

# Learning Metrics Task Force

## Meeting on Next Steps

### Decision Memo

### November 2013

#### Background

With the release of [recommendations](#) in September 2013, the Learning Metrics Task Force has accomplished its first stage of work as set out at its inception. At the last meeting in Bellagio, task force members agreed that the momentum generated should be sustained even though the first phase of the task force work is complete, and therefore we should move forward collectively and discuss what a second phase would look like. The task force agreed to meet again in November 2013 to outline the next steps required to carry the recommendations forward into action.

For the first phase of work, the objectives were to catalyze a shift in the global education conversation from access to access *plus* learning, and to build consensus on global learning indicators and actions to improve the measurement of learning in all countries. With a common commitment to a highly consultative process, the initiative was structured around three guiding questions:

- What learning is important globally?
- How should it be measured?
- How can measurement of learning improve education quality?

To answer these questions, the task force of 30 member organizations collected input from 3 technical working groups of 186 experts, consultations engaging more than 1,700 individuals in 118 countries, and a secretariat composed of staff from the UNESCO Institute for Statistics (UIS) and the Center for Universal Education at Brookings (CUE).

#### Preparing for the Next Phase of Work

As the task force prepares to take on a new phase of work, the group must collectively revisit its goals, strategies, organization, and ways of working. This memo provides an outline of key decisions to be debated during the task force meeting on November 5-6 in Washington, DC. For each decision, the Secretariat offers suggestions for a way forward. **These proposals are intended only to provide a basis for discussion at the meeting; members and other attendees are encouraged to come prepared to discuss, make additions, and suggest changes to these proposals.**

#### Meeting Decisions

1. What results do we want to achieve over the next two years?
2. What strategies will we use to achieve those results?
3. How will we organize ourselves to carry out these strategies? Who needs to be involved? What roles and responsibilities will each member undertake?
4. What mechanisms and processes (i.e. ways of working) will we use to enable effective collective action around the recommendations?

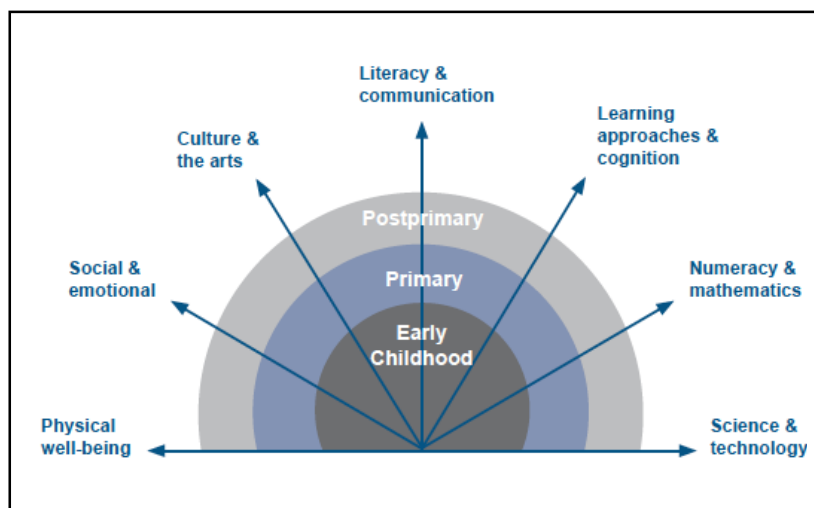
## Decision 1: What results do we want to achieve over the next two years?

In Bellagio, the task force agreed to sustain the momentum built by the first phase and carry on the work in implementing the recommendations into a second phase while the process of developing a multi-stakeholder advisory group is underway. A time frame of two years for phase two is proposed both for practical as well as strategic reasons. The rationale is that this will allow sufficient time to set up an effective multi-stakeholder partnership on learning to carry the work forward, while also sustaining momentum through 2015, a critical juncture in the global development agenda.

In September, the task force recommendations were launched in New York City during the UN general assembly meeting, as a contribution to the UN Secretary-General's Global Education First Initiative (GEFI). The seven recommendations are as follows:

1. **A Global Paradigm Shift:** The task force calls for a shift in global focus and investment from universal access to access *plus* learning. The collection of better data on learning is central to that effort.
2. **Learning Competencies:** The task force calls upon education systems to offer opportunities to children and youth to master competencies in seven domains of learning (Figure 1). Education systems around the world should focus on these competencies starting from early childhood through lower secondary school.<sup>1</sup>

Figure 1: Global Framework of Learning Domains



3. **Learning Indicators for Global Tracking:** The task force recommends a small set of learning indicators to be tracked in all countries (see Table 1 below). These indicators measure fundamental learning opportunities over a child's educational career. Some indicators within these areas of measurement currently exist, while others need to be developed.

<sup>1</sup> Given the many and varied areas of specialization students take on in upper secondary school and beyond, the task force decided to limit its recommendations to the lower secondary level and focus on the knowledge and skills all youth need, regardless of the future occupations and learning opportunities they pursue.

**Table 1: Learning Indicators for Global Tracking**

Areas of Measurement	Description
Learning for all	Combine measures of completion and learning (reading proficiency at the end of primary school) into one indicator.
Age and Education Matter for Learning	Measure timely entry, progression and completion of schooling, and population-based indicators to capture those who do not enter or leave school early.
Reading	Measure foundational skills by Grade 3 and proficiency by the end of primary school.
Numeracy	Measure basic skills by end of primary and proficiency by lower secondary school.
Ready to Learn	Measure acceptable levels of early learning and development across a subset of domains by the time a child enters primary school.
Citizen of the World	Measure among youth the demonstration of values and skills necessary for success in their communities, countries and the world.
Breadth of Learning Opportunities	Track exposure to learning opportunities across all seven domains of learning.

4. **Supporting Countries:** The task force recommends that support is provided to countries in strengthening their assessment systems and, ultimately, in improving learning levels. An international, multi-stakeholder partnership would ensure better collaboration among existing agencies, fill essential gaps in support to countries, and help sustain a broad coalition of stakeholders with a common vision of learning for all.
5. **Equity:** Measurement of learning must include an explicit focus on equity, with particular attention to rising inequality within countries. Measures of access and learning, along with data on child characteristics, should be used to ensure equitable learning opportunities (shaped by a range of factors such as school conditions, teacher quality, etc.) and to reduce disparities in learning outcomes. This requires understanding the characteristics of out-of-school children and youth, the barriers they face, as well as identifying effective strategies to reach children who are furthest behind.
6. **Assessment as a Public Good:** Measures for globally tracked indicators must be considered a public good, with tools, documentation, and data made freely available. No country should be precluded from measuring learning outcomes due to financial constraints.
7. **Taking Action:** Stakeholders must take action to ensure the right to learn for all children and youth and advocate for accessible, transparent systems for measuring learning.

For each of the seven task force recommendations, the following are proposed results to be achieved at the end of the first and second years of implementation. Again, these are offered for debate and discussion amongst task force members. Task force members and partners will identify milestones throughout each year to lead up to the agreed-upon results.

**Table 2: Proposed Results for January 2014 – December 2015**

<b>Recommendation</b>	<b>Task</b>	<b>Year 1 Results (End of 2014)</b>	<b>Year 2 Results (End of 2015)</b>
<b>1: Global paradigm shift</b>	Ensure paradigm shift is institutionalized in global policies and donor priorities.	# of donors increasing funding for improving learning and measurement. # of global organizations and countries devoting resources to improving learning and measurement.	Learning and LMTF recommendations are represented in the post-2015 development framework and EFA.
<b>2: Learning competencies</b>	Promote a broad, holistic definition of learning across seven domains	# of ministries/orgs/donors who endorse, adopt or adapt the LMTF framework of 7 learning domains.	# of ministries/orgs/donors who endorse, adopt or adapt the LMTF framework of 7 learning domains
<b>3: Learning indicators for global tracking</b>	Develop and refine the technical tools required to measure learning in the 7 recommended areas:	Lead and partner agencies secure funding and begin work as described below.	Results achieved as described below.
	1. Learning for All	Decision on methodology and guidelines for collecting data	# countries collect quality data for this indicator following the methodology and guidelines developed in year 1.
	2. Age and Education Matter for Learning	Decision on methodology and guidelines for collecting data	# countries collect quality data for this indicator following the methodology and guidelines developed in year 1.
	3. Reading	Decision on quality assurance guidelines for reading assessments; strategy agreed upon to link existing international and regional measures and plan developed (PIRLS, LLECE, SACMEQ, PASEC; include developing efforts in EAP and MENA).	Global mapping of reading assessments in # countries; # countries collect quality data for this indicator following guidelines developed in year 1. Report on indicators for tracking reading achievement globally.
	4. Numeracy	Decision on quality assurance guidelines for numeracy assessments; strategy agreed upon to link existing international and regional measures (TIMSS, LLECE, SACMEQ, PASEC; include developing efforts in EAP and MENA).	Global mapping of numeracy assessments for # countries; # countries collect quality data for this indicator following guidelines developed in year 1.
	5. Ready to Learn (ECD)	Technical guide for measuring learning and quality in pre-primary settings complete; prototype measure of young children’s learning piloted for country-level data collection.	# countries assess readiness to learn using prototype measure or measures meeting technical properties.

	6. Citizen of the World	Reach consensus on what to measure and guidelines for how to measure.	Develop and begin piloting the tools, as they are available.
	7. Breadth of Learning	Simple, global measure for tracking breadth of learning across the curriculum developed and piloted. Self-diagnostic tool for countries is developed and piloted.	Simple global tool is expanded; a global database is launched on breadth of learning in intended curriculum. Self-diagnostic tool used in # of countries.
<b>4: Supporting countries</b>	Support a small number of countries and regions in implementing a subset of LMTF recommendations.	# countries, states, districts begin process to adapt LMTF recommendations nationally, including: diagnose assessment system, build national consensus among diverse stakeholders, and develop plan to implement agreed-upon assessment system.	# of first cohort countries/states/districts that begin implementing the assessment system; # of new sites begin process to adapt LMTF recommendations nationally.
	Support countries in the longer term through a multi-stakeholder partnership on learning.	Reach consensus on the form, function, funding for and location of a multi-stakeholder partnership.	The multi-stakeholder partnership on learning is established and operational.
<b>5: Equity</b>	Ensure data collection and analysis includes child, family, teacher and community characteristics to enable tracking disparities between groups.	Publish guidelines for how to standardize data analysis for subpopulations.	# countries that collect and analyze data according to guidelines.
<b>6: Assessment as a Public Good</b>	Ensure tools, documentation, and data for globally tracked indicators are freely available Identify innovative methods for data collection.	Assessment companies commit to making some products and services freely available for some countries. Technology companies commit to providing free support to identify innovative methods for data generation, collection, and analysis.	# assessment companies offer pro-bono support to countries. # technology companies offer pro-bono support to countries.
<b>7: Taking action</b>	Build political support at the international, regional, and national levels.	Key youth and civil society groups advocate for improved assessment of learning.	Increased demand for transparent assessment of learning.

**Additional questions for consideration:**

1. Are these the results we want to see two years from now? If not, what else?
2. Are these results too ambitious? Not ambitious enough?

**Decision 2: What strategies will we use to achieve those results?**

Four streams of work are proposed to achieve the results described above.

**I. Sustain momentum through a multi-stakeholder partnership on learning.**

- a. The Secretariat continues coordinating the next phase of LMTF work until the multi-stakeholder partnership is set up and operational. For this phase, CUE at Brookings and UIS propose a division of responsibilities within the Secretariat with CUE leading on the overall facilitation and coordination of the task force and UIS leading on the technical work, particularly in relation to indicators. Secretariat tasks will include:
  1. Facilitating expansion of the task force to include new stakeholders.
  2. Coordinating and tracking implementation by lead agencies.
  3. Ensuring that the inclusive, consultative, and transparent approach of the first phase of LMTF continues through the implementation phase, including in the development of new tools and recommendations.
  4. Reviews indicators for global tracking and sets quality assurance guidelines.
- b. Explore various models for the multi-stakeholder partnership and come to consensus on the form, function, location, and membership.
- c. Agree on ways of working and mechanisms for establishing membership, decision-making, information-sharing, accountability, and reporting.

**II. Technical: Develop and refine the technical tools required to measure learning in the seven recommended areas.**

For each of the seven recommended areas of measurement, indicators must be either designed or adapted from existing ones, in collaboration with and with the consensus of the education community. The following chart (see Table 3 below) summarizes the next steps required for each indicator and serves as a roadmap for the overall technical work, recognizing that various actors will need to be involved to achieve this shared vision.

**Equity Lens.** In addition to the work required to develop measures and decide on indicators, technical work is needed to enable analysis of these indicators by sub-groups. This is critical to ensuring gains in learning outcomes are equitable. To do this, the following activities are proposed:

- a. Come to consensus on key dimensions of equity for global tracking (e.g. sex, urban/rural location, wealth and disability status) and guidelines for countries wishing to measure other areas (e.g. conflict vs. non-conflict regions, ethnic and religious minority groups, linguistic minority groups, children in informal settlements).

- b. Develop technical guidance on standardizing data analysis for various subpopulations, including z-scores and other techniques.
- c. Incorporate this guidance into country efforts to assess learning.

**Table 3: Next Steps for Global Measures and Indicators**

Category	Existing Work	Remaining Technical Work
<b>Learning for All</b>	Approaches for indicators that combine both completion and attainment perspectives have been developed. The “yield” indicator has been modestly addressed in the academic literature and some form of it is currently used in several countries, including Brazil.	Based on existing literature, develop and test an indicator that would combine measures of access (completion) and learning (reading proficiency) at the end of primary school. This would require the next steps described under <i>Age Matters for Learning</i> and <i>Reading</i> (see below).
<b>Age and Education Matter for Learning</b> (access + completion)	Access and completion indicators are collected for almost all countries and reported globally.	Improve measurement of timely entry, progression, and completion of schooling, and use additional indicators to capture children who do not enter and progress on time.
<b>Reading</b>	There are many valid and reliable tools used to assess foundational “learning to read” skills and proficiency, i.e. “reading to learn,” some of which are used in multiple countries and/or are internationally comparable.	Convene a group of experts to review and set standards for measuring foundational skills by grade 3 and proficiency by end of primary.
<b>Numeracy</b>	There are many valid and reliable tools used to assess mathematics and numeracy at the primary and secondary levels, some of which are used in multiple countries and/or are internationally comparable.	Convene a group of experts to review and set standards for measuring foundational skills by upper primary and proficiency by lower secondary.
<b>Ready to Learn</b>	There are multiple measures of children’s readiness to learn, including national, global, and regional tools. However, the age of assessment and domains assessed vary widely among these tools.	Develop a shared “ready to learn” indicator for children at primary entry (approx. ages 5-7) in tandem with other sectors, including health, child protection, and nutrition.
<b>Citizen of the World</b>	This is an emerging field and the existing measures focus on civics, national citizenship, and 21 <sup>st</sup> century skills related to digital communications.	Set up a consultative process (in collaboration with youth organizations and others) to build consensus on a measure of skills and/or values that enable youth to be constructive citizens in a globalized world.

Category	Existing Work	Remaining Technical Work
<b>Breadth of Learning</b>	This is a new effort at the global level. There are some efforts to track curriculum across countries, but they focus on high-income countries and only in the areas of reading, mathematics, and science in upper primary and lower secondary.	This indicator is intended to be broader than curriculum and may encompass indicators related to teacher preparation and in-service training, learning materials, and classroom practices. Work is needed to develop a simple global measure along with a self-diagnostic tool that countries can use to examine the breadth of learning experiences their education systems provide across the seven domains of learning.
<b>Equity</b>	A variety of methods for analyzing data across subpopulations are well established in other sectors.	Come to consensus on key dimensions of tracking equity for education (via consultation or convene a group) and develop technical tools for guidance.

The figure below describes the main steps required for institutionalizing the indicators for global tracking.

**Figure 2: Process for Developing/Refining Indicators for Global Tracking**

Areas of Measurement	STEP 1	STEP 2	STEP 3	STEP 4
	Develop consensus on principles for indicator (political buy-in)	Develop indicator	Review/Pilot indicator	Institutionalize indicators for global tracking
<ul style="list-style-type: none"> <li>• Learning for All</li> <li>• Age Matters for Learning</li> <li>• Reading</li> <li>• Numeracy</li> </ul>	--	Year 1	Year 2	Year 2
<ul style="list-style-type: none"> <li>• Ready to Learn</li> <li>• Citizen of the World</li> <li>• Breadth of Learning</li> </ul>	Year 1	Year 2		
<ul style="list-style-type: none"> <li>• Equity (applies to all areas)</li> </ul>	Year 1	Year 1	Year 1	Year 2

### III. Institutional: Support implementation of a subset of LMTF recommendations at the country and regional levels.

In Bellagio, the task force agreed on five core principles for moving forward on implementation with countries, states, cities, and other parties:

1. The process should be country-driven, beginning with an assessment of the current learning measurement system and including a “menu” of options for national-level support.
2. Implementation should be carried out in collaboration with existing efforts by national, regional, and international organizations. In particular, regional collaborations should be leveraged to facilitate shared learning across the region and ensure recommendations are implemented in a culturally relevant way.



3. Implementation should proceed via multi-stakeholder collaboration, including through national communities of practice on assessment.
4. Interested countries should demonstrate commitment through political support and cost-sharing.
5. Any recommended products or services should be considered public goods, with tools, documentation, and data made freely available.<sup>2</sup> Quality assurance mechanisms should be in place to evaluate tools before they are shared.

Guided by these core principles and using the LMTF recommendations as a framework, the following activities are proposed:

- a. Support countries in diagnosing the strengths and weaknesses of their assessment systems.
- b. Create a global inventory of measurement expertise and link countries to technical support in the field.
- c. Through regional meetings and a global meeting of implementers, facilitate a global learning community to share progress, connect with technical and financial resources, and finalize plans to implement learning assessments.
- d. Support countries/regions as they develop a plan to implement learning assessments and record and report the results (see below for more detail). Proposed candidates include:<sup>3</sup>

<b>Regional</b>	<ul style="list-style-type: none"> <li>• East Asia/Pacific</li> <li>• Latin America/Caribbean</li> <li>• Middle East/Northern Africa</li> </ul>
<b>National</b>	<ul style="list-style-type: none"> <li>• Kenya</li> <li>• Liberia</li> <li>• Malawi</li> <li>• Rwanda</li> <li>• South Sudan</li> <li>• Zambia</li> <li>• Pakistan (3 provinces)</li> <li>• Kyrgyz Republic</li> </ul>
<b>Sub-national</b>	<ul style="list-style-type: none"> <li>• Nigeria (Kano)</li> <li>• India (Uttar Pradesh)</li> <li>• Zanzibar</li> <li>• US States</li> </ul>

<sup>2</sup> Procedures should also be fully replicable by independent researchers. While the data should be publicly available, it should protect participants' identities. The only exception to this principle applies to the safeguarding of instruments' integrity; in this case, instruments can be kept in reserve and only exemplars be released publicly.

<sup>3</sup> Candidates were identified based on the following criteria:

- Extensive participation in the LMTF, with involvement from various stakeholder groups.
- Buy-in from members of government and/or non-governmental organizations into the LMTF process who have requested help in implementation.
- Implementation planned in a diversity of contexts, including regional, national, and sub-national groups.
- Strategic importance, including strong global advocates that are key players in the post-2015 development agenda, e.g., India, Brazil, Nigeria, Kenya, South Korea, and Jordan.

- e. Convene a consortium of assessment companies and experts to support availability of materials and data.
- f. Convene a consortium of technology companies and experts to identify innovative methods for data generation, collection, and analysis.

**Supporting countries/regions in implementation:** The Secretariat has received multiple inquiries from countries, regions, and organizations eager to implement the recommendations and asking for assistance and support. Many of these countries and regions have already started a process to implement the LMTF recommendations, often beginning with mapping the seven domains of learning to existing curriculum frameworks. The proposal is to have a clear framework for providing support that would help the Secretariat prioritize time and attention. Having a clear framework as well as clarity on some initial geographical areas of focus—where regional and national actors in particular will work on LMTF recommendations—will also be helpful in capturing and sharing early lessons learned.

Ultimately, LMTF members must decide if and how to support regions and countries in these efforts. Specifically, there is a need to provide tools and to monitor how the recommendations are implemented, both to inform other countries and to mitigate some of the unintended consequences identified by the LMTF in the previous phase (e.g. a narrowing of curriculum or resources being spread too thin if all recommendations are taken on at once). Four types of support are proposed:

1. **LMTF direct support to countries:** The task force and partners working within a particular country will support national stakeholders to identify the needs, build consensus on measurement priorities, and connect with financial and technical resources needed to implement the plan. This may involve funding an organization within the country to carry out the day-to-day work and mobilization of a small team of external experts tailored to the country's needs.
2. **LMTF direct support to regions:** The task force and its partners will work with a regional organization to support countries in the way described above. The majority of the work will be done by the regional organization with the secretariat helping design the approach, connecting with technical and financial resources, and documenting the results achieved. This may involve funding for the regional organization to carry out the work.
3. **LMTF auxiliary support to countries:** In countries where there is sufficient existing capacity or there are already organizations working in this arena, the task force and its partners can provide a platform to share information and connect regional and global efforts. This may include quarterly virtual meetings, an online portal for sharing resources, and inclusion in global and regional meetings.

4. **LMTF open-source support:** The task force and its partners will also work to have materials freely available online for interested parties. These materials would include toolkits for various non-governmental audiences on how to incorporate the LMTF recommendations into their work (teachers, NGOs, donors, etc.). LMTF could ask these groups to register and track progress.

#### **IV. Political: Continue building political support at the international, regional, and national levels.**

- a. Continue communications and outreach with stakeholders around the world to promote a focus on access plus learning and uptake of LMTF recommendations.
- b. Ramp up post-2015 outreach to ensure LMTF recommendations inform the next round of MDG/EFA goals.
- c. Develop and use communications materials with shared, cohesive messaging for various audiences, including webcasts, infographics, policy briefs, and toolkits.

#### **Additional questions for consideration:**

1. Do the four streams of work proposed above capture the scope of activities required for the next phase of LMTF? If not, what is missing? What should be changed?
2. Will the proposed strategies lead to the desired results? If not, what different strategies should be considered?

### **Decision 3: How will we organize ourselves to carry out these strategies?**

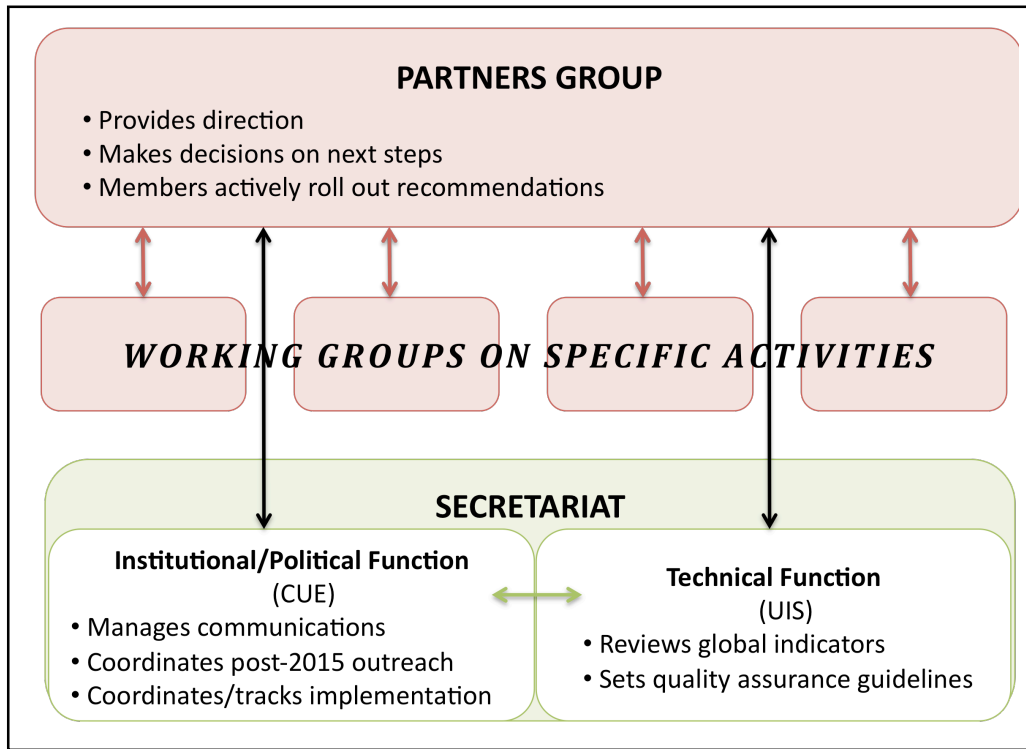
For the first phase of work, the task force was composed of task force member organizations (30 institutional representatives, chaired by three individuals), three working groups corresponding to the three core questions (technical experts), and a secretariat (UIS and CUE). For this second stage of work, a new structure is needed that aligns with the new sets of tasks required. The following proposals are broken down into two time frames:

1. **Now through the end of 2015:** The structure of the task force over the next two years.
2. **Beyond 2015:** Characteristics of the multi-stakeholder partnership on learning that will be established over the course of the next two years to carry forward the task force work after 2015.

#### **I. Proposed Task Force Organization for the Next Two Years**

In Bellagio, task force members discussed possible ways to organize ourselves for collectively working together during the next phase. One directive was clear: the approach of mixing technical and political perspectives and representatives on the task force worked well for the first phase, but this needs to change for the second phase. In particular, there is a need to find a forum for technical discussions among experts that will directly guide the work. There is also a need to engage more partners who are interested in actively contributing. The following figure depicts a suggested structure for the task force (including current and new members) moving forward. The proposed makeup and responsibilities for each subgroup are described in greater detail below.

**Figure 3: Proposed Structure for LMTF Phase 2**



**Partners Group:** Members represent institutions that are important political/policy-related actors for rolling out task force recommendations. This includes existing task force members that wish to stay on, and allows for new members that should be represented around the table. Members are actively engaged within their spheres of influence (both internally within their own organizations and externally) in acting on task force recommendations. Members continue to guide task force work and take decisions on directions forward. There will likely need to be working groups carrying out work jointly over the next two years and reporting back to the larger group (e.g. post-2015, developing specific indicators, engaging technology companies for new ways of collecting education data). At minimum, the partners group should meet once a year in person and once a year virtually. Implementing countries should also be considered members.

**Current Task Force Member Organizations**

ActionAid	Inter-American Development Bank (IADB)
Agence Française de Développement (AFD)	International Education Funders Group (IEFG)
African Union Commission	Office of the UN Secretary-General
Arab League of Educational, Cultural, and Scientific Organization (ALECSO)	Organización de Estados Iberoamericanos (OEI)
Association for Education Development in Africa (ADEA)	Pearson
Australian Agency for International Development (AusAID)	Pratham
Campaign for Female Education in Zambia (Camfed)	Queen Rania Teacher Academy
Center for Universal Education (CUE) at the Brookings	Southeast Asian Minister of Education Organization

Institution [Secretariat]	(SEAMEO)
City of Buenos Aires, Argentina	UK Department for International Development (DFID)
Coalition des Organisations en Synergie pour la Défense de l'Éducation Publique (COSYDEP)	UNDP
Dubai Cares/United Arab Emirates	UNESCO
Education International	UNESCO Institute for Statistics (UIS) [Secretariat]
Global Partnership for Education	UNICEF
Government of India, Ministry of Human Resource Development	United States Agency for International Development (USAID)
Government of Kenya, Ministry of Education, Science and Technology	World Bank
Korea Institute for Curriculum and Evaluation (KICE)	

### Organizations Expressing Interest in Participating as of October 2013

Canadian International Development Agency (CIDA)	Microsoft
Center for International Cooperation in Education Development (CICED) of the Russian Presidential Academy of National Economy and Public Administration	Kenya Primary School Headteachers Association (KEPSHSA)
The Commonwealth Secretariat	Organisation for Economic Co-operation and Development (OECD)
German Society for International Cooperation (GIZ)	The Queen Rania Foundation
German Federal Ministry for Economic Cooperation and Development (BMZ)	Save the Children
Idara-e-Taleem-o-Aagahi (ITA) Pakistan	Sustainable Development Solutions Network (SDSN)
Intel	Youth Advocacy Group of the Global Education First Initiative (GEFI)

**Working Groups:** As in the previous phase of work, working groups of members and partners will need to move forward particular pieces of work. Exactly what topics and activities these working groups should cover is yet to be determined, but can be discussed, particularly in relation to the larger task force organization moving forward.

**Secretariat:** UIS and CUE will divide responsibilities as the secretariat, with UIS leading on the technical work, including providing quality assurance and technical reviews of indicators for global tracking. CUE will provide overall facilitation and coordination of the task force, including managing communications, coordinating post-2015 outreach, and coordinating and tracking implementation of the recommendations.

#### Additional questions for consideration:

1. Overall: Does this way of organizing the task force make sense to achieve the results desired over the next two years?
2. What other organizations should be part of the partners group? Is there a limit to how large it should get? Should there be criteria for admitting members?
3. Are there other ways for members to engage without joining the partners group?

4. Should there be a separate group for individuals/organizations who are supportive but cannot commit to membership?
5. What should the working groups focus on?
6. What is the best way to ensure technical review of indicators for global tracking that takes into account various perspectives?

## **II. Multi-stakeholder Partnership on Learning – Beyond 2015**

As part of its recommendations, the task force proposed a multi-stakeholder partnership on learning that would ensure better collaboration among existing agencies, fill essential gaps in support to countries, and help sustain a broad coalition of education and development stakeholders that share a common vision of learning for all. The task force was clear that this does not mean creating a new independent organization; rather, this global collaboration should work with and build upon existing efforts, notably by leveraging regional initiatives. The partnership should include a diverse membership – from national governments, teacher organizations, civil society organizations, bilateral and multilateral and other development partners, to the private sector, philanthropic foundations and research and academic institutions.

In Bellagio, the task force debated general direction functions for the multi-stakeholder partnership, but did not develop with a specific Terms of Reference. The main areas or functions discussed were:

- Technical support: Provide quality assurance review for assessment tools that actors may want to use for measuring some of the indicators for global tracking. Provide an “objective” source of guidance for the different avenues for technical assistance and where necessary help actors connect to them.
- Institutional support: Help actors connect to financial support to carry out task force recommendations. Support communities of practice at the country level.
- Political support: Help advocate broadly for better education data and ultimately better access to quality education.

The task force recommended that the feasibility of the following three options be explored for the form and location of this multi-stakeholder partnership:

### **1. Global Partnership for Education**

About GPE: Its work aims to galvanize and coordinate a global effort to deliver a good quality education to all girls and boys, prioritizing the poorest and most vulnerable. The GPE accomplishes this by bringing together the various stakeholder groups in nearly 60 countries; helping developing country partners develop and implement education sector plans; and mobilizing and coordinating resources to support achievement of the plan’s goals. Within each country, Local Education Groups (LEGs) develop, implement, monitor, and evaluate the education sector plans. The GPE board and members of the partnership are supported by a secretariat that sits in the World Bank in Washington DC.

## 2. Education for All Global Monitoring Report

About GMR: Developed by an independent team and published by UNESCO, the Education for All Global Monitoring Report is an authoritative report that provides an evidence-base to inform, influence and sustain genuine commitment towards the six Education for All goals. The GMR team sits in UNESCO Paris. It has an advisory board with a range of actors, in addition to other things the board helps maintain the independence of the report.

## 3. Independent Entity

The task force also agreed to explore a third “independent” option. There are several possibilities within this option and a careful review is needed. For example, one option is to become a network (such as the Inter-Agency Network for Education in Emergencies [INEE]) that shares good practice, conducts advocacy, and collectively develops technical tools. Another option could be to establish a formal commission with a discrete function and rotating members. In Bellagio, it was also suggested that one path might be to assess how much progress the task force has made in implementing its recommendations through 2015 (the next two years) and then embed the remaining functions into existing institutions.

The CEO of GPE and the Director of GMR both expressed openness to considering how their institutions could be helpful to the task force, and noted that any decisions on hosting arrangements would need to be approved by their respective boards. However, both noted that without a clear Terms of Reference for what the multi-stakeholder partnership would be expected to do, it would be quite hard to advance the conversation.

### Additional questions for consideration:

1. Are we able to develop today a clear Terms of Reference for the multi-stakeholder partnership today? If so, what would it be? If not, what process should we undertake to get there? Should we revisit in 6 to 8 months?

### Decision 4: What operating principles/ways of working will we use over the next two years to enable effective collective action around the recommendations?

#### Criteria for Membership

Carrying forward the principles that contributed to the success of the first phase of the LMTF initiative, work in the next phase should continue to be open, participatory and transparent. The following basic criteria/minimum requirements are proposed for membership.

Learning Metrics Task Force members commit to:

- Internalizing LMTF recommendations, integrating them into current work and policies
- Taking action in support of agreed-upon goals, reporting on progress, and sharing lessons learned

## Principles for Working

LMTF members must decide on the principles for working together in the implementation phase. Initial ideas are outlined below.

**Speaking on behalf of LMTF:** All LMTF members are encouraged to speak on behalf of LMTF within their organizations and at conferences and meetings. The Secretariat will maintain a current set of talking points and PowerPoint slides to ensure that messages are cohesive and consistent, and will be available for briefings in advance of meetings or presentations.

**Using the “LMTF brand” or identifying with LMTF:** All LMTF members and participants are encouraged to identify with LMTF and use the materials developed through this collaboration, post about their involvement on websites and blogs, etc. The LMTF currently has no organizational logo (the UIS and CUE logos have been used to date), but one can be created. The proposal is for organizations to use the LMTF logo along with their own organizational logos from here forward. There have been some suggestions to change the name of the initiative in the second phase for greater clarity and to reflect a greater emphasis on implementation and a more permanent collaboration. One possibility is to keep the acronym the same but change the words (e.g. Learning *Measurement* Task Force), as some task force members argue that LMTF has now built up “brand” recognition, and switching the name would be confusing.

Each year a global meeting of LMTF implementing partners should be conducted in a different location in the global south. This would be an opportunity for partners to share resources and ideas and to link implementing partners with funders and technical experts. These meetings could be open to all LMTF implementers, including a limited number of those who only receive open-source support.

**Involving all interested parties:** During the first phase of LMTF, all who were interested in participating had a platform to do so through the task force, working groups, and public consultation. This model was critical to the widespread buy-in of the final LMTF recommendations. During this second phase, there should also be some opportunities for consultation, whether through draft documents posted online for public comment and/or in-person consultations facilitated by LMTF members. This will be especially important in the area of *Citizen of the World*, where the dialogue on “what” to measure is least developed.

There is also a need to involve interested organizations that can contribute expertise and funding, and link to their existing efforts. Some of these organizations can be included in the global inventory of expertise (see above).

**Making decisions:** During the first phase of LMTF, the technical working group members made a proposal to the task force that was informed by public consultation, and the task



force came to consensus on the final recommendations at in-person meetings. However, as the technical work becomes more complex, it is proposed that the partners group be heavily involved in selection of the technical committee members—ensuring broad representation and diverse viewpoints—and the technical committee makes the final decision.

On other decisions that are less technical, the partners will continue to deliberate and come to consensus as before, although there will likely be fewer in-person meetings and some decisions will need to be taken virtually.

**Questions for Consideration:**

1. How many members can there be on the task force? How can we ensure membership is inclusive, while also making sure the group doesn't become too large and unwieldy?
2. To activate membership, should organizations provide a letter signed by the organization's leader (or other senior representative in the institution), agreeing to their commitments and outlining specific actions to be taken?
3. Who can speak on behalf of the LMTF? Do we need to create/promote an "LMTF brand"? Should we change the name of the initiative? Should we create an LMTF logo?
4. What is the process for making decisions? Does the whole task force need to sign off on key decisions, or can it accept expert recommendations, for instance from the Technical Committee?
5. What is the best way to share information among members? Do we need an online platform with open access for members and participants?
7. Should local/regional partners meet once a year to exchange information and best practices?

## Annex: Activities and Potential Partners

Activity	Interested/Potential Organizations
<b>Indicators for Global Tracking</b>	
Learning for All	<ul style="list-style-type: none"> <li>• UIS</li> <li>• Other?</li> </ul>
Age Matters for Learning	<ul style="list-style-type: none"> <li>• UIS</li> <li>• Other?</li> </ul>
Reading	<ul style="list-style-type: none"> <li>• USAID (possible?)</li> <li>• UIS (end of primary)</li> <li>• Other?</li> </ul>
Numeracy	<ul style="list-style-type: none"> <li>• BMZ (possible?)</li> </ul>
Ready to Learn	<ul style="list-style-type: none"> <li>• UNESCO (w/ other sectors)</li> <li>• UNICEF</li> <li>• CUE</li> <li>• Other?</li> </ul>
Citizen of the World	<ul style="list-style-type: none"> <li>• CUE (Note: This is for the measurement component of the larger global citizenship work that UNESCO is leading on)</li> <li>• GEFI Youth Advocacy Group</li> <li>• UNESCO</li> <li>• Other?</li> </ul>
Breadth of Learning	<ul style="list-style-type: none"> <li>• CUE</li> <li>• UIS</li> <li>• Education International (possible?)</li> <li>• IBE (possible?)</li> </ul>
Equity	<ul style="list-style-type: none"> <li>• World Bank (possible?)</li> <li>• UNICEF (possible?)</li> <li>• Other?</li> </ul>
<b>Supporting Countries</b>	
Diagnostic tool	<ul style="list-style-type: none"> <li>• GPE (possible?)</li> <li>• World Bank (possible?)</li> <li>• Other?</li> </ul>
Regional Communities of Practice	<ul style="list-style-type: none"> <li>• ALESCO (possible?)</li> <li>• ADEA (possible?)</li> <li>• South Korea (possible?)</li> <li>• UNESCO Bangkok (possible?)</li> <li>• IADB (possible?)</li> <li>• Pearson</li> <li>• Other?</li> </ul>
<b>Assessment as a Public Good</b>	
Data collection	<ul style="list-style-type: none"> <li>• Consortium of companies (HP, Pearson, Google)?</li> </ul>
“Generic drug equivalent” for assessments of global indicators	<ul style="list-style-type: none"> <li>• Gates Foundation (possible?)</li> <li>• Other?</li> </ul>
<b>Paradigm Shift</b>	
Post-2015 global	<ul style="list-style-type: none"> <li>• GEFI (possible?)</li> </ul>
National mobilization	<ul style="list-style-type: none"> <li>• GCE/CSOs/GPE CSO constituency (possible?)</li> </ul>