

INEE Minimum Standards Contextualization Guidelines

The INEE Standards and Practice Working Group has developed these guidelines for the contextualization of the INEE Minimum Standards (INEE MS) to ensure that the process builds on lessons learned globally, is in line with best practices, and is in coordination with the INEE Secretariat. Each INEE MS contextualization process must be adapted to be appropriate for the context, however, if the process does not follow the general principles and quality standards outlined below, INEE may not endorse the document.

Before you start

Before beginning the contextualization process, please inform the INEE Secretariat (minimum.standards@inee.org) that you would like to develop a country-specific contextualization of the INEE Minimum Standards. This allows the INEE Secretariat to provide support during the contextualization and also allows the Secretariat to better coordinate the widely collaborative and consultative process necessary to develop country-level education standards based on the framework of the Minimum Standards.

Before starting this process, please read through this WHOLE document, paying close attention to the 'General guidance and good practices' section. Also, do keep in mind that the framework of the INEE MS provides a comprehensive approach to education rights, ALL standards are highly relevant in each context, and so ALL standards must be included in the contextualization process.

List of key actors in MS Contextualization:

- **Host partner(s):** This group, consisting of 2-3 well-respected agencies working on education and coordination in the context, leads the contextualization organization, resource mobilization and management, project implementation, and follow-up.
- **MS Contextualization Working Group:** This group of 3-6 members provides technical guidance and support throughout the contextualization process. This group can include Cluster partners, local or international NGOs, UN agencies, and Ministry officials.
- **Project manager:** This individual from a host partner organization oversees the entire process of contextualizing the standards, including managing logistics, coordinating partners, including the Working Group, and hiring/supporting the lead contextualization consultant. Attention to local language knowledge is essential.
- **Lead Consultant:** Lead all technical phases of the project including preparing workshop materials, facilitating workshops, drafting and finalizing the standards. Attention to local language knowledge is essential. Ideally, both the Project Manager and Lead Consultant are fluent in the local language, but if not, at least one of the two should be.
- **Contextualization participants:** A diverse and inclusive range of stakeholders working on education and EiE should be invited to participate in the contextualization process, see Step 4 below.
- **Standards Champions:** This group should include members of the MS contextualization Working Group and other interested partners identified through the contextualization process to follow up on the promotion and implementation of the contextualized standards. A critical champion is, of course, the Ministry of Education (or a related entity in the context).

where you are working). They must be committed and substantively involved in this process from even before the start.

- **INEE Secretariat:** All MS contextualization processes are supported by the INEE Coordinator for Standards and Practice, supported by the INEE Standards and Practice Working Group.

Further details on the roles and responsibilities of the key actors are clarified below.

STEP 1: Build Consensus

Clearly define the purpose and goal of the contextualization process. Key partners should be able to articulate (to themselves, education stakeholders, donors in country, and to the INEE Secretariat) why the contextualization is needed, its scope [what it can cover and what it cannot cover, the latter often being problematic in challenging political contexts.], what purpose it serves, and what is the final goal, i.e., what plans the host partners have for the ultimate usage of the contextualized standards after they are developed. Ensure broad stakeholder agreement on the purpose and goal(s) and a strong buy-in from all relevant education stakeholders from the onset. Find out if similar work has gone on before, in other sectors, or in earlier emergencies, and learn from / include this work in your preparations.

Since contextualization is a multi-stakeholder process, discuss the project at Education Working Group or Education Cluster meetings to build support and receive input from a range of key actors and institutions. The involvement of the Ministry of Education (MOE) or the national education authority from the beginning is crucial to the success of the contextualization exercise. Decentralized education authorities should also be engaged.

INEE Secretariat support: Plans on the purpose and final goal of the contextualization process should be clarified in writing and shared with the INEE Secretariat and key partners.

STEP 2: Set up leadership & organizational structure to guide the process

Identify one or more strong **host partners** to lead the contextualization organization, implementation, and follow-up. Host partners should be well-respected agencies working on education in the context and in good relationships with all actors, especially with the Ministry of Education (and can often be the MoE itself). Involve any education organization that wants to contribute to the organization of the contextualization. If more than one organization is a host partner, set clear roles, responsibilities, budgets, and deadlines. Actions should be divided fairly among all host partners, and host partners must ensure adequate financial resources are available to cover all project components. Engage MOE or national education authorities in the process. In some countries, written permission may be required from the government to hold the contextualization workshop. Note that while you build consensus (see Step 1 above), you may concurrently seek permission to host the workshop.

Consider developing an **MS Contextualization Working Group** consisting of 3-6 partners to provide technical guidance and support throughout the process. Working Group partners should be committed to feeding into project planning, workshop development, and supporting facilitation. In addition, Working Group members can contribute by reviewing key documents, including the draft standards, and leading contextualization follow-up work, including the promotion and

institutionalization of the contextualized standards after the document is finalized. Roles and responsibilities for Working Group members should be clearly articulated in writing.

INEE Secretariat support: Partnership with the INEE Secretariat should be discussed and determined from the beginning of the process so that INEE can support as appropriate. INEE can share a sample Gantt chart and budget to ensure that all aspects of the project are considered in the planning stage and provide general technical support, reviewing Gantt charts, concept notes, etc.

STEP 3: Provide strong management and skilled human resources

A chairperson or **project manager** from the host partner organization(s) is needed to oversee the entire process of contextualizing the standards including managing logistics, coordinating partners, and hiring/supporting the lead contextualization consultant. Continuity in people (not just organizations) is very important, and not just for the project manager but also for his or her interlocutors in the Working Group and at the MoE. Ownership of the process and outcome may be lost by having too many passing through. Depending on the scope of the contextualization process, support from the project manager may be needed to help manage logistics.

Given the level of effort required to lead a high-quality contextualization exercise, a dedicated **lead consultant** is required. The TOR for the lead consultant should be developed by the host partners and shared with the INEE Secretariat for review. It is recommended that one consultant lead all phases of the project, from the orientation, workshop, drafting and finalization of the standards, and possibly the implementation, follow-up, and M&E phases. The consultant who will lead the contextualization must be a skilled facilitator who can reach compromise within the workshop sessions and during the drafting process. They must also have knowledge of and experience with the INEE Minimum Standards, a strong background in emergencies, and knowledge of the context. In addition, the facilitator must have strong oral and written communication skills in the working languages (for more on language choice for INEE MS contextualization processes please see tips and good practice below).

INEE Secretariat support: INEE can share previous contextualization consultant TORs and support the adaptation to meet the needs in-country. The consultant TOR can be posted on the INEE Jobs page, where EiE consultants go to find opportunities. As well, the INEE Secretariat may help identify consultants as needed. Finally, the INEE Secretariat can set up calls with the consultant and key partners once they are on board to establish a channel for communication, discuss work plans, and share lessons learned.

STEP 4: Identify contextualization participants

A diverse and inclusive range of stakeholders working on education and EiE should be invited to participate in the contextualization process. Usually, these are members of the MOE and national education authority, Education Cluster, local education group, and education sector donor group. School leaders and teacher representatives should also be considered along with government officials from relevant ministries (e.g., those dealing with refugee affairs, disaster management, risk reduction, etc.) Because contextualization requires deep knowledge of the barriers to education

across the country, it is important to include both senior leadership as well as mid-level implementers and those working at the school level.

Find out the other partners that are working in education in your context. Consider working with the Contextualization Working Group to map the various stakeholders that should participate in the contextualization process considering the following groups:

- Specialists working on all types of emergencies within the particular context are represented (e.g., conflict, camp setting, urban refugees, drought area, etc.)
- Those working on key thematic issues related to EiE are included (e.g., gender, WASH, child protection, disabilities, etc.)
- Participants should be included from all minority and vulnerable groups

All participants should be committed to actively participating and to attend for the full duration of the different stages of the process to which they are invited.

INEE Secretariat Support: INEE may be able to identify active INEE members in-country to ensure broad stakeholder participation.

STEP 5: Host an Orientation for the INEE Minimum Standards workshop

You may want to consider hosting a pre-contextualization training or workshop to orient participants on the INEE MS and to introduce the process of contextualization. This is especially important if colleagues working on education are not familiar with the INEE MS but should be done nonetheless (don't assume familiarity with INEE if there was a training 1-2 years ago, staff turnover is huge, and there may not be any left!). Invite members from agencies who are working in education in your context to participate in the workshop, including education authorities such as Ministry of Education staff. This way agencies can understand the standards and how they can be used in education responses and build support for future work on the INEE MS. Encourage wide participation.

Host partners should finalize participant lists at least 2 weeks in advance of the workshop (see diversity and participation under Tips and Good Practices below). This will give the lead consultant time to adjust any exercises and make necessary accommodations.

It is from this group of workshop participants that working groups for the contextualization process can be sought. You may need to consider using a translated version of the INEE Minimum Standards Handbook into the local language so that you can have wide participation in the workshop.

For guidance on how to print the INEE MS 2024, Edition or to request hard copies, please contact minimum.standards@inee.org.

STEP 6: Contextualization work

One or more participatory workshops may be held, where participants discuss, debate, determine, and agree upon the locally appropriate and concrete meaning of the standards. In order to ensure

diverse participation and a holistic view of education within the particular context, you may want to consider holding workshops in the capital as well as in other areas of the country that may have very different experiences and perspectives. Subsequent workshops can build on the contextualization work that has already taken place.

Contextualization workshops typically last between 3-5 days. Factors to be considered in deciding the length of the workshops include: the participant's level of knowledge and background of the INEE MS, whether it is the first contextualization workshop (which may require more time) or a follow-up session, whether small (Domain) groups have already been formed in advance and who may have read and prepared themselves, the inclusion of additional training content in the workshop, and time participants will be able to contribute to the workshop realistically.

The workshop is best facilitated by a team of 2-3 facilitators, one of them being the lead consultant and others being the INEE Secretariat, host partners, and/or WG members.

The general structure of the workshop includes:

1. Introduction to the INEE MS structure, content, and development and the importance of quality standards for all contexts.
2. Small group work to contextualize each standard
3. Peer review
4. Formation of shepherd groups or individual/agency responsibilities and formulation of the process going forward to ensure shared ownership of this process and especially to ensure people stay committed and involved.

For more in-depth guidance on the contextualization workshop see, [Contextualizing Global Standards to Local Settings: Challenges and Lessons Learned](#).

The contextualization workshop should end with an action planning session in order to identify and prioritize actions that can be taken at the country level to support sustainable use of the standards. Where time does not permit such a session, a separate workshop or meeting should be convened on the same topic.

INEE Secretariat support: INEE may be able to support workshop development as needed. Possibility of INEE Secretariat involvement during the contextualization workshops, either in-person or virtually. As well, INEE can share previous workshop materials that can be adapted.

STEP 7: Draft one of the contextualized standards and consultative review

Once the standards have been contextualized through the workshop(s), the lead consultant, working closely with identified focal points and shepherd groups (in whatever way the manager and lead consultant have arranged them), will compile them to develop a draft version of the contextualized standards. The draft version should follow the same format as the final contextualized standards

Once the lead consultant has drafted the contextualized standards, the draft needs to be circulated among all workshop participants and other key stakeholders to ensure broad engagement and participation in the development of the standards. Feedback on the initial draft contextualized standards should be obtained from as many reviewers as possible agencies including those who

did not participate in the workshop.

If feedback via email is insufficient, holding a separate workshop to review the draft should be considered. Focus group discussions, surveys, or structured interviews can strengthen the draft standards and should be considered.

Consider asking individuals/organizations to review either certain domains or standards where they may have particular expertise or to review with a particular lens (e.g., gender, inclusive education, human rights, etc.) to ensure a crosscutting inclusion of key themes.

Reviewers should have the opportunity to review the first draft in their native language (see also section on Language and Translation below). For example, if the draft document was drafted in English, it must be translated back into the local language(s) in order for those in-country to comment. Feedback on the draft document may need to be translated back into English/French in order for the lead consultant to consider and incorporate all the feedback. Time and resources must be set aside in the budget and timeline from the start for this necessary translation back and forth.

Host partners should agree in advance on how to handle discrepancies and conflicting comments.

The lead consultant, with support from the focal points and project manager, will consolidate all feedback and comments into a second draft, which should go through a final review with the host partners, Working Group, and INEE Secretariat before finalization. All three of these entities will have been involved with this process from the start and must be engaged to the end/completion.

INEE Secretariat support: Before the standards are designed, they must be reviewed and approved by the INEE Secretariat.

STEP 8: Finalization and MOE (or other) endorsement of the final document is obtained

The final document should be approved by the appropriate partners in-country and the INEE Secretariat. The final text should be graphically designed following a similar format as existing INEE contextualized standards.

The final standards should include a letter of endorsement, if possible, from the MoE or the pertinent national education authorities. This helps raise visibility and promote adherence to the standards.

INEE Secretariat support: INEE can provide design files that can be used to support the design of new contextualized standards. Before the final document is designed, the INEE Secretariat must approve it. The INEE logo may not be attached to any contextualized standards without written permission from the INEE Secretariat.

STEP 9: Launch, follow up, and technical support

Organize an event where the standards can be launched, hard copies can be distributed, and how the standards may be used to improve the quality of education services can be discussed.

Host partners, working group members, and EiE champions in the country should develop and implement a follow-up strategy that ensures wide distribution of both the hard and the soft copies of the new standards, provides technical support and possible training to INEE MS users in the country and creates a functioning mechanism for sharing good practice and lessons learned on the usage of the INEE MS at the country level. Partners should agree upon and support a monitoring and evaluation plan for the application of the standards. The INEE Secretariat should be informed regarding using the standards, to support as needed.

One or more organizations should be identified to serve as champions of the follow-up for the technical support on the application of the contextualized standards in country. Key champions (both institutional and individual) between MOE and local civil society organizations are crucial. Champions should include members of the MS Contextualization Working Group and can work in collaboration with the INEE Secretariat.

If there are regular coordination forums in your context, you could suggest that the INEE Minimum Standards become an agenda item where agencies can reflect on their application and usage in service delivery.

INEE Secretariat support: Promotion of standards once they are developed through INEE membership and other channels. Provide guidance, lessons learned, and support for INEE MS implementation, M&E, and advocacy.

General guidance and good practices

Language and Translation: Ideally, the contextualization workshops should happen in the local language, facilitated by a well-respected EiE specialist, fluent in the local language, and familiar with the INEE MS. When this is not possible, external facilitators can be hired. If there is more than one local language, host partners, in collaboration with the Ministry and Contextualization Working Group, should reach a consensus on the appropriate working languages. If translation is needed, the process for translation of workshop materials, workshop outcome documents, draft versions and feedback should be established in advance and included in the budget. Host partners should be clear on who will cover associated costs. The translators selected (both written and simultaneous translators) must be familiar with technical education in emergencies terminology in all languages.

Transparency: All partners should strive for transparency in each step of the process, including but not limited to recruiting participants, selecting a chairperson, creating the working group and its Terms of Reference (ToR), agreement on leadership and decision-making process to avoid bottlenecks or misunderstandings, incorporating feedback, receiving endorsement, and distribution of the document. It is crucial that all parties involved, including the INEE secretariat, are aware of what is happening throughout the entire process.

Participation: The host partners are responsible for putting out a call for participants, advertising it and organizing a fair, transparent, and gender-sensitive selection process. **Endorsement and active involvement and/or leadership of the process by the relevant government Ministry are crucial.** The success of the entire process hinges upon strong host partners and participants who are committed to the goal and objectives of the contextualization process. Stakeholders can participate through various channels beyond the workshop, for example, through focus groups, interviews,

surveys, or online reviews.

Diversity: Care should be exercised to ensure diverse participant representation in the contextualization process (in terms of geographical location, expertise, sector, organization or government, etc.): a group heavily dominated by education policy staff will produce an outcome document quite different from a group of mostly teachers. Host partners should take care to secure participants who collectively could offer a wide variety of perspectives and content input (covering all 5 INEE MS Domains evenly).

Conflict Sensitivity: Host partners should ensure that the selection and drafting process is conflict-sensitive and should not contribute to further exacerbating possible existing tensions. Host agencies should share relevant background documents (strategies, sector plans, etc.) from the humanitarian and development sectors. For example, in Ethiopia, UNHCR and Education Cluster strategies were used to inform the adaptation of the contextualization process.

Rights-based Standards Development: The standards must not be lowered because the context is particularly challenging – the right to education for all applies at all times. For example – a globally recommended maximum class size for primary grades is 40 children per teacher. If your context has 80 - 100 children per class, then you know that you need to find ways to reduce class sizes. This may be split shifts (one teacher teaches twice daily), make-shift classrooms, or employing and training more teachers. Be careful not to say that 80 children per class is the recommended class size just because it is occurring in your context. The framework of the INEE MS provides a comprehensive approach to education rights, ALL standards are highly relevant in each context, and so ALL standards must be included in the contextualization process.

Please direct questions on the above or on anything related to INEE MS contextualization to minimum.standards@inee.org.