The Global Education Initiative (GEI) Model of Effective Partnership Initiatives for Education

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Top left: computer lab at one of the Discovery Schools – Jordan. Computer labs are used to teach e-content

Top right: children in computer session in school covered by the Computer Aided Learning Programme in Rajasthan

Bottom left: girls learning in schools in Jaipur, Rajasthan

Bottom right: development of e-learning in schools in Egypt

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This report presents and describes the Global Education Initiative (GEI) model of effective partnership initiatives for education as it is currently being implemented in Jordan, Rajasthan, India and Egypt and summarizes the many lessons learned in the process of implementing initiatives across these three countries. The report acknowledges and applauds the significant progress that has been and continues to be made in each of the three initiatives, but the emphasis is on what needs to be done to continue to sustain and scale up these important initiatives. The report is intended to support ongoing efforts to strengthen existing initiatives and to help guide those considering the establishment of similar initiatives in other countries.

The GEI model provides a systemic framework for planning and analysing partnership initiatives. The model is composed of twelve interrelated components. Each component consists of a number of subcomponent elements or criteria important to ensuring the development and maintenance of an effective initiative.

The report presents a detailed account of lessons learned and promising practices identified across the three current initiatives. These can be summarized as follows:

- Multistakeholder partnerships can be effective in supporting ongoing education reform efforts and adding value to the activities and public images of partners
- Strong, systemic management is essential for a successful initiative
- Broad and balanced partnership involvement on initiative leadership and management teams is very important
- Changing teaching practices in schools and classrooms is considerably more complex and challenging than is typically understood or planned for
- Teachers and principals are at the heart of the change process and their active participation critical to initiative success
- Sustained partnership involvement is critical to the long-term success of initiatives. It must be carefully managed and should not be taken for granted
- Monitoring and evaluation and considerations of scale-up and sustainability are essential to the long-term success of initiatives and have yet to be given the attention required

Figure 1: The GEI model of effective partnership initiatives for education
The report places particular emphasis on the importance of establishing and maintaining productive multistakeholder partnerships. A specific section of the report provides an extended discussion of the factors associated with the development of effective partnerships and the characteristics of good partners and healthy partnerships.

The report concludes that the World Economic Forum’s Global Education Initiatives in Jordan, Rajasthan and Egypt have provided important opportunities for us better to understand what is required to mount and maintain effective multistakeholder partnership initiatives, that such initiatives can significantly contribute to broader education reform efforts, but that greater attention needs to be given to ongoing monitoring and evaluation and considerations of sustainability and scale-up if such initiatives are to be successful over the longer term.
2. Introduction

The vision for the Global Education Initiative (GEI) was first outlined during World Economic Forum Annual Meeting 2003 in Davos. Commitment to the development of a model of effective partnership initiatives for education began in Jordan soon afterwards with the establishment of the Jordan Education Initiative (JEI). The JEI began with the explicit objective of developing a model for effective partnerships to support the provision of sustainable quality education through more ICT-enhanced learning in Jordan that could be used to inform efforts to build similar initiatives in other countries in the region and around the world. Over the first four years of its implementation, not everything has proceeded as smoothly as it might have, some early assumptions about what was required to build effective partnerships were challenged and the composition and focus of the JEI's leadership and management teams changed several times, but its commitment to and focus on the development of an effective partnership model has remained visionary and strong, a testament to the hard work and dedication of a devoted set of partners that have stayed involved from the beginning. As the oldest of the three current initiatives, the JEI experience provides many useful insights and ideas to inform the development of a model of effective partnership initiatives for education.

In late 2005 and early 2006, inspired by the early successes of the JEI, initiatives based on the evolving JEI model and its implementation were established in the State of Rajasthan in India, the Rajasthan Education Initiative (REI), and in Egypt, the Egyptian Education Initiative (EEI). While these initiatives borrowed many features of the JEI, the initiatives in both Rajasthan and Egypt were initially designed and continue to evolve in somewhat different ways from the JEI and from each other. The three initiatives, however, share and are linked by the objective of developing effective models of multistakeholder partnerships for education in their respective countries and by the role of the World Economic Forum in their inception.

Although they are relatively young by comparison, the REI and EEI are both already vibrant, fully operational initiatives showing early successes of their own. The rapid take-off of initiatives in both Rajasthan and Egypt was made possible in part by the JEI model and the lessons learned in implementing it, but early progress in Rajasthan and Egypt was also a function of many earlier experiences with education reform efforts in both countries. For example, the rapid take-off of the ICT-related activities in the EEI was facilitated by several earlier, if more limited, partnership initiatives that were intended to promote more ICT-enhanced teaching and learning in schools. In Rajasthan efforts have been ongoing for several years to provide equal educational opportunities for girls, and so incorporating these into the REI model was not as difficult as it might otherwise have been. Despite their youth, both the REI and EEI also provide useful insights and ideas to inform development of an effective partnership model.

On the basis of the successes of the ongoing work in Jordan, Rajasthan and Egypt, the World Economic Forum's GEI team and its global partners have recently launched a new programme with UNESCO, 'Partnerships for Education' (PfE). The broad objective of the PIE is the creation of a global coalition to advance multistakeholder partnerships (MSPEs) to achieve the objectives of UNESCO's Education for All (EFA) goals. Implicit in this new initiative is an expansion of the GEI's early emphasis on partnerships to enhance ICT deployment in support of teaching and learning to include a broader set of educational objectives and a broadened set of partners.
3. Objectives

To contribute to the strengthening of the three current initiatives and the development of effective initiatives in other countries, and to support the new Partnerships for Education initiative, the GEI team at the World Economic Forum commissioned a review of the GEI-supported initiatives currently under way in Jordan, Rajasthan and Egypt. The objectives of this review were:

- To propose a model that accurately captures the most salient features of the GEI model of effective partnership initiatives for education as it is evolving in current initiatives
- To identify lessons learned across the three initiatives about how better to support, organize, manage and strengthen such initiatives
- To identify particular lessons learned about the characteristics of good partners and the factors associated with the building of effective partnerships
- To identify examples of particularly effective features of the existing initiatives, that is to say, structures, processes and other elements that could be useful to others seeking to mount similar initiatives

A supplemental but important additional objective added as model development progressed was:

- To propose a monitoring or diagnostic tool based on the GEI model of effective partnerships that could be used to facilitate the assessment of an initiative’s strengths and weaknesses; to inform the early development of effective remedial interventions when things may not be going as well as they might

It was specifically not an objective of the review to provide detailed overviews or critical assessments of each of the three initiatives. Detailed and summary descriptions of the objectives, the governance and decision-making structures and processes and the management and implementation structures and processes of each initiative are available in other documents. Similarly, friendly critical assessments of each initiative are available. It is hoped, however, that the model and tool presented below will be useful in facilitating detailed reviews of each of the current initiatives and in shaping future such initiatives.

Introduction of new ways of learning through ICT in a school in Rajasthan
4. Methodology

The GEI model of effective partnership initiatives for education presented below has been informed by the following:

- A review of available descriptive and analytical documents related to each initiative
- Interviews with a cross-section of individual stakeholders/partners in each country, including representatives of initiative leadership and management teams, international and local private sector partners, donor–lender community partners, selected NGOs, representatives of the ministries of education and ICT and a number of principals, teachers and training providers
- Focus group discussions with selected stakeholders/partners in each country
- Interviews with members of the World Economic Forum’s central GEI team
- Visits to several schools and training venues in each country
- The principal author’s earlier experience as a member of the JEI’s Academic Advisory Board
- Feedback from World Economic Forum’s GEI central team and selected representatives of each initiative
- Feedback from participants in response to a brief presentation of the model at a meeting of bilateral donors and private sector partners organized by the World Economic Forum’s GEI

The specific format of the interviews conducted during the review varied depending on the role of the person being interviewed in each initiative, but in all cases those interviewed were asked some form of the following questions:

- What advice would you give to your counterpart in Country X who is considering involvement in a multistakeholder partnership agreement similar to the xxx (JEI, REI, or EEI)?
- What would you say are the most important things that you have learned about multistakeholder partnership initiatives?
- What would you say have been the biggest successes of the xxx (JEI, REI, or EEI) to date?
- What would you say have been the biggest challenges?
- Are there any elements of the xxx (JEI, REI, or EEI) that you think others considering development of similar initiatives in other countries should consider adopting? Why?
- From your experience what are the characteristics of a good partner? Of a good partnership?
- What is needed in an initiative to assure good partnerships?
5. Model development: a cautionary note

Models are always simplifications of reality; all the more so when trying to capture the salient elements across three dynamic initiatives operating in three very different country, cultural and organizational contexts. Despite their common roots and shared goals and objectives, each initiative has developed and continues to develop in somewhat different ways with localized goals and objectives, and structures and processes modified to complement and fit within local organizational contexts and cultural norms. While every effort has been made honestly to capture and accurately report and incorporate the opinions and observations of the many GEI partners in Jordan, Rajasthan and Egypt who willingly participated in our review, the objective was to capture and report findings across the three initiatives and not to provide a detailed review and model of each initiative. Thus, from the perspective of individual initiatives, some important feature, element or even a lesson learned may not be included in this report. This is not to discount the importance of any of these within a given initiative. It is understood that the richness and uniqueness of each initiative may not be fully reflected in the model presented below.

The GEI model is intended to guide, not to prescribe exactly what and how initiatives should be structured in every situation. Indeed, to take the model as a prescription would be to work against the dynamic, innovative, change-oriented, participatory spirit that underpins the entire GEI effort. It would contradict the GEI commitment to developing models that are country – and context – specific. The GEI model identifies a set of components that focus on issues and actions that specific initiatives must attend to and a framework for organizing these, but it does not suggest all of the specific implementation mechanisms for carrying these out. While initiatives are linked and guided by a set of core values, development objectives and shared goals and objectives, the main focus should be on the attainment of results, not the specific structures, mechanisms and processes used to achieve them. Crafting the specific strategies and mechanisms for achieving the desired results is the responsibility and work of the leadership, governance and management team(s) and all partners in each initiative.

Developing a model is a powerful learning experience. The insights and understandings gained from model development are in many ways more important than the model itself. Through the process of building a model, one learns a great deal about the subject being modelled and about the limitations of one’s own knowledge and thinking on the subject. Thus, one of the strong recommendations is that this report and the model presented below be considered only as a starting point, as the beginning of ongoing efforts to capture and share knowledge of the implementation of these important initiatives with others, and that individual initiatives be encouraged to modify and adapt the model to more accurately capture and reflect their efforts.

Despite the inherent limitations in such models and our cautionary notes above, our review and look across the GEI initiatives under way in Jordan, Rajasthan and Egypt do suggest a potentially very useful model for:

- Understanding, describing and monitoring current initiatives
- Helping to prepare the foundation for new initiatives
- Informing decisions about where, and where not, to pursue the development of future initiatives
- Helping newcomers to think about and expedite the design and organization of effective and efficient multistakeholder partnerships
6. Structure of the report

This report begins with a presentation of the overall model that our review suggested as an accurate and useful way of thinking about, guiding and structuring future country-specific Global Education Initiatives. This is because the model is the summary of what was learned about the effective organization and structure of such initiatives; a summary of our observations and the collective lessons learned across the three initiatives.

Presentation of the model is followed by sections that:

- Identify key lessons learned and promising practices
- Elaborate our findings about what makes for good partners and effective partnerships

Appendix 1 presents a prototype of a tool based on the GEI model, the GEI implementation monitor, for monitoring and assessing an initiatives strengths and weaknesses.

Appendix 2 provides an elaboration of selected elements of the GEI model to help clarify some of the thinking behind the model that may not be obvious or intuitively derived from the lessons learned section of the report.
7. The GEI model of effective partnership initiatives for education

Figure 1 on the following page provides a schematic depiction of the GEI model of effective partnership initiatives for education as derived from our recent reviews of the JEI, REI and EEI. Table 1 on page 12 provides a list of subcomponent elements/criteria for each of our proposed components. The elements/criteria listed under each component reflect what was learned or confirmed from our review of GEI documents and interviews in all three countries as being particularly important to the success of a particular component.

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The model proposes thinking about such initiatives as systems consisting of 12 interrelated components, each component consisting of a number of subcomponent elements or criteria important to ensuring the development and maintenance of an effective initiative. These could, of course, be elaborated in more detail, and in some cases country teams will want to do this to adapt the model to their own purposes, to remove any ambiguity in the meaning of some of the terms used, and to facilitate an informed initiative-specific dialogue.

The importance of thinking of these initiatives as complex systems that are themselves subsystems of the larger education system, which in turn is a subsystem of many other overlapping economic and social systems, and managing them as such is perhaps the most important lesson learned from this initial review. From a systems perspective, attention must be given to the careful alignment and linkage of initiative activities to all other initiative activities as well as with elements of the broader education system and with other economic and social sector development initiatives and systems. Thinking systemically, all components and subcomponent elements and criteria in our model are important; many are critical. Weakness or failure in any one component or subset of component elements or in the alignment of component elements can compromise the ongoing success of an initiative. It was clear from our review that future initiatives will be strengthened by encouraging use of a systemic framework and providing initiative management with a sound grounding in systems thinking and systemic management.

The model is comprised of a series of components or functional domains that any such initiative must attend to and a framework for thinking about how these components are related to one another. Further, it identifies sets of elements or criteria within each component that our review suggested were particularly important to the success of each component.

Children in computer session in school covered by Computer-Aided Learning Programme in Rajasthan
The Global Education Initiative model of effective partnership initiatives for education is comprised of the following 12 components (see Appendix 2 for more detail):

1. Core values and development objectives
2. Vision, goals and objectives
3. Organizational readiness (enabling environment)
4. Leadership, governance and decision-making
5. Management and implementation
6. Planning
7. Communications
8. Resource mobilization
9. Schools and communities
10. Partners: ICT partners and other partners
11. Monitoring and evaluation
12. Results

Components 1, 2 and 3 of the model are differentiated from all others as the foundational components of the model. As a group, the elements in these components suggest an extensive set of preconditions that may predispose an initiative to success, or not. However, while it may be true that if the elements in these three components are not all present and aligned, an initiative is starting from a less than ideal position, care must be taken not to use these components as a definitive screening mechanism in selecting sites for future such activities. First, there are few places that are likely to meet the full set of criteria outlined in these three components; but, and perhaps more importantly, the elements in these three components may be more useful to prospective government partners in helping them to prepare the foundation for building a productive partnership initiative. In this case, consideration of and efforts to put in place the elements/criteria in Components 1, 2 and 3 may be thought of as a first step in building an effective partnership model.

Component 4 sits above the initiative, and Component 11 below it, figuratively and literally, as these components represent the glue holding the initiative together and keeping it focused and on track.
Components 5, 6, 7 and 8 comprise the work that must be done to put in place and effectively manage implementation of the initiative and create the optimal conditions to ensure maximum benefit from all partnerships and for all partners. Taken together these components represent the work of those responsible for the day-to-day management of the initiative.

Components 9 and 10 are at the core of the GEI model – facilitating the effective alignment and linkage of the knowledge, skills and other resources of all initiative partners with ongoing efforts to improve the quality of the educational experiences offered to all students and achieve the desired goals and objectives of each initiative.

Component 12 stands starkly alone to keep the focus on the ultimate goals of all such initiatives – opportunities for all students to receive a relevant, quality educational experience; opportunities for all partners to realize their objectives; and ultimately the achievement of national economic and social goals.

The model schematic also includes the designation of a Project Management Office/Unit (PMO/PMU). This is to acknowledge the critical importance of a highly capable management capacity and a clearly designated, full-time project management office/unit cited by most partners in all three current initiatives as being critical for the success of the initiative. The complexity of these initiatives, the number of partners involved, the multiple lines of activity and the new approach to organizational change and educational development that they reflect requires highly competent proactive and ongoing management. Inclusion of the PMO in the model is not, however, to suggest or endorse the creation of management units independent of existing government structures. On the contrary, the building of the capacity of the government to mount, manage and maintain such initiatives is an explicit objective of the GEI. Project management offices/units are found in all three current initiatives; each is addressing this issue differently, but in all cases current project management offices/units are linked in one way or another with existing government operations and include government staff on their teams and/or oversight committees. This important issue is discussed further in a later section of this report (see 8.33 Management and implementation page 15).

Lastly, it should be noted that while only one of the components in the model explicitly includes reference to ‘partners’, this is not meant to compartmentalize how partners are involved in these initiatives. On the contrary, partner representatives currently play important roles in all of the components. They serve on most governance, leadership and decision-making committees; their input is regularly sought in working groups and at update meetings; and some currently play very active roles in initiative management. Indeed, it is the pervasive emphasis on mustering and aligning the inputs of all partners in all aspects of the initiative that sets the GEI apart from many past such efforts. If activities are to be effectively and efficiently designed and aligned from the start and throughout an initiative, a representative cross-section of all partners must be involved in the activities of all components.
Table 1  
List of component sub-elements/criteria

1. Core values and development objectives
   • Focus on 21st-century citizenship (civic, social and economic participation)
   • Commitment to EFA
   • Emphasis on ICT-enabled learning
   • Widely shared social responsibility for development
   • Commitment to public–private partnerships for development
   • Commitment to ongoing organizational development, innovation and change
   • Commitment to participatory, collaborative planning and implementation
   • Commitment to human resource development
   • Commitment to sustainability and scale-up

2. Vision, goals and objectives
   • Widely shared vision
   • Widely understood, achievable goals and objectives
   • Aligned with national economic development goals and objectives
   • Aligned with national education goals and objectives
   • A systemic approach

3. Organizational readiness (enabling environment)
   • Stable political leadership
   • Actively committed national political leadership
   • Vibrant economic and social development environment
   • Vibrant education system reform under way
   • Supportive regulatory and bureaucratic environments
   • Well-developed human resource development systems
   • Commitment to the appropriate deployment of ICT in education and government
   • A vibrant private sector, in particular in ICT
   • Access to sufficient resources

4. Leadership, governance and decision-making
   • Broad partner participation
   • Effective governance and decision-making structures
   • Stable, effective leadership teams
   • Systemic approach to decision-making
   • Formalized commitments and agreements
   • Broad buy-in from all partners
   • A productive work culture

5. Management and implementation (PMO)
   • Effective management structures
   • Stable, effective management teams
   • Systemic approach to management
   • Sufficiency and retention of operations staff
   • Effective school management and supports
   • Effective partner management and supports
   • Emphasis on process and change management

6. Planning
   • Planning informed by data, information and research
   • Need assessments (government and all partners)
   • Strategic planning guided by systems thinking
   • Projection of resource requirements
   • Implementation plans
   • New ideas/ approaches are adequately pilot tested
   • Emphasis on planning for sustainability and scale-up

7. Communications
   • Effective strategic and operational communications plan
   • Multiple vertical and horizontal communication channels
   • Regular staff meeting
   • Regular direct partner communications
   • Regular initiative-wide update meetings

8. Resource mobilization
   • Availability of adequate resources
   • Effective mobilization of resources
   • Effective coordination, integration and alignment of resources

9. Schools and communities
   • Engagement of principals/head teachers
   • Engagement of teachers
   • Engagement of parents
   • Emphasis on student learning
   • Emphasis on changing school cultures
   • Engagement of the community

10. Partners: ICT partners and other partners
    • Sufficiency of partners
    • Productive engagement of partners
    • Formalized partner agreements
    • Productive inter-partner relationships
    • Effective integration and alignment of partner activities
    • Effective management of partner relations

11. Monitoring and evaluation
    • Relevant, unambiguous key performance indicators
    • Development and maintenance of an initiative information system
    • Initial baseline assessments completed
    • Regular self-assessments
    • Regular external review

12. Results
    • More effective schools
    • 21st-century relevant student knowledge and skills
    • Strengthened public sector management capacity
    • Strengthened ICT sector
    • Other initiative-specific objectives
8. Lessons learned and promising practices

8.1 Introduction

Common themes and insights that can be categorized as lessons learned and promising practices emerged from the extensive interviews conducted during the course of our review of the GEI initiatives in Jordan, Rajasthan and Egypt to inform our model. However, before outlining these, it is worth noting that although the individuals interviewed represented a broad cross-section of partners playing many different roles in each of the initiatives, there was considerable uniformity in many of the cited lessons learned across the three initiatives. It is also noteworthy that not a single person interviewed, when asked what advice they would give to their counterparts in other countries considering involvement in such an initiative, said that they would advise them not to do it. On the contrary, there was broad agreement among those interviewed that despite all of the issues and challenges involved, these initiatives have proven to be highly effective in energizing, focusing and mobilizing broader coalitions of stakeholder partners than any previous education initiatives that they have been involved with. Further, it was widely acknowledged that although there is a lot of work still to be done before any of the three initiatives can be declared as unequivocal successes, each of the three initiatives has accomplished a great deal in a relatively short period of time as compared to other initiatives that those interviewed have been involved with in the past.

It is also notable, however, that in response to the same question, every person interviewed was readily able to cite several lessons learned, or more, that they felt others considering implementing similar initiatives in other places should be made aware of. One of the core purposes of this report is therefore to share these experiences more widely, so that others can benefit from these lessons learned.

In some cases the lessons learned were related to the development of a particular mechanism or approach to organizing and/or managing some aspect of the initiative that has proven or promises to be particularly effective. Lessons learned of this type are cited below as promising practices, that is to say, strategies, structures and/or processes for organizing and implementing aspects of an initiative that are proving particularly useful and effective in one or the other or all three initiatives and are thus worthy of consideration by those planning the development of similar initiatives in other countries. We specifically do not refer to these as best practices as all of the initiatives are too young to make such a claim, but also because of the prescriptive implications of the reference to something as being a best practice. What works well in one place may or may not be appropriate in another context.

8.2 Lessons learned: summary

Before outlining the lessons learned in some detail, seven broad lessons learned by many of the involved partners in looking across the three initiatives can be summarized as follows:

1. GEI multistakeholder partnerships initiatives as they are evolving can be very effective in supporting ongoing education reforms and in adding value to the activities and public images of participating partners. As evidenced in the three initiatives, partnerships can and do lead to, among other things:
   - Increased advocacy for political, social and economic support for schools
   - More effective leadership and management
   - Increased material support for improving the conditions for effective schooling
   - Enthusiasm for changing teaching–learning practices in schools
   - Increased enthusiasm for learning by students
   - Increased professional development activities
   - Organizational culture shifts in the public bureaucracy
   - Strengthening of the public image of partnership members
   - Strengthening of private sector partner capacity to work with government units
   - A strengthening of some private sector partners’ capacities to provide effective services

2. To be successful, multi-partner initiatives must be very well and systemically managed. More active, ongoing management and management involvement in supporting implementation activities is required to ensure an effective initiative than was believed necessary and planned for earlier in all three initiatives.

3. To be successful, leadership and management teams must include a balanced representation of educators, ICT experts and representatives of all types of partners.

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4. Changing what goes on in schools, most importantly changing teaching practices in classrooms, is a much more complex and challenging undertaking and is going to take more time than many partners, particularly non-education partners, initially believed.

5. Teachers and principals are at the heart of the change process. More professional development opportunities and supports for teachers and principals are required than has been the case thus far in any of the three initiatives; most notably, increased opportunities for the development of new pedagogic skills and experience integrating ICT into daily teaching practices.

6. Sustained partner involvement, particularly of many private sector partners and some donor and lending agency partners, should not be taken for granted. All partners need/want and deserve something from the partnership. More attention needs to be given to understanding, managing and servicing all partners’ needs if partner participation is to be sustained in going forward.

7. Monitoring and evaluation and considerations of scaling-up and sustaining current initiatives must be given much greater attention in all these initiatives. The lack of investment in ongoing monitoring and evaluation and serious planning for scale-up and sustainability threaten to compromise the credibility of all three current initiatives.

8.3 Lessons learned and promising practices

Many of the lessons cited by those interviewed were common across initiatives and independent of the role played in the initiative by those interviewed. In most cases the lessons learned that people cited are not so much about some radically new element that needs to be included in an initiative, but rather the lessons are that more, and in some cases much more, of a particular activity/input is required than was originally planned for. This leads to the observation that those responsible for planning these early initiatives put most of the important elements in play, but that the quantities and alignments of the various inputs were not always in proper balance and most implementation timelines have been overly ambitious.

Below we summarize the insights, common lessons learned and promising practices gleaned from our look across all three initiatives. The country of origin of a lesson learned or promising practice is cited when appropriate.

8.3.1 Goals and objectives

Initiatives must be more explicitly education-driven. In hindsight, despite rhetoric to the contrary, technology and technology-related issues have dominated implementation efforts and concerns early in all three initiatives. While understandable, given the explicit early emphasis on ICT-enabled learning, there is now wide agreement that much more attention needs to be given to how to support and facilitate broader changes in schools and, in particular, to providing more pedagogical training for teachers. In going forward, more balanced attention needs to be given to:

- Understanding the challenges of managing schools
- Understanding the factors that contribute to more effective teaching; and
- Understanding the multiple learning styles of students and how initiatives can help schools, using ICT and other tools and methods to better meet the needs of all students

Doing so will facilitate more effective ICT use in schools and significantly strengthen the impacts of all three initiatives.

Initiative activities must be even more carefully crafted and aligned and integrated with overall educational objectives, and, as importantly, with other government reform initiatives/projects and programmes, than they have been thus far, and this takes a lot more time and effort than originally anticipated.

Initial goals and objectives must be aligned with realistic projections of the human and other resources required to ensure effective implementation. There was near-universal agreement among those interviewed that considerably more resources are required to support the timely achievement of stated initiative goals and objectives than was originally planned for in all three cases.

8.3.2 Leadership and governance

Care must be taken to ensure a balanced representation on all leadership and management committees and teams of educators experienced in the development and implementation of education reform initiatives, as well as local education leaders and civil servants, and national and international ICT company representatives and technical experts. Representatives of other important education initiatives under way in each country expressed concerns that GEI representatives and PMO officers did not, at least initially, make enough efforts to reach out to them, ask for their input or make serious efforts to integrate their activities in the GEI effort. Instead, they chose to work largely independently.
from other important reform activities. This oversight created resentment among some potentially very useful initiative allies and probably slowed the early progress of the initiatives. Experience in Jordan in particular supports this observation, where increased involvement of a highly experienced international education reform expert on the PMO team is credited with significantly strengthening the initiative.

A state or national steering committee, working independently but in concert with an international steering committee, should be formed to provide more timely decision support to the local initiative management team. Initially in Jordan, the initiative and the local management team received their primary guidance and support from an international steering committee. However, it was observed after some time that the dynamic nature of the initiative required more immediate and responsive support than an international committee could sometimes provide. An international steering committee comprising representatives of prominent international and regional partner representatives will continue to have an important role to play in setting broad directions, mustering the support of large multinational and regional partner organizations and linking initiatives across countries, but a national/local committee can be more responsive to the immediate needs of initiative management and ensure more timely, effective and efficient decision-making and responsiveness of the local management team to the implementation challenges that they face. A national steering committee was recently formed to support the JEI in Jordan, and by all accounts it is working very effectively.

More thoughtful attention needs to be given to ensuring buy-in across and at all levels of an initiative and, in particular at the operational levels within the ministry, regional education authorities and schools. While institutionalized partnerships are established at the senior levels of organizations, effective and efficient implementation requires the active and committed participation of many operations-level professional and support staff. Operational-level professionals and staff, including some principals and teachers, interviewed for this review expressed concerns that they are considered only secondarily as partners despite the important and central roles that they play in the initiatives, and they expressed concerns that their ideas and opinions are not often sought nor valued by management.

Initiative leadership needs to give more attention to encouraging and helping partners to collaborate with one another at the management and operational levels. Partnering as understood in the GEI model and more broadly in the Partnerships for Education movement is a new concept for many people. In particular, proactive attention must be given to building constructive operational linkages between staff in the ministries of education and ICT. Efforts are under way in all three initiatives to create and nurture these important links, but many of those interviewed raised questions about others’ real commitments and capacities for collaboration, suggesting that still more needs to be done in this area in going forward.

8.3.3 Management and implementation

Highly competent, proactive, hands-on and full-time project management is essential for ensuring the success of partnership initiatives. The number and variety of partners who are involved, the volume and complexity of the tasks to be completed, the considerable organizational changes that these initiatives are trying to facilitate and the careful planning, communications and follow-up required demands dedicated management. An incomplete, part-time management team compromises what can be accomplished. The experience of the JEI provides a valuable lesson in this regard. In the early days of the JEI the work of the project management office (PMO) was by design largely limited to serving as the broker of partnerships between the government/ministry of education and private and civil sector partners. The assumption was that once established the government would organize and manage partner relationships and lead implementation efforts. As the complexity of the initiative evolved, it became obvious to all that a much higher level of guidance and support was required from the PMO than had originally been envisioned. In response, the JEI PMO remade itself to take a much greater role in planning and proactively managing day-to-day initiative implementation and managing partner relations. This shift in strategy is widely credited with having significantly strengthened the JEI and, by some, as maybe saving the initiative. This is despite the fact that the PMO was never fully staffed. We can only speculate what the results might have been with a full staff, but the consensus of the JEI leadership and management team and many partners is that the active role eventually played by the PMO was significant to many of the successes that the initiative has achieved and that incomplete staffing of the JEI management team has limited the effectiveness of an otherwise highly effective team.

The appropriate location of the project management office/unit in these initiatives continues to spark debate among some partners, but the clear consensus is that the physical location of project management offices/units in the ministry of ICT sends the symbolically wrong message about the ultimate
objectives of these initiatives. While the important current role
played by ministries of ICT in facilitating the spread of ICT
infrastructure and use in schools is widely acknowledged
and appreciated, the education and broader development
objectives of these initiatives and concerns about scale-up
and sustainability argue for a more primary role to be played
by ministries of education in going forward, and suggest the
ministry of education as the more appropriate locus of
initiative management activities in the future.

More attention needs to be given to building capacity for
managing partnership initiatives within existing government
structures. Scaling up and sustaining the successes of
these initiatives will require the institutionalization of a
capacity to manage complex partnership initiatives within
existing government structures, in particular, within ministries
of education, which have responsibility and are accountable
for all the affairs of the education sector. Ministry of education
staff are currently integrally involved in the leadership,
management and implementation activities of all three
initiatives, but none are yet prepared to assume long-term
responsibility for these initiatives and efforts to help them
build this capacity are currently modest at best. As initiatives
mature, they will require more skilled management and more
institutionalized, disciplined processes than is currently the
case to assure optimization of resource use and the success
of these initiatives.

Change management is a concept that needs to permeate
the entire initiative. It is not a job description for one person
as it was conceived of at the start of the JEI.

Commitment with initiative partners must all be formalized
as MoUs (memorandums of understanding) or other forms
of commitment agreements and should include clear
specification of all expectations, obligations, responsibilities,
starting and ending dates and implementation plans. Lack
of clarity around partnership agreements was cited by both
public and private sector partners as constraining the
effectiveness of some partnerships.

8.3.4 Planning

More attention needs to be given to helping local initiative
leadership and managers know and understand the lessons
learned elsewhere regarding the organization, management
and implementation of partnership initiatives. There are
important lessons to be learned from similar experiences in
other countries. Planning should begin with a review of the
experience in other countries. Many of those interviewed
suggested that this is a role that the World Economic Forum
could/should play.

More attention should be given to assessing carefully the
specific needs in classrooms and schools and assessing
partner capacities to help meet these needs than appears to
have been the case thus far in all three initiatives. Significant
underestimations of the levels of resources, the types and
number of professional development opportunities needed
and the time required to realize many of the desired objectives
might have been avoided if more attention had been given to
the conduct of proper needs assessments. This issue is
related to concerns about monitoring and evaluation and the
absence of proper baseline initiatives in all three initiatives
which are discussed elsewhere in this report (see 8.3.11
Monitoring and evaluation page 20).

Detailed implementation plans specifying the resource
requirements, clear distribution of responsibilities, the
specification of critical alignments and linkages and the timing
of inputs and activities must be in place from the start of the
project, and these must be widely shared with ALL partners.
Many noted that they did not know the big picture, that is to
say how their activities fit in the larger scheme, or what is
coming next. The lack of such plans and/or the sharing of
these plans with all partners have and continue significantly
to limit the effectiveness and efficiency of initiatives.

Variation in strategies and capacities for planning and
change management across partners was cited by some
of those interviewed as having significantly inhibited initiative
implementation at the beginning of the JEI. The absence of a
standardized approach to planning and a clear understanding
of what is meant by change management meant that partners
had to spend a lot more time on planning and management
than might otherwise have been required. The strong
recommendation is that seminars/workshops on planning
and change management should be held early in an initiative
in an effort to define protocols for planning and to clarify
understandings about what change management is all about.
The organization of initiative activities into tracks, as is the case in all three initiatives, has proved a very effective way to organize an initiative’s activities. The logic and language of tracks are widely understood by most partners in all three initiatives, thus leading to the conclusion that structuring initiatives into tracks is an advisable strategy.

More explicit attention needs to be given to using a systems thinking frame in planning all activities, that is to say, explicitly to mapping out critical interconnections, alignments, linkages and dependencies between the many activities and the work of all partners. Examples were cited in each country of breakdowns in the implementation chain due to lack of planning and management of independencies in the implementation chain, breakdowns that compromised initiative efforts.

8.3.5 Scale-up, sustainability and time

While one hears considerable talk about the importance of thinking and planning for sustainability and scale-up, there is little evidence that much serious attention is being given to either issue. Successful implementation of the changes in practices and thinking that the GEI aspires to will require time. Those we interviewed all emphasized the need for giving more attention to issues of sustainability, scale-up and time. There is an urgent need in all three initiatives to begin to think strategically and plan realistically to address these issues.

The need for greater care in the development and use of criteria for selecting the initial set of initiative schools was cited by some as an important element in preparing the initiative for longer-term scale-up and sustainability. Lack of a carefully selected sample limits what can be learned across different types of schools serving different types of communities, thus limiting our understanding of what will be required to scale up these initiatives to larger groups of schools.

8.3.6 Communications

There is a need for the development of clear, comprehensive communications strategies in all three initiatives. There cannot be too much communication and there is a need for much more of it both horizontally and vertically throughout all three initiatives. These initiatives involve many people working at many levels of the system with varied interests and roles to play and varied skills in understanding such a complex undertaking. Despite the best efforts of initiative management, lack of adequate communications, the need for more constant and regular communications and communications in various forms was widely cited as an important element in going forward. In particular, the need for more communication for and with district offices and schools was noted.

More opportunities for participation in planning and feedback were called for by partners of all types. Annual and semi-annual update meetings were cited as important and useful but too infrequent, too short and not as participatory as representatives of most partners would like them to be.

8.3.7 Resource mobilization

A careful plan, including an outline of the resources required successfully to implement the plan, can contribute to more effective identification, recruitment and participation of initiative partners. The ‘contribution matrix’ created by the leadership and planning team of the EEI is a very good example of such a tool. The process of building the contribution matrix required the EEI team carefully to consider and plan all initiative activities and develop clear specifications of the resources required to achieve initiative objectives. The contribution matrix allows a potential partner to know exactly what is needed that they may be able to bring to the initiative and provides a useful tool for the initiative team in assessing the potential utility of a partner’s proposed involvement.

The need for a mechanism giving initiative management a degree of discretionary control over how at least some resources are used was cited by PMO team leaders in both Egypt and Jordan as important, particularly as the initiatives in each country mature. Without access to some discretionary funds, initiative management can be constrained in its ability to act in a timely manner to unanticipated needs. The establishment of an initiative trust fund, currently under way in Egypt provides one such model for how this might be accomplished. The Trust Fund provides a valuable mechanism for partners to contribute financial resources into a central fund that can be used by initiative leadership and management, as specified by a set of guidelines for the use of the funds, strategically to target some resources on an as-needed basis to help achieve initiative results. This is not however, to suggest that partners should only contribute financial resources to an initiative. On the contrary, it is the value of the wider knowledge, experiences and resources that partners bring to these initiatives that makes these partnerships so potentially effective. Direct financial resources should be but a small part of the contributions of partners to a given initiative, but in the hands of a competent leadership and management team, such contributions could be very important.
8.3.8 Human resource development (capacity building)

More attention must be given to the development of carefully crafted, long-term professional development and training strategies and comprehensive, appropriately sequenced professional development and training delivery plans than has been the case thus far in any of the initiatives. The building of capacity through professional development and training is central to the success of these initiatives. Attention must be given to both in-service and pre-service programmes and to ensuring the alignment and integration of these programmes. In addition to basic ICT training, the need for and importance of many different types of professional development activities and training were widely cited. Typical examples of what is required include: for teachers, continued emphasis on subject mastery and pedagogic skill; for school principals on coping with and managing change at the school level; for ministry staff on changing organizational cultures and understanding private sector culture and how to work with it effectively; and for private sector partners on understanding the complexities and politics of education reform, how government bureaucracies function and how to work them.

In particular, the importance and need for many more professional development opportunities for teachers was cited by many as an important lesson learned in all three initiatives. While the ICT training provided by international private sector partners is widely acknowledged to be very good and helpful, many more professional development opportunities for teachers are needed beyond the ICT foundation courses that have been offered thus far. In particular teachers need opportunities:

- To understand better the knowledge and skill needs of students vis-à-vis the changing demands of knowledge economies in a global world and life in the 21st century
- To continue to develop their own knowledge of the subjects they teach
- To expand their knowledge and skills in new pedagogic methods and practices; and
- To relate the ICT training they are receiving through the initiatives to the creative application of these new technologies in their teaching

Activities that provide public sector employees with opportunities to work in private sector settings can contribute to shifts in organizational culture, notably work ethics and habits. Offsite professional development, where ministry employees worked with private sector counterparts in the private sector offices, proved to be a very effective strategy for helping both government and private sector employees better understand each other’s working cultures and for building very effective partnership collaborations. A particularly notable example of this type of exchange was observed in Jordan where subject content specialists from the ministry of education worked for several months in the offices of Rubicon, one of the local private sector ICT partners engaged to develop online eContent applications. During the course of this collaboration, ministry staff reported that they developed new working habits, learned new ways to work together and became more aware of the inadequacies of the working environment in their ministry units and how to improve them. Our interviews with supervisors in the relevant ministry units confirmed these reports. Supervisors noted that upon return to the ministry, most of those who worked at Rubicon who returned to their ministry posts became much more disciplined and engaged in their work and became models for their co-workers. For its part Rubicon learned to work effectively with education specialists, government sector employees, and government rules and regulations, knowledge which has positioned Rubicon very nicely to grow its business working with ministries of education in a number of other countries.

More attention must be given to managing, sequencing and aligning professional development and training opportunities with other relevant initiative inputs and activities. The professional development/training implementation chain in all three countries involves the coordination of a number of partners, each of whom plays a different role in the process – the training providers, those responsible for training logistics, host institutions, the target trainees and others. Careful coordination of professional development and training activities between partner providers and ministry training divisions and that takes into account the other activities and obligations of the targeted trainees is necessary to ensure maximum participation of the right people in the planned programmes. When everything goes well, highly effective training can take place. Several very effective training programmes were observed during our review. A breakdown in the chain of communications between partners and/or failure of a partner to meet their responsibilities, however, can significantly compromise the effectiveness of the training.

When possible, training for teachers should be conducted as close to the teachers’ home schools as possible. The hidden costs to teachers of attending training far from their home schools and where they live were cited as a serious
constraint to the enthusiasm and regular participation of teachers in professional development activities. Recent efforts in Egypt and Jordan to provide training more locally have reportedly improved both the morale and attendance of teachers in training activities.

Further, efforts should be made to explore opportunities for more blended learning solutions, whereby teachers are able to use both face-to-face and online learning opportunities.

8.3.9 Schools and communities
As Figure 2 below suggests, improving the quality of education, aligning knowledge and skill outcomes and changing teaching–learning practices and the learning culture in schools are a much more challenging undertaking than many partners understood at the start of these initiatives. This model is a generic representation of the dynamics in the standards-based reform paradigm that is found in all three current initiative countries. Interviewees suggested that providing partners with opportunities to become more acquainted with the work of schools and teachers and the challenges of changing schooling systems and teaching practices would have been helpful to them in understanding the work ahead of them and planning and managing their work accordingly. Figure 2 may be helpful in this effort.

Principals are even more important to the success of initiative activities than was originally believed. Initiatives must give more attention to the role of principals as change agents and facilitators of initiative implementation. More opportunities for professional development and professional networking should be made available to principals.

More attention needs to be given to getting real buy-in at the school level. Consistent with the wider literature on school reform, buy-in and a sense of ownership and responsibility for the initiative at the school level was cited as critically important by many of those interviewed. Our interviews at the school level revealed that there is great excitement, enthusiasm and hope for the initiatives at the school level. However, many schools, principals and teachers, remain guarded in their opinions about the initiatives over which they do not yet feel a real sense of ownership. There are exceptions, but in general, principals and teachers do not
feel fully informed about the goals and objectives of the initiatives or about the implementation plans; they do not feel that their voices are always heard; and they do not think that initiative leaders and managers fully understand the challenges of running schools, managing classrooms and teaching. Clearly, more communications with schools, principals and teachers, and more opportunities for substantive participation in initiative planning and follow-up activities are needed.

More outreach to communities is needed. We know from so many other development efforts that community/parental support and involvement can be a powerful contributor to the success of reform initiatives. Increasing parental involvement by offering some ICT training for parents is reportedly being planned as a part of the EEI in an effort to muster more active parental support; but in general while the potential importance of parents and community involvement was cited by many of those we interviewed, explicit efforts to engage parents and communities appear to have been limited in all three initiatives until very recently.

There are concerns expressed by some of those interviewed that the ICT objectives of the GEI are not aligned with the realities and needs in some schools. Their argument is that if basic health, safety and nutritional concerns are not met, a school is not likely to be ready for higher level interventions; that before ICT can effectively be deployed, a school must, first of all, be capable of providing a healthy enabling environment for learning. While there is merit to this argument, there are others who argue that withholding opportunities for students in such schools perpetuates inequalities in the opportunities that are offered to students across schools. The inclusion of non-ICT tracks in the REI represents an effort to address some of the issues that this debate raises. The REI’s efforts bear watching for insights that it may provide in how best to respond to these concerns.

8.3.10 Partners and partnerships
The roles of partners and differing partnership practices have been central to all three initiatives, and these are therefore discussed separately in Section 9 of this report below.

8.3.11 Monitoring and evaluation
The lack of adequate attention to monitoring and evaluation (M&E) in all three current initiatives is well documented and widely known. It significantly limits what can be said with confidence about how successful the initiatives are, continues to constrain initiative development in all three countries and raises serious credibility issues for the GEI with some partners and outside observers. The importance of the early development of a monitoring and evaluation strategy and plan, the development of key performance indicators and the conduct of baseline studies were cited by all as critically important to ensuring the successful attainment of initiative objectives and the preparation of effective and efficient sustainability and scale-up plans. It is too late to conduct credible baseline studies in current initiatives, but immediate attention must be given to the development of M&E systems in all three initiatives. It is also crucial that any future such initiatives should build M&E mechanisms into their strategies from the very beginning.

The establishment of academic advisory boards (AABs) in all three initiatives was in part an effort to focus greater attention on monitoring and evaluation. The role of the AABs was periodically to visit each country to review initiative progress and provide advice to initiative management teams as to how to strengthen each initiative. By all accounts the AABs have played an important role in each initiative and have offered valuable advice, but their visits have been too infrequent and their mandate not sufficiently broad to compensate for the lack of adequate attention given to monitoring and evaluation in all three initiatives.

More attention needs to be given to documenting the decisions and agreements that have been made, the processes that have been found to work, the successes, the failures, the persistent challenges, and the productive dialogues and open debates in all three initiatives than has been the case thus far. The documentation that does exist needs to be organized. Doing so would be extremely helpful to efforts to scale up the current initiatives and to those who seek to develop similar initiatives in other locations in the future.
9. Partners and partnerships

9.1 Good partnerships
Exploring the questions of what a good partner is and what makes some partnerships more effective than others was an important focus of our reviews of the three GEI initiatives. To explore these questions we asked two simple questions of those we interviewed:

- From your experience what are the characteristics of a good partner? Of a good partnership?
- From your experience what is needed in an initiative to have good partnerships?

The establishment and maintenance of positive, productive multistakeholder partnerships is at the heart of the GEI. From our review, it is clear that while outwardly the enthusiasm of most partners remains high, many are guarded in their optimism about the long-term success of the initiatives and some are unsure of their future involvement. Some partners are openly sceptical about the future. A few key early partners have already moved on. There are some unresolved tensions in the relationships of some partners with these initiatives that need to be addressed proactively sooner rather than later. There are also some key partners who are clearly in for the long haul, but the longer-term participation of key partners should not be taken for granted. The future involvement of many current partners and the recruitment of additional partners that will be required to scale up and sustain current initiatives will depend on how well current initiatives and partnerships are managed, on ensuring the attainment of value-added propositions for all partners over the longer term, and on how well partners are managed and serviced by the initiatives.

In sum, the responses to our question about the characteristics that set a good partner apart from a not-so-good partner confirmed much of the broader literature on the subject. Good partners should:

- Deliver on their commitments
- Actively participate in initiative planning and implementation activities
- Stay involved when things are not going as well as they might
- Be in for the long haul
- Trust other partners
- Respect the work of other partners
- Work independently but also cooperatively with other partners to achieve shared results
- Be upfront about their motivations for participation

Responses to our questions about what makes for good partnerships similarly confirmed what others have reported in the broader literature. Good partnerships are built upon:

- Responsiveness to local context
- A broadly shared vision
- Realistic goals and objectives
- An understanding that all partners must gain something from the partnership and agreement that this is okay
- Well-crafted and clear partnership agreements, memorandums of understanding (MoUs), terms of reference and work plans
- Clear delineation of partner roles and responsibilities
- Sustained longer-term partner commitments
- Agreement on key performance indicators and performance targets
- Honest, open multiple-path communications

To these our review suggests the following additional considerations. Good partnerships are also built upon:

- Collegial partnerships, not hierarchal relationships
- Careful alignment of initiative activities with other reform initiatives and activities (systems thinking)
- Careful alignment of partner activities and careful management of the linkages among the various partner activities (systems thinking)

Knowing these things is not enough. The challenge is in knowing how to orchestrate a multistakeholder partnership that brings all of these elements together in ways that maximize the chances that initiatives will be successful, scalable and sustainable. The short answer from our review is that orchestration of effective initiatives will depend upon:

- Competent, proactive initiative management
- Improving our collective understanding of the complexities involved in such partnership initiatives (systems thinking)
- Strengthening capacities for managing this complexity
- Maintaining unrelenting attention to monitoring partnership activities so that we can know sooner rather than later what is working and what is not, and we may replicate what is working and take appropriate, timely remedial actions when things are not; and
Developing strategies to protect partners’ interests and service partner needs

Partnerships are not new in education. Good school principals in many countries have long understood the value of partnerships in securing resources for their schools through partnerships with parents, the community and nearby civil and private sector partners. The ministries of education in Jordan, Rajasthan and Egypt have all worked with many partners over many years.

What is different about the GEI in the broadest sense is the following:

- The idea of mustering and integrating the involvement of many very different partners in a genuinely shared and coordinated strategy for education reform and change
- Expansion of the concept of ‘partner’ to invite and legitimize the active participation of a much broader set of stakeholders in education reform than has typically been the case in the past
-Explicitly inviting partners into the dialogue about both the substance of the reform and how change might/should happen
- Trusting partners to deliver with minimal government interference; and
- Commitment to the value-added proposition that all partners can and should gain value from their participation in the partnership

These differences represent a significant shift from past strategies in which ministries entered multiple, but largely bilateral, one-to-one relationships with a number of external partners, mostly NGOs and regional and international donor/lender agencies, relationships that were most often contractual arrangements of the ‘tender’ variety and that involved partners in activities that were loosely coupled at best with the activities of other partners. Learning to work effectively within the new model that the GEI and the initiatives underway in all three countries represent is proving challenging for many partners and a significant challenge to those responsible for managing these new types of initiatives. Figure 3 below provides an illustrative mapping of some of the many ways in which partners representing different types of public, private and civil society organizations are contributing to current global education initiatives. It is not an exhaustive description, yet it is designed to provide a useful visual illustration of the challenges and complexities involved in managing multiple partnership activities to a common end.

As has been suggested above, the GEI did not begin with as broad a concept of ‘partner’ as one observes in practice in all three initiatives today. Early on the term partner was used primarily to refer to the international and local private sector organizations called on to support the ministry of ICT and the ministry of education in their efforts to introduce ICT-enabled learning in schools. For a few, this is still the operative definition. As initiatives have matured, however, the concept has broadened. It is now more widely understood that working with government ministries involves working simultaneously with multiple internal partners at the national, regional and local levels – with individual divisions, departments and units; with regional education authorities; and with communities and schools. Additionally, traditional donor and lending agencies which were held at arm’s length early on in the JEI are now accepted as important partners, not only for the resources that they bring, but more importantly for the knowledge and skills they bring about managing education reform initiatives and working with ministries of education, with government bureaucracies, with NGOs and with schools. Similarly, thinking about the types of inputs that partners can provide to initiatives has broadened. It is now widely appreciated that partners can be good sources of skilled management, planning, accounting, technical support and other forms of consultative expertise, not just money, infrastructure, commodities and training. This expanded definition of partner and the desire to forge meaningful longer-term, sustainable partnerships has serious implications for initiative management, as has been noted throughout this report. Considerably more attention, effort and time must be devoted to managing, communicating, involving and servicing partners than was originally anticipated. As initiatives evolve further and begin to tackle the challenges of scaling up to increasing numbers of schools, how well each initiative manages and services the growing numbers and types of partners will in large part determine how successful each initiative will be.
9.2 Lessons learned about partners and partnerships

Initiatives need to be carefully developed and proactively managed. Thoughtful proactive management is required:

- To identify and recruit appropriate partners
- Develop effective implementation plans and guide the implementation process
- To ensure the effective coordination, integration and alignment of all partner activities
- To support the work of individual partners and help protect the value-added proposition of all partners
- To service the needs of individual partners

A strong PMO does not mean a controlling PMO. On the contrary, what is needed and what partners want is PMO leadership that protects and honours their investments and interests by facilitating and ensuring ongoing effective and efficient management, monitoring and coordination of the activities of all partners.

More explicit effort needs to be given to ensuring, protecting and maximizing the value-added proposition for all partners. Doing so will increase the chances that partners will be in for the long haul. To paraphrase the responses of several interviewees: “if you help partners increase their value, they will stay around”.

There are a number of ways that participation in a GEI can potentially benefit private sector partners and that initiative management may employ to add value to partners, including:

- Providing opportunities to pilot, test and refine new goods and services
- Providing opportunities to develop new capacities within the partner organization
- Purchasing of partners’ goods and services
- Creating demand for partners’ goods and services
- Public relations – enhancement of partners’ public image
- Transferring knowledge, skills and work ethic from international organizations to local companies

Figure 3: Partnership involvement in a standards-based education system change model (illustrative)
Partnerships are made with organizational entities and servicing the needs of local partner representatives. While more attention also needs to be given to understanding and attention needs to be given to this issue.

Of classifying some partners as core partners and others as with. It is not easy. The subtle and not-so-subtle implications partners is another challenge that each initiative is struggling with. How to differentiate the relatively larger contributions of partners is something that all initiatives recognized. Finding ways adequately to recognize the their opinion their contributions have not been adequately than a few expressions of concern from partners that in

More careful attention should be given to mapping out, managing and monitoring implementation activity chains. These are complex initiatives. Few initiative activities are stand-alone activities. Most activities involve networks of partners with overlapping responsibilities for the success of an activity. The work and contributions of one partner are often dependent on the work of other partners. A breakdown in the implementation chain can seriously compromise the investments and work of other partners. Non-delivery by one partner has effects that can ripple through the initiative.

Strategies and mechanisms need to be developed to recognize and give credit to the contributions of all partners while at the same time finding ways to differentiate the relatively more significant contributions of some partners without appearing to be disrespectful to the contributions of all partners. This is a sensitive issue. Despite what they may say publicly, all partners want to be appreciated for their contributions, whatever form they may take. A sincere, timely ‘thank you’ and other forms of recognition for partners are important. In our interviews we heard more than a few expressions of concern from partners that in their opinion their contributions have not been adequately recognized. Finding ways adequately to recognize the contributions of partners is something that all initiatives are wrestling with. How to differentiate the relatively larger contributions of some partners without alienating other partners is another challenge that each initiative is struggling with. It is not easy. The subtle and not-so-subtle implications of classifying some partners as core partners and others as something else is cause for angst with some partners. More attention needs to be given to this issue.

More attention also needs to be given to understanding and servicing the needs of local partner representatives. While partnerships are made with organizational entities and formalized at the highest levels, the success of individual partnerships depends in large part on the quality of personal relationships with the local partner representatives at the management and operational levels. Considerable attention has been given in all three initiatives to managing the top-level relationships; relatively less to managing personal relationships with local partner representatives. Greater attention must be given by PMO staff to understanding the directives and expectations, the pressures and the demands under which individual local partner representative work, and efforts should be made to provide them with what they need to fulfill their obligations to their organizations. Not to do so is to jeopardize the institutional partnership as local representatives are the eyes and ears of their organizations on the ground.

More opportunities for substantive partner participation in initiative planning, update meetings and reviews should be provided than has been the case thus far in all three initiatives. While it is appreciated that initiative management in each country and the GEI central management team believe that they have provided sufficient opportunities for partner participation, many people do not yet feel fully valued, and in particular they feel that their participation in update and review meetings is often more symbolic and perfunctory than substantive. Partners, including teachers, principals, division heads, local private sector representatives and representatives of some larger international partners, want to be more substantively involved in planning initiative activities. Partners want more opportunities to share their observations and thoughts at update meetings and in other forums.

Formalized partnership agreements through MoUs, commitment agreements or other formal mechanisms help to maintain healthy partnerships. As noted above, these agreements should include clear specification of the responsibilities of the involved partner, beginning and ending dates of the partnership, identification of alignments and linkages with other partners that are critical to the success of the partnership and as much additional detail as is available. Such formalized agreements provide a basis for clear mutual understanding of the parameters and limitations of the partnerships.

Further, it is important to ensure that partner commitments are made from the highest levels of the partner organizations. Looking back, it is now recognized that some early partnerships were more the expression of the interests of one or several mid-level representatives of an organization and did not necessarily reflect the larger corporate strategy of the partner organization. In such cases, when the individuals lost interest or left, the partnership dissolved, if ever one actually existed.

Similarly, there are opportunities to add value to the activities of public sector partners including:

- Earlier achievement of important goals and objectives
- Transfer of knowledge/skills and perhaps, more importantly, attitudes and behaviours between private sector organizations and government staff
- Providing individual staff with skills and knowledge leading to more effective and efficient job performance and new job opportunities as evidenced by ministry staff, principals and teachers using new knowledge to secure employment
Working with ministries and education systems and schools required much more time and effort than most private sector partners initially understood. As many non-education partners have come to understand, while one formalizes a partnership at the highest levels of the government, working with government institutions, with ministries and in particular with ministries of education involves working with ‘multiple’ internal partners at multiple levels in the system. Education is a far more loosely coupled enterprise than many people understand with individual divisions, department, regional and district office players having a significant degree of autonomy from the ministries of which they are a part. Civil service rules and regulations notwithstanding, protocols and standards for working with individual units are more often a function of individual management styles and personalities than a standard corporate model. Thus, much more time and effort needs to be planned for working with internal partners than has typically been the case thus far in these initiatives.

Making the shift from a ‘tendering mentality’ to a ‘partnering mentality’ has in the past challenged and continues to challenge some partners. As has been noted above, multistakeholder partnership initiatives like the GEI represent a significant shift in the model of educational development. Ministries have long experience buying services and goods from external providers through tendering processes that are highly structured and governed by often complex sets of rules and regulations and demands for government oversight, oversight which has often been criticized as focused more on inputs and ‘bean counting’ than on attention to implementation processes and achievement of results. They have had considerably less experience at sharing responsibilities with external service providers as partners with almost equal stakes in the outcome of the relationship. That some partners, particularly public/government sector partners, are struggling with this change is understandable but frustrating for some private and civil society partners. A number of private sector partners expressed concerns that government representatives were not sincere in their efforts to work with them in new ways; that the rhetoric of partnerships was not supported by the day-to-day realities in their work with government officials.

Finding ways to foster greater cross-cultural understanding among partners was cited by many as an important immediate need in all initiatives. A lack of understanding of the differences in the organizational cultures and operational practices of other partners can lead to misunderstandings and frustrations in initiative implementation, misunderstanding and frustrations that could be avoided if partners better understood how different one organizational culture can be from another. In particular, a number of those interviewed noted that partnerships would be more productive sooner if private sector partners took the time to understand better the demands and constraints of working within politicized public bureaucracies and if public sector partners better understood the pressures and demands of working in the private sector, especially in large corporate environments.
The involvement of the World Economic Forum’s Global Education Initiative in supporting educational change in Jordan, Egypt and Rajasthan has provided a rare and important opportunity to gather together experiences of what it is that makes such educational partnerships effective. This report has sought to provide an overview of these experiences and to bring them together into a single model (Figure 1 and Table 1) that encapsulates the essence of these partnerships.

In conclusion, it is also important to highlight those areas commented upon within the text as providing evidence of promising practices and lessons learned. This report has identified seven main promising practices that have emerged from the GEI experiences:

1. High-level championing of the initiative from a senior figure within each country or state has been an essential element of its success, ensuring that there is appropriate buy-in at all levels and that the initiatives have been given the necessary publicity to contribute to their acceptance and success.

2. An important feature of the GEI model is the role of the project management office/unit in managing and directing the initiatives. Although different in form in each of the initiatives, an effective management unit has been an essential ingredient of their success.

3. A state or national steering committee, working independently but in concert with an international steering committee, has been seen to provide more timely decision support to the local initiative management team than might otherwise have been possible.

4. The organization of initiative activities into tracks, as is the case in all three initiatives, has proved to be a very effective way to organize the various activities involved in delivering the educational change programme.

5. A careful plan including an outline of the resources required to implement the initiative successfully can contribute to effective identification, recruitment and participation of initiative partners.

6. The establishment of an initiative trust fund, giving management a degree of discretionary control over how some of the resources are allocated, is a valuable mechanism to ensure that timely interventions are possible.

7. Activities that provide public sector employees with opportunities to work in private sector settings can contribute to shifts in organizational culture, notably work ethics and habits.

Likewise, the GEI has provided experience from which seven valuable lessons learned can be gleaned:

1. Multistakeholder partnership initiatives can be very effective in supporting ongoing education reforms and in adding value to the activities and public images of participating partners.

2. To be successful, multi-partner initiatives must be very well and systemically managed.

3. To be successful, leadership and management teams must include a balanced representation of educators, ICT experts and representatives of all types of partners.

4. Changing what goes on in schools, and particularly changing teaching practices in classrooms, is a much more complex and challenging undertaking that is going to take more time than partners often believe. It is critically important to give such initiatives sufficient opportunity to achieve their results.

5. Teachers and principals are at the heart of the change process and must be involved actively in their design and implementation.

6. Sustained partner involvement, particularly of the many private sector partners and some donor and lending agency partners, should not be taken for granted. There needs to be active management of the partnership arrangements if these initiatives are to be successful.

7. Monitoring and evaluation and considerations of scaling-up and sustaining current initiatives must be given much greater attention in all such initiatives.
Appendix 1: The Global Education Initiative implementation monitor

Introduction
With little modification, the GEI model of effective partnership initiatives for education proposed in this report could be used as a monitoring and diagnostic tool in support of self-assessments of an initiative’s strengths and weaknesses. The need for such a tool was suggested by a number of those interviewed in the preparation of this report and at the first meeting of the Partnerships for Education Initiative held at UNESCO headquarters in Paris in July 2006.

Objective
The tool’s objective is to facilitate an informed dialogue about how a particular initiative is doing; to help initiative management identify areas in need of attention, as well as to identify areas of particular strength upon which further successes may be built.

A cautionary note
This GEI implementation monitor is not intended to be a summative assessment device.

It is not a quantitative tool. It is a heuristic tool that is unabashedly qualitative and at this point in time quite subjective. The objective for the tool we propose is the facilitation of a meaningful and useful dialogue as the basis for strengthening educational partnership initiatives.

Considerable work would need to be done to reach agreement on operational definitions of such terms as “committed”, “significant” etc and to develop detailed widely accepted rubrics to guide assessment of individual components and all elements that would work across cultures. It could possibly be done, but at considerable cost and doing so could possibly lead to a formalization of the monitor that would potentially limit rather than enhance its effectiveness as a didactic tool.

It is understood that many of the terms/words used in identifying specific elements/criteria are open to interpretation, for example, ‘commitment to xxx’ or ‘widely understood xxx’ or ‘aligned with xxx’ or ‘effective…’. One could specify in more detail the intended meanings of each of these terms as used but we do not, leaving it instead to be negotiated by those who use the model and the proposed GEI implementation monitoring tool in their efforts to strengthen existing or structure new initiatives.

The monitor
The Global Education Initiative implementation monitor is built upon the component and element structure of our proposed GEI model of effective partnership initiatives for education. The monitor uses a six-point scale for assessing an initiative against the elements/criteria in each component and for making an overall assessment of each component. Individual component assessments are not computed by adding or averaging the assessed values of each element/criteria. At this point in time, there is insufficient experience and evidence upon which to build a credible quantitative tool. The elements/criteria in any given component grouping are not all of equal value; all are critical, but some are more critical than others, and what is critical in one context may not be as critical in another.

The ratings scale that we propose is as follows:

3 = Promising practice
2 = Significant strength
1 = Strength
-1 = Questions
-2 = Concern
-3 = Critical concern

A six-point scale with no neutral value is proposed as it requires one to make a judgment. One is not permitted to be ambiguous in an opinion. We think that the distinctions across the rating scale are self-explanatory with one exception. If a particular element cannot be confidently rated as either a strength or weakness, it must be rated as a -1. If it is not a strength, something is not right, and at the very least more investigation is required.

In addition to rating each element/criterion, it is advised that for each component summary observations should be included to highlight relevant and noteworthy strengths and concerns.

Despite the inherent limitations, our initial tests suggest that the GEI monitor can serve a very useful purpose in our efforts to strengthen current initiatives. It can be used to help organize one’s personal observations about an initiative, but we believe the real strength of the tool will be in facilitating and focusing a productive dialogue among initiative teams about the relative importance of various elements/criteria and about how well initiative implementation is proceeding or not.
### The GEI implementation monitor – Part 1

**Assessments**

3 = Promising practice  
2 = Significant strength  
1 = Strength  
-1 = Questions  
-2 = Concern  
-3 = Critical concern

**Initiative:**

1. Core values and development objectives

- Focus on 21st-century citizenship (civic, social and economic participation)
- Commitment to EFA and MDGs (Millenium Development Goals)
- Emphasis on ICT-enabled learning
- Widely shared social responsibility for development
- Commitment to public–private partnerships for development
- Commitment to organizational development, innovation and change
- Commitment to participatory, collaborative planning and implementation
- Commitment to human resource development
- Commitment to sustainability and scale-up

- Vibrant education system reform under way
- Supportive regulatory and bureaucratic environments
- Well-developed human resource development systems
- Commitment to the appropriate deployment of ICT in education and government
- A vibrant private sector, in particular in ICT
- Access to sufficient resources

4. Leadership, governance and decision-making

- Broad partner participation
- Effective governance and decision-making structures
- Stable, effective leadership teams
- Systemic approach to decision-making
- Formalized commitments and agreements
- Broad buy-in from all partners
- A productive work culture

5. Management and implementation (PMO)

- Effective management structures
- Stable, effective management teams
- Systemic approach to management
- Sufficiency and retention of operations staff
- Effective school management and supports
- Effective partner management and supports
- Emphasis on process and change management
### 6. Planning
Planning informed by data, information and research
Need assessments (government and all partners)
Strategic planning guided by systems thinking
Projection of resource requirements
Implementation plans
New ideas/approaches are adequately pilot tested
Emphasis on planning for sustainability and scale-up

### 7. Communications
Effective strategic and operational communications plan
Multiple vertical and horizontal communication channels
Regular staff meeting
Regular direct partner communications
Regular initiative-wide update meetings

### 8. Resource mobilization
Availability of adequate resources
Effective mobilization of resources
Effective coordination, integration and alignment of resources

### 9. Schools and communities
Engagement of principals/head teachers
Engagement of teachers
Engagement of parents
Emphasis on student learning
Active comprehensive professional development activities

### 10. Partners: ITC partners and other partners
Emphasis on changing school cultures
Engagement of the community
Sufficiency of partners
Productive engagement of partners
Formalized partner agreements
Productive inter-partner relationships
Effective integration and alignment of partner activities
Effective management of partner relations

### 11. Monitoring and evaluation
Relevant, unambiguous key performance indicators
Development and maintenance of an initiative information system
Initial baseline assessments completed
Regular self-assessments
Regular external review

### 12. Results
More effective schools
21st-century relevant student knowledge and skills
Strengthened public sector management capacity
Strengthened ICT sector
Other initiative-specific objectives eg. increased participation of girls other objectives
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Appendix 2: Elaboration of selected component elements and criteria

The GEI model of effective partnership initiatives for education proposed in this report captures what we believe to be the central components, elements and criteria of the initiatives currently under way in Jordan; Rajasthan, India; and Egypt. Below we provide an outline of the model components and their respective elements/criteria and some selective comments and elaborations in an effort to clarify some of the thinking behind the model that may not be obvious or intuitively derived from the lessons learned as cited in the main report.

1. Core values and development objectives
The elements in this component are related to the core beliefs and shared development objectives that link and guide the development of current global education initiatives in Jordan, Rajasthan and Egypt and others that may follow. Key values and objectives are derived from the following:

- Focus on 21st-century citizenship (civic, social and economic participation)
  Reference to a focus on 21st-century citizenship reflects and summarizes our understanding of goals and objectives of the GEI in the broadest sense. It is intended to capture the future orientation of the GEI and to highlight the initiative’s emphasis on the development of a broad set of knowledge, skills and attitudes that students will need to become responsible productive citizens in the communities – local, national and global – in which they will live.

- Commitment to EFA (Education for All; UNESCO)

- Emphasis on ICT-enabled learning

- Widely shared social responsibility for development

- Commitment to public-private partnerships for development

- Commitment to ongoing organizational development, innovation and change

- Commitment to participatory, collaborative planning and implementation

- Commitment to sustainability and scale-up

2. Vision, goals and objectives
This component refers to the development of the vision, goals and objectives for a specific country initiative. It seeks to highlight that preparing for a successful GEI begins with the setting of a vision, goals and objectives that are shared and understood very broadly by those whose participation will be essential to successful implementation. Together with Component 3, it seeks to highlight that context matters; that if initiatives are to be effective, they must be systemically aligned with and supportive of national economic and social development goals and, in particular, with the national education goals and objectives.

- Widely shared vision

- Widely understood, achievable goals and objectives

- Aligned with national economic development goals and objectives

- Aligned with national education goals and objectives

- A systemic approach
  The dynamic complexity of these initiatives and of improving the quality of schooling generally demands the use of a systemic approach in planning and implementing GEIs. A systemic approach is needed to ensure the integration and sustained consistency of focus of initiatives with broader national economic and social goals from the start and on an ongoing basis as initiatives evolve and mature.
3. Organizational readiness (enabling environment)
This component seeks to highlight the importance of a stable and supportive governmental organizational environment to the success of an initiative. If all of the elements included in this component are not present, an initiative is starting from a less than ideal position. The particular importance of stable political leaders and a political champion was emphasized by a number of those interviewed.

- Stable political leadership
- Actively committed visionary national political leadership
- Vibrant economic and social development environment
- Vibrant education system reform under way
- Supportive regulatory and bureaucratic environments
- Well-developed human resource development systems
- Commitment to the appropriate deployment of ICT in education and government
- A vibrant private sector, in particular in ICT
- Access to sufficient resources

4. Leadership, governance and decision-making
This component refers to the leadership, governance and decision-making of the initiative itself. It is about the importance of employing leaders with the skills to guide and manage initiative activities over the longer term; leaders who are able to build and sustain high-performing working cultures throughout the initiative.

- Effective governance and decision-making structures
- Stable, effective leadership teams
- Systemic approach to decision-making
  A systemic approach to decision-making is required to ensure integration and alignment of initiative component activities with one another as well as collectively with the broader national economic and social goals
- Formalized commitments and agreements
- A productive work culture
  The establishment and maintenance of a productive work culture is essential to a successful initiative. The establishment and management of high-performing initiative leadership and management teams and the establishment of productive work cultures has been a priority objective of the World Economic Forum’s GEI central team. Establishing a productive work culture is about developing an environment, structures and processes that encourage, motivate and support the PMO team, track implementation teams, partners and all involved in the initiative to high levels of performance.
  All three countries have been particularly effective in this area. The work cultures of all three initiatives can be characterized as generally being: disciplined, highly energized, motivated and committed, professional, team-oriented and consistently focused on finding ways to strengthen initiative activities
5. Management and implementation
This component refers to the management of the initiative, an area of responsibility of the project management office/unit.

- Effective management structures
- Stable, effective management teams
- Systemic approach to management
  By design, the Global Education Initiatives have been intended to be dynamic, responsive to changing needs and conditions, adaptive and continuously improving. This emphasis on dynamic change demands a systemic approach to initiative management; to maintaining a constant focus on the linkages, integration and dynamic interactions among activities; to regularly monitoring and understanding how actions, successes and challenges in one area impact activities, processes and results in other areas
- Sufficiency and retention of operations staff
- Effective school management and supports
- Effective partner management and supports
- Emphasis on process and change management

6. Planning
This component refers to planning of the initiative. It is about how well organized and effective the PMO is in preparing the way for effective initiative implementation; in preparing action plans that are tightly aligned and consistent with the initiative vision and its goals and objectives, how effective the team is in outlining and sequencing initiative activities, projecting resource requirements and anticipating and addressing challenges along the way.

- Planning informed by data, information and research
- Need assessments (government and all partners)
- Strategic planning guided by systems thinking
- Projection of resource requirements (partner needs)
- Implementation plans
  For all tracks specifying resource needs, timing, critical alignments and linkages and responsibilities and accountability
- New ideas/approaches are adequately pilot tested
- Emphasis on planning for sustainability and scale-up

7. Communications
This component refers to the work and responsibilities of the project management office/unit for the development and maintenance of effective communications systems that link all partners; that keep them informed as well as soliciting their ongoing involvement in a constructive dialogue about how to continually strengthen the initiative.

- Effective strategic and operational communications plan
- Multiple vertical and horizontal communication channels
- Regular staff meeting
- Regular direct partner communications
- Regular initiative-wide update meetings

8. Resource mobilization
This component represents another important area of responsibility of the project management office/unit. It is about how effective the PMO team is in identifying, procuring, mobilizing and managing deployment of all required resources.

- Availability of adequate resources
- Effective mobilization of resources
- Effective coordination, integration and alignment of resources

9. Schools and communities
This component is at the heart of the GEI, changing and strengthening teaching–learning at the school level.

- Engagement of principals/head teachers
- Engagement of teachers
- Engagement of parents
- Emphasis on student learning
- Active comprehensive professional development activities
  To include professional development opportunities in the areas of pedagogy and subject mastery as well as ICT training
- Emphasis on changing school cultures
  Refers to shifts required in school cultures from an emphasis on rote learning, memorization, passive and individual learning to inquiry-based learning activities, knowledge formation and team learning
- Engagement of the community
10. Partners: ICT partners and other partners
This component is about how effectively the PMO team is in identifying, engaging, nurturing and maintaining productive involvement of partners throughout the initiative.

- Sufficiency of partners
- Productive engagement of partners
- Formalized partner agreements
- Productive inter-partner relationships
- Effective integration and alignment of partner activities
- Effective management of partner relations

11. Monitoring and evaluation
This component is about how effectively the PMO team is in monitoring initiative implementation and performance and organizing and using ongoing formative evaluation to steer the initiative to attainment of the desired results. This component can be considered the organization learning component of the model. It is about the development of an initiative strategy and systems to ensure the availability of relevant, reliable and timely data and information to guide and improve initiatives on an ongoing basis. The objective of the monitoring and evaluation system should be the early identification of successful strategies and results that may be of use in guiding other initiative activities and, at the same time, facilitating early identification of strategies and activities that may not be working as well as they might so that timely corrective actions can be taken.

- Relevant, unambiguous key performance indicators
- Development and maintenance of an initiative information system
- Initial baseline assessments completed
- Regular self-assessments
- Regular external review

12. Results
This component focuses our attention on the ultimate objectives of the initiative – the achievement of the intended initiative goals and objectives. An ongoing focus on results is essential to steering initiatives to success. It is evidence of successful results that will drive efforts to sustain the changes that global education initiatives help to bring to schools. It is results that will provide the motivation, energy and resources needed to extend the new models of effective teaching and learning that the Global Education Initiative is helping to bring to schools.

- More effective schools
- 21st-century relevant student knowledge and skills
- Strengthened public sector management capacity
- Strengthened ICT sector
- Other initiative-specific results, goals and objectives
The World Economic Forum Global Education Initiative acknowledges and thanks the GEI Steering Board for their support: AMD, Cisco Systems, Goldman Sachs, Google, HP, Intel, Microsoft and SK Group.
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