NO05, NO17, NO31.

131 For example, the Research and Higher Education Portfolio drew heavily on a final review of the NORHED programme to shape their portfolio. NORHED is the Norwegian Programme for Capacity Development in Higher Education and Research for Development.

BOX 2

Findings from our quality assessment of the 13 portfolio Theories of Change

As outlined in section 3, to inform our understanding of portfolios management we conducted an assessment of all portfolio theories of change, using a set of criteria related to what a 'good' theory of change should look like. The heat map below shows the distribution of scores across the five ratings, from 'not evident' to 'highly evident'.

The highest scores relate to the problem analysis and theory of change development process. A majority of portfolios have well-justified theories, drawn from a basis of research and professional knowledge set out in a problem analysis, and developed in a collaborative way with a range of portfolio team members. The criteria with lower scores relate to putting theories into practice. A majority of portfolios have not yet developed a realistic sense of how to implement their theory and are still at the early stages of operationalising.

The quality of theories of change is variable across portfolios. Although many provide clarity on what they want to achieve, they lack specifics on how they see this happening and what Norad's contribution will be. Norad's 13 portfolios seek to address a wide array of complex systems issues, from governance and public finance to deforestation and SRHR. Although most theories of change detail what needs to change in the system for these problems to be addressed, they lack clarity on where in the system Norad should intervene and through what interventions or mechanisms. As such, many of the theories of change lack sufficient detail on the underlying *theory* for how Norway's efforts will make a difference. This is reflected in the scores from our theory of change quality assessment.[132]

132 Scores were lowest across criteria such as completeness, explained and realistic, that relate to the clarity of the theory (the explanation of how and why change will happen) underpinning the ToC (see annex 8).

Theory of Change Assessment Summary

Some portfolios have begun to think through the boundaries of what Norad's role and contribution should be in different areas of their work.[133] Many key factors are at play, including Norad's comparative advantage, the nature of the funding stream (core, multi-donor, bilateral), and the degree of Ministry involvement. Some teams have done this in an analysis of their partnerships, but this has not translated into their theory of change products.[134] Some teams have not yet reflected on how these factors affect different areas of their work and on what Norad's added value could be as a result – funder, advocate, convenor, conduit to normative spaces, advisor, knowledge commissioner, etc.

Underlying some of the weaknesses in theories of change is a lack of clarity around what a theory of change is. Across portfolio teams, there are different views on what a theory of change is. Some see it as another name for a logframe, others as a tool for presenting the meta-theory for how to address a problem (e.g. shrinking civic space), others as a communication device for explaining what a portfolio does. This stems partly from the lack of clear guidance from the Change Hub/Knowledge Department in the early stages of the reform process around what a good **theory of change** looked like, and partly from the complexity of applying the process to the Norad context. This conceptual confusion is a contributing factor to the variable quality we are seeing.[135]

133 NO01, NO02, NO03, NO04, NO05, NO06, NO19, NO20, NO21, NO26, NO27, NO28, NO29, NO30, NO33, NO38.

134 NO28, NO29; ToC - Health Systems Strengthening figur revidert des 2023; ToC_2 pager HEALTH SYSTEMS STRENGTHENING.

135 For the purposes of this evaluation we defined a ToC as an evolving explanation of how and why an intervention contributes to change that details the causal chain between interventions and outcomes and the underlying preconditions and assumptions. What is crucial is that it presents an explanation – a theory – for how and why an intervention or portfolio is going to lead to change. This theory, or theories, can then be tested through implementation, and either validated or adapted through ongoing M&E.

BOX 2 CONTINUED

In line with Norad's own guidance, we considered the theory of change as both a process and a product. Teams seem to have found more use from the process than from the product. In most portfolios, teams have engaged with the process of developing their theory, finding it a helpful way to think about their work more holistically. They often found value in the space created for connection and discussion with colleagues. As such, in interviews, portfolio team members articulated a good sense of the theory and its logic, from interventions to impacts.[136] In cases where the teams are at an earlier stage of development, they are aware that their thinking needs further refinement.

In the majority of portfolios, the product generally does not reflect the way that portfolio teams have engaged in the development process. The theory of change documents are almost universally less complete than people's thinking; they remain very high-level. Factors contributing to this include a mismatch in expectations and understanding between portfolio teams and management around what the theory of change should include.[137] In other cases, teams do not have the time to develop the theories of change further, or, as discussed above, there is a lack of clarity as to what a theory of change actually is and what its purpose is as a management tool.

Most portfolios recognise the gaps in their theories of change and are intending to address them, but at the same time they are eager to progress implementation before refining them any further. Although many portfolio teams recognised the need to improve their **theories of change**, there is a strong sense that these improvements should not delay implementation.[138] The theories of change, although not perfect, have brought greater strategic direction and focus to many portfolios. As one stakeholder commented: "We shouldn't let perfection get in the way of progress."[139]

Many portfolios are considering developing sub, regional and country-specific theories of change. To bring greater clarity, several portfolios are considering developing nested **theories of change.**[140] These are more specific versions of the overall portfolio **theory of change**, contextualised to an issue or geography. This approach is likely to push teams to detail more clearly the specific pathways for change in a specific context. It will also help portfolio M&E because for many, the expected results from the portfolio manifest in a specific country context. Although this approach has value, it would also need to be underpinned by the management structures to align and coordinate Norad, Ministry of Foreign Affairs and embassies' efforts in a country context.

136 NO01, NO02, NO03, NO04, NO05, NO06, NO16, NO17, NO20, NO21, NO22, NO23, NO24, NO26, NO8, NO29, NO30, NO31, NO33, NO35, NO37, NO38, NO39, NO44, NO46.
137 NO28, NO29.
138 NO16, NO31, NO30, NO21, NO38, NO05, NO48, NO60.
139 NO33.
140 NO56, NO16, NO25, NO19, NO31, NO30, NO18, NO60.

4.2.2 Assumption: Knowledge informs the selection of partners and interventions that best contribute to the portfolio objectives

This section covers Step 3 in Norad's portfolio management cycle: choosing interventions and partners that, together, best contribute to the goals of the portfolio. It explores to what extent and how portfolios are using knowledge to inform decisions around who and what to fund. We also consider the ways in which political priorities and budget constraints affect portfolios' ability to use knowledge in the way outlined in Norad's current model of portfolio management.

Moderately evident

There are early signs of knowledge use informing partner and invention selection, despite some structural issues. Portfolios are starting to use evidence to inform the selection of partners and interventions through knowledge shaping calls for proposals, reviewing the knowledge base for interventions before approving funding, and using portfolios' theories of change to shape partnership discussions. Leadership's championing has been an enabler of this shift (see section 4.1.2). Although this is not happening systematically across all portfolios, it represents important progress. However, there are internal structural issues to portfolios that significantly complicate knowledge-informed funding decisions becoming consistent practice. This includes many of the factors discussed in section 4.1.6, such as the nature of Norad's long-term strategic partnership, whether the portfolio spans multiple Sections and long grant management cycles, and the role of political direction in grant making. Working together, these close the space for systematic use of knowledge. This element is therefore moderately evident.

There is emerging evidence of portfolios using knowledge to guide the selection of new partners and interventions. Three portfolios have designed calls for proposals to address gaps or new priorities identified during the portfolio analysis and theory of change development process. The case studies and wider portfolio review found that the process of analysing the portfolio and developing the theory of change has helped some portfolios to identify gaps in their work. They have a more holistic and comprehensive view of their portfolio of work, and a clearer sense of where their priorities should lie and which partnership best suits the portfolio objectives.[141] This comes largely from the process of developing the knowledge base and theory of change, and therefore draws heavily on research and professional knowledge. For example, the Civic Space portfolio team developed a call for proposals because of its review of the knowledge base and theory of change.[142] The Climate Change Adaptation team's work on its theory of change shaped a new call for proposals on damage and loss. Their knowledge review highlighted this as important, particularly the role of insurance schemes in climate adaptation. They commissioned a consultant to undertake an in-depth review to plug evidence gaps, and this shaped a call for proposals.[143] The Oceans portfolio team's knowledge review identified a need for a greater focus on the private sector in the portfolio. The team has since put out an invitation-only call for proposals focused on the private sector and establishing new projects working on incubators and accelerators; although this was initiated by the Oceans Section initially, owing to falling short on the marine litter programme's target on the private sector, the call for proposal was department-wide – food, climate and nature, energy, and oceans (both marine litter and blue economy), as well as the private sector section.[144]

141 NO16, NO17, NO26, NO27, NO31, NO35.
142 NO26, NO27.
143 NO16, NO35.
144 NO17, NO31.

Some portfolios have also reinforced integration of knowledge into their approval of new agreements. The wider portfolio review found that the Energy Portfolio has set up an internal investment committee that reviews proposals for new agreements put forward by grant managers. The committee includes the portfolio coordinator, the Head of Section, and someone from another part of Norad. The committee reviews and scores proposals based on the International Evaluation Criteria approved by OECD-DAC,[145] benchmarks it against alternatives and decides on whether the partner fits the portfolio. The aims of the approach are to mitigate the risk of one-off cases and personal interests and to support more collective, portfolio-level, knowledge-informed decision making.[146] The Research and Higher Education Portfolio team also relies on external committees to review applications from Norwegian universities, leading to a shortlist of proposals being taken forward by the portfolio for further consideration. In relation to the NGO call for food security projects in Africa, the Section relied on support from the Knowledge Department in assessing the concept notes' description of planned knowledge components as part of shortlisting candidates (from 200 to 12). The Knowledge Department also facilitated incubator workshops for applicants, emphasising the need for NGOs to rely on knowledge and to identify and address knowledge gaps. The food section made the final decision based on full applications from the shortlisted candidates (see annex 6 for a fuller description).

Other portfolios have made strategic shifts which are leading to new partnership discussions. There is evidence from the case study that the Governance and Public Finance Portfolio established the importance of accurate, national statistics to working in public financial management, anti-corruption and Tax for Development, and that this needed to be integrated more fully across all elements of the portfolio. They have begun discussions among the team and with their partners, including Statistics Norway, to set this in motion. The wider portfolio review found that the Research and Higher Education Portfolio team are putting more emphasis on southern priorities in selecting applications and interventions. They have also included specific advocacy outcomes in the theory of change on influencing other donors to improve funding modalities in the sector.[147] This is something they have already started doing.

The role of portfolio leadership, particularly from the Section Head and portfolio coordinator, seems from interview data to have been central to this driving this new practice, as was signalling from senior leadership (see section 4.1.2). Although knowledge use is not as extensive in this step as in portfolio design, given the early stages of the reform process this is still encouraging. That said, there are various challenges to the use of knowledge at this stage of the management cycle becoming systematic across all portfolios. These challenges are explored below.

However, portfolios have experienced limits in their ability to select partners and interventions based on knowledge. As discussed earlier in section 4.1.6, aspects of Norad's approach to partnership constrain the space for portfolios to select between partners and interventions. Norad channels a large proportion of its budget to core and earmarked funding of multilateral organisations. These are typically organisations or institutions with whom it is necessary to work to have an influence in the sector and for which there is a political commitment to support.[148] For example, Norad needs to fund organisations such as the World Health Organization (WHO) or the global health funds because of Norwegian political priorities.[149] The Norwegian public sector is also politically defined as an important channel for Norwegian aid. This included several partners in the Governance and Public Finance Portfolio and also, to a lesser extent, in the Food Security Portfolio. In the research and higher education sector the bulk of the funds are channelled through

145 Effectiveness, efficiency, impact, relevance, sustainability.

146 When putting together a proposal for the committee to review, grant managers need to draw on various sources of knowledge, including partner documentation of achieved results, the wider evidence supporting the intervention, and a comparison of other projects through consulting reviews and evaluations.

147 NO30.

148 NO01, NO02, NO05, NO18, NO21, NO22, NO23, NO24, NO25, NO28, NO29, N036, NO38.

149 NO28, NO29.

Norwegian universities. Likewise, Norwegian NGOs are an important channel in Norwegian aid, especially in relation to humanitarian aid. In other cases, for organisations which mirror Norad's values and are perceived to occupy an important space within the sector, Norad maintains consecutive agreements over a long period of time.[150]

The timing of when grant agreements are up for renewal has also posed a barrier to when partners can be selected. As discussed in section 4.1.6, many portfolios inherited a collection of grant agreements that were either just starting their three-to-five-year cycle or were midway through. In reality, therefore, the wider portfolio review found that the space for selecting who and what to fund, at least initially, was limited. In these instances, portfolios spoke of wanting to improve their understanding of the knowledge base and tighten their theory of change, so that when these agreements are being renewed, they are in a better place to either influence and steer partners or select new agreements.

Portfolios with a high proportion of multilateral funding have had to think about using knowledge differently – in terms of how to influence or advocate within these key organisations, rather than choosing whether or not to fund them, or which interventions to support. For example, the Health Systems Strengthening Portfolio team strategically utilises their placement on boards and committees to steer their partners to raise awareness and start discussions about a health systems approach. The portfolio continually incorporates the importance of a systems approach in their communications with partners and organisations such as WHO.[151] However, not all teams have considered this part of their work in their portfolio theory or how it could contribute to their portfolio goals.

Portfolios which have a significant proportion of agreements managed outside their section have limited control over the choice of partners and agreements. This has impacted their ability to use knowledge to inform funding decisions. As discussed in section 4.1.6, some portfolios, because of the way in which their budgets are split across chapter posts and Sections, have a more limited their ability to decide who to fund. This is a factor (to varying degrees) in seven portfolios. Where these conditions exist, using knowledge in a consistent way to select who and what to fund in a portfolio is significantly more complex.

150 For instance, Norad was one of the first funders of the Tax Justice Network in 2003, and has maintained some form of support to them ever since.

151 N028.

4.2.3 Assumption: Knowledge is used in the management and coordination of partners and interventions to achieve portfolio objectives

This section covers Step 4 in the portfolio management cycle: managing the portfolio through following up interventions and coordinating partners. This includes managing grants in line with the portfolio objectives and facilitating the flow of information and knowledge across the portfolio so as to support better coordination among partners and interventions, creating synergies and avoiding overlaps. This section discusses the extent to which this is currently happening.

Slightly evident

At the level of individual grants, knowledge is used to steer partners. This predominantly takes the form of insights from partner meetings and annual reporting. The reportedly variable quality of partner reporting is an impediment to this (see section 4.1.8); however, wider efforts in Norad should improve this, as may P-Dash. At portfolio level, some portfolios are convening and sharing knowledge with partners to support coordination. However, this practice is not yet embedded systematically across teams, and this element is therefore rated slightly evident.

At grant level, portfolio teams draw on a range of knowledge to steer individual grants. This includes partner reports, insights from partner meetings, and periodic reviews and evaluations. Across these sources, the most commonly used type of knowledge seems to be insights from partner discussions and annual reports.[152] Mid-term reviews are also used but, as discussed in section 4.1.3, portfolio teams have raised questions about their quality[153] and that of partner reporting more generally (see section 4.1.8). However, with efforts under way to improve partner knowledge generation, including Knowledge Department training for partners, this will likely shift in the future, with higher-quality strategic evaluations featuring more in the knowledge used by grant managers to shape and steer partners and the portfolio. The portfolio dashboard, 'P-Dash', is also a tool that could strengthen the use of knowledge in managing grants in support of portfolio objectives, because it encourages grant managers to put down what may be in their heads with regard to partner performance and bring this together with other forms of knowledge to make a more structured assessment about progress and portfolio contribution. As the system is still new, we have seen limited evidence of it being used in this way. For instance, the case studies found that it has not yet been used in the Food Security Portfolio. The Governance and Public Finance team has completed this once, but need more guidance to develop and embed its use.[154] However, in interviews, the Forest and Energy departments both advocated for the platform and its usefulness or potential usefulness.[155]

There are some early examples of knowledge being used to drive strategic choices and management of portfolios' advocacy, influencing and knowledge commissioning activities identified in case studies and the wider portfolio review. Portfolios are starting to use professional knowledge and some monitoring data to shape and manage activities that sit outside their funding to partners. They have done this by recognising the different facets of Norad's role – convenor, funder, advocate, facilitator of knowledge exchange – as interventions in their own right, and developing strategies to manage these.[156] For example, the Research and Higher Education portfolio team monitor the effectiveness of their convening and advocacy activities and feed learning from this back into practice. The Governance and Public Finance portfolio team have conducted reviews of their partner convening activities through their portfolio analysis. The Health Systems Strengthening portfolio team has identified points where they can exert influence on multilateral partners and track progress against these. Although these practices are not widespread across portfolios, they present important examples of teams recognising their contribution beyond funding and beginning to think about how to manage these as part of the overall portfolio. In all cases, the portfolios that have progressed most in this area are ones that were operating as portfolios before portfolio management was introduced. This suggests, perhaps, that having had more time to work in this way has enabled them to develop deeper understanding and skills in this area.

Another example is emerging from the Forest Portfolio. A recent (April 2024) Norad evaluation of Norway's International Climate and Forest Initiative (NICFI) support through civil society identifies several weaknesses in the use of knowledge in management and the monitoring of the support. However, it also notes that the shift to portfolio thinking is leading to significant changes, suggesting an improvement.[157]

Some portfolios are convening partners to coordinate actions and share professional knowledge and experiences. For example, case study evidence shows that the Governance and Public Finance Portfolio team, shortly after signing agreements with a new cohort of civil society organisations in the area of Tax for Development, shared information among them on who was working on what issues, in what geographies and with which sub-grantees. Organisations have subsequently

152 NO26, NO35, NO19, NO28, NO33, NO17, NO21, NO18.
153 NO31, NO30, NO19.
154 NO01, NO08.
155 NO20, NO25, NO37.
156 NO28, NO29, NO30, NO33.
157 See Norad (2024) Evaluation of Norwegian International Climate and Forest Initiative Support to Civil Society, Oslo Department for Evaluation.

started to coordinate and increase efforts to avoid overlaps and create synergies.[158] Likewise, the wider portfolio review found that the Civic Space Portfolio team organised a partner convening around the Norad conference on civic space in order to facilitate knowledge exchange and peer learning between partners. This identified important synergies between partner activities.[159] The Climate Change Adaptation, SRHR and Forests portfolio teams have undertaken similar efforts.[160]

"One of the biggest value-adds of portfolio management is recognising Norad's role as a convener. Bringing partners together to get them to work together in a context. It's about helping partners to see the synergies in their work."[161]

158 Governance and Public Finance Portfolio Analysis, 2003.
159 NO27.
160 NO19, NO38.
161 NO16.

4.2.4 Assumption: Knowledge is used to review and adapt portfolio objectives and strategy

This section covers Step 5 in the portfolio management cycle: performance reporting, adjustment and learning. It involves the annual process of stepping back and reviewing portfolio progress in order to identify learning and adaptations. It involves assessing the performance of individual agreements and their contribution to portfolio objectives, and then, through a portfolio analysis, assessing the overall progress of the portfolio.

Slightly evident

Although the majority of teams have conducted a portfolio analysis, there are mixed views on its utility. Teams do not yet see the time they invested in the process as having sufficient benefit for their work, largely owing to a lack of clarity about its audience and purpose. At this time, many of the enabling conditions are not in place for this step in the portfolio management cycle to function as hoped and to add value to teams. The portfolio dashboard; 'P-Dash' is not yet developed enough to provide useful results data, and the lack of functional knowledge plans is a further impediment. This element is therefore rated slightly evident.

There are some early signs of teams reviewing their portfolios. 2023 was the first year when teams completed a full portfolio management cycle. At the time of writing, many have only just completed this step. To date, only a few teams have completed a portfolio analysis.

Teams have mixed opinions on the utility of the portfolio analysis. Although they have found it valuable to interrogate their work in detail, the time needed to carry out this process, and also the lack of feedback or attention from the Portfolio Council, meant that some teams did not see the investment of time as worthwhile.[162] Several teams were also unclear as to the purpose of the report and who the audience for it was.[163] This links to a point raised earlier in section 4.1.2: that although it has been important that knowledge-based portfolio management has been pushed from the top, it has also created a situation where teams have carried out tasks in order to satisfy requirements rather than because they see value in them. Although guidelines on conducting a portfolio analysis were in place, they were largely not enforced, and so teams conducted it in many different ways. The evidence shows that that allowing more flexibility has improved motivation and has allowed portfolios to respond to their sectors and contexts more effectively.

162 NO01, NO05, NO21, NO38.
163 NO38.

The portfolio dashboard, 'P-Dash' was used by portfolios as part of the portfolio analysis. However, the level of detail provided in the assessment was highly variable. We were not able to review P-Dash entries for all portfolios, but we did conduct a light-touch review for our two deep dive case studies. It had not been used in the management of the Food Security portfolio. In the Governance and Public Finance portfolio, we found that the clarity and depth of the analysis used to inform the grant-level performance assessments was highly variable. As discussed in section 4.1.8, the value of P-Dash hinges on the quality and robustness of the data and analysis that informs the judgements. Although our evidence is limited, the indication is that because those who undertook P-Dash assessments did not find the process useful or meaningful, they may not have put sufficient care and attention to completing the assessments. This, in addition to time constraints, has led to variable levels of detail and quality across the assessments.

Not having workable knowledge plans which include an M&E plan is a major barrier to knowledge use at this stage of the portfolio management cycle. As detailed in section 4.1.3, the wider portfolio review found that most portfolios lack a developed and owned knowledge plan. Various factors have contributed to this, such as lack of clarity of its purpose and teams not having the time to complete it. The absence of this plan, however, makes it very challenging to use knowledge in a strategic way in this step of the cycle. Unless a portfolio has thought through how it is going to supplement partner reporting to monitor portfolio results, it will not have the knowledge to hand to be able to systematically review and reflect on portfolio progress and what this means for objectives and strategy.

Photo: **Marte Lid** | Norad

4.3 Is knowledge-based portfolio management likely to lead to improved development results?

This section discusses the extent to which knowledge-based portfolio management is leading to better-designed and better-implemented portfolios that are more likely to achieve their objectives and, through this, lead to improved results. It provides the available evidence to answer evaluation question three (EQ3).[164]

We have identified seven change pathways from the evaluation theory of knowledge use in portfolio management. These represent different ways in which the practices of portfolio management can lead to positive development results. Given how new portfolio management is to Norad, we did not set out to formally 'test' these. Our focus has been on collecting emerging evidence along the causal chain in order to be able to indicate to Norad, at this early stage in the reform process, if the conditions are in place for the theory to progress as anticipated in the future, and where corrective action is needed to get the theory back on track.

Looking at this question as a whole, knowledge-based portfolio management is not likely to lead to improved development, until key barriers in the enabling environment are addressed. A number of preconditions for success are not yet in place, such as high-quality knowledge plans, or skills in place to engage in portfolio M&E. This is what we would expect from a change process still in its early stages. It is possible for Norad to address the barriers currently in place, as discussed below in the recommendations.

However, even if Norad creates the right enabling environment, and consistent knowledge use becomes embedded, it is important to recognise the complexity of linking a better use of knowledge in how Norad manages it portfolios to improved development results. Further down each causal pathway, factors outside Norad's control play an increasingly large role. These factors include partners' commitment to generating good knowledge, partners' own enabling environments, and the complex set of economic, political, social and cultural factors at country level. All of these will impact and influence the ability of partners to make changes based on knowledge which lead to improved development outcomes.

The theory that links knowledge use to development impact is therefore not linear. Norad needs to identify which elements are within its control and focus attention on addressing those in order for the theory to have the best chance of improving development results.

We discuss our findings for each change pathway in more detail below. For a depiction of this pathway, see figure 3 in section 2.

164 'To what extent and how is the use of knowledge in current portfolio management likely to result in improved results of Norwegian development assistance?'

Change pathway 1: Moderately evident

Outcome: Portfolios have a clear and focused design and strategy

The early signs show that where portfolios have a good quality theory of change, they are able to use knowledge to bring more clarity and focus to their work. The quality of portfolio theories of change is variable, however, both in terms how teams engaged in theory of change development and on the utility of the current theory of change document as a tool for management. This creates some risk to Norad consistently achieving this outcome across all portfolios. Although all portfolios had reviewed and used knowledge to inform their design, theories of change are of variable quality (see section 4.2.1). They provide clarity on what portfolios want to achieve and why, but lack detail on how this will happen and on Norway's specific contribution. Without this in place, teams will not have well defined, coherent goals. Various factors contribute to this, including teams struggling to dedicate adequate time to the process, a lack of clear guidance on what needed to be included in a theory of change, different understandings of what a theory of change is for (see section 4.2.1), and, in some cases, motivation for the reforms (see section 4.1.1). Norad is moving in the right direction, and some portfolios are more progressed than others; however, for the theory to work, the quality of theories of change, needs to be improved, and the associated conditions need to be put in place to enable this.

Change pathway 2: Slightly evident

Outcome: Portfolios are more responsive and adaptive to changes in context and challenges

Although most teams have used knowledge to review their portfolio, two key barriers prevented this from being a valuable exercise for many; insufficient buy-in to the change process, and a lack of operational knowledge plans. These two barriers currently stand in the way of this outcome. Most portfolios have conducted their first review of portfolio progress – the portfolio analysis – but how this was approached, and the value teams got from it, was variable (see section 4.2.4). Some found the process useful and were able to identify specific lessons and actions. Others focused too much on what they thought management wanted and not enough on what was going to be of most value to them. Various factors contributed to this. The top-down nature of the change process has meant that, in some teams, there still is not complete buy-in to the changes (see section 4.1.1). Time and resources also played a role. A more fundamental barrier is that most portfolios do not have an operational knowledge plan (see section 4.1.3). As such, they do not have a clear view of what knowledge they need to track portfolio progress.

Change pathway 3: Slightly evident

Outcome: The selection of partners, interventions and levels of funding are substantiated by knowledge.

The emerging evidence suggests that some portfolios are starting to use knowledge from new portfolio processes to support selection of new partners. Structural barriers mean, however, that this is unlikely to become a systematic practice within Norad. Given the constraints, this outcome is more likely to be achieved if the organisation concentrates on selecting interventions, where interventions are understood to include Norad's role as convenor, advisor, advocate, etc. (See section 4.2.2 for fuller discussion.) We found several examples of portfolios using knowledge to inform the selection of partners and interventions; however, at this stage, these practices are not systematic across all portfolios (see section 4.2.2). There are some notable challenges to knowledge-informed partner selection becoming a systematic practice in Norad, including a path dependency in whom Norad funds, structural challenges in how certain portfolios operate, and political directives from MFA (see section 4.1.6). These come together more strongly in some portfolios than in others. It is unlikely that this theory will play out as expected across all portfolios, particularly in terms of selecting between partners. Although some portfolios have the right enabling conditions in place for this

theory to progress as anticipated, others do not. Focusing on using knowledge to determine which type of intervention will be most useful, particularly with established long-term partners such as multilaterals or large Norwegian NGOs.

Change pathway 4: Not evident

Outcome: Partners adapt interventions based on knowledge of what is working and what isn't

At this point, we do not have the necessary evidence to say whether this outcome is likely to take place as anticipated. Norad's emphasis on knowledge generation with partners is still quite new. The key conditions that will need to hold, though, are that resourcing is made available and that partners are committed and do in fact use evidence to inform decision making. Norad's portfolio management is likely to be one of several factors that will shape this outcome.

Change pathway 5: Not evident

Outcome: Partners receive continued or scaled up funding because there is knowledge indicating their interventions work

It is too early in the roll-out of portfolio management to say whether knowledge is feeding into decisions about continued funding, but the lack of processes for collecting M&E data is likely to prove a significant barrier. We found examples of evidence informing future iterations of grants, but these were from before the roll-out of portfolio management. However, the mixed quality of results data and the lack of clear portfolio-level M&E plans are currently barriers (see sections 4.1.3 and 4.1.8). Our evidence is limited, but the issues identified need to be addressed before it will be possible for this outcome to be achieved.

Change pathway 6: Not evident

Outcome: Knowledge of what interventions work is shared across the portfolio, and taken up by partners in different contexts

Similarly, it is too early to judge how likely this change pathway is to lead to improved management and results. Norad plays a role in convening partners, however, which is an important precondition for this to take place. As discussed in section 4.2.3, an important element of Norad's role in portfolio management is to share knowledge among partners. As portfolios develop a deeper understanding of what interventions work in different contexts, this knowledge will need to be shared across partners to support their individual and collective learning. Although we found evidence of some portfolios convening partners and sharing information, this has not extended into disseminating the results of, for example, evaluations conducted by one partner that could be useful to another. At this point, we do not have the necessary evidence to say whether this outcome is likely to be achieved.

Change pathway 7: Slightly evident

Assumption: Through knowledge gathering and generation, portfolios identify and address synergies and overlaps between partners

There is very early evidence that portfolio teams are well set up to use knowledge to manage and coordinate partners. We identified several teams that are managing their portfolios in this way and are beginning to see results, and others that indicated their intention to do this (see sections 4.2.2 and 4.2.3). Although this practice is not widespread in Norad, we did not identify any major challenges to this way of working becoming common practice. Given the available evidence, there are some encouraging early signs that conditions are in place for this outcome to be achieved.

5

Conclusion

In this section we return to the evaluation questions (EQs) which have guided our enquiry and present our overarching conclusions, focused on:

- The extent and use of knowledge in portfolio management (EQ1).
- The extent to which there is an enabling environment for knowledge use in portfolio management (EQ2).
- The likelihood of changes leading to better development results (EQ3).

We address EQ4, which relates to lessons and recommendations, in section 6.

Knowledge-based portfolio management was introduced to Norad in 2022, with the aim of creating greater coherence and synergies between grants, programmes and Norad's own influencing in support of overall strategic objectives. The rationale was to apply existing knowledge and generate new data and insights more strategically, leading to better decision making and development results.

There are early signals that knowledge is being used more systematically. The organisation has come a long way in a short space of time. The process of developing theories of change has enabled the majority of portfolios to build a robust problem analysis, drawing on research and professional knowledge. Key management tools, the theory of change and knowledge plan, are in place across all portfolios, though their 'quality and utility vary. Across portfolios, theories of change are of higher quality than knowledge plans, because teams had a better understanding of their purpose and had more time to invest more time in their development. Knowledge plans need work to develop them into useful and implementable tools, particularly in terms of supporting portfolio-level M&E and in setting out a resourcing plan. Some teams have gone beyond knowledge use in establishing their portfolio theory and have started to make decisions about partners and interventions based on knowledge.

There are some key enablers that have supported this: strong senior leadership support; the introduction of portfolio coordinators and a Portfolio Council; a dedicated Knowledge Department; and guidelines and training for portfolios and their partners. However, important building blocks are still missing. Resources, particularly time for portfolio coordinators and the Knowledge Department, are currently insufficient. Organisational structures sometimes act as an impediment to cross-section working within portfolios. The lack of comprehensive M&E or results data and a skills gap for analysing it are further key factors.

The chain between using knowledge in portfolio management and development outcomes is uncertain and complex, but addressing these issues will increase the chance that it will be achieved. This will help embed knowledge use as a consistent practice across the entire portfolio management cycle.

5.1 Use of knowledge

EQ1: To what extent and how is knowledge being used in Norad's portfolio management?

Conclusion 1:

Across all portfolios, knowledge is being used in a more consistent way. This has been enabled by new systems and processes and by consistent leadership. However, knowledge use is not embedded in all stages of the portfolio management cycle. This is partly because Norad is still in the early stages of the change process. It is also because of the absence of key building blocks, notably operational, resourced knowledge plans.

Norad is only two years into the roll-out of knowledge-based portfolio management, but already portfolios are using knowledge in a myriad of ways to shape strategy and funding. Although teams used knowledge before portfolio management was introduced, this now happens more consistently. The main drivers of this change are the new systems and processes introduced and the championing by senior leadership (see conclusion 4).

Currently, however, knowledge is not being used across all steps in the portfolio management cycle. Although teams have used knowledge to establish portfolios and shape theories of change, and some are starting to use it to select new bilateral partnerships and to convene partners, few are using it systematically to review progress and strategy. This is partly to do with timing: since portfolio management was launched, most time has been spent selecting and designing portfolios. To date there has only been one full implementation cycle. But it is also a reflection of key enablers not being in place, notably high-quality knowledge plans that include M&E plans. This is crucial to delivering timely evidence to support decision making. Without clarity on the knowledge a portfolio needs to support delivery and how portfolio progress will be monitored, it will be very difficult to use knowledge meaningfully to steer implementation or to review and adapt objectives and strategy. This issue was exacerbated in some instances by a lack of clarity in portfolio theories of change, particularly in defining Norad's role. This is one of the reasons teams struggled with the first rounds of portfolio analysis process. Without a clear framework in place for judging progress, it is difficult to step back and reflect in a meaningful way on strategy.

Conclusion 2:

Knowledge-based portfolio management will work best if a plurality of knowledge is used. Currently, results knowledge, including evaluations, is used less than professional and research knowledge. There have been some encouraging efforts to improve results knowledge production and use.

For the evaluation, we used a broad definition of knowledge that encompasses three types: professional, research, and results (see section 3). To date, portfolios have tended to draw on professional and research knowledge more than on results knowledge. There are various reasons for this. Professional knowledge is easy to access and interpret. Similarly, many teams keep up to date with the latest research, often through partners that are funded to conduct research. Results knowledge is used less frequently because the quality of partner results evidence is perceived to be variable and, as discussed above, portfolios do not have clear plans in place for monitoring progress. Efforts to strengthen partners' use of evaluations are encouraging and could improve this situation (although we would urge Norad to promote a plurality of evaluation designs given the diversity of issues covers by portfolios), as would developing portfolio M&E plans (conclusion 1).

Photo: **Ken Opprann**

5.2 Enabling environment

EQ2: To what extent, how and why are Norad's portfolio set-up and practices and the wider environment conducive to the use of knowledge in portfolio management?

Conclusion 3:

The reality of knowledge use in Norad is more complex than the current model of portfolio management implies. The high proportion of multilateral funding, and Norad's role as an agency delivering on political priorities, mean that the organisation needs to think about knowledge use differently. Acknowledging this and adjusting expectations of how portfolios can realistically use knowledge will lead to a more effective management model; failure to do this may lead to growing frustration and disengagement from teams charged with implementation. Norad is a directorate operating within the policy and budgetary priorities set by the Ministry of Foreign Affairs (and by the Ministry of Climate and Environment in relation to Norway's International Climate and Forests Initiative). Multilateral agencies, Norwegian NGOs and Norwegian public sector institutions are all established channels for Norwegian aid, and there is a long-term, often political, commitment to fund them. Every portfolio is managing agreements like this, and in most cases, they make up most of their budget. Norad's guidance does acknowledge that knowledge-informed decision making takes on a different form in these contexts. This guidance has not yet become embedded in organisational thinking or practice, however, largely because using knowledge to select partners and interventions has been a focus of communicating the new approach.

More work is needed to implement the guidance which states that knowledge should be used to *influence* and steer partners in line with portfolio objectives, to *ensure balance* in the portfolio at global assistance, and *to provide* technical assistance to the Ministry of Foreign Affairs. This is a much longer-term endeavour than simply using knowledge to inform a funding decision. In the case of multilaterals, there are opportunities to influence through Norway's position on boards and committees, and with Norwegian NGOs, through strategic dialogue. Although there is still room for the current understanding of knowledge-informed decision making through calls for proposals, these other modes of engagement still require a knowledge-informed approach. Ultimately, portfolio management will help Norad navigate these complexities, as clear theories of change, underpinned by robust knowledge, will support teams to provide more consistent, evidence-based advice and guidance to the Ministry of Foreign Affairs to shape and steer these engagements.

Conclusion 4:

Leadership support to knowledge-based portfolio management has been crucial to getting it to this point. Portfolio teams now need space to own and drive the knowledge agenda in order for the new practices to become embedded across the organisation. Senior leadership has been crucial in progressing portfolio management to this point. They have set the vision and created the drive for the reforms to happen. However because of their strong support, the reforms are seen by some as a top-down management agenda. This has created unintended consequences in some teams: they have developed key documents, such as theories of change and portfolio analyses, focused on what they perceive management will want to see rather than on what is most useful to them. Senior leadership has recognised this already to some extent and has provided teams with greater flexibility in managing their portfolios. This has helped teams take more ownership of core

management processes. This more flexible approach should continue. Recognising the complexity of the agenda and the implications for how knowledge-informed decision making is practiced in reality will also be important (see conclusion 2).

Conclusion 5:

Although some additional staffing resources have been mobilised to support the knowledge-based portfolio management agenda, they are insufficient to achieve its objectives. Portfolio coordinators are stretched thinly, and wider teams are struggling to engage effectively in core portfolio management tasks. This is resulting in tasks not being undertaken well enough, or not being undertaken at all. Knowledge-based portfolio management takes time to do well. Across all portfolios, staffing resource constraints were a factor in explaining why elements of portfolio management had not been completed – or had not been completed to a sufficient level that they were valuable to the team. The early stages of any new system or process come with a resourcing peak, with teams expected to undertake tasks for the first time. Even taking this into account, staff are spread very thinly. The new portfolio coordinator role is invaluable in enabling knowledge use, but coordinators are only part-time, and many are struggling with the scope of the role. Wider portfolio teams are also struggling to engage meaningfully. Although in some cases this may be an issue of prioritisation, in most it is not. The fact that knowledge plans lack a clear plan for how data will be collected, and by whom, is illustrative of how teams are struggling to complete core portfolio management tasks. The Knowledge Department is providing important and valuable additional support to portfolios, but they too are spread very thinly. Consultancy has been a safety valve for many portfolio teams. It has been used not only to access specialist skills and knowledge but also to undertake knowledge-related tasks that portfolio coordinators do not have the time to do. However, pressure is being placed on this arrangement because of the relatively small allocation provided to Norad to cover the administrative costs of managing aid and because of the general push to lower consultancy expenditure across government.[165] As we have already argued in conclusion 2, as they begin to develop and implement portfolio M&E plans, demands on staff time will likely increase. The further transfer of grant management responsibility to Norad during the August 2024 restructure is likely to further increase this pressure on staff.

Conclusion 6:

Portfolios that include agreements managed by other Sections face a significantly more complex task in using knowledge. Norad needs to either address these structural complexities or think about a less ambitious, more tailored form of knowledge-based portfolio management for these portfolios. Of 13 portfolios, seven do not control a significant proportion of agreements within their remit. This makes knowledge-based portfolio management significantly more complex and challenging. In these cases, the portfolio coordinator needs to work across multiple Sections and Departments, trying to influence others to ensure that decisions reflect the portfolio goals. Effective management becomes very challenging with such limited control of resources. In these instances, perhaps the approach to portfolio management needs to be adapted.

165 NO21, NO22, NO23, NO24, NO38.

5.3 Development results

EQ3: To what extent and how is the use of knowledge in current portfolio management likely to result in improved results of Norwegian development assistance?

Conclusion 7:

Currently, portfolios have variable potential to achieve improved development results through knowledge-based portfolio management because they do not all currently have the right enabling conditions in place. Ultimately, it will take time for knowledge-based portfolio management to become Norad's de facto management model. Given how early it is in the roll-out, and the fact that enabling factors are present to varying degrees across Norad and individual teams, it is no surprise that knowledge use varies from portfolio to portfolio. This means that the likelihood that portfolio management will lead to improved development results is also highly variable at this stage. However, the reason that this evaluation was commissioned was to identify, early in the reform process, areas for course correction. If Norad can identify which enabling conditions it can improve and then focus its attention there, this will increase the chances that the vision for knowledge-based portfolio management will be achieved and that this new way of working will in fact contribute to improved development results.

6

Recommendations

In the light of our conclusions, we present four main recommendations which we consider necessary for Norad to make further progress in its roll-out of knowledge-based portfolio management and to put it in the best possible position for this new way of working to contribute to improved development results.

Resourcing

Recommendation 1: Norad should initially focus its available staff and consultancy resources on fewer priority portfolios, which receive more targeted support in the short term. A range of factors could determine which portfolios are considered a priority, including political priorities, portfolios' comparative advantage, budget allocation, or the structural underpinnings of a portfolio. There are three possible ways in which Norad could then increase support to priority portfolios.

- **Increase time allocation for portfolio coordinators.** Portfolio coordinators do not currently have enough capacity to ensure that knowledge management tasks are completed consistently. Dedicating more of their time to their coordination role would help solve this. This could take the form of making the role full-time, rather than a 50% role, in priority portfolios.
- **Allocate consultancy budget to address portfolio knowledge needs.** Currently, the available consultancy budget in Norad is allocated in small amounts across all portfolios. This should be consolidated and used more strategically, with priority portfolios being allocated more resources to aid effective knowledge-based portfolio management. By doing this, Norad could consider establishing portfolio knowledge partnerships with external agencies for priority portfolios to provide ongoing support to knowledge generation, learning and portfolio M&E.
- **Provide more Knowledge Department support.** To the extent that they have been able to engage with portfolios, their support has been valued by teams. Spreading their capacity across 13 portfolios, however, means that they have not been able to give each portfolio the attention it needs. Focusing their support on priority portfolios would increase the value of their offering.

The advantage of this more prioritised approach is also that focused support can, over time, develop a few portfolios into best practice examples for other portfolios to learn from, and for Norad to learn what can be achieved through knowledge-based portfolio management. This would in turn facilitate the task of supporting portfolios that were not initially selected as priorities.

Portfolio M&E

Recommendation 2: Norad should improve its capacity to implement portfolio-level M&E. Portfolios do not currently have a clear way to understand how their work as a portfolio is progressing overall. As portfolios progress, this will become increasingly problematic and will pose a significant barrier to knowledge-based portfolio management. There are three elements to achieving this, and we would suggest that these efforts are concentrated in the prioritised portfolios.

- **Build team skills in portfolio M&E.** Because the portfolio approach is new, teams do not yet have the skills to develop the right approach to assessing the progress of their portfolio. Addressing this skills gap is the first step.
- **Include a portfolio M&E approach in knowledge plans.** Knowledge plans do not yet include plans for portfolio M&E that can be put into practice. Once staff have developed their understanding of how to assess progress at portfolio level, concrete plans for implementing this M&E should be included in the larger knowledge plan. Plans should include an appreciation for a diversity of evaluation designs, should focus on matching the right design to the context and questions that need answering, and should ensure that whatever is selected is high-quality and robust.

- **Resource portfolio M&E adequately.** The M&E approach outlined in the knowledge plan needs to be underpinned by a realistic resource envelope. Gathering knowledge, analysing it and making use of it takes time to do well. There are different ways of achieving this. One option is to use consultancy support more strategically, as discussed in recommendation 1. This could be used to bring on board knowledge partners to accompany the portfolio. Another option is to aggregate the budget currently allocated to agreement-level evaluations to portfolio level and use this to fund more strategic portfolio-level evaluations. These two options are not mutually exclusive.

This is an essential step in embedding knowledge-based portfolio management within the organisation so that decision making about portfolios is rooted in robust evidence of its achievements and challenges.

Portfolio management structures

Recommendation 3: Norad should identify, and address siloes affecting portfolios that work across departments and sections. Portfolios that work across multiple departments and sections face additional barriers in managing agreements linked to their portfolios because of how lines of responsibility and decision making are structured. One specific action would help Norad to mitigate this issue.

- **Provide portfolio coordinators with a clear mandate.** Currently, portfolio coordinators do not have an official mandate to influence decisions outside their own section. Making this a formalised part of the role would make it clear that they should be involved in decision making about agreements that fall within their portfolio.

This would help to achieve one of the key aims of knowledge-based portfolio management, enabling and supporting teams across the organisation to work effectively and strategically on one single thematic issue.

Norad's role in achieving portfolio outcomes

Recommendation 4: Norad should ensure that all portfolios identify the different channels through which Norad contributes to portfolio objectives. The reality of knowledge use is more complex than Norad's current practice allows for. Although influencing, advising and convening partners are fundamental to every portfolio's work, most do not yet clearly articulate the different ways in which they contribute to change. There are two steps Norad could take to address this.

- **Ensure that portfolio theories of change delineate different aspects of Norad's role.** Working as advocate, adviser or convener should be included as interventions in portfolio theories of change and considered as a core part of the overall logic of the portfolio's work.
- **Support teams to implement the existing guidance.** Although current Knowledge Department guidance does acknowledge this complexity, portfolio teams are not yet implementing knowledge-based portfolio management in this way. Further Knowledge Department support would help ensure that practice is more in line with the guidance.

This would allow for more strategic, portfolio-level thinking about this vital part of Norad's work, and clearer understanding of any outcomes it contributes to.

7

Annexes

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Annex 1:

Terms of Reference

Evaluation of Norad's approach to knowledge-based portfolio management

1. Background

"Norway regards the 2030 Agenda with its 17 Sustainable Development Goals (SDGs) as a transformative global roadmap for our national and international efforts aimed at eradicating extreme poverty while protecting planetary boundaries and promoting prosperity, peace and justice." Norway's official development assistance (ODA) shall promote the SDGs in the global South, in strategic collaboration with partners.

The Norwegian aid administration – including the Ministry of Foreign Affairs (MFA), the Ministry of Climate and the Environment and the Norwegian Agency for Development Cooperation (Norad) – mainly funds development aid projects, programmes and partners, and normally does not implement aid projects. In 2021 NOK 23.2 billion (about 58%) was channelled through multilateral partners, NOK 6 billion (about 15%) was channelled through Norwegian non-governmental organisations (NGOs) and NOK 5.5 billion was channelled through other Norwegian public sector entities. The knowledge needs of a funder may differ from those of an implementer. A funder could, in theory, also facilitate learning across partners.

Norad manages an increasing share of ODA – from about NOK 4.5 billion in 2015 to about NOK 18 billion in 2020. In 2023, Norad is responsible for about half of the ODA budget and most of the long-term development cooperation.

Provisions for Norad's management of Norwegian ODA are laid out in the general financial management regulations that apply to all public management of funds, the state budget, appropriation letters from relevant ministries and general directives to the agency. Results-based management of ODA is a requirement and involves setting clear objectives and collecting and using information for management for results, accountability and learning purposes.

Previous evaluations initiated by Norad's independent Department for Evaluation have found weaknesses in the Norwegian aid administration's approach to results-based management, which focused more on reporting and accountability than on management[166] and the organisation's ability to use knowledge and other types of results-based information for management purposes.[167]

2. Recent initiatives for improved knowledge-based portfolio management

Several steps have been taken by MFA and Norad to improve the approach to knowledge-based portfolio management.

The state budget for 2023 includes a reference to the quality of management and the use of knowledge, and states that the management should be of high quality and should be knowledge-based.[168] In addition,

166 Department for Evaluation (2018).
167 Department for Evaluation (2020b).
168 Prop 1 s. 2023: 74.

MFA and Norad have an ongoing collaboration to strengthen and develop better systems and methods for measuring and analysing results.

In 2021, Norad published a new strategy towards 2030 and was reorganised to better fit its grant management role. The new strategy stressed that facts should inform policy and stressed the importance of using knowledge and other insights to ensure effective and efficient management of funds.

As part of the reorganisation of Norad, a new Department for Knowledge was created. The department is responsible for systematic knowledge management, aid statistics and analysis.

Norad has also undertaken considerable efforts to improve results-based management at the portfolio level and has issued guidelines and principles for improved portfolio management. It is expected that all portfolios will develop accompanying theories of change (ToCs) and knowledge plans, which shall be used both for portfolio management and for strategic dialogue with partners.

3. Purpose and users

The purpose of this evaluation is to provide evaluative evidence about the extent to which the approach to use of knowledge is likely to improve the quality of Norad's portfolio management and, ultimately, contribute to better development results.

The evaluation should be a tool for practical lessons and learning and should acknowledge that the efforts to improve the use of knowledge for portfolio management are ongoing and that all results may not yet have materialised. To encourage learning, the evaluation shall strive to identify positive changes as well as areas that can be improved.

The users of this evaluation are, first, Norad's top management team, who can use the evaluation to learn more about how successful the implementation of the strategy is likely to be at the portfolio level and who can take corrective action if required. Second, MFA and the Ministry of Climate and the Environment can use information from the evaluation in their dialogue with Norad. The findings may also be of interest to the public.

4. Evaluation object, scope and definitions

Evaluation object

The evaluation object is Norad's approach to knowledge-based portfolio management.

This approach is expected to be influenced by Norad's new strategy and the steps that have been taken to improve portfolio management. The evaluation will consider guidelines and key documents as well as how the use of knowledge takes place in practice.

In-depth analysis of two portfolios

As of April 2023, Norad has eight development aid portfolios, and it will establish additional new portfolios in 2023. The evaluation of current practices will focus on two portfolios: the Food Security Portfolio and the Governance and Public Finance Portfolio.

The choice of the Food Security Portfolio is based first and foremost on the emphasis on food security in various strategies for Norwegian development cooperation and the fact that it will be an area where substantial needs will exist and it will likely have a high priority for Norway in the years to come. The current government platform has food security as one of its top priorities. The priority of food security support is also reflected in Norway's National Budget for 2023, and Norway has recently launched a new strategy for food security in its development cooperation.

The Governance and Public Finance Portfolio was selected in dialogue with Norad's management to maximise the learning potential from the exercise. The portfolio also includes Tax for Development, which was subject to an evaluation of portfolio management in 2020.[169] This allows for capturing learning and positive changes from a previous evaluation.

169 Department for Evaluation (2020).

A broader assessment of the current system

Although the guidelines and requirements are the same for all portfolios, the use of knowledge may nevertheless vary, due to differences in what the portfolios aim to achieve, the state of knowledge in the sector, and other characteristics specific to portfolios. Although an in-depth investigation of practice will occur only for the two portfolios, the evaluation shall also investigate more broadly, to assess whether findings are valid for the organisation's approach to knowledge-based portfolio management in general.

Concepts used in this evaluation

In this evaluation, **knowledge** is understood broadly and includes knowledge from research, evaluation and other sources, including practical experience and other insights. Because this is a broad definition, it is possible that 'knowledge' and 'use of knowledge' are understood differently throughout the organisation. The evaluation team will need to be mindful of differences in understanding and use of the concept when collecting data.

The definitions below are from the evaluation of the Norwegian aid administration's approach to portfolio management[170] and the accompanying evaluation brief.

In this evaluation **portfolio management** is understood as "The management practices and procedures used to design, plan, organise and coordinate a collection of interventions, grants, and initiatives towards the effective and efficient delivery of specific development assistance objectives. It involves setting overall portfolio objectives and strategy, aligning resources towards these, and then using evidence to oversee and coordinate grants and initiatives, monitor overall progress, learn, and adapt, and report."[171] This understanding of portfolio management is based on the Norwegian Agency for Public and Financial Management's (DFØ's) guidance material on results-based management and adapted to the portfolio level.

In this evaluation a **portfolio ToC** is understood as an evolving explanation for how and why a portfolio contributes to a desired change.[172] The portfolio ToC details the causal chain between funding decisions (what and whom to fund) and the expected achievement of the portfolio objectives, including the underlying assumptions. The portfolio ToC typically attempts to answer questions such as: what is the problem and its underlying causes? How can we best contribute? What is our comparative advantage? What does the evidence base suggest are promising approaches? What will be our geographical focus? What are our long-term goals, specific short-term outcomes and assumptions?[173]

Knowledge plans detail what type of knowledge to collect and when, and what decisions the evidence will inform.

In this evaluation, **learning** related to portfolio management refers to learning within Norad and in Norad's grant management. If Norad facilitates learning in partners, this is also of interest. Furthermore, the evaluation can consider different types of learning, such as single-loop and double-loop learning. With regard to portfolio management, single-loop learning refers to planning for and managing results within the existing programme, ToCs and knowledge plans, and double-loop learning refers to learning required to change the portfolios themselves, including programme theories and knowledge plans.[174]

5. Objectives

Describe the current guidelines, set-up and practice for the approach to knowledge-based management in Norad.

Identify strengths and weaknesses in the existing set-up for and practice of knowledge-based portfolio management, and identify how this can be further improved.

170 Department for Evaluation (2020b).

171 Department for Evaluation (2020b): 8.
172 Department for Evaluation (2020b): 9.
173 See Department for Evaluation (2020a).

174 See Argyris (1991) for an introduction to the term.

6. Evaluation questions (EQs)

1. To what extent and how are Norad's portfolio set-up and practices conducive to learning and management for results?
2. To what extent and how is the use of knowledge in current portfolio management likely to result in improved results of Norwegian development assistance?

7. Approach

Investigation of practice and set-up

To investigate the use of knowledge in portfolio management (practice), the evaluation will use the management wheel as a conceptual tool to organise data collection. The management wheel at the portfolio level is from the evaluation of portfolio management published in 2020 and is based on DFØ guidance material. The evaluation shall also consider the guidelines and principles for portfolio management developed by Norad, as well as the legal requirements.[175]

The consultants are encouraged to consider whether improvements in practices can be identified through a comparison with previous practices documented in relevant evaluations.[176]

The evaluation team shall identify both the organisational set-up, including requirements and guidance documents, and the underlying assumptions for this system to work.

Examples of underlying assumptions include, but are not limited to, the following: (a) Norad employees have the capacity and competence to identify and use knowledge in grant management; (b) there is a common understanding of what should be done and how; (c) portfolio governance structures allow for results-based management; (d) decisions about what and whom to fund can be informed by knowledge; (e) knowledge is relevant and in a form that can be used for portfolio management; (f) the organisational culture and incentives are conducive to learning. Literature on results-based management, organisational learning and previous evaluations can inform the type of underlying assumptions that are investigated.

Although data collection to learn more about the organisational set-up is expected to occur at the level of the organisation, an assessment of practice will be case-based, and data collection will go in-depth for the two selected portfolios. However, additional data collection is expected to be undertaken to validate the extent to which the main findings are also representative of portfolio management in general.

The evaluation may include the following data collection methods:

- Desk review of steering documents, guidance material, programme documents (including ToCs and knowledge plans) and grant management documents.
- Desk review of relevant academic literature on portfolio management and organisational learning.
- In-depth interviews with key staff and stakeholders. All interviews should be recorded (subject to the informed consent of interviewees) and either transcribed or summarised and, upon request, handed over to the Department for Evaluation.
- The evaluation team will identify and describe the portfolios' ToCs. This should be included in the inception report.

8. Risks and limitations

The selected portfolios are new, and there may be limited written information on different aspects of the portfolios. This will need to be compensated for through interviews.

Earlier evaluations have found weaknesses related to the knowledge management system, and this could

175 Source: Department for Evaluation (2020a).

176 See for example Department for Evaluation (2014, 2018, 2020b).

create challenges for data collection.

The aid administration has undergone a reform, a reorganisation and several efforts to improve the quality of grant management. Staff may have limited capacity to engage with the evaluation. Although interviews are necessary, the evaluation team shall strive to minimise burdens on staff and to undertake data collection as efficiently as possible.

9. Ethics

The evaluation process itself should be conducted ethically. The evaluation shall be carried out according to OECD-DAC's evaluation quality standards and criteria and other recognised academic and ethical principles for chosen methods.

The evaluation shall consider ethical risks and suggest safeguards, if risks are identified, throughout the evaluation. Ethical risk assessments and safeguards shall be documented in the inception and evaluation reports.

The Department for Evaluation and the team shall emphasise transparent and open communication with the stakeholders. The team should consult widely with stakeholders pertinent to the assignment.

10. Organisation of the evaluation

The evaluation will be managed by the Department for Evaluation, Norad. The Department for Evaluation is governed under a separate mandate for evaluating the Norwegian aid administration and reports directly to the secretary generals of MFA and the Ministry of Climate and Development.

The evaluation team will report to the Department for Evaluation through the team leader. The team leader shall oversee all deliveries and will report to the Department for Evaluation on the team's progress, including any problems that may jeopardise the assignment. Through regular contact with the Department for Evaluation, the team and stakeholders will assist in discussing any issues arising and will ensure a participatory process. All decisions concerning the interpretation of these Terms of Reference, and all deliverables, are subject to approval by the Department for Evaluation.

Stakeholders will be asked to comment on the draft inception report and the draft final report. In addition, experts or other relevant parties may be invited to comment on reports or specific issues during the process. The evaluation team shall take note of all comments received from stakeholders. Where there are significant divergences of views between the evaluation team and stakeholders, this shall be reflected in the final report. The quality assurance shall be provided by the institution delivering the consultancy services prior to submission of all deliverables. Access to archives and statistics will be facilitated by Norad and stakeholders. The team is responsible for all data collection, including archival search.

11. Phases and deliverables

The deliverables consist of the following outputs:

- Inception report describing the approach, consisting of a maximum of 15,000 words (excluding figures, graphs and annexes). The inception report needs to be approved by the Department for Evaluation before proceeding further.
- Workshops for data collection with the two portfolios.
- Draft evaluation report: After circulation to the stakeholders, the Department for Evaluation will provide feedback.
- Workshop(s) on draft findings and conclusions, facilitated by the Department for Evaluation.
- Final evaluation report, not exceeding 20,000 words (approx. 40 pages) excluding summary and annexes.
- Easy access summary of the report.
- Presentation of the report in a public seminar.

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Annex 2:

List of interviewees

Name	Position	Department/Section/Organisation
Alex Cobham	Chief Executive	NGO
Åsta Ingvild Langhus	Senior Adviser	Department for Climate, Nature and the Private Sector, Section for Food, Norad
Astrid Thesen Tveteraas	Leader	Department for Climate, Nature and the Private Sector, Section for Food, Norad
Barbro Elise Hexeberg	Leader	Department for Partnerships and Shared Prosperity, Section for Multilateral Partnerships, Norad
Bård Vegar Solhjell	Director General	Norad
Camilla Holst Salvesen	Senior Adviser	Department for Human Development, Section for Gender Equality, Norad
Carola Casti	Senior Adviser	Department for Knowledge, Section for Statistics and Analysis, Norad
Claire Melamed	Chief Executive Officer	INGO
Daniel Frans van Gilst	Senior Adviser	Department for Climate, Nature and the Private Sector, Section for Food, Norad
Darya Bernett Rekdal	Senior Adviser	Department for Climate, Nature and the Private Sector, Section for Food, Norad
Elin Ruud	Senior Adviser	Department for Human Development, Section for Education and Research, Norad
Emilie Oftedal	Senior Adviser	Department for Knowledge, Section for Statistics and Analysis, Norad
Endre Ottosen	Senior Adviser	Department for Climate, Nature and the Private Sector, Section for Energy, Norad
Erik Aakre	Assistant Director	Department for the Nansen Support Programme for Ukraine, Norad
Finn Arne Moskvil	Policy Director	Department for Operation Management, Section for Grant Management Systems, Norad
Fredrik Berglien Werring	Senior Adviser	Department for Partnerships and Shared Prosperity, Section for Governance, Norad
Gerd Hanne Fosen	Policy Director	Department for Human Development, Section for Education and Research, Norad

Name	Position	Department/Section/Organisation
Grete Benjaminsen	Senior Adviser	Department for Human Development, Section for Education and Research, Norad
Gunvor Wittersø Skancke	Leader	Department for Partnerships and Shared Prosperity, Norad
Håkon Mundal	Senior Adviser	Department for Partnerships and Shared Prosperity, Section for Governance, Norad
Harald Walter Mathiesen	Senior Adviser	Department for Partnerships and Shared Prosperity, Section for Governance, Norad
Håvard Mokleiv Nygård	Leader	Department for Knowledge and Innovation, Norad
Hege Fisknes	Subject Director	Department for Sustainable Development, Section for Partnerships and Development Policy Analysis, Ministry of Foreign Affairs
Helle Biseth	Senior Adviser	Department for Climate, Nature and the Private Sector, Section for Food, Norad
Hilde Dahl	Leader	Department for Climate and the Environment, Section for Forests, Norad
Inger Brodal	Senior Adviser	Department for Climate, Nature and the Private Sector, Section for Food, Norad
Ingrid Buli	Senior Adviser	Department for Human Development, Section for Education and Research, Norad
Ingunn Merete Tysse Nakkim	Senior Adviser	Department for Human Development, Section for Global Health, Norad
Ingvar Theodor Evjen Olsen	Policy Director	Department for Human Development, Section for Global Health, Norad
Janne Utkilen	Head	Division for International Development Cooperation, Statistics Norway
Johanne Nordby Fremstad	Senior Adviser	Department for Climate, Nature and the Private Sector, Section for Oceans, Norad
Jorun Sigrid Nossum	Leader	Department for the Nansen Support Programme for Ukraine, Norad
Kjetil Østnor	Section Head	Department for Partnerships and Shared Prosperity, Section for Civil Society, Norad
Kyrre Berland	Adviser	Department for Climate, Nature and the Private Sector, Section for Forests, Norad
Lars Andreas Lunde	Policy Director	Department for Climate, Nature and the Private Sector, Section for Nature and Climate, Norad
Lauren Céline Naville Gisnås	Senior Adviser	Department for Climate, Nature and the Private Sector, Section for Nature and Climate, Norad
Lene Jeanette Lothe	Project Manager	Department of the Director General, Director General's Staff
Lillian Prestegard	Senior Adviser	Department for Partnerships and Shared Prosperity, Section for Governance, Norad
Lisa Knutsen Sivertsen	Leader	Department for Human Development, Norad

Name	Position	Department/Section/Organisation
Lise Stensrud	Policy Director	Department for Partnerships and Shared Prosperity, Section for Governance, Norad
Liv Moberg	Senior Adviser	Norwegian Agency for Public and Financial Management
Marianne Haugh	Senior Adviser	Department for Partnerships and Shared Prosperity, Section for Civil Society, Norad
Monica Kirya	Principal Programme Adviser	Research Institute
Nina Strøm	Senior Adviser	Department for Human Development, Section for Gender Equality, Norad
Odd Arnesen	Minister Counsellor	Embassy, Ministry of Foreign Affairs
Øyvind Dahl	Senior Adviser	Norwegian Ministry of Climate and Environment
Øyvind Eggen	Policy Director	The Knowledge Bank, Norad
Øyvind Sunde	Senior Adviser	Norwegian Agency for Public and Financial Management
Paul Richard Fife	Policy Director	Department for Human Development, Section for Global Health, Norad
Per Andreas Windingstad Larsen	Leader	Department for Climate, Nature and the Private Sector, Section for Oceans, Norad
Per Fredrik Ilsaas Pharo	Director	Department for Climate, Nature and the Private Sector, Norad
Ragnhild Eitungjerde Høyvik	Senior Adviser	Department for Climate, Nature and the Private Sector, Section for Nature and Climate, Norad
Silje Hanstad	Senior Adviser	Department for Climate, Nature and the Private Sector, Section for Food, Norad
Solbjørg Sjøveian	Leader	Department for Human Development, Section for Education and Research, Norad
Srinivas Gurazada	Secretariat Head	Multilateral organisation
Toril Iren Pedersen	Leader	Department for Partnerships and Shared Prosperity, Section for Governance, Norad
Trond Kvarsvik	Senior Adviser	Department for Partnerships and Shared Prosperity, Section for Multilateral Partnerships, Norad

Annex 3:

List of documents and literature reviewed

Documents

Norad (2023) Norad documents on strategic partnerships

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Norad (2021) Konsept: Porteføljestyring, Prosjekt Forbedring

Norad (2021) Konsept: Resultatstyring, Prosjekt Forbedring

Norad (2023) Landbruk for Utvikling – Programdokument – utkast

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MFA (2022) Combining forces against hunger – a policy to improve food self-sufficiency Norway's strategy for promoting food security in development policy

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Annex 4a:

Theory of change assessment form

Enablers	Assessment and Score		
1. Testable: Steps are described in a way that can be verified. The causal links/pathway between the stated events are clear and testable.			
	Score:		
2. Complete: The chain of events connects the intervention to the ultimate impact and include Norad's role/interventions.			
	Score:		
3. Explained: Assumptions are explicit in, and relevant to, the theory.			
	Score:		
4. Justified: Theory is based on existing knowledge, and this knowledge supports the chain of events.			
	Score:		
5. Realistic: The chain of events connecting the intervention to the ultimate impact is logical and realistic.			
	Score:		

Enablers	Assessment and Score		
6. Owned: Those who are implementing the theory have been involved in its development.			
	Score:		
7. Operationalizable: The theory has been operationalised through implementation.			
	Score:		

1	2	3	4	5
Not evident	Slightly evident	Moderately evident	Highly evident	Fully evident

Annex 4b:

Knowledge plan assessment form

Enablers	Assessment and Score		
1. Aligned: The plan should be closely aligned with the overall strategic objectives of the portfolio and broader organisational goals.			
	Score:		
2. Comprehensive: The plan should cover all major aspects of the portfolio, including but not limited to monitoring progress, context and results, identifying and closing knowledge gaps, and future directions of the portfolio.			
	Score:		
3. Prioritised: The plan should clearly set out and prioritise the portfolio's knowledge needs.			
	Score:		
4. Blended: Both qualitative insights (e.g. from case studies, interviews, narratives, experience) and quantitative data (e.g. SDGs, standard indicators) are included for a more rounded understanding.			
	Score:		
5. Collaborative: The plan involves contributions from different, relevant stakeholders, including (where appropriate) beneficiary groups, partners and donors, to ensure relevance and applicability.			
	Score:		

Enablers	Assessment and Score		
6. Complete: Each learning question in the plan should specify how the question will be answered, who is responsible, the timeline, and what learning outcome the question will contribute to.			
	Score:		
7. Realistic: The timelines for answering learning questions should be realistic, and learning outcomes to which the questions contribute should be feasible.			
	Score:		
8. Adaptive: The plan includes a clear mechanism for regular reviews and updates to ensure the plan remains responsive to changing conditions and needs.			
	Score:		
9. Resourced: Resources required for implementing the plan, including financial and human resources, are clearly documented and are sufficient for implementing the plan effectively.			
	Score:		

1	2	3	4	5
Not evident	Slightly evident	Moderately evident	Highly evident	Fully evident

Department for Evaluation

norad.no/evaluation