



# JOINT EDUCATION SECTOR MONITORING IN THE CONTEXT OF COVID-19

NOVEMBER 2021



This guidance is part of the efforts of the Global Partnership for Education (GPE) to support governments and their partners in monitoring education delivery throughout COVID-19 and into the recovery phase.

**The guidance responds to a demand from GPE partner countries for practical recommendations on how to continue organizing joint sector reviews in ways that are feasible and responsive to their needs in the current context.**

It complements the *Practical Guide for Organizing Joint Sector Reviews in the Education Sector* and can be used by all education stakeholders (including ministries of education, development partners, civil society and nongovernmental organizations and representatives of the education workforce), irrespective of the country's experience with joint monitoring exercises.

It may also interest stakeholder groups across sectors (health, nutrition, child and refugee protection) wishing to engage in a collaborative process of education sector monitoring.

# HOW TO NAVIGATE THIS DOCUMENT

Four types of contents are accessible through tabs in the top navigation bar. They offer different levels of support, from high level to technical, through a progression across the tabs. Each tab can also be used as a stand-alone segment. **The emphasis is always on what could be adjusted or done differently** in times of COVID-19, while keeping in mind good review practices and what remains the same.



## KEY DIFFERENCES

A brief look at **SHIFTS** in joint reviews in the COVID-19 period and beyond can be useful for those wishing to quickly grasp how monitoring might be adjusted to stay relevant and agile



## VALUE DURING COVID-19

An **OVERVIEW** of challenges and opportunities can assist local education groups and steering committees in exploring how joint sector reviews can generate value in times of COVID-19



## STEP BY STEP

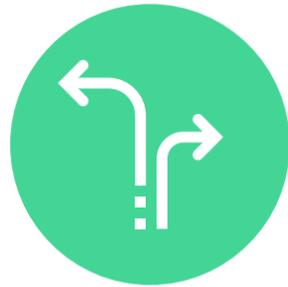
The **BRIEF GUIDANCE** supports all actors in thinking through the different steps of the joint review process and any adjustments needed in context of COVID-19



## PRACTICAL SUPPORT

The steps are complemented by quick **TIPS** and **DEEP DIVES** supporting organizational and technical teams. Country **EXAMPLES** from 2021 will be added in the next iteration to demonstrate monitoring practices in the context of COVID-19.





# KEY DIFFERENCES

The COVID-19 pandemic has impacted heavily on national education systems. Millions of children have missed out on face-to-face teaching for long periods of time, with the most vulnerable children hit the hardest. This education emergency has been equally disruptive on the governance and management of education at a time when countries are already struggling to provide education to all children.

**As education priorities shift, countries are revisiting the purposes and scope of their education monitoring and joint sector reviews to better align with decision making and planning needs. The modalities for organizing joint reviews are also being revisited with a view to greater agility in challenging contexts.**



## PRE-COVID-19

## COVID-19 AND BEYOND

<p><b>Predictability and relative stability</b> in education systems and the overall socio-economic context</p>	<p><b>Context</b></p>	<p><b>Greater uncertainty</b> due to public health situation, revised education priorities, contextual risks and conditions</p>
<p>Ministry of education working closely with a cross-section of <b>education stakeholders and partners</b></p>	<p><b>Partners</b></p>	<p><b>Dialogue and collaboration extended</b> to other sectors and partners through education taskforces, Education Cluster, Humanitarian Cluster, as well as edtech partners</p>
<p>Joint review normally linked to planning cycles within <b>multi-year</b> strategies, supporting course correction across medium- and long term horizons</p>	<p><b>Planning horizon</b></p>	<p>Joint review prioritizes data and information with <b>immediate</b> relevance for reprogramming and resource allocations and strengthening resilience</p>
<p>Review strives for <b>comprehensive</b> status update of annual/multi-year operational plans, accompanied by deeper thematic dives</p>	<p><b>Scope</b></p>	<p>Focus is agile and <b>prioritized</b>, including status update of sector plans (or sub-sets) alongside progress in COVID-19 response plans and/or education reform measures</p>
<p>Progress ideally measured against <b>all</b> sector plan indicators and targets in current operational plan results frameworks</p>	<p><b>Results frameworks</b></p>	<p>Progress measured against <b>selected</b> sector/COVID-19 indicators due to interruptions and newer activities in COVID-19 response plans</p>
<p>Change analyzed against <b>existing sector baselines</b></p>	<p><b>Baselines</b></p>	<p><b>Plan baselines and targets are revisited</b>, with consideration of contextual developments, achievability and newer baselines established since the onset of the pandemic</p>
<p>Data collection gathers quantitative and qualitative information through <b>regular channels</b> to cover reporting items</p>	<p><b>Data collection</b></p>	<p>Data collection leverages <b>innovative approaches</b> and tools and seeks to mitigate against risks and/or disruption</p>
<p>Annual implementation report reflects <b>detailed</b> reporting for periodic status updates of sector results and performance</p>	<p><b>Inputs &amp; outputs</b></p>	<p>Attention to <b>succinct</b> reporting contents and formats with immediate utility for decision making, enabling quick turnaround of review findings</p>
<p>Modalities, timing and agenda of the review meeting assume <b>in-person</b> participation</p>	<p><b>Meeting modalities</b></p>	<p>Review meetings organized with <b>flexible in-person, virtual or hybrid</b> options for stakeholder engagement</p>



# THE VALUE OF JOINT SECTOR REVIEWS DURING COVID-19

**Joint monitoring and joint sector reviews create value through a multi-stakeholder process for gathering information and building knowledge that supports decision making, and advocacy for investments in education, based on evidence.**

Joint review processes can play an important role in taking stock of changes and tracking progress since the pandemic began, helping decision makers and practitioners to assess evolving needs and revise programming priorities.

The five dimensions of the original joint sector review effectiveness framework offer an analytical lens for local education groups, steering committees and technical teams to discuss monitoring challenges in the current context, and to identify quick wins and longer-term opportunities for systems strengthening through the undertaking of a joint sector review.



# CHALLENGES DURING COVID-19



## WHERE JOINT REVIEW PROCESSES CAN ADD VALUE

### 1. Inclusive and participatory

Little coordination across public, civil society and private sector actors involved in remote education delivery



Opportunity to understand **who is active** and contributing to COVID-19 response plans (prioritizing what, where, and when) and how partners are tackling teaching and learning challenges.

Opportunity to collaborate and exchange information with **implementation partners** leveraging educational technologies (edtech) and e-learning, and with humanitarian partners and representatives from other sectors (health, WASH, nutrition, child protection).

Disconnect between centralized decision making and planning processes, and locally implemented COVID-19 responses



Opportunity to capitalize on **stronger linkages forged during the pandemic** between central and local levels to support decision making through:

- Cooperation in data collection and evidence uptake with local implementation partners, civil society organizations and nongovernmental organizations; and
- Closer consultation with beneficiaries to understand the impacts of the pandemic on learner groups, particularly girls and women, and learning solutions that have worked in different contexts.



## 2. Aligned with policy frameworks

Risk of fragmenting planning and monitoring efforts due to multiple education and humanitarian plans in operation



**More agile and harmonized sector implementation and monitoring** through a reassessment and adjustment of its purposes and scope.

Opportunity to **align sector plan and COVID-19 response plan implementation** and monitoring activities, prioritizing what is most vital to look at in the education sector plan results frameworks (e.g., in annual operational plans) and assessing the main successes and challenges of COVID-19 responses and mitigation strategies.

## 3. Based on evidence

Insufficient information available to support re-programming and resource allocations, and data serving longer-term monitoring



Sharper focus on **utility of information collected** with mobilization of stakeholders to enhance the quantity and quality of data available, by looking at:

- What types of actionable information are needed right now to understand policy and operational options and make appropriate decisions around emerging challenges and needs?
- What types of evidence are needed long term to put in place policies protecting learning outcomes and ensuring equitable access to remote schooling?

Lack of evidence on good practices that can be replicated or scaled up



**Opportunity to enrich the evidence base on good practices**, including perspectives on how innovations can be scaled up and/or harnessed by state and nonstate actors to improve education delivery.



## 4. Monitoring tools

Usual parameters for performance monitoring may have shifted due to changes caused by COVID-19



Opportunity for diverse stakeholders to support education monitoring through:

- **Implementation status updates** on sector plan/COVID-19 response plans: That is, whether activities and targets are on track/delayed/canceled in light of COVID-19 impacts on education systems and if targets are still relevant and achievable? Have recommendations from previous joint sector reviews been implemented and are they still relevant?
- **Stocktaking of the impacts of COVID-19 on education systems:** What have been the impacts on schooling coverage and learning losses? Has education financing been allocated as planned or transferred to other activities or sectors?

## 5. An instrument for change

Uncertainties and instability undermining planning, delivery modalities, monitoring approaches, and expected progress in the medium to long-term



Opportunity to use the findings of the review to:

- **Base policy and programming decisions** on identified sector priorities, lessons learned, and emergent challenges (including contingency planning);
- **Make recommendations for corrective measures** so that sector plans remain achievable: Will fundamental changes be needed? Should COVID-19 response plan activities be incorporated within the education sector plan and/or operational plan?
- **Advocate for increased investments** in the education sector, including for capacity development, to build resilience and recovery strategies;
- **Assist development partners and education actors** in reviewing and adjusting their programs based on commonly agreed priorities and gaps; and
- **Inform dialogue on use of evidence** for longer-term, more responsive decision making and management—including how to integrate crisis sensitivity into planning, reporting and budgeting.



# STEP BY STEP



GETTING  
STARTED



PREPARING FOR  
THE REVIEW



REVIEW MEETING,  
COMMUNICATIONS  
AND FOLLOW-UP



IMPLEMENTATION  
REPORT



LEARNING  
AND ADAPTATION





## 1

**GETTING STARTED >>** During the early stages of organizing the joint sector review, time should be taken to understand the evolving education landscape. Discussions can begin into the forum of the local education group where different perspectives can be shared and heard, and new sector developments, opportunities and expertise identified.

### 1.1 HARNESS SECTOR COORDINATION

As governments and their development and local implementation partners continue to adapt their education programs and resource allocations, participatory dialogue and coordination are more important than ever. Early consultations within the local education group (or equivalent) can help to:

- Generate discussion on the review's specific purposes and scope in the context of COVID-19 (see 2.2);
- Identify which government departments and bodies are actively tracking and monitoring sector plans, and COVID-19 education responses, as institutional roles may have changed;
- Discuss how to align review timelines, approaches and activities with national COVID-19 monitoring and evaluation processes to avoid generating new transaction costs, duplication and inefficiencies;
- Identify where expertise, financing and support for the review can be mobilized across the education community;
- Generate reflection on how to strengthen overall partner cooperation around education monitoring, information transparency and citizen-led accountability.

### 1.2 GENERATE A QUICK CONTEXTUAL UPDATE

Before decisions are taken on the review's purposes and modalities, contextual and situational elements should be identified that could have consequences for the planning and conduct of the review. A quick situational update would serve to:

- Identify specific education monitoring efforts already underway in the sector (initiated by government and/or different partners);
- Identify available evidence that can support the joint sector review and its reporting items;

Different types of situational or contextual overview may already be available from ministries of education or through multilateral partners (UNICEF, Education Cluster, UN OCHA). Their contents should support reflection around the review purposes and organizational modalities, as well as informing the contents of the implementation report and agreed reporting items.



- Anticipate any institutional and technical factors likely to impact on the efficiency of the joint monitoring exercise,
- Anticipate any health/environmental/security risks likely to pose challenges for the review.

A quick summary can be established by the technical team in liaison with the local education group, national COVID-19 education task force or Education Cluster (where activated).

### 1.3 CLARIFY ROLES AND RESPONSIBILITIES

Bearing in mind the existence of COVID-19 education task forces, crisis response and monitoring teams, the organization of the joint sector review might foresee:

- A steering committee or leadership group providing strategic direction to the review;
- A technical committee engaged in coordinating the review process, including the substantive and technical aspects of evidence gathering and production of review reporting items; and
- Where situations allow, task teams or working groups would also be responsible for preparing analysis focused on specific themes or issues related to COVID-19.

Team composition should:

- Be representative of different stakeholder groups;
- Leverage the knowledge, experience and technical capacities of national and sub-national level stakeholders involved in education delivery in the COVID-19 context;
- Include familiarity with monitoring tools in crisis contexts and/or countries existing COVID-19 monitoring and evaluation efforts; and
- Consider team members experience and technical capacities to undertake equity and gender-responsive data collection and analysis.



TIPS AND INSPIRATION 1  
Budgeting and mapping capacities



DEEP DIVE 1  
Quick contextual updates





## 2

**PREPARING FOR THE REVIEW >>** Changes in context and priorities may require a repositioning and adjustment of the review's purposes, scope and modalities. The steering committee and/or task team should explore options for safely and efficiently undertaking the review and generate agreement on changes needed to ensure utility and alignment with national monitoring needs and COVID-19 responses.

### 2.1 AGREE ON PURPOSES AND SCOPE

The preparatory stage should generate a common understanding of the purposes and scope of the joint sector review in the current context and what it will prioritize. The discussions should take into account that not all of the original purposes for joint sector monitoring – related to comprehensive status updates of annual operational plans – may still be achievable, particularly where:

- Sector plan activities have been paused or postponed;
- There are gaps in data and information supporting status updates on results framework indicators;
- There are gaps in evidence supporting analysis of successes, opportunities and bottlenecks; or
- Ministries have insufficient time and capacities to monitor and report on both sector and COVID-19 response plans.

Decisions on purpose / scope will depend on what decision makers hope to achieve from joint monitoring, the utility of gathering different types of data and evidence, and the extent of the disruption caused by the pandemic.

### 2.2 EXPLORE SCENARIOS FOR ORGANIZING THE REVIEW

Review modalities should be crafted to meet monitoring needs – both with regard to immediate COVID-19 response monitoring and longer-term sector objectives – based on available (and potential) resources.

In light of information gathered during the contextual update, and depending on country conditions and participants ability to travel, technical committees or task teams should:

- Explore which data collection approaches (balance between desk study and collection of new data) to employ;

Stakeholders may have different perspectives on where energies and resources should be directed; that is, whether to monitor sector operational plans, or COVID-19 responses and changes in plan implementation. There are no “either/or” propositions.



- Discuss which meeting sites and formats are the most feasible for generating broad stakeholder inclusion and engagement in the review (for example, would it be effective to evidence gathering to organize a series of preparatory meetings at regional level? Is a series of national, more specific stakeholder review meetings more appropriate to discuss the review findings, or a larger, more inclusive event? Will the meeting formats need to be virtual or hybrid, or can they be in-person?);
- Bring diverse stakeholders to the table to understand their concerns relating to different risks, for example, if there are limited capacities to gather data, if a resurgence of the virus where to suddenly disrupt in-person data collection, or if the review meeting needs to switch quickly to an online format; and
- Anticipate the types of safeguarding measures or contingency plans needed.

Such reflections will help to generate review approaches and responses that are multi-stakeholder and multi-sectoral and based on the likely evolution of the pandemic. Preparatory frameworks for planning activities in crisis contexts, such as evaluability assessments and scenario planning, can be useful for framing the dialogue.

### 2.3 ESTABLISH TERMS OF REFERENCE

The terms of reference should ensure clarity, transparency and accountability with regard to adjustments to the review’s purposes, scope and organizational modalities.

The document should give details on timelines and actions needed to support the different phases of the review process and identify responsibilities and funding sources. The ministry of education should share the terms of reference with all relevant education stakeholders, including stakeholder groups representing vulnerable learners adversely affected by interruptions to education delivery.

	TIPS AND INSPIRATION 2 Agreeing on modalities			DEEP DIVE 2 Options for scope and approach	
	TIPS AND INSPIRATION 3 Establishing terms of reference			DEEP DIVE 3 Monitoring utility	
				DEEP DIVE 4 Evaluability questions	



## 3

**IMPLEMENTATION REPORT >>** Participatory evidence and information gathering is central to the joint review process. Technical teams should consider the potential to draw on existing evidence from across the sector, as well as opportunities to leverage partner capacities for new data collection in the context COVID-19. The reporting, in turn, should focus on what matters most for decision making around education delivery during the pandemic and as countries advance through the recovery phase.

### 3.1 GATHER INFORMATION AND DATA

A good place to start in the data collection is by regrouping information already available through the local education group and through a quick contextual update (Step 1). The COVID-19 situation also offers a window of opportunity to diversify the portfolio of evidence that can be used for tracking progress in reaching targets and decision making during the COVID-19 period. Data sources might include:

- Education management information systems (EMIS) and data systems using data from the previous school year (as baseline and to estimate COVID-19 impacts and response progress);
- Existing formats for sector and COVID-19 reporting available through district/provincial education offices and local implementation partners;
- Rapid assessments undertaken by nongovernmental organizations, civil society organizations and edtech partners that are working closely with beneficiary groups and are aware of the impact of the pandemic on students and teachers; and
- Development partners in the public health, child protection and disease control sectors also collecting information on education impacts through rapid assessments and/or studies based on sample populations and sector diagnostics.

### 3.2 DRAFT THE IMPLEMENTATION REPORT

Depending on decisions taken on the joint sector review's purposes and scope, the main findings can be documented and reflected in: a comprehensive implementation report; a more targeted report focusing on a subset of sector issues, or; succinct summary reports or slide decks.



The process should always be preceded by a number of important steps, including:

- Discussion around existing formats for sector and COVID-19 reporting, and the possible need to align joint review reporting items, including for the implementation report (if retained), summary reports and policy briefs; and
- Discussion around the choice of contents (evidence, data, and trends) to be highlighted, including potential decision points and recommendations for high-level decision makers and partner actions.

As with joint sector reviews in ‘regular’ circumstances, it is key to share the draft report with intended audiences well in advance of review meetings to enable the formulation of feedback and engaged participation.

	TIPS AND INSPIRATION 4 Deciding on data collection approaches			DEEP DIVE 5 Data sources, challenges and mitigation	
	TIPS AND INSPIRATION 5 Reporting findings			DEEP DIVE 6 Baselines	

# 4

**JOINT REVIEW MEETING, COMMUNICATIONS AND FOLLOW-UP >>** The joint sector review meeting and aide-memoire are part of an ongoing cycle serving to strengthen processes and capacities for monitoring. In the context of COVID-19, agile and pragmatic approaches are needed to organize the joint sector review meeting, document and communicate around its recommendations, produce the aide-memoire and follow up on action points.

## 4.1 CONDUCT THE REVIEW MEETING(s)

Joint sector review meetings offer a unique opportunity for stakeholders to convene to discuss review findings, good practices and ongoing bottlenecks and reach consensus on key recommendations and action points. In the current climate, ensuring a robust, inclusive event with effective stakeholder



engagement (particularly from the local level) can be challenging. Keeping the meetings productive and “on point” also raises its own issues in virtual and hybrid meeting environments. Attention should be given to established and newer meeting principles (including meeting etiquette, session facilitation and backroom technical support in online meeting spaces).

#### 4.2 COMMUNICATE FINDINGS

The information and communications needs of different audiences (including education decision makers, partners, sector stakeholders and the Education Cluster where activated) should guide the creation of different formats for disseminating the review findings. To the extent possible, technical teams should:

- Favor succinct summaries and communicate stakeholder recommendations shortly after the review is completed.
- Formulate communications and dissemination strategies to raise awareness of key review outcomes and enhance confidence in the joint sector review process as a reliable source of new knowledge and gain adherence to recommendations.

#### 4.3 ENSURE FOLLOW-UP

Commitment to following up on review recommendations and action points is a key part of system strengthening and a reflection of successful joint sector reviews. The ways in which follow-up can be ensured include:

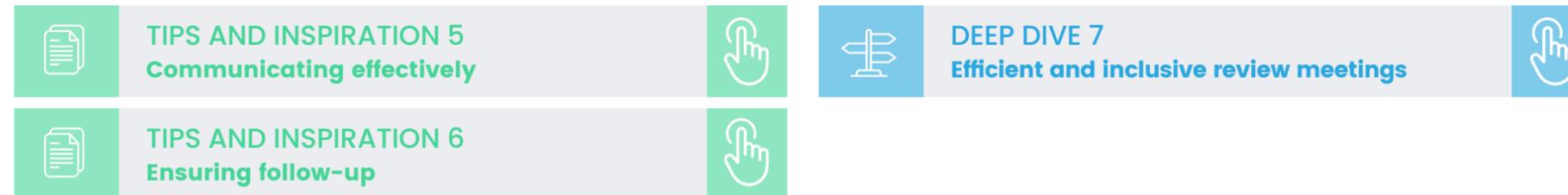
- Agreement (through the local education group) on a clear plan for addressing identified bottlenecks and evidence gaps;
- Take-up of recommendations as an agenda item within education strategy meetings focusing on how to make sense of (and mainstream) key recommendations within national systems; and
- Partners and stakeholders committing to the inclusion of recommendations and action points in their own work plans for the following year.

For greatest impact, the key will be to connect review findings and recommendations to processes already

Actors often want, but might not be guaranteed, succinct summaries of review findings and stakeholder recommendations. In crisis situations, information can have an immediate impact on programming and budgeting decisions. The rapid accessibility of key data and evidence in digestible formats is therefore extremely important.



happening in the country (i.e., through sector monitoring, reporting, planning and budgeting cycles and mechanisms).



## 5

**LEARNING AND ADAPTATION >>** There are no blueprints for joint sector reviews that can be applied across all contexts during COVID-19; purposes, processes and modalities will need to be approached according to a range of country-specific factors. The review can nonetheless be an opportunity to “pause and reflect”, enabling teams to identify emergent needs and lessons that can be taken on board in the next review (and in monitoring more generally).

### 5.1 GENERATE OPPORTUNITIES FOR LEARNING

As education landscapes continue to evolve, deliberate cycles of learning and capacity development will ideally be configured into the joint sector review process, enabling a continuous culture of learning and adaptation beyond the context of COVID-19. Any new insights on good practices and challenges during the joint sector review should be harnessed for joint reviews in the future, in particular with regard to:

- Adjusting the purposes, scope, and organizational mechanisms to remain relevant and functional in the face of COVID-19 or other disruptive events, including the organization of gender responsive joint sector reviews;
- Safeguarding stakeholder inclusion in the review process and addressing evidence gaps as a way of better understanding equity and gender-equality issues from different perspectives;



- Working across the central–local nexus, by sharing and triangulating data and qualitative information with decentralized education management levels and locally based implementation partners;
- Working with online and low-tech solutions for joint monitoring; for instance, using telecommunications, online platforms, radio, and paper-based methods for data gathering so that stakeholders stay connected and work together at different education management levels (including in places with limited internet access);
- Ensuring the quality and reliability of data and evidence through more efficient and dynamic processes for analysis and production of reporting items; and
- Creating products for “data clients” that enhance the immediate utility of review-based evidence in decision making.



DEEP DIVE 8  
Learning and adaptation





# PRACTICAL SUPPORT



## TIPS AND INSPIRATION



## DEEP DIVES



## EXAMPLES

GETTING STARTED



1. Budgeting and mapping capacities



1. Types of quick contextual updates

A selection of country examples will be included in the next iteration of this guidance

PREPARING FOR THE REVIEW



2. Agreeing on modalities



2. Options for scope and approach



3. Establishing terms of reference



3. Monitoring utility



4. Evaluability questions

IMPLEMENTATION REPORT



4. Deciding on data collection approaches



5. Data sources, challenges and mitigation



5. Reporting and communicating findings



6. Baselines

REVIEW MEETING, COMMUNICATIONS AND FOLLOW-UP



6. Ensuring follow-up



7. Efficient and inclusive review meetings

LEARNING AND ADAPTATION



8. Leveraging new practices



## Tip 1 Budgeting and mapping capabilities

Resources and capacities for joint sector reviews in times of COVID-19 can relate to direct and indirect ministry budget and personnel costs, as well as capacities that can be mobilized across the sector.

### MAP ALL EXPECTED COSTS ASSOCIATED WITH THE REVIEW

- This includes communications, transport, facilitation of technologies and translation services (if needed), as well as costs associated with the collection of information, report writing and stakeholder engagement during and after the joint review meeting.
- The estimated budget should be compared against the finances available for the review and, if necessary, steps taken to minimize all non essential costs.
- Cooperation agreements and joint financing arrangements (including newer or innovative financing sources) might be identified.<sup>1</sup>

### IDENTIFY ANY NEED FOR EXTERNAL SUPPORT

- Any need for technical consultants (e.g., for information collection and analysis and/or virtual meeting facilitators) should also be identified and budgeted, specifying how technical assistance will help to strengthen the government's own capacity to organize and deliver the review.

### LEVERAGING SECTOR EXPERTISE AND ASSETS

- Organizers can save costs indirectly by capitalizing on sector expertise and partners' monitoring efforts.
- The local education group can support a stocktaking of who is collecting, what types of information are being collected, at what level and where (also looking at how to strengthen coordination and information/knowledge sharing between key institutions and implementation partners). This can also facilitate new data collection where this involves stakeholder interviews and focus group discussions.

<sup>1</sup> Note that eligible partner countries can apply for GPE funding to support joint sector reviews and more broadly the strengthening of monitoring systems through the system capacity grant.

<https://www.globalpartnership.org/content/guidelines-education-sector-plan-development-grants>



## Tip 2 Agreeing on organizational modalities

Planning decisions around the review should take into consideration known contextual variables with regard to:

### THE TIMING OF THE REVIEW

- The schedule for the review should ideally be aligned with country reporting and planning processes to feed the findings into decision making. However, the timing may require flexibility in light of COVID-19 lockdowns, social distancing and restrictions on movement.
- In turbulent or highly unstable contexts, the review may need to be delinked from reporting, planning and budgeting mechanisms altogether. Stakeholders should clarify how they will still contribute to sector reporting irrespective of whether a review takes place.

### FEASIBLE DATA COLLECTION APPROACHES

- Where typical joint sector review preparatory work is no longer possible (including field trips, subnational reviews and learning exercises led by thematic and technical groups at regional or district level), a variety of data collection approaches should be considered. Members of the education community may be able to fill the gaps. (Tip 4: Deciding data collection approaches)

### POTENTIAL REVIEW MEETING MODALITIES

- Strategies should be elaborated to promote optimum stakeholder engagement during the review, with reflection around the mechanisms and formats for stakeholder participation and convening, and how to ensure meeting efficiency (Deep dive 7: Efficient and inclusive review meetings).
- Where in-person review meetings are not advised or recommended, actors can be convened through virtual meeting formats or hybrid in-person/virtual formats.

### MECHANISMS FOR DISSEMINATING REVIEW FINDINGS

- Where usual implementation report formats have been retained or reconceived in favor of shorter summary reports, discussions should include arrangements for debriefing decision makers, sharing findings with partners in other sectors and communicating findings to the education community (Tip 6: Communicating effectively).

### TRAINING NEEDED FOR REVIEW TEAMS

- Training may already be available within ministries for the monitoring of countries' COVID-19 education plans (e.g., tools and reporting processes) and for virtual meeting organizers. These trainings and skills-sets should be leveraged to the extent possible to support joint sector reviews.



## Tip 3 Establishing a terms of reference

The details of the joint sector review can be articulated in terms of reference (or an equivalent planning document) including the following:

### RATIONALE FOR REVIEW

- Rationale for undertaking joint monitoring at this particular time, including any adjustments, change of purpose and scope, comparing to previous joint sector review(s);
- Overview of the country context (relevant to health and sanitation protocols in place, significant risks or monitoring challenges etc.)

### ROLES AND RESPONSIBILITIES

- Responsibilities within the technical team for establishing contextual updates, synthesizing existing knowledge, creating monitoring tools for new evidence collection, developing reporting guidance, undertaking data collection, drafting reports, organizing meetings, and so forth. This includes expectations for collaboration with local implementation partners and education offices to support the joint monitoring effort.

### MONITORING APPROACH AND METHODOLOGY

- Description of information gathering approaches and objectives, including choice of desk study and reviews, surveys, observations and use of communications technologies;
- Sources of newer qualitative information, including key respondents and stakeholder focus groups for facts related to COVID-19.

### DISSEMINATION OF FINDINGS

- An overview of how results will be communicated/circulated to institutional decision makers and broader communications to education stakeholders.

### TIMELINE AND OPERATIONAL PLAN

- A review calendar (including timelines foreseen to establish a contextual update) and key steps of the process: agree on purposes/scope; engage in data collection, quality assurance and validation; draft reporting items; and generate follow-up to review meeting.



## Tip 4 Deciding on data collection approaches

Successful reviews depend on technical teams being able to gather sufficient inputs to inform the review outputs. A combination of approaches will be needed and any data limitations should be acknowledged in the implementation report.

### BUILD ON WHAT ALREADY EXISTS

- Gather information already available through existing data sources (e.g., EMIS, policy studies, evaluation reports, publications and datasets). Sources may include findings from rapid assessments, qualitative research and surveys already undertaken by ministries and their partners. It can also include poverty and health data, as well as geo-mapping information provided by other sectors. There should be a preference for data disaggregated by sex to allow for an informed discussion on potential differences on COVID-19 impacts.

### TAP INTO DECENTRALIZED MONITORING AND REPORTING

- Technical teams can leverage bottom-up reporting processes from the regional, provincial and district levels as monitoring and evaluation arrangements may have been specifically strengthened for the purpose of monitoring COVID-19 education responses. Across the board, expectations for partner reporting related to their agreed commitments should also be communicated.

### EXPLORE DATA COLLECTION WITH LOCAL PARTNERS

- Civil society and organizations, nongovernmental organizations and local networks can provide useful information on school closures, teaching conditions, enrollments and re-enrollments helping to extend the availability of more specific, disaggregated data. They can also extend monitoring information on the impacts of COVID-19 to beneficiaries who might not be accessible through remote monitoring tools.

### USE COMPLEMENTARY DATA COLLECTION TOOLS

- A large number of data collection tools - e.g., via KoBo Toolbox, Jotform, Device Magic (all open source); or FastField (not open source) - can support efficient information gathering, classification and synthesis in challenging environments. Many can create a dashboard of preliminary results from the review data to help visualize findings in real time and clean data as they are gathered.

### FACILITATE CHECK-INS AND FEEDBACK LOOPS

- Check-ins enable team members to make sense of the facts collected so far, verify findings, signal problems in the collection process and exchange opinions on adjustments needed. They also enable review teams to address gender gaps in the ongoing data collected. Modalities for checking in may include WhatsApp groups, email, or use of existing collaborative platforms.



## Tip 5

**Reporting, communicating and disseminating review findings**

The reporting and communication of review findings should be guided by the needs of education decision makers and partners, including for high-level advocacy around education financing.

**PRODUCE SUCCINCT REPORTING ITEMS**

- Ensure that the documentation and storage of review data is available in disaggregated form (by sex, age, population group, geographic location etc.), facilitated if necessary through adaptation of existing reporting templates and use of the open-source tools (Tip 4: Deciding data collection approaches).
- Create synthesis documents (implementation report, summaries, power points etc.) that are short and to the point, focusing on analysis of main trends, achievements and any gaps or challenges with respect to key indicators. Such documents should sufficiently answer all equity and gender related questions as per the review purposes and provide specific, actionable recommendations to address quality and equity related priorities in the COVID-19 context and beyond.
- State clearly in all reporting formats that new information is likely to be circulated as ministries learn more about efficient COVID-19 education responses.

**CREATE A COMMUNICATIONS AND DISSEMINATION STRATEGY**

- Generate a communications and dissemination strategy (if it doesn't exist already) to specify contents needed for decision making and public communications purposes and how they will be disseminated.
- Share review documents with participants as soon as possible in the process, and as soon as review findings have been validated by country leadership.
- Share findings and takeaways in bite-sized, easy to grasp formats via the ministry of education website, online information sharing platforms, partner websites, social media and newsletters, press releases to the national media.
- Continue to collaborate with partners beyond the joint sector review to enable sector communications to be harmonized and "on-point", and to ensure that partners are updating their information on a regular basis.



## Tip 6 Ensuring follow-up

Commitments to follow-up on joint sector reviews, recommendations and action points can be promoted and encouraged through different avenues, including:

### DISCUSSIONS WITH HIGH LEVEL DECISION MAKERS

- Organizers might convene data sense-making exercises with senior management, development and implementation partners to understand how review evidence can be used in planning and policy making (related to crisis preparedness, prevention and mitigation) at national and district levels.
- Organizers might also share briefing documents through regular policy dialogue channels, including online or virtual sessions among decision makers and education stakeholders in the presence of ministers of education and heads of directorates and departments.

### LINKAGES WITH PLANNING CYCLES

- Joint monitoring recommendations and action points should be immediately integrated into sector programming and planning cycles. The discussions might take up the recommendations of previous joint reviews, or the minutes of previous discussions on how COVID-19 has impacted sector plans, with newer review data overlaid to inform decisions around reprogramming and shifts in resource allocation.

### DISCUSSION WITHIN THE LOCAL EDUCATION GROUP

- As in more stable conditions, the local education group and its thematic working groups play a key role in supporting and monitoring the implementation of the recommendations and decisions resulting from the review during its regular meetings, and adjust its priorities for dialogue and coordination accordingly.



## Deep dive 1 Types of quick contextual updates

It is important to gather background information that can be used to reflect on the purposes, timing and organizational modalities of the joint review, as well as providing evidence that can inform the reporting outputs.

### CONTEXTUAL OVERVIEW

- Looks at situational factors with direct relevance for the monitoring approach and potential findings, including:
  - Public health guidelines related to physical distancing, quarantine or lock down;
  - Recently gathered data (quantitative and qualitative) and analytical evidence; in particular, information on the equity and gender dimensions of education access and quality during the COVID-19 period;
  - Identification of different beneficiary groups including WHO, HOW and WHEN will be included in the review process (e.g., as data respondents/during the review meeting).

### SECURITY ENVIRONMENT ANALYSIS

- Identifies specific risks and challenges for the joint sector review, including thresholds when parts of the monitoring exercise cannot feasibly go ahead (such as local fact-finding missions and in-person data collection being halted due to school closures or high infection areas).
- Other considerations in the security environment include general security risk levels (low/medium/high) and privacy and safety issues related to use of online platforms for remote data collection.

### CAPACITY STOCKTAKING

- Identifies existing country expertise, knowledge and capacities that can support the review, for example through:
  - Institutional bodies, expertise and resources (accessible through the ministry of education, local education group or on an ad-hoc basis);
  - Teaching organizations, nongovernmental organizations, civil society organizations, foundations and the private sector.

### Sources of information

#### Multilateral response efforts:

Collecting data from surveys such as the Education Cluster's 4W survey asking "who, what, when, where" questions on the humanitarian response, (e.g., where are different agencies responding, doing what?).

#### From subsector coordination bodies:

Drawing insights from national, local and international stakeholders on challenges and opportunities for monitoring in the operating environment.

#### Implementation partner:

Telephone surveys and efforts to track the reach, quality and use of education technologies, rapid response assessments, citizen's assessments and data gathered in the health and child protection sectors.

#### Recent sector analysis: (if undertaken)

#### Online collaboration platforms:

Information from platforms where stakeholders are uploading and sharing information in real time on education challenges, mitigation strategies and practices in the COVID-19 context.



## Deep dive 2 Options for scope and approach

1

### COMPREHENSIVE REVIEW OF EDUCATION SECTOR OPERATIONAL PLAN

In a “normal” joint sector review, governments and the education community monitor the implementation of the education sector operational plan, looking at progress toward planned results for the year under review. This involves a systematic review of programs and activities in sector action plans.

2

### PARTIAL REVIEW OF EDUCATION SECTOR OPERATIONAL PLAN

Given capacity and resource constraints, and stakeholders’ energies needed across multiple management areas, steering committee members may decide to reduce the scope of the joint sector review.

A number of approaches to joint sector monitoring are possible and review organizers should decide on which is the most appropriate and feasible in the current context.

Under a *comprehensive sector review* approach, monitoring would take place at different levels including:

#### Sector-level outcomes

- To assess if projected sector outcomes (e.g., related to equitable learning outcomes for different population groups, gender-equality, special needs learners) can still be achieved in the foreseen timeframe; and whether stated key priorities remain relevant given the evolving operating environment;
- To better understand the impacts of COVID-19 on policy (e.g., reprogramming and resource allocations) and on learners, and reach consensus on whether revisions are needed to policy goals and their corresponding indicators.

#### Programs and intermediate outcomes

- To evaluate progress towards intermediate outcomes to see if they are still achievable in the current context and timeframe; and whether intermediate outcomes remain relevant.

#### Plan activities and outputs

- To take stock of the implementation of planned activities during the pandemic, report on the implementation of newer activities and decide on actions to unlock implementation bottlenecks.

A *partial sector review* approach could be organized along at least two axes:

#### Review at high level

- The monitoring is kept at the level of policy goal/priority and/or intermediate outcome, without entering into the operational details of activity implementation.



3

### REVIEW OF COVID-19 RESPONSE PLAN

Most GPE partner countries have developed COVID-19 education response plans to ensure continuity of learning in the context of lockdowns and school closures. Joint review organizers may decide to focus the review primarily on the implementation of these plans.

4

### COMBINED REVIEW

Steering committee members may decide to organize combine elements of options 1-3

#### Review at multiple levels, but only of certain parts

- The monitoring is still in-depth, but for a limited number of sector goals and their intermediate outcomes and activities at the output level. For instance, the review may focus on one or two sub-sectors (e.g., pre-primary and primary), or a specific set of sector goals (e.g., secondary access and gender).

Where activities have been suspended or modified, or implementation differs substantially from activities originally foreseen, the review scope would describe any revisions to policy targets and their rationale.

Under this option, the review would concentrate on the *COVID-19 monitoring and evaluation plan* including:

#### Sector-level outcomes

- To assess progress towards stated objectives since the start of the pandemic (e.g., related to continuity in schooling and equitable learning outcomes for different population groups, gender-equality, special needs learners) have been achieved and safeguarded.

#### Programs and intermediate outcomes:

- To evaluate progress in achieving intermediate outcomes through the implementation of COVID-19 response programs and activities; and
- To identify and analyze on-going program bottlenecks.

#### Plan activities and outputs

- To report on the implementation of newer COVID-19 activities and implementation bottlenecks.

The review may be the opportunity to monitor different types of progress in relation to both education sector operational plan and COVID-19 response plans. It could look at combinations of policy, financial, technical and thematic issues, including more specific consequences of the pandemic (Deep Dive 4: What to monitor and utility).



## Deep dive 3 Monitoring utility

The following sections support reflection around the utility of monitoring in relation to different dimensions of sector plans and COVID-19 education response strategies.

### WHAT TO MONITOR

#### 1 IN RELATION TO EDUCATION SECTOR OPERATIONAL PLANS

##### a. Progress toward activity/output/outcome indicators

Sector results frameworks can be reviewed in light of developments since the pandemic began and indicators prioritized. Indeed, some countries may wish to focus their review only on specific segments of the annual plan. Where planned activities have been suspended or modified, or implementation differs substantially from activities originally foreseen in the annual plan, the joint review scope would include:

- Revision of monitoring targets and their rationale; and
- Any new baseline indicators for sector activities (e.g., teacher training for remote learning in virtual classrooms).

##### b. Changes to allocations and disbursements

Both allocation and disbursement of financial resources can be looked at within the review and included in the implementation report. Any developments and changes in the budget within the same fiscal year, or between two fiscal years, ideally, should also be documented. Issues for monitoring might include:

### UTILITY

➤➤ Tracking the status of the education sector plan implementation against the baselines can be used to:

- Understand progress made, along with COVID-19 impacts and their level of severity, since the pandemic started;
- Ensure that sector strategies remain coherent/aligned with countries' COVID-19 education responses;
- Update indicators to ensure that sector plans remain achievable and relevant; and
- Make adjustments to subsequent sector plans and operational plans to anticipate revised targets and ensure resilience, preparedness and mitigation, including the formulation of recommendations.

➤➤ Analysis of budget (re)allocation and financial reporting in times of COVID-19 can help to:

- Assess whether sector education budgets have been maintained in real terms and in proportion to the total government expenditure, and whether part of the education budget was reprogrammed to other activities or sectors;



- Revision of the annual education budget since the onset of the pandemic, highlighting any differences from the initial allocation of resources to the sector (i.e., have education sector budgets been redirected to other priority sectors during the fiscal year?);
- Reprogramming of the education budget to support new programs and activities, highlighting any changes per sub-sector;
- Assessing resource implications for the emergency response (i.e., have additional financial resources been made available, including domestic financing, international aid and private investments?);
- Reviewing how new activities in the education sector have been funded and by whom; and
- Tracking changes in budget allocations to the ministry (ies) of education from one year to the next, and forming a perspective for the medium-term expenditures/budgeting.

In parallel, the implementation report can include elements of financial reporting to verify how the budget was spent in line with plan projections, thus giving an indication of their reliability. Issues for monitoring might include:

- Whether the recurrent education budget has been disbursed and what changes there are, if any, from previous years. In this case, it might be important to check whether salaries of teaching and nonteaching workforce have been paid, whether payments have been on time and whether financial commitments have been honored (rent, bills, etc.);
- Whether the capital/development budget has been disbursed and what changes there are, if any, from previous years. The analysis can help understand to what extent the pandemic has contributed to delays in the disbursement; and
- Whether the education budget (including new resources) has been used and disbursed in line with the annual operational plan and COVID-19 response plan.

- Check whether service delivery has been impacted by public finance management issues during the pandemic (teachers not paid, textbooks not purchased and/or delivered, etc.);
- Understand the extent to which the ministry of education and partners are operating in a more constrained fiscal space, and which subsectors or regions are more impacted;
- Support advocacy to maintain education budgets and mobilize new partner funding, given lower predicted share of national spending on education going forward;
- Track resources allocated to and spent on interventions addressing inequalities;
- Expand or revise categories of financial reporting for activities since the onset of the pandemic (e.g., subcategories for distance teacher training to engage in remote learning);
- Inform resource reallocation exercises to address rising inequities (by population group and geographic area); and
- Assess the sustainability of COVID-19-related activities past the short term (differentiating between one-off actions and the ones that will need to be continued in the long-term, thus increasing operating costs).

## WHAT TO MONITOR

## 2 IN RELATION TO COVID-19 EDUCATION RESPONSE PLANS

## a. Tracking equity and gender-equality targets

The focus of monitoring might include:

- **Retention, attendance and drop-out rates** for different population groups at different education levels, particularly for “at risk” and marginalized populations, including the number of primary and secondary learners (in formal education) reached with remote learning solutions during the COVID-19 period;
- Take-up and effectiveness of digital and nondigital channels in low-resource environments and assessing how far technology-based learning has benefited the poorest, including the most marginalized girls and women.

The analysis of available secondary data may also take into account rates of violence against children, including sexual violence and pregnancy rates among school-age young women, which may explain lower return-to-school rates.

## UTILITY

- Evidence and data related to *retention and attendance* can be used to:
- Identify gaps in remote coverage for different population groups, including by ethnic group, gender and disabilities, to inform the costing of infrastructure to ensure continual access to vulnerable learners (e.g., access to learning materials; technology such as TV, radio and computer devices; internet and electricity connectivity; appropriate learning spaces; suitability for children with disabilities; etc.);
  - Understand general changes in school attendance and dropouts during school closures, and the levels of absenteeism of the most at-risk learner groups to design/cost communication campaigns targeting specific population groups;
  - Understand the contribution of specific factors such as sexual violence and teenage pregnancy as barriers to reengaging in formal education, and design prevention campaigns and targeted strategies to encourage female learners to return to school;
  - Communicate intended plans for COVID-19-related mitigation strategies and mobilize stakeholders and partners.

Evidence and data related to *equity* can be used to:

- Understand the extent of underlying technological inequities in education systems;
- Design and cost targeted interventions to promote and improve digital inclusion and access to remote learning technologies;
- Develop programs and networks that reduce the risk of violence against children, including sexual violence, during school closure;
- Identify low-tech solutions.



## b. Tracking quality targets

Finally, joint monitoring might look at issues related to education *quality* to understand where reprioritization of sector plans and budgets may be needed.

The focus of monitoring might include:

- **Learning loss/backsliding:** Look at the impact of school closures, educational or training facilities on different population segments (learners living in extreme poverty, language and religious minorities, orphans, learners with disabilities, etc.);
- **Training and support for teachers and the education workforce:** Focus on the preparedness and resilience of education systems to support teachers, facilitators, and parents/caregivers in the successful and safe use of technological solutions for learning; and
- **Level of parent and student engagement during remote learning and school closures:** Efforts have been made to develop online, digital and low-tech learning materials, but there is little information on how kids are using them or on how families and teachers are following up on the learning taking place.



Evidence and data related to *learning loss/backsliding* can be used to:

- Determine whether targets linked to literacy, numeracy, social and emotional or soft skills, school readiness, and professional/vocational/job-specific skills have been maintained or require revision;
- Design targeted initiatives to tackle the threat of learning loss, and if necessary, generate research to better measure and understand the impact of the crisis on learning losses, including comparisons across population subgroups; and
- Design training for teachers around instructional methods and instruction platforms appropriate for remote learning and low-tech solutions.

Evidence and data related to *training* can be used to:

- Design and budget for targeted campaigns to increase preparedness among teachers, school leaders and support staff;
- Develop teachers' capacities to manage remote virtual classrooms, improve teachers' instructional techniques and train them to blend technology effectively into their lessons once schools reopen; and
- Develop new indicators related to the number of teachers, support staff and school directors in primary and secondary education receiving training and support in remote-teaching techniques and/or education management in times of crisis.

Evidence and data related to *parent and student engagement* can be used to:

- Understand the use and learning outcomes of different delivery modalities in the home and students' learning habits; and
- Design and cost the development of low-tech teaching and learning solutions for parent- or caregiver-guided education.



### Deep dive 4 Evaluability questions

Evaluability questions can produce information to support decision making around the level at which the review is undertaken (its scope), including adjustments needed to logistics, safeguarding measures and the availability of resources.

RESULTS  
FRAMEWORKS

DATA AND  
INDICATORS

#### OPTION 1: Comprehensive review

- Are sector plan results frameworks still relevant?
- Is a full set of data available (or potentially available) through national monitoring and evaluation systems, sector and cross sector partners to cover all activity/output levels?

- Is up-to-date, disaggregated data on schooling and learning indicators available for all subsectors since the pandemic began, including quality, equity and gender objectives and activities/outputs?
- Are additional programmatic, technical and financial indicators needed to reflect COVID-19 goals?

#### OPTION 2: Partial review

- Can the monitoring of certain sub-sector goals be “paused” (due to activities/programs being paused or modified)?
- Have results frameworks already been revised for sector plans?

- Have indicators (e.g., related to quality-, equity- and gender-equality- goals) been identified as the focus of countries monitoring efforts?
- Will adjustments to the review scope generate any bias in data collection? E.g., underrepresentation of groups with limited or no access to the internet and/or mobile networks?

#### OPTION 3: COVID-19 response plan

- Have results frameworks been elaborated for COVID-19 response plans with expected reporting schedules?

- Have indicators been developed through the COVID-19 response plan along and data sources identified?
- Is there baseline data on the situations of women, men, girls and boys at the beginning of the pandemic and sufficient data to measure progress since its onset?

#### OPTION 4: Combined review

- Can monitoring easily be organized around key indicators regrouped from across different results frameworks?

- Will selected indicators generate enough disaggregated data to assess COVID-19 impacts on different segments of the population? Will combined data approaches generate additional complexity?
- Will longitudinal comparisons be possible?

CAPACITIES  
AND  
RESOURCES

- Does the ministry have the capacities, resources and inclination to undertake a comprehensive review?
  - Will the expected benefits and utility of comprehensive monitoring outweigh the investments of time and resources?
  - Will participation, representing all key stakeholder groups, and ownership be assured?
- Will a partial review improve the feasibility of monitoring and generate significant resource savings and efficiencies?
  - Would a partial review support system strengthening, i.e., through faster turnaround of data/information sector reprogramming, resource allocation, reporting and budgeting cycles during the COVID-19 pandemic?
- Has a specific department, unit, sector or cross-sector task force been identified with responsibilities for measuring progress against key results indicators and their measurement frequency?
  - Are COVID-19 monitoring arrangements aligned with national monitoring and evaluation systems and reporting schedules?
- Will the expected benefits and utility of a combined approach outweigh the investments of time and resources?
  - Will participation, representing all key stakeholder groups, and ownership be assured?



## Deep dive 5 Data sources, challenges and mitigation

Depending on resources, capacities and time available, the joint sector review could rely on data gathered through desk study or remote data collection. Identification of sources of data in both categories is complemented by an overview of potential challenges and mitigation strategies.

### 1 DESK STUDY

#### Review of existing government data and documentation

##### Relevant documents might include:

- Multi-year sector plan documents and medium-term expenditure frameworks;
- Operational documents (operational plan documents, budgets, mission reports, minutes of coordination meetings);
- Updates on implemented joint sector review recommendations from previous years;
- Education management information system (EMIS) databases (offering reliable historical data to enable comparisons of data on learning, attendance and absenteeism before /during COVID-19);
- Financial data collected just prior to and during COVID-19 through financial management and reporting systems.

#### Existing surveys and rapid assessments in the education and other sectors (health, WASH, etc.)

##### Relevant documents might include:

- UNESCO, UNICEF, World Bank Surveys on National Education Responses to COVID-19;
- Rapid Humanitarian Needs Assessments, Refugee Education Management Information System;
- Household surveys with information on the level of engagement of parents, families and learners in the learning process during remote learning and school closures, and on how end users perceive the effectiveness of remote learning programs; and
- Information from the Service Delivery Indicators (SDI-WB) survey and Multiple Indicator Cluster Surveys (MICS-UNICEF).

**Information from measurements of learning**

Relevant documents to compare teaching and learning under different contexts (COVID-19 versus pre-COVID-19, classroom versus remote learning) might include:

- Baselines from previous age-appropriate learning assessments;
- Survey samples of vulnerable school populations (i.e., learners in poverty, in remote areas, with special needs, minority language groups, migrants and displaced peoples);
- Teacher/educator administrator surveys with information on training, socio-emotional support and capacity development needs;
- Cross-sector information on public health, migration and critical risk from counterparts at national/community levels.

**Partner reporting and evidence**

Relevant documents might include:

- Development partner reporting, evaluations and planning documents and field mission reports;
- Rapid assessments, including data being collected from beneficiaries and local respondents;
- Reporting from the Education Cluster, interagency appeals and other groups; and
- Lessons learned sector assessment or evaluative exercises (gender analysis of education dynamics by population group, age, geographic setting etc.

**CHALLENGES**

Some desk study information may be out of date or have important gaps (concerning demographic groups, disability, gender, geographical area). Low quality data will then influence the quality of reporting.

Data limitations should be highlighted in reporting outputs to ensure transparency and identification of gaps in evidence.

**MITIGATION**

Consider how desk study information can be complemented and triangulated with the minimum effort/disruption possible.

- Use outdated and/or low-quality data as little as possible, or only in extreme circumstances (i.e. where no other data is available), and triangulate as possible through interviews and focus group discussions among key informants and partners;
- Consider which education actors and stakeholders can be easily contacted for interviews or focus group discussions to fill gaps/triangulate data;
- Identify which actors may be able to share and update information quickly with recent assessments, studies or reports.



## 2

## REMOTE DATA COLLECTION

**Focus group discussions**

- Rapid focus group discussions could be organized with frontline partners, education administrators, school leaders, teachers and/or learners, etc.). Stakeholders are organized into small groups, in person or via virtual platforms (Zoom, Skype, WEBEX or Microsoft Teams) or via group messaging (WhatsApp, Skype, Blue Jeans).

**Online surveys**

- Surveys via phone, email, online tools (via SurveyMonkey, LimeSurvey, Microsoft Forms, etc.) or messaging apps (WhatsApp, etc.).

**Telephone or video interviews**

- If well facilitated, telephone or video interviews bring together tacit knowledge, perception data and other qualitative information to inform the joint sector review findings. Such modalities give more voice to district education officers, school leaders, teachers and representatives of learner communities.

**Direct observation**

- Direct observation of implementation of program activities, such as trainings, via online feed or video footage.

**Polls via messaging apps**

- Platforms include Facebook Messenger, Viber, and WhatsApp. For example, UNICEF's U-Report sends polls on Facebook Messenger to voluntary respondents on issues such as COVID-19.

**Information-sharing platforms**

- Application of participatory methods to engage beneficiaries (e.g., compiling opinions of communities on development priorities or monitoring trends in indicators through local citizen reporters).

**SMS surveys**

- Software or apps enable data collection via phone-based SMS surveys. Many countries have local providers available; for example, Viamo, RapidPro, Frontline, Magpi and GeoPoll are regional/international providers, and Kuja Kuja works with beneficiary feedback.

**Third-party monitoring**

- Partnerships with local data mapping, collection and analysis firms and organizations specializing in the collection and analysis of big data sources.



## CHALLENGES

Certain remote data collection modalities come with challenges and inherent biases, including:

- **Bias.** Remote tools may generate bias in the information collection where key respondents are unable to participate due to their inability to access telecoms, computers and the internet. It means that many local stakeholders, institutional staff and respondents could potentially be excluded from monitoring efforts. It particularly concerns women in countries where there is a significant digital gender divide.
- **Narrow geographic focus.** Sampling approaches may leave out certain geographic areas due to travel restrictions and shifting institutional priorities.
- **Safety and well-being.** Information privacy and security of target populations will need to be maintained through data safeguarding, and informed consent obtained.

## MITIGATION

If new or complementary information collection is needed, consider how to address the above challenges in remote monitoring efforts by:

- **Building on existing remote data collection.** Where possible, piggyback on remote data collection already completed or underway among COVID-19 implementation partners and across other sectors.
- **Ensuring that monitoring tools and methods are appropriate for context and feasible.** When possible, leverage existing remote monitoring tools with proven feasibility, reach and impact in the country.
- **Developing inclusive and differentiated data collection strategies.** Different monitoring methods may be more practical and feasible in some geographies and populations (e.g., low-tech approaches to gathering data, such as direct observation of work with local partners and locally facilitated focus groups).
- **Increasing triangulation of information.** Incomplete information or low-quality data can be strengthened through telephone interviews, focus group discussions and check-ins between teams and institutional oversight staff.
- **Updating health and security guidelines.** Due attention should be paid to ensuring that all joint sector review activities and mechanisms minimize risks (related to COVID-19 safety and security) for institutional staff, technical partners, third-party organizations and communities).





## Deep dive 6 Baselines

Baselines are essential to successful monitoring and adaptive management. Without these, stakeholders are unable to assess how far the sector has come since the starting point, what kinds of progress have been made and whether targets need to be adjusted. Reviewing baselines should go hand in hand with agreement on the scope of the review and data collection modalities.

### **BASELINE EXIST**

If data already exists for baselines in the current operational plan, new data to assess progress can be obtained from the same primary and secondary sources and from implementation partners' activities—provided that the same quality standards for validity, reliability, precision, integrity and timeliness are observed. The ideal is to ensure that previously monitored indicators are not lost or forgotten. Attention should also be paid to baselines established for monitoring COVID-19 education responses.

### **BASELINES MUST BE COLLECTED**

In cases where data for new activities in the COVID-19 period is weak, the ministry and its implementing partners will need to collect it.

Rapid assessments (similar to those employed in crisis situations) can be employed to quickly establish an up-to-date baseline (this may have already been undertaken within the context of COVID-19 responses).

Certain countries are also choosing to carry out quick surveys to substitute for missing baseline data. However, primary data collection can be expensive and may not be possible due to safety measures. Joint sector review organizers should therefore consider costs and incorporate them into the planning of the joint sector monitoring exercise.

### **BASELINES ON A ROLLING BASIS**

In times of COVID-19, it may be possible to collect baseline data on a rolling basis as COVID-19 responses proceed and adjust in specific geographic areas for specific target population segments (or control groups). For example, implementation during the first phase of COVID-19 response serves as the baseline for the next period.

### **BASELINES IS ZERO**

For some indicators in the COVID-19 period, baselines will be zero. For example, for remote teacher training, the baseline for the indicator “the number of teachers trained is zero.



## Deep dive 7 Efficient and inclusive review meetings

A number of preparatory and real-time steps can be taken to ensure that joint sector review meetings (virtual, in-person or hybrid) are efficient, productive and engaging.

### BEFORE THE MEETING

#### ENSURE CLARITY ON THE AIMS OF THE MEETING

- Ensure clarity on the purposes of the joint sector review meeting related to the education sector plan and wider COVID-19 issues.
- Communicate objectives well in advance of the meeting through the terms of reference and governments' and partners' communications efforts.

#### ESTABLISH AND CIRCULATE AN AGENDA

- Develop an agenda in collaboration with key stakeholders to ensure that priority issues identified during the review are covered.
- Include the time frame for the overall meeting, for side events and break-out sessions.

Ensure clarity on expected participant contributions to different agenda items.

#### ENSURE BROAD AND INCLUSIVE REPRESENTATION

- Aim for a broad and inclusive participation of state and nonstate actors, including members from the Education Cluster (where activated), relevant crisis coordination bodies and the health and humanitarian response sectors.
- Identify which types of high-level, national and local representation are realistic—and can be present at the right moments during the review meeting.
- Identify presenters for different discussion items, including who could be invited to chair the different sessions.
- Generate strategies for including women's voices, including under-represented groups, by identifying potential barriers to their participation and looking at ways of promoting experience-sharing from the community level up.

#### FACILITATE REMOTE PARTICIPATION

- If local beneficiary groups are not sufficiently equipped to attend a virtual review meeting, look at whether they can be partnered with other local implementation partners with access to technologies and online connectivity.
- Identify meeting technicians and persons to troubleshoot all technical issues ("backstage") for participants connecting remotely.
- Identify persons to facilitate actual sessions ("frontstage").
- Identify session rapporteurs.



## DURING THE MEETING

### OPTIMIZE STAKEHOLDER ENGAGEMENT

- Informational notes can be developed to promote stakeholder engagement in both online and in-person joint review spaces:
  - For stakeholders on expectations for how they will participate in the review;
  - For development partners, including presentation formats for reporting on their activities during specific meeting sessions;
  - For civil society and nonstate or private sector actors to ensure that quality, equity and gender-equality are promoted and the voices of the most marginalized are heard;
  - For chairs so that the event does not become a series of unchallenged presentations, but rather a robust discussion about what is working and what needs to be done differently;
  - For session facilitators and presenters to ensure the presentations run smoothly with the technologies in use and are orientated to the joint sector review purpose; and
  - For all participants underlining modalities to contribute to formulating and following up on recommendations.

### ENSURE CLARITY ON MEETING ETIQUETTE

- It is important for the session chairs and facilitators to establish clarity at the outset on how the meeting and its sessions will be run and what the expected outcomes are.
  - Introduction: Including information on meeting etiquette (e.g., instructions for using visual cues and the chat function) to join a specific discussion or add a contribution, and boundaries for how contributions are made (interrupting speakers, etc.);
  - Length of interventions: Keeping interventions short and to the allotted time is important—attention span is the biggest challenge! But it is also important for session chairs and facilitators to stick to the agenda and rein in discussions if they go too far off topic; and
  - Offline discussions: New agenda items should be taken offline where not everyone needs to be involved, and follow-up meeting(s) booked if not all points have been covered by the end of the meeting.

### PROMOTE MEANINGFUL ENGAGEMENT

- During the discussions, the session facilitator should ask open-ended questions that provide opportunity for discussion. If the meeting needs to get through a lot of content or requires specific stakeholder engagement, the most engaging modality for people to participate in the conversation is through breakout sessions, including in hybrid or online meeting settings.

Many resources exist for hosting productive online and hybrid meetings, for instance [\*Hosting productive online meetings 101\*](#) (Digital Now, UNDP), [\*Running effective virtual meetings\*](#) (Mindtools), [\*Five tips for running effective online meetings or workshops\*](#) (Collaborative Future).



### Deep dive 8 Leveraging new practices

Following the review, it can be useful to **structure a dialogue around new practices**, or aspects of the joint review process, that were done differently during the COVID-19 period. The reflections might identify what worked well and what worked less well, generating lessons on improvements to future reviews.

The table below can facilitate discussions within a select group of education actors, with the conclusions shared within the local education group. The **overall aims** of the discussions are to:

1. Capture new organizational practices that were successful in terms of generating **innovation, flexibility and agility**, and could be kept for the next review regardless of the COVID-19 context.

2. Capture ways in which (new) practices improved overall **review effectiveness** in relation to stakeholder inclusion, and the generation and utility of evidence for decision making, adaptive management and planning.

		Which (new) practices worked well?	What worked less well and why?	What (new) practices are worth keeping?
GETTING STARTED	»»			
PREPARING FOR THE REVIEW	»»			
IMPLEMENTATION REPORT	»»			
REVIEW MEETING (S)	»»			

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