COORDINATED EDUCATION IN EMERGENCIES NEEDS ASSESSMENTS AND ANALYSIS SUMMARY GUIDE

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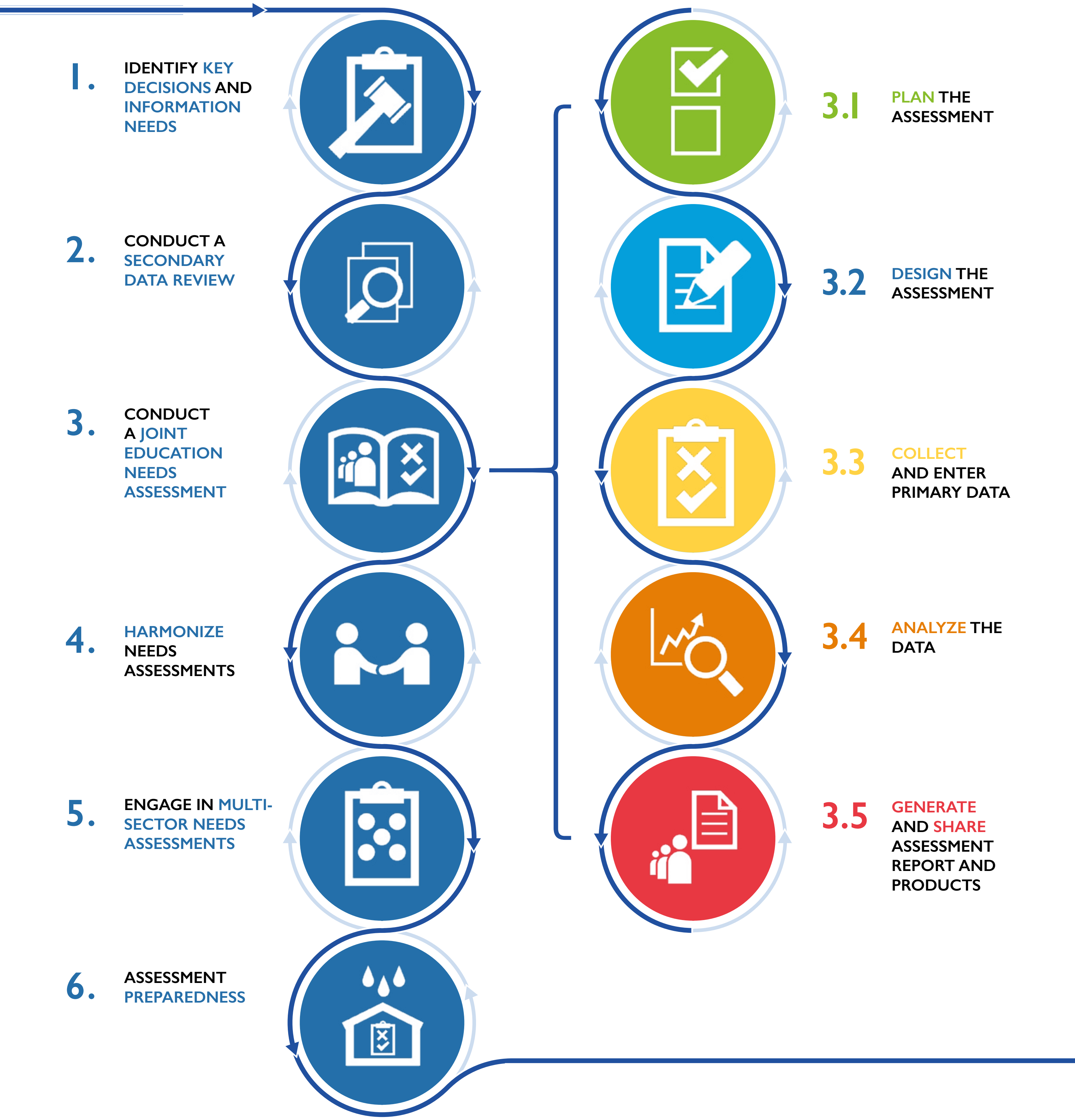
This Summary Guide is a companion to the full Guide to Coordinated Education in Emergencies Needs Assessment and Analysis, an initiative of the Global Education Cluster (GEC), which provide the theoretical foundation and practical guidance needed to establish a sound evidence-base for the design and delivery of a quality education in emergencies (EiE) response. They are part of the GEC's broader Needs Assessment Package which together provide practical guidance, tools and resources for EiE staff as they coordinate, conduct and participate in the assessment and analysis process. The intent of the Guide and this Summary is to improve and ease the process of gathering and generating evidence. Critical to this is ensuring that when possible, needs assessments are joint in nature, utilizing the individual and comparative strengths of multiple organizations. This considered, coordination mechanisms, starting with the Education Cluster, have a unique responsibility for leading their collective organizations in a joint assessment process. The Guide includes information to support coordinated approaches to assessments and analysis. It can be used across EiE contexts, so while it provides specific guidance for Education Cluster Teams[1], it can be used to guide the work of any coordination mechanism including EiE working groups, and those found in refugee scenarios.[2]

This Summary Guide not only provides a brief overview of the contents of the full Guide, but it also serves as an at-a-glance checklist for the key actions and considerations of conducting an assessment with their accompanying outputs and available resources from the Needs Assessment Package. The steps outlined below can be expanded or compressed depending on your circumstance: you may be working in a rapid onset emergency and have only a few weeks to conduct a rapid needs assessment, or you may be working in a protracted crisis where you are conducting an in-depth assessment. In almost all cases you will not be starting from scratch, and many of the components of the assessment can be drawn from preexisting materials. Whatever the emergency context you are working in, remember:

- Review this summary, relevant parts of the full Guide and available resources in the Needs Assessment Package before you start; make full use of these preexisting materials and do not start from scratch
- Plan ahead as much as you can
- Reach out to the Global Education Cluster for help: help.edcluster@humanitarianresponse.info as well as expertise around you – your partners, other experts and stakeholders[3]
- You can do it!

1 Education Cluster Team typically include coordinator(s) and information management officer(s)
2 Refer to the UNHCR Refugee Coordination Model
3 In addition to the GEC, you may be able to receive technical assessment expertise/support from ACAPS, REACH, OCHA, IOM, Statisticians Without Borders, local universities and research institutions, etc. Also consider individuals and organizations who may be able to provide support in other specific areas of your assessment: inter-sector experts, child participation experts, youth groups, Disabled People's Organisations, etc.

COORDINATED EIE NEEDS ASSESSMENTS AND ANALYSIS PROCESS



1. IDENTIFY KEY DECISIONS AND INFORMATION NEEDS

Needs assessments should be designed to deliver answers to specific questions and to inform prioritized, timebound decisions. Therefore, the first step of any assessment is to identify the key decisions that need to be made and to determine the information that is needed to make those decisions. **Do not begin designing or implementing an assessment until you have first identified the key decisions and information needs.**

ACTIONS	CONSIDER...	NA PACKAGE RESOURCES	OUTPUTS
Establish an Assessment Working Group	The AWG will most likely be led by the Education Cluster (e.g. the Cluster Coordinator) and the Ministry of Education (when appropriate) and be comprised of a small group of Cluster and inter-sector experts and relevant ministry counterparts who will help identify key decisions and information needs, conduct the Secondary Data Review (SDR), define an assessment's objectives, locate and mobilize resources, develop a methodology and collection tools, validate and agree on findings and recommendations.	AWG ToR Template and country examples	AWG ToR
Begin an assessment framework	An assessment framework is a guiding document for the entire assessment process and helps ensure that data for every question has a specific purpose for being collected as well as plan for how it will be analyzed and used. At the start of the assessment process, key decisions, deadlines and information needs should be recorded into this framework. While key decisions will vary widely by context they often relate to: where to respond, how to respond, who to respond to, what to respond with, etc. You may wish to compile and organize your key decisions and information needs into top-line research questions in your Assessment Framework, however, this often is done at a later stage in the Assessment ToR (see below).	Assessment Framework Template	Key decisions, deadlines and information needs recorded in the assessment framework.

2. CONDUCT A SECONDARY DATA REVIEW

Once you have identified the information needed to inform your prioritized decisions, you should then conduct a Secondary Data Review (SDR). An SDR is an analysis of pre-existing, available information and will help you identify existing information gaps as well as plan and design primary data collection that will be geographically and thematically relevant.

ACTIONS	CONSIDER...	NA PACKAGE RESOURCES	OUTPUTS
Determine the SDR team and lead focal point	An SDR team (e.g. 3-5 Cluster/AWG members) will be responsible for collecting and analyzing secondary data and writing an SDR report. An assigned focal point (e.g. Cluster Coordinator or IMO) should ensure the team completes the SDR tasks on time. Remember: getting in-country help from your partners as well as remote support from the GEC and relevant stakeholders will allow you to compile, review and analyze more secondary sources more quickly.		
Create an SDR work plan	The SDR focal point should create a work plan outlining tasks, outputs, persons responsible and timeframe for completion of reports and products.	SDR section of the Assessment Work Plan Template	SDR work plan
Plan the SDR report and products	The SDR report and products (presentations, summary sheets, infographics, dashboards, etc.), including timeframe for completion and updates, should be planned from the outset and recorded in the work plan.	SDR Report Template	Report and products included in the SDR work plan
Identify SDR questions and sources (in assessment framework)	Revisit your assessment framework, further break the indicators into questions that could potentially be asked of secondary source and identify those potential sources.	Assessment Framework Template	Assessment framework updated
Prepare an SDR tool	Create an SDR tool or database in order to enter, compile, tag and analyze secondary data. Work with the SDR team to determine most relevant tags including: thematic, geographic, dates, source, reliability of source, timeframe, name of document, etc. Note: as the SDR is ideally an on-going exercise, there may be an existing SDR tool you can use as a starting point (in addition to the SDR Matrix Template).	SDR Matrix Template DEEP	Contextualized SDR matrix
Determine secondary data compilation	Determine who, how and when all secondary data will be compiled for analysis. This will involve setting a cut-off date for entry for the current 'round' of SDR analysis and compilation into a single, 'master database'.		

2. CONDUCT A SECONDARY DATA REVIEW

ACTIONS	CONSIDER...	NA PACKAGE RESOURCES	OUTPUTS
Compile secondary data sources	Identify where you will begin looking for information. Secondary data can be comprised of published research, internet materials, gender or conflict analyses, media reports, datasets, and even emails and minutes from calls and conversations. Sources may include humanitarian/development actors, government counterparts, academia, media, members of the affected communities, etc. (see Section 2.2.1 in the full Guide for a table of potential resources). Store the information/documents into an easily accessible, well-structured repository, such as a centralized, shared folder.		Repository of secondary sources
Train the SDR team and assign sources	Train the SDR team on how to review compiled sources and properly enter and tag relevant data into the matrix. From the repository, create a list of all secondary data sources and use the list to assign sources to relevant team members.		SDR team trained
Conduct and manage the SDR	Have team members enter data into the SDR database. Regularly review team members' work to ensure quality entry and to resolve any questions or problems early. Answer questions about how to properly enter and tag the information.		
Analyze secondary data	As data is being collected and compiled begin to clean and analyze it. Analysis will most likely be based on the pre-defined tags.		
Generate and share an SDR report and products	Based on the SDR data and analysis, generate a report summarizing the key findings and information gaps and produce any related products previously planned. Share the drafted report with relevant stakeholders who may be able to help fill your information gaps. The report may be sufficient to inform the key decisions previously identified. If not, it will inform the planning and design phases of primary data collection. Be sure to also update the assessment framework based on the SDR findings.	SDR Report Template	SDR report and products
Continue SDR and reporting on an ongoing basis	Your SDR should be an ongoing activity and not end after the generation of the first report. An SDR focal point should be sure to keep the matrix up-to-date and generating regular reports or, schedule dates to reconvene the SDR team to conduct another 'round' of SDR and reporting.		Regular SDR report updates

3. CONDUCT A JOINT EDUCATION NEEDS ASSESSMENT

Once key decisions and information needs have been identified and an SDR has highlighted what information exists and what information still needs to be collected, you should then conduct primary data collection and analysis through a joint education needs assessment (JENA). A JENA is an inter-agency assessment focusing on the education sector; it is done jointly with multiple organizations and is typically led by the Education Cluster and, where appropriate, the Ministry of Education (MoE).

3.1. PLAN THE ASSESSMENT

ACTIONS	CONSIDER...	NA PACKAGE RESOURCES	OUTPUTS
Define the objectives and scope	The objectives of your assessment should be designed to inform your prioritized, key decisions. These can be taken directly from the assessment framework (and based on the findings and information gaps identified in the SDR) and used to formulate the overall assessment research question(s). Once objectives are defined, consider the potential limitations of your context (security/access, deadlines, resources, etc.) to help define the assessment's scope.	Assessment Framework Template Assessment ToR Template	Key objectives and scope of the assessment outlined in the Assessment ToR (see also below)
Create an assessment work plan	Create a work plan for the JENA including key tasks, responsible persons/organizations and timeframe/deadline. If your context is multi-lingual be sure to plan time and resources for translating all assessment-related materials.	Assessment Work Plan Template	JENA work plan

3.1. PLAN THE ASSESSMENT

ACTIONS	CONSIDER...	NA PACKAGE RESOURCES	OUTPUTS
Determine assessment coordination team	The assessment coordination team are the staff responsible for the concrete implementation and management of the assessment. The team will typically consist of an assessment coordinator and information analyst(s) (for a list of respective responsibilities, see the table of section 3.1.3 in the full Guide). If needed and if budget allows, full-time assessment coordination teams can be recruited and much of the assessment can be outsourced to external organizations and individuals[4]. Often, however, these roles are filled by Cluster staff themselves (e.g. the Cluster Coordinator as assessment coordinator and Information Management Officer as information analyst). In either case, the AWG (see description of AWG above) along with other relevant assessment and technical experts can then provide the assessment coordination team with the support needed to conduct the assessment as outlined in the tasks below.		
Draft an assessment ToR	Draft and agree-upon a ToR which should include: a brief background to the assessment, objectives, research questions, proposed sampling strategy and geographic coverage, data collection technique, expected outputs, roles and responsibilities, and timeframe. Although some details, such as sampling and methodology, may be finalized later, it is important to begin drafting the ToR early in the assessment process. Be sure to share drafts of the ToR as early as possible with partners to notify them of the assessment, obtain buy-in and get initial feedback on their potential contributions.	Assessment ToR Template and examples	JENA assessment ToR
Develop a budget and track partner contributions	The budget should include a list of all items/personnel required, their associated costs and who will provide the items and/or cover the costs. It is important that the overall scope of the assessment is in-line with available resources. With the draft budget, contact partners, including the MoE, to see what resources they can contribute. These may be financial contributions but are often in-kind (e.g. data collectors, vehicles, gas, phone credit, etc.). Broad participation helps ensure budgetary needs are met, increases inclusivity and transparency and develops partner ownership of the process, findings and report.	Assessment Budget Template and examples	Finalized budget

4 ACAPS, REACH, GEC's Rapid Response Team, consultants, etc.

3.1. PLAN THE ASSESSMENT

ACTIONS	CONSIDER...	NA PACKAGE RESOURCES	OUTPUTS
Develop a code of conduct and informed consent forms	Ethical considerations should also be planned. A code of conduct should be signed by all enumerators and outline the guiding principles of their conduct pertaining to respect and dignity, confidentiality and informed consent as well as clearly articulate provisions and responsibilities regarding Protection from Sexual Exploitation and Abuse (PSEA), data confidentiality and ramifications for breach of conduct. If enumerators will be working with children, include guidelines and principles of engaging with children and child safeguarding, including referral protocols. Additionally, respondents (or their caregivers in the case of working with children) should provide written or verbal informed consent to participate in the assessment.	Code of Conduct and Consent Form Templates and examples	Code of conduct and consent forms
Plan assessment analysis, report and products	Adequately plan, schedule/assign (in the work plan) and budget for analyzing the data (which may include an interpretive workshop, report writing and product dissemination). This may include: Assessment analysis and report; Presentation on the report; Summary/fact sheets and infographics; Anonymized datasets for deeper analysis by others; Joint action plan (with action plan workshop). Plans should be made not only for sharing final products with partners and relevant stakeholders, but also with assessment communities and affected populations.	Interpretive Workshop Template; Assessment Report Template and country examples; Assessment presentation country examples; Action Planning Template	Report and products included in the JENA work plan and budget

3.2. DESIGN THE ASSESSMENT

Assessment design can be seen as the planning process for the technical aspects of the assessment; specifically, how you will collect, manage and analyze the data. The design of the assessment should be done in conjunction with the planning process described above as each will inform and affect the other.

ACTIONS	CONSIDER...	NA PACKAGE RESOURCES	OUTPUTS
Determine assessment questions and sources	Based on the information needs (i.e. the remaining information gaps identified by your SDR) outlined in your assessment framework, determine which primary data questions to ask, to whom and at what level (e.g. community, school, household, individual, etc.). Common sources include: Head teachers; Teachers/education personnel; Students/out-of-school children and youth; Parents/ caregivers; Community/IDP site leaders; Direct observations at the assessed location (school, IDP site, temporary classrooms, community site, etc.).	Assessment Framework Template	Updated assessment framework
Develop a sampling strategy	Sampling is the process of collecting information from a subset of the entire population; this allows you to collect data from a significantly reduced number of locations and informants, cutting costs and time, while still obtaining needed information. The three types of sampling most common for JENAs are: representative, purposive and convenience.	Guidance note and additional resources on sampling strategies	Sampling strategy outlined in Assessment ToR
Select a collection technique	For each assessment question and source identified (see above), determine the best, safest and most culturally appropriate way of obtaining the information. Main approaches include: direct observation; key informant interviews; focus/community group discussions; participatory methodologies for children and youth. When selecting your method(s), consider other planning and design elements such as your timeframe, budget and capacity of assessment field teams.	See resources listed below for 'Design translate and pilot collection tool(s)'	Collection methodology outlined in Assessment ToR

3.2. DESIGN THE ASSESSMENT

ACTIONS	CONSIDER...	NA PACKAGE RESOURCES	OUTPUTS
Design, translate and pilot collection tool(s)	A unique data collection tool will likely be needed for each of the different types of sources and collection methodologies you have decided to assess. Determine if tools will be paper-based or if mobile data collection is possible/appropriate (or a combination). Questions can be taken directly from your assessment framework and modified for each of the different targeted audiences. This helps ensure each question is linked to informing key decisions and that you do not collect more information than is necessary. It is also good practice to solicit feedback and inputs from other sectoral and relevant technical experts (e.g. Child Protection, GBV, WASH, Shelter, Cash, etc.). Once designed, translate (if relevant) and pilot your data collection tools, preferably by field-testing with relevant respondents. Piloting is a crucial step as it will help you work out any problems, mistakes or misunderstandings in the tools prior to actual data collection.	Checklist for Developing Data Collection Tools and country examples	Collection tools
Design the analysis	The information analyst should determine (and record in the assessment framework) how each question on each tool will be entered into a database, analyzed and visualized. This perspective will help to catch potential problems that may arise during data entry and analysis, and questions may need to be rephrased or reformatted accordingly.	Assessment Framework Template	Updated assessment framework
Determine assessment field team composition	Selection of field team members and appropriate team composition is of utmost importance. A field team may include: a team lead, data collectors, driver, interpreter/translator. The size and number of teams required will depend on the assessments' scope, methodology and budget. Team composition considerations should be made in terms of gender, language, ethnicity, affiliation, national/international partners, etc. Where appropriate, ensure participation of the MoE and local authority counterparts on the teams.	ACAPS Brief: "Building an effective assessment team"	Field teams organized
Prepare field team packages and data collection plans	Prior to training teams, prepare a package for each assessment field team containing the essential information and documents they will need; including: locations/maps of the areas to be assessed, data collection plans (with site/informant selection and replacement instructions), copies of data collection tools (paper based or on mobile collection tools), guidelines on collection techniques, key terms and definitions, communication and emergency procedure and contact list, letter of introduction, code of conduct, informed consent forms, etc.	Data Collection Plan Template	Field team packages and collection plans

3.2. DESIGN THE ASSESSMENT

ACTIONS	CONSIDER...	NA PACKAGE RESOURCES	OUTPUTS
Design a data entry tool	If paper-based collection is used, an electronic database (e.g. using Microsoft Excel or Access) will need to be developed for data entry. Mobile data collection will already be entered and have an automatic export function.	Data entry tool examples; ACAPS brief: database design	Data entry tool
Select an approach and team for data entry	If paper-based collection is used, determine how data will be entered (centralized and/or decentralized entry) and by whom.		

3.3. COLLECT AND ENTER PRIMARY DATA

Once the JENA has been appropriately planned and designed, assessment teams can be trained and sent to collect primary data.

ACTIONS	CONSIDER...	NA PACKAGE RESOURCES	OUTPUTS
Train assessment field teams and data entry teams	All members of assessment field must participate in a mandatory assessment training prior to data collection (including drivers and translators). The less technical education and/or assessment experience the team members have, the more important the training. The training should be as practical as possible, using group-work, role-play and simulation to practice the techniques that will be used while collecting data and become familiar with the data collection tools. If appropriate and practical, the training can also include a field-level pilot of the collection tools. Adequate time should be planned and dedicated for developing the training materials. The time spent in adequately training teams will pay off in better quality data.	Training Agenda Template	Field and data entry teams trained

3.3. COLLECT AND ENTER PRIMARY DATA

ACTIONS	CONSIDER...	NA PACKAGE RESOURCES	OUTPUTS
Conduct and manage the data collection	The assessment coordinator is responsible for managing the primary data collection, including overseeing all preparation and execution of operational, administrative and logistical elements of the field work. The assessment coordination team should have daily contact with each field team leader and be available to receive calls at any time from the teams (report updates, problems, changes, security issues, etc.). Quality supervision should include daily checking and review of incoming data, feeding back to teams to ensure any issues can be rectified as soon as possible, ensuring the data and integrity of the assessment is maintained as well as ensuring safety, safeguarding and do no harm principles and practices in line with the Code of Conduct and global best practice on PSEA are upheld.	Data Collection Management Checklist	Primary data collected
Debrief with assessment field teams	Debrief with the field teams and discuss the collection process, challenges and potential validity problems with the data. Field teams provide a great deal of insight into the data that may not be apparent from simply analyzing it. During debriefs, begin cleaning the data, by quickly 'spot-checking' the completed data collection tools with the individual data collectors.		All field teams debriefed
Enter primary data	If a centralized data entry methodology is used, trained data entry teams should be on hand and ready for immediate entry as data is received from the field teams.		Completed database

3.4. ANALYZE THE DATA

Analysis is the process of interpreting available information including 'raw' data to identify significant facts, trends and anomalies to inform decision-making. Analysis should start as soon as you begin to receive data and continue as long as you are receiving new data. Data analysis may sound highly technical, but it does not take any specific qualifications; just a critical mind and an eye for practical observations.

ACTIONS	CONSIDER...	NA PACKAGE RESOURCES	OUTPUTS
Analyze the data	Analysis is not a single action, but a process consisting of several steps: Prepare (clean, summarize and visualize), Compare, Explain, Interpret, Forecast, Recommend. The full Guide walks through each of these steps individually.	ACAPS briefs on analysis and data cleaning; Guidance note on visualization	Data analyzed
Conduct shared analysis (i.e. interpretive workshop)	After the assessment coordination team has completed an initial round of analysis, there must also be a shared analysis (i.e. interpretive workshop) in which the AWG, MoE (where appropriate), wider Cluster members and relevant stakeholders come together to discuss and analyze the findings.	Interpretive Workshop Template	Shared analysis/workshop conducted

3.5. GENERATE AND SHARE AN ASSESSMENT REPORT AND PRODUCTS

ACTIONS	CONSIDER...	NA PACKAGE RESOURCES	OUTPUTS
Write the assessment report	The assessment coordinator is responsible for ensuring the assessment findings are turned into a readily and easily accessible report which should include: executive summary, background/introduction, methodology, findings, recommendations. Report may need to be translated.	Assessment Report Template and country examples	Assessment report
Prepare and translate other assessment products	In addition to the final report, other assessment products may be developed and (where necessary) translated. These additional products may include: an assessment presentation as a useful advocacy exercise to encourage explanation, discussion and buy-in; summary sheets and infographics; cleaned and anonymized primary datasets.	Assessment presentation country examples	Assessment presentation and other products

3.5. GENERATE AND SHARE AN ASSESSMENT REPORT AND PRODUCTS

ACTIONS	CONSIDER...	NA PACKAGE RESOURCES	OUTPUTS
Disseminate and share report and products	It is important to consider the actual process of getting the assessment findings and recommendations to the people who need them as well as the appropriate format for sharing. Section 3.5.3. Disseminate and share report and products in the full Guide contains a table for potential target audiences, information format and communication channel. Considerations should be made for sharing results with assessment respondents and the affected communities assessed.	Table in Section 3.5.3 of the full Guide.	
Conduct an action plan workshop	An action plan workshop with the AWG, MoE, Cluster members and relevant stakeholders (including inter-sector colleagues from OCHA, Child Protection, GBV, WASH, etc.) should be conducted to develop a concrete action plan highlighting what actions need to be taken as a result of the assessment findings and recommendations.	Action Planning Template	Cluster action plan

4. HARMONIZE NEEDS ASSESSMENTS

Chapter 3 detailed how to conduct a specific type of assessment: a JENA. In some contexts, however, conducting a JENA will not be possible or appropriate. Furthermore, multiple, organizational assessments or multi-sector assessments with an education component may be conducted after, parallel to or instead of a JENA. In these instances, the Education Cluster should continuously strive to harmonize education-related assessments. Harmonizing assessments involves pre-emptively agreeing with partners on common indicators and questions, geographic coverage and interoperable methodologies; it also involves receiving raw data from these assessments (not just the final reports) on a regular basis, compiling and analyzing data for common questions/indicators and generating a 'harmonized' report. Since partner assessments will most likely take place on an ongoing basis, compilation, analysis and harmonized reports should be done regularly, as information needs require. This is unlike joint assessments which are typically a one-off exercise.

ACTIONS	CONSIDER...	NA PACKAGE RESOURCES	OUTPUTS
Create a harmonization work plan	Create a work plan for harmonizing assessments including key tasks, responsible persons and timeframe/deadline. Typically, the Education Cluster team (coordinator and IMO) will be responsible for the majority of the tasks pertaining to harmonizing assessments; however, you should also reach out to the AWG and Cluster members for relevant support.	Assessment Work Plan Template	Work plan for harmonizing needs assessments
Define the objectives	While the individual assessments you are trying to harmonize have their own set of objectives, you should also clarify the specific objectives for harmonization: what are you are trying to achieve or inform by bringing these assessments together? Using the key decisions identified in your assessment framework and the information gaps from your ongoing SDR, define the harmonization objectives.		
Design harmonized questions and analysis	Based on the information needs (see above), determine and outline in the assessment framework the primary data questions that need to be asked (and harmonized) as well as potential sources and collection methods. Once determined, you can then indicate how each question will be analyzed. The drafted assessment framework will provide a foundation for the harmonization workshop (see below).	Assessment Framework Template	Assessment framework updated
Conduct a harmonization workshop	Contact relevant actors and find out who has, is or will be conducting an assessment, what methodologies and tools they are using, their geographic focuses and then record these assessments in an inventory tool. Based on the findings of this inventory, conduct a harmonization workshop in which Cluster members, MoE and relevant stakeholders consider thematic, methodological and geographic harmonization.	Assessment Inventory Tool	Harmonization workshop conducted

4. HARMONIZE NEEDS ASSESSMENTS

ACTIONS	CONSIDER...	NA PACKAGE RESOURCES	OUTPUTS
Design data collection and entry tools	Although harmonized assessments do not share a common data collection tool, sharing a summary tool containing standardized questions agreed upon during the harmonization workshop may help partners design their own tools and help ensure these common questions are integrated.	Assessment Inventory Tool	Inventory and data entry tools
Develop harmonization Standard Operating Procedures (SOPs)	Develop SOPs governing context-specific assessment harmonization in which the agreed provisions relating to the harmonization process are outlined and shared with relevant stakeholders. The SOPs should include information pertaining to the agreed-upon thematic, methodological, and geographic issues as well as information sharing protocols.		Harmonization SOPs
Develop and maintain an inventory of assessments	Establishing and maintaining an inventory of assessments will aid in tracking who has conducted an assessment, where it was conducted, what it covered, and how it was conducted.	Assessment Inventory Tool	Inventory of assessments
Compile harmonized data	As partners submit their assessment products, including their raw datasets, you can begin compiling the data for the pre-determined, harmonized questions and indicators into your data entry tool.		Harmonized dataset
Analyze the harmonized data	Once compiled, you will hopefully have a dataset that looks as if it had been collected during a single, joint assessment. To clean and analyze this data, follow the same analysis process described for joint assessments, including conducting a shared analysis/interpretive workshop.	Interpretive Workshop Template	Shared analysis/workshop conducted
Generate and share a harmonized assessment report and products	The process for generating, translating and sharing an assessment report and as well as the type of products (presentation, summary/fact sheets, infographics, datasets, etc.) is the same as outlined for a JENA. However, JENA reports and products are fairly static while harmonized assessments will be ongoing and reports and products should be updated on a regular basis. Each update should be shared with relevant partners and stakeholders, including as appropriate, MoE counterparts, affected communities, etc.	Assessment Report Template and country examples	Harmonized report; Assessment presentation and other products
Conduct an action plan workshop	As with the JENA, an action plan workshop with the AWG, MoE, Cluster members and relevant stakeholders (including inter-sector colleagues from OCHA, Child Protection, GBV, WASH, etc.) should be conducted to develop a concrete action plan highlighting what actions need to be taken as a result of the harmonized assessment findings and recommendations.	Action Planning Template	Cluster action plan

5. ENGAGE IN MULTI-SECTOR NEEDS ASSESSMENTS AND ANALYSES

Multi-sector assessments and analyses typically follow the same process outlined for a JENA, however, rather than focusing on a single sector (e.g. education) they seek to provide key information on humanitarian needs for multiple sectors in order to provide an evidence base for strategic decisions. They are particularly common immediately after a rapid onset emergency but can also take place at a later stage – such as Post Disaster/Post Conflict Needs Assessments (PDNA/PCNA) – or as needed throughout a protracted crisis (e.g. to inform the HNO process). It is essential that education be represented in these multi-sector assessments and that the Education Cluster be engaged in the assessment and analysis processes. In some cases, the role expected of cluster experts will be clearly defined, for example you may be invited to attend key meetings and submit education-related questions, while in other cases the Education Cluster may have to carve out its own space and strategically and proactively become involved. For examples and resources see the Multi-sector assessments and analyses folder in the NA Package.

ACTIONS	CONSIDER...	NA PACKAGE RESOURCES	OUTPUTS
Identify Education Cluster key decisions and information needs	Regardless of whether a multi-sector assessment will take place, the Education Cluster and the Cluster's AWG should identify the key decisions needing to be made and the information needed to make those decisions. The Cluster's AWG should identify which of these key information needs could be fulfilled through a multi-sector assessment. AWG should also discuss the personnel and other resources that could be dedicated to a multi-sector assessment.	Assessment Framework Template	Priority key decisions/ information needs as well as potential resources for multi-sector assessment identified and shared with multi-sector assessment coordinator
Conduct a rapid SDR	An SDR should be ongoing, regardless of multi-sector assessment plans; however, if a multi-sector assessment is decided, you should ensure that an initial analysis and report of the SDR findings is produced and shared with the multi-sector assessment coordination team before the primary data tool is finalized. Use the SDR to identify information gaps, what the Cluster needs to know and what information needs validating. From this, key questions that would be useful for the Education Cluster to include in the primary data collection can be determined. Providing a solid SDR also indicates that the Cluster is taking the activity seriously which increases credibility and may help influence the quality (and quantity) of education questions on the questionnaire. If there is a set multi-sector analysis structure or framework with pre-determined taxonomy/language, considering adding these as potential tags to the Education SDR matrix; this will allow your analysis to quickly and easily feed into the multi-sector analysis.	SDR Matrix Template; SDR Report Template	SDR report and products
Update the education assessment framework	Based on information needs post-SDR, update your education-specific assessment framework; include the needed questions and indicators and how you would analyze each question. Begin to think about what questions could potentially be answered through the multi-sector assessment.	Assessment Framework Template	Assessment framework updated

5. ENGAGE IN MULTI-SECTOR NEEDS ASSESSMENTS AND ANALYSES

ACTIONS	CONSIDER...	NA PACKAGE RESOURCES	OUTPUTS
Liaise with MoE (where appropriate) on the multi-sector assessment	Where appropriate, ensure that the MoE is aware, involved and kept up-to-date.		
Be involved in assessment planning	Be involved in planning from the outset, ensuring someone from the Cluster is attending inter-sectoral working group meetings and workshops. Know who the key people involved in the assessment are, be aware of the assessment schedule and workplan, and make sure they know who the education focal point for the assessment is.		
Participate in the design	Attend the meetings and/or workshops when the multi-sector assessment framework and analysis is being designed; come prepared with your education-specific assessment framework outlining the questions you are advocating to include as well specific terminology, age group classifications and methodologies (e.g. child/youth participation, use of headteachers as key informants, etc.). If children and youth are not included in the target respondents, consider working with other relevant sectors (such as Child Protection) to advocate for a child-focused participatory needs assessment process to be undertaken to complement the more general household or community surveys.	For examples and resources see the Multi-sector assessments and analyses folder	
Provide education questions to be included in the primary data collection tool(s)	Based on the education questions included in the multi-sector assessment framework, ensure these questions are appropriately integrated into the collection tool(s). Consider inter-sectoral linkages where additional education-related questions could be incorporated (e.g. WASH in schools). Often data useful for EiE response planning will be gained through non-education specific questions. Advocate for the inclusion of a question pertaining to communities', and especially children's, prioritized needs and that education is one of the multiple-choice options. Children and their communities often prioritize education, which may be one of the most important education findings from a multi-sector assessment.	For examples and resources see the Multi-sector assessments and analyses folder	Education questions for input
Attend the assessment team training	Ensure someone from the Education Cluster attends the assessment team training and leads on the education components of the primary data collection.		

5. ENGAGE IN MULTI-SECTOR NEEDS ASSESSMENTS AND ANALYSES

ACTIONS	CONSIDER...	NA PACKAGE RESOURCES	OUTPUTS
Participate in data collection	Where possible, encourage Education Cluster members to participate in field work, logs, data collection, etc.		
Update your SDR analysis and report	While assessment teams are in the field, revise and update your SDR. Share your updated SDR with those responsible for analysis and writing the assessment report and do so in a format that, as much as possible, can be directly used in the assessment report.		Updated SDR report and products
Participate in joint analysis of the findings	The assessment coordination team should schedule a joint analysis session to share preliminary findings and look at cross-sector linkages; be sure the Education Cluster is represented.		
Be available to review the education sections of the final assessment products	Make it clear to the assessment coordination team you are ready to review the education portion of the final assessment products at any time. Encourage and facilitate dissemination of findings and final products to Education Cluster members.	For examples and resources see the Multi-sector assessments and analyses folder	Final multi-sector assessment and analysis reports/products

6. ASSESSMENT PREPAREDNESS

Lessons learned from emergencies show that if country-level stakeholders are ready to carry out assessments when crises occur there will be significant benefits in terms of quality and timeliness. Assessment preparedness is the process of reviewing the operational context in terms of risks, taking collective decisions about the most suitable assessment approach for the kinds of emergencies that are likely to occur and doing groundwork at the country level to be prepared to implement an assessment process. The level of assessment preparedness should be proportionate to the emergency profile of the country and should be embedded in, or linked to, other emergency preparedness or contingency planning activities. It can be a detailed and resource intensive exercise or it can involve taking minimum key decisions. Assessment preparedness can be multi- sector, or it can be something carried by individual clusters

WHAT SHOULD HAPPEN IN ANY CONTEXT

ACTIONS	CONSIDER...	NA PACKAGE RESOURCES	OUTPUTS
Prepare for an Assessment Working Group	Develop an AWG ToR and determine membership that can be activated as required	AWG ToR Template	AWG ToR
Conduct an ongoing SDR	Always have an ongoing SDR. Compile and store pre-crisis secondary data, including baseline data, lessons learned, and risk analyses, populate key indicator sets, and compile common datasets. Work with partners to collect secondary data on an on-going basis, updating the SDR as new information becomes available. Ensure that the SDR is a key component captured in the contingency plan and updated on a regular basis.	SDR Matrix Template; SDR Report Template	Up-to-date SDR matrix
Maintain an up-to-date assessment inventory	A key to assessment preparedness is to be aware of any other recent, ongoing or planned assessments.	Assessment Inventory Tool	Up-to-date Assessment Inventory Tool
Review existing assessment preparedness plans	Review assessment planning already undertaken, particularly MoE contingency planning, based on lessons learned. Plan to review assessment preparedness annually.		
Develop SOPs for when assessment is needed	In collaboration with relevant stakeholders, determine and agree upon SOPs for what takes place once an assessment is triggered		
Maintain potential enumerator and key informant contact list	Identify potential enumerators (e.g. staff trained during previous assessments) and key informants relevant for the education sector (e.g. head teachers, local education authorities, etc.). Maintain a list of their location and contact details in case of emergency. Focus particularly on emergency prone areas.		

6. ASSESSMENT PREPAREDNESS

WHAT SHOULD BEGIN AS SOON AS AN ASSESSMENT SEEMS LIKELY

ACTIONS	CONSIDER...	NA PACKAGE RESOURCES	OUTPUTS
Inform Cluster members of the assessment	Establish a shared understanding within the Education Cluster about what an assessment is, what it involves, how it will be led and when it is likely to be carried out.		
Consider partner buy-in, budget and organization of logistics and human resource	Select key partners that will be involved in an education assessment (MoE, Cluster members, research institutions, etc.), including drafting of Memorandum of Understand (MoUs), budgets and plans that could be activated at the onset of crises. Track partner contributions and map out which partner would contribute what to an assessment. Remember to reach out to the Global Education Cluster (help.edcluster@humanitarianresponse.info) who may be able to help arrange capacity and technical support for the assessment.	Assessment Budget Template and examples	Budget and partner MoUs
Contextualize tools from the GEC Needs Assessment Package	Review assessment tools from the GEC Needs Assessment Package and from other countries and adapt to the country context. Translate into local languages.	GEC Needs Assessment Package	Contextualized tools prepared
Raise awareness at the strategic level	Conduct awareness raising sessions on the assessment at the strategic level among partners that will use the information		
Develop communication and information sharing protocols	Develop protocols for data sharing and a dissemination plan for communicating the findings, particularly with the MoE and national statistics authority.		