

# INEE

Inter-Agency Network for Education in Emergencies  
Réseau Inter-Agences pour l'Éducation en Situations d'Urgence  
La Red Interagencial para Educación en Situaciones de Emergencia

## INEE Guidance Notes on Teacher Compensation in Fragile States, Situations of Displacement and Post-Crisis Recovery

MARCH 2009



INEE is an open global network of staff from UN agencies, NGOs, donors, governments, teachers, students, and academics working together within a humanitarian and development framework to ensure all persons the right to quality and safe education in emergencies and post-crisis recovery. Through a dynamic inter-agency forum INEE fosters collaborative resource development and consensus-driven advocacy, and strives to ensure that:

- All people in crisis-affected and fragile states have access to quality, relevant and safe education opportunities;
- Education services are integrated into all humanitarian responses;
- Governments and donors ensure sustainable funding for education preparedness, crisis response, mitigation and recovery;
- All education programs responding to emergencies, chronic crises and reconstruction are consistent with the INEE Minimum Standards and are held accountable for quality and results.

INEE, with its member agencies the International Rescue Committee, International Save the Children Alliance, UNESCO, UNHCR, UNICEF and the Women's Refugee Commission (formerly Women's Commission for Refugee Women and Children), led the inter-agency initiative to develop these INEE Guidance Notes for compensating teachers in fragile states, refugee, internally displaced and returnee contexts. Working together with a team of consultants from CfBT Education Trust, the INEE Guidance Notes were developed through a consultative process of workshops, peer reviews and the collection of good practices and lessons learned from international rights, tools and a series of country-specific case studies.

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**Cover photo:** Save the Children in Uganda. Apolonia, 40, teaches Level One of the Save the Children Accelerated Learning Program at Ntoroko Primary School. The ALP is designed for children who cannot afford the Universal Primary Education and/or who have to work or help with domestic tasks in the morning and can only dedicate afternoons to studying.

# **INEE Guidance Notes on Teacher Compensation in Fragile States, Situations of Displacement and Post-Crisis Recovery**

**MARCH 2009**

These Guidance Notes are dedicated to Jackie Kirk, who was killed in an ambush of a humanitarian aid vehicle in Logar Province, Afghanistan on 13 August 2008. Jackie, a technical specialist in education in emergencies, post-conflict and fragile states, focused on gender and teacher-related issues, including teacher compensation. She worked extensively with educators, field staff, education organisations and institutions, including ministries of education and teacher education institutions around the world and the positive impact of her tireless work with all of these groups will be felt for years to come.

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# Acronyms

ALP	Accelerated Learning Programme
ARTF	Afghanistan Reconstruction Trust Fund
CCSDPT	Coordinating Committee for Services to Displaced Persons in Thailand
CEC	Community Education Committee
CEDAW	Convention on the Elimination of All Discrimination Against Women
DAC	Development Assistance Committee
DFID	Department for International Development (UK)
DRC	Democratic Republic of Congo
EFA	Education for All
EFA-FTI	Education for All Fast Track Initiative
IDP	Internally Displaced Person
IIEP	International Institute for Educational Planning
ILO	International Labour Organisation
INEE	Inter-Agency Network for Education in Emergencies
INGO	International NGO
IRC	International Rescue Committee
JRS	Jesuit Refugee Service
MDTF	Multi-Donor Trust Fund
MoE	Ministry of Education
Mol	Ministry of Interior (Thailand)
NGO	Non-Governmental Organisation
NRC	Norwegian Refugee Council
PACE-A	Partnership for Advancing Community Education in Afghanistan
PBS	Protection of Basic Services (Ethiopia)
PTA	Parent-Teacher Association
PTC	Parent-Teacher Committee
SCUK	Save the Children UK
SCUS	Save the Children US
SMC	School Management Committee
UN	United Nations
UNESCO	United Nations Educational, Scientific and Cultural Organization
UNHCR	United Nations High Commissioner for Refugees
UNICEF	United Nations Children's Fund
USAID	United States Agency for International Development

# Executive Summary

Along with structures, supplies, curricula and furniture, appropriately qualified teachers are critical for the provision of quality, protective education. However, in fragile states, situations of displacement and post-crisis recovery, teachers are often underpaid or not paid at all. Meanwhile, there are no policies or guidelines that exist on teacher remuneration in these contexts. This has led to inconsistencies in the eligibility for, amount and frequency of teacher stipends among and within non-governmental organisations (NGOs), government ministries and UN agencies. In the long-term, these insufficiencies and inconsistencies can lead to a brain drain from the teaching force thus weakening education systems. Non-payment of salaries can also contribute to social unrest, and to learning situations in which children are vulnerable to exploitation.

The INEE Guidance Notes on Teacher Compensation in Fragile States, Situations of Displacement and Post-Crisis Recovery (INEE Guidance Notes) were developed to address this critical challenge to quality education, and as such, provide a suggested framework for compensating teachers. They are organised around three themes (A, B and C below) and are intended for staff within education authorities (at national, county and district levels), and for staff of donors, United Nations (UN) agencies, community-based organisations and NGOs working to provide education in fragile states, situations of displacement and post-crisis recovery.

The INEE Guidance Notes are not intended as a prescriptive solution or a blueprint response to issues of compensation. As such they should be adapted to the local context, and used as a platform for planning and implementing an appropriate response to teacher compensation. Under each theme, there are a number of points for consideration for agencies (including education authorities) to reflect upon as they plan and implement their interventions. These are illustrated with examples of good practice, lessons learnt and illustrative strategies from a range of refugee, internally displaced person (IDP), returnee and overall population contexts to assist the reader in identifying which approaches are likely to be effective in their particular situation.

“Among the most vexing and widespread operational challenges in field co-ordination for education during emergencies is devising an appropriate and affordable payment structure for teachers.”  
(Sommers, 2004: 74)

## ***Summary of Guidance Notes***

### **A. Policy and Coordination of Teacher Compensation**

- Undertake collection of reliable data and information related to teacher compensation.
- Develop coordinated policy regarding teacher compensation.
- Monitor and enforce coordinated policy regarding teacher compensation.

### **B. The Management and Financial Aspects of Teacher Compensation**

- Recognise and respect that government and education authorities have the principal responsibility for ensuring teachers are compensated.
- Develop an appropriate system for the identification and payment of teachers that is equitable, graduated and sustainable.
- Identify appropriate systems for financial controls and payment mechanisms.

### **C. Teachers' Motivation, Support and Supervision as Forms of Non-Monetary Teacher Compensation**

- Value the role of complementary forms of teacher motivation and support as important for teacher well-being.
- Ensure the place of professional development and other aspects of training and support in contributing to teacher motivation.
- Institute appropriate management, supervision and accountability systems for teachers.

# Introduction and Context

***“Among the most vexing and widespread operational challenges in field co-ordination for education during emergencies is devising an appropriate and affordable payment structure for teachers.”***  
**(Sommers, 2004: 74)**

Teachers are critical to ensure that children receive a quality education. In emergency situations or during transition, teachers not only enable children to continue learning but they also provide life-saving information and serve as a source of reassurance and normalcy for children and the wider community. Yet the world faces a shortfall of 18 million teachers in the coming decade (UNESCO, 2007) and the areas most desperately in need of teachers are fragile states. Thus strategies for ensuring that teachers are appropriately compensated are vital in attracting teachers to the profession, retaining them once in position and keeping them motivated to provide quality education. An established system for teacher compensation increases teacher motivation; helps to stabilise the education system thus effecting control, professionalism and accountability; decreases teacher absenteeism and high levels of turnover; protects the investment made in teacher training; and ultimately increases the quality and availability of education for children. Teacher salaries often make up more than 75 percent of any given country's total spending on education. Thus, providing possible solutions to the challenges of teacher compensation in fragile states is both directly and indirectly a contribution to the global Education for All (EFA) initiative.

These Guidance Notes use as their foundation the INEE Minimum Standards for Education in Emergencies, Chronic Crises and Early Reconstruction (2004) in which the second standard for ‘Teachers and other education personnel’ states that teachers should be “appropriately compensated”. This compensation should be “provided on a regular basis [and] related to the level of professionalism and efficiency of work”. It further states that “international actors [should] coordinate with education authorities, community education committees (CECs) and NGOs to develop appropriate strategies, and agree to use fair, acceptable and sustainable remuneration scales for the various categories and levels of teachers and other education personnel”. (2004: 67)

In addition, the Guidance Notes rely on other policy and standards texts<sup>1</sup>, including the guidelines on teachers' salaries and related teacher policies contained in the ILO/UNESCO Recommendation concerning the Status of Teachers (1966).

## Objectives and scope of the INEE Guidance Notes

These Guidance Notes were developed to provide a frame of reference for discussions about teacher compensation in situations where the responsible public authority is unable or unwilling to effectively coordinate and monitor the employment of teachers. In such circumstances it is common that other agencies (e.g. communities, civil society organisations, local and international NGOs, relief and reconstruction agencies and donors) assume the role of employer of teachers and put in place compensation arrangements which may vary widely. Such contexts are typically found in countries affected by extended conflict, fragility or humanitarian/emergency situations or in immediate post-crisis or early reconstruction. These ad hoc arrangements often fill an urgent service delivery gap and help to meet children's education rights. In many cases these arrangements are highly creative and responsive to urgent needs. They can set precedents which embed important principles such as equity, fair compensation, flexibility and community involvement in the system. However, such arrangements can also be highly inequitable, unpredictable, unsustainable and sometimes even exploitative of teachers and communities, thus exacerbating the potential for conflict or further instability.

These Guidance Notes are intended to offer guidance to stakeholders in setting and adapting interim teacher compensation arrangements in ways that help to establish and institutionalise good practices and avoid negative consequences. They are not intended to provide a framework for the negotiation of a national teacher compensa-

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<sup>1</sup> Principles drawn from these documents are listed in Appendix 2. Documents include: DAC Principles for Good International Engagement in Fragile States and Situations (2007); EFA-FTI Progressive Framework (2006); INEE Good Practice Guide on the Compensation and Payment of Educational Staff (2006); UNICEF Resource Tool Kit for Education in Emergencies (2006); Paris Declaration on Aid Effectiveness (2005); INEE Minimum Standards for Education in Emergencies, Chronic Crises and Early Reconstruction (INEE Minimum Standards) (2004); Chapter 16 on Teacher Motivation, Compensation and Working Conditions within the UNESCO IIEP Guidebook for Planning Education in Emergencies and Reconstruction (2002); UNESCO Guidelines for Education in Situations of Emergency and Crisis (2002); UNHCR Education Field Guidelines (2003); UN Security Council Resolution 1325 on Women, Peace and Security (2000); UNESCO/ILO Recommendations Concerning the Status of Teachers (1996 and 1966); Beijing Platform for Action (1995); UN Convention on the Elimination of All Discrimination Against Women (CEDAW) (1979); and the UN Convention on Refugees (1951).

tion policy or teacher salaries, which would involve a wider range of stakeholders than are addressed here. However, any interim teacher compensation arrangements need to take into account wider initiatives in public sector and civil service reform as and where they exist.

### What constitutes compensation?

Compensation comprises both monetary and non-monetary support; the latter encompasses a very broad range of in-kind payment (such as provision of food, shelter, health care, transportation, and personal items) and contains here a range of other strategies to help support and motivate teachers, including the provision of teaching materials and training. The Guidance Notes consider both types of compensation, regarding non-monetary support as an often necessary supplement to wages, or as a form of incentive to both motivate teachers to remain within the profession and volunteers to participate.

**Table 1: Forms of compensation**

	Form of compensation	Example
Monetary	<ul style="list-style-type: none"> <li>Salary</li> <li>Fixed compensation paid to a person for regular work or services.</li> </ul>	
	<ul style="list-style-type: none"> <li>Stipend</li> <li>Form of payment, usually associated with training or on-the-job learning prior to full qualification, e.g. for teaching assistants or unqualified teachers.</li> <li>Levels of payment are often lower than permanent salary levels for similar work by qualified individuals.</li> <li>Stipends are often complemented by other benefits, such as training (including on-the-job), food and accommodation allowances.</li> </ul>	<ul style="list-style-type: none"> <li>Trainees on a UNICEF/Save the Children US (SCUS) programme for unqualified volunteer teachers in Sudan received monthly training stipends of 120 Sudanese pounds (approximately US\$60).</li> </ul>
Non-monetary	<ul style="list-style-type: none"> <li>Allowances</li> <li>These aim to reduce the day-to-day living expenses of teachers and address their basic needs.</li> <li>They have a role in addressing specific needs, such as housing allowances in rural areas.</li> <li>Examples include: food, housing, medical care, mosquito nets and bicycles. They may also be extended to include agricultural support, such as seeds.</li> </ul>	<ul style="list-style-type: none"> <li>In the Democratic Republic of Congo (DRC), Save the Children UK (SCUK) provided teachers with a kit including teaching and personal items.</li> <li>Communities in Southern Sudan volunteered farm produce, such as maize, millet, beans, goats or even chickens, to support teachers.</li> </ul>

**In addition to the forms of compensation described in Table 1, section C of the Guidance notes also considers other forms of non-monetary compensation, namely:**

- Opportunities for professional development and support, including training, mentoring, effective supervision and management. These are often combined with stipends or allowances. For example, unqualified teachers involved in the Partnership for Advancing Community Education in Afghanistan (PACE-A) project in Afghanistan receive 30 days of training per year. For participating, they also receive a per diem and travel allowances equivalent to US\$5 per day. In addition, trainees receive classroom support from trainers.
- Improved working conditions, which may involve physical working conditions, such as the provision of school desks, benches and fences so that the school is secure; access to teaching and learning materials such as curriculum, teaching guides, textbooks and stationary; and manageable pupil-teacher ratios (?40:1).

These support mechanisms relate more broadly to the employment terms and teaching and learning conditions for teachers rather than to direct teacher compensation. They are included in the final section of the Guidance Notes due to the significant effect that they have on teacher recruitment, performance, motivation and attrition.

Even in the most fragile of contexts teacher compensation will be shaped by market forces. The value and form of compensation will be affected by the cost of living, the demand for teachers and other professional jobs, wage levels in other similarly qualified professions (especially healthcare) and the availability of teachers or other qualified personnel. In order to be sustainable, strategies for teacher compensation need to take into account these market forces rather than simply reaching agreements between donors, education authorities and other employers of teachers. This is particularly pertinent in situations of displacement where qualified teachers are mobile and thus more likely to move in response to market forces, attracted by higher wages even if it means they have to cross borders or potentially not return to their country of origin.

### ***Definition of a teacher***

The term ‘teacher’ has many different meanings in different contexts. Teachers’ professional status may vary from a fully qualified state employee to a community teacher with a low level of education. Teachers can also be distinguished by their position (ranging from a pre-school or classroom assistant, primary or secondary school teacher, subject specialist, vocational trainer, religious educator, life skills instructor or professor), the context in which they work (non-formal or formal education, primary or secondary) and whether the school or learning centre is registered and managed by the government or the non-government sector (including schools run by NGOs, faith-based organisations, communities and the private sector). For the purpose of these Guidance Notes the term ‘teacher’ is used to cover all persons in schools who are responsible for the education of pupil<sup>2</sup>. Where guidance is specific to a ‘type’ of teacher as distinguished by qualification level and/or working context, this is stated in the text, e.g. unqualified primary teacher.

All governments of functioning states have norms, definitions and professional categories of teachers which should be the basis for deciding the definition of a teacher or teacher categories, and therefore their terms and conditions in that specific country context. These norms and the practices based on them, should be free from discrimination on grounds of “race, colour, sex, religion, political opinion, national or social origin or economic condition.”<sup>3</sup>

### ***Roles and responsibilities of stakeholders in teacher compensation***

The Guidance Notes start from the basis that access to education is a right. They also assume that education is both a public and private good, but that governments ultimately have the responsibility for ensuring the right to education. This does not, however, imply that governments should be the sole or even necessarily the major provider of education, although, especially with regard to basic education, this is frequently the case. It does imply that governments have a responsibility to ensure that children’s rights are met, and this requires policy frameworks, regulation and monitoring of standards and mobilising and assigning resources to promote equity.

The employment of teachers involves rights relating to labour practices as well, which are also the ultimate responsibility of governments. In the kind of environments for which these Guidance Notes are intended, the political authorities may not have control of the mechanisms of the state to ensure provision of education, or may not have the institutional capacity, resources or political will to ensure such provision. In certain circumstances, communities, civil society organisations, local and international NGOs or donors may have constraints on working with the authorities. These Guidance Notes refer to the importance of working, wherever possible, with the education authorities, and where this is not possible, of working in ways that lead towards the assumption by the state of its responsibilities.

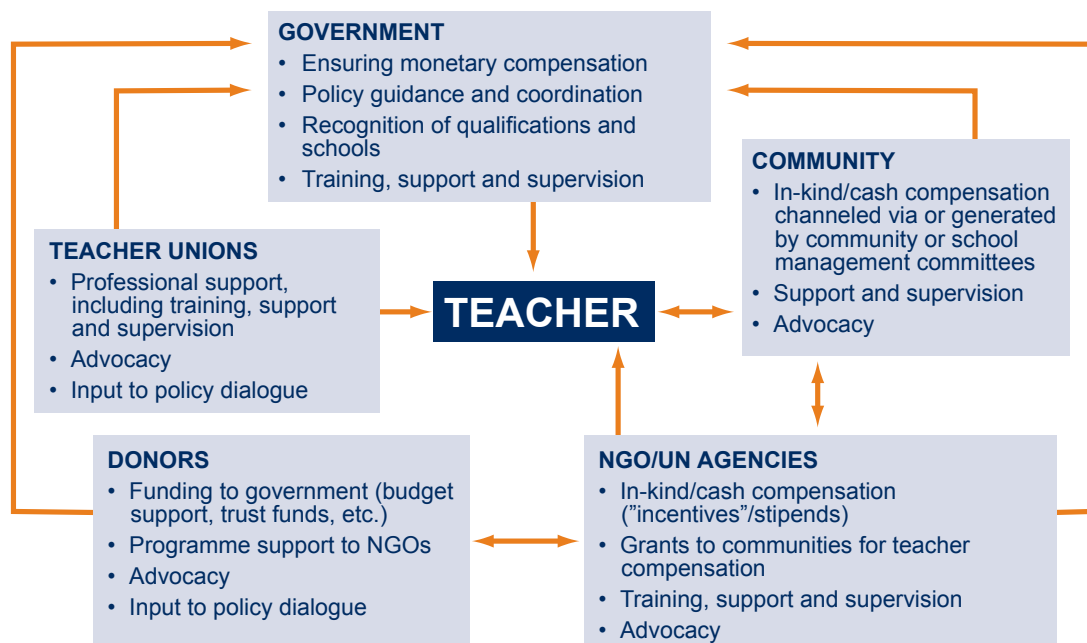
Figure 1 represents a simplified model for the relationship between stakeholders, indicating the different roles and responsibilities that stakeholders can adopt. It assumes that all of these stakeholders may be involved in directly employing teachers, even though the government should have the ultimate responsibility for overseeing policy and coordination around teacher compensation and ensuring that, from a rights perspective, employed teachers are receiving appropriate compensation. The balance of the roles will vary over time depending on the context of fragil-

<sup>2</sup> As defined in the 1966 ILO/UNESCO Recommendation Concerning the Status of Teachers.

<sup>3</sup> 1966 ILO/UNESCO Recommendation Concerning the Status of Teachers: article 7

ity and the capacity level and will of government. Thus the weighting of responsibilities between stakeholders will vary in different contexts, and stakeholders may not take on all of these roles at one point in time. For example, in a refugee situation both the host government and the home government may be unable or unwilling to engage, which can result in NGOs or United Nations (UN) agencies adopting a leadership role in compensation.

**Figure 1: Roles and responsibilities of stakeholders<sup>4</sup>**



### Structure of the INEE Guidance Notes

The Guidance Notes are organised around the following three themes:

- Policy and coordination of teacher compensation;
- The management and financial aspects of teacher compensation; and
- Teacher motivation, support and supervision as forms of non-monetary teacher compensation.

The first theme of policy and coordination overarches the other two, providing core principles for teacher compensation strategies that should be applied to both the financial aspects and non-monetary forms of compensation. Policy coordination is vital in circumstances of fragility and displacement where a number of agencies have stepped in to assume the role of employers of teachers due to the responsible education authority being unable or unwilling to effectively implement this role. In such circumstances arrangements for teacher compensation can vary greatly between stakeholders and more effective coordination is needed to ensure that approaches are consistent, sustainable and equitable.

The second theme on the management and financial aspects of teacher compensation addresses the arrangements and mechanisms for teacher compensation. Recognising the different roles that stakeholders play, the theme provides guidance to ensure that teachers are identified and payscales are appropriate when developing and implementing teacher compensation strategies. Consensus between stakeholders on how to approach teacher compensation in their specific context is essential from the outset not only to provide a foundation for later policy, but to also provide a basis for monitoring.

The third theme addresses the role of non-monetary compensation in providing support at system level. It prompts a more holistic view of teachers and their role in the education sector with strategies for investing in

<sup>4</sup> There is assumed reciprocity in these arrangements in that the teachers have multiple responsibilities in terms of adhering to codes of conduct and the services they deliver back to these groups and ultimately to their direct beneficiaries — children themselves.

activities such as training to build the capacity of the education workforce, as well as helping to motivate teachers and improve the quality of teaching. Compensation plays an important role in motivating teachers, and in this sense non-monetary compensation should be seen as a complement to financial compensation, rather than an alternative. Forms of non-monetary compensation are more directly linked to an improved sense of self-actualisation rather than working to cover the costs of living. Such strategies to improve and retain the teaching workforce also ensure that investments in training and other types of support are not wasted.

### ***In which contexts should the INEE Guidance Notes be applied?***

These Guidance Notes are designed to be applicable to all education systems, whether public, private, faith-based, community-based or NGO-run schools; and at all levels of education, in both formal and non-formal settings. The assumption is that they are valid in both rural and urban contexts and within refugee or IDP camps, although it should be recognised that the forms and levels of compensation may differ between these contexts due to market forces and/or logistical constraints.

These Guidance Notes are framed in the context of the four OECD Development Assistance Committee (DAC) categories of fragile states (deteriorating, arrested development, post-conflict transition and early reconstruction) so that they are consistent with international commitments and frameworks for engaging with fragile states (see Appendix 3 for more information). These categories will capture the majority of contexts related to teacher compensation in fragile situations, situations of displacement and post-crisis recovery, but they leave out some situations, such as countries that are not fragile but hosting refugees from neighbouring fragile states; or countries that are generally stable but require temporary assistance in relation to teacher compensation due to the impact of a major natural disaster on the education system. While these situations do not fall under the fragile states typology, the INEE Guidance Notes do address these contexts.

In framing the INEE Guidance Notes this way, there is a recognition that states transition in and out of different phases of fragility. To aid planning and programming in such conditions, it is important that from the outset of any crisis, whether the situation worsens or improves over time, policies and procedures are put in place that help build a sustainable teacher compensation system that can be adhered to as far as possible by all actors in a coordinated manner. This will also enable easier transition between emergency and development contexts, ensuring that any systems and approaches adopted and used during emergency phases by donors, NGOs and UN organisations are sustainable and viable once the country has moved towards a more stable state and the government resumes greater responsibility for the payment of teachers.

# INEE Guidance Notes on Teacher Compensation in Fragile States, Situations of Displacement and Post-Crisis Recovery

## Who should read and use the INEE Guidance Notes?

These Guidance Notes are intended for staff within education authorities (at national, regional, county, provincial, district or local municipal, town and village levels), and for staff of donors, UN agencies, community-based organisations and NGOs working to provide education in fragile states, situations of displacement and post-crisis recovery.

## How should the INEE Guidance Notes be applied?

The Guidance Notes provide a suggested framework for compensating teachers. They are not intended as a prescriptive solution or a blueprint response to issues of compensation; some parts may be more relevant to some contexts than others. As such the Guidance Notes should be adapted to the local context, with due attention to commonly accepted principles and norms for teacher recruitment and compensation, and be used as a platform for planning and implementing an appropriate response to teacher compensation.

General Guidance Notes are proposed under each theme (policy and coordination; management and financial aspects; teachers' motivation; support and supervision) with specific points for agencies and educational authorities to reflect upon as they plan and implement their intervention. Under each theme, a number of points to consider are given. These are illustrated with examples of good practice, lessons learnt and illustrative strategies from a range of refugee, IDP, returnee and overall population contexts to assist the reader in identifying which approaches are likely to be effective in their particular situation. At the end of the Guidance Notes, specific guiding principles for good practice, outlining strengths and challenges, are articulated in relation to each policy area.

## A. Guidance Notes on Policy and Coordination

**A1 Undertake collection of reliable data and information related to teacher compensation.**

**A2 Develop coordinated policy regarding teacher compensation.**

**A3 Monitor and enforce coordinated policy regarding teacher compensation.**

Once implemented, teacher compensation policies set a precedent that teachers will then expect to be maintained. Therefore it is essential that policies on teacher compensation are well-informed and coordinated with all relevant stakeholders. By being aware of socio-economic conditions and the activities and concerns of others, agencies can minimise the risks of creating distortions in the job market, and prevent brain drain of teachers leaving the profession or moving to better-paying areas or agencies. Early coordination, based upon reliable data and information, lays the foundations for sustainable teacher compensation policy and practice and helps smooth the transition towards development and/or reconstruction. Coordination should involve all relevant stakeholders, and should continue past the initial planning stages to ensure coherent implementation of approaches and enable monitoring of practice.

### **A1 Undertake collection of reliable data and information related to teacher compensation:**

Baseline information needs to be gathered to create an informed policy on teacher compensation and identify all relevant stakeholders. Data collection and mapping in order to provide a situational analysis should include (in no particular order):

- a. Number of teachers, student-teacher ratios, grades of employment, gender, ethnicity and teacher protection policies;

- b. Numbers of other educational personnel, including supervisors, head teachers and administrative support staff;
- c. Pre-crisis salaries, current salaries and information on cash and in-kind compensation;
- d. Salaries across competing sectors (e.g. health workers and other professional roles);
- e. Data from both rural and urban areas (i.e. not just average or mean data), including information on regional costs of living;
- f. Data from public and private sector, including faith-based and community schools;
- g. Data on teacher qualification levels (education, professional training if any) and certification;
- h. Regional data (e.g. in the case of refugee teachers, Iraqi refugees are spread throughout Jordan, Syria and Lebanon);
- i. The role of different stakeholders, including education authorities, NGOs, donors, teacher unions, etc. in the provision of education services; and
- j. Salary distribution systems and the Ministry of Education's (MoE's) budgetary processes.

**Illustrative Strategy:** In the DRC, Save the Children UK (SCUK) signed agreements with the MoE at district and provincial levels for their intervention in establishing an Accelerated Learning Programme (ALP) that included compensation of teachers. The community was involved in planning and mobilisation meetings, and SCUK also collaborated with other agencies, including SIDA, UNICEF, UNESCO and the Norwegian Refugee Council (NRC) for issues such as providing textbooks, experts for training teachers and technical advice in organising training for ALP teachers.

*Source: Case Study 1.*

### Key points to consider:

#### *Situational analysis*

- What good practice and lessons have been learnt from similar teacher compensation approaches in other contexts?
- Are such approaches likely to work in this context? Why or why not?
- What approaches are other agencies and education authorities using in the current context?
- Is the funding approach (cash, in-kind, how funds are disbursed) suitable in this context or is an alternative approach more appropriate?
- Are teachers and the surrounding population in receipt of relief goods (e.g. food, health services, etc.)?
- Are the salary scales (cash or in-kind) and approaches to payment (community involvement, etc.) suitable in this context or is an alternative approach more appropriate?
- Who are the different stakeholders involved in the employment of teachers? What are their policies and frameworks regarding compensation?
- To what extent are any approaches planned consistent with what other agencies, teacher unions and the education authorities are doing or advocating for?
- What additional structures or activities can be put in place/effectuated to enhance the approaches used or to adapt to local demands and/or needs?
- What role do the education authorities (central and local) play in coordinating and ensuring the provision of teacher compensation?

#### *Data collection*

- How is data collected and shared? Are there opportunities to coordinate data collection between agencies?
- How frequently is data reviewed, verified and updated?

## A2 Develop coordinated policy regarding teacher compensation:

Use baseline data and international doctrine (such as the ILO Recommendations on the Status of Teachers) to bring together education authorities and relevant stakeholders (identified in A1) to develop a coordinated policy for compensating teachers in this context. Where possible and appropriate, the role of coordination should remain with education authorities.

### Key points to consider:

#### **Mechanisms for coordination**

- What mechanisms exist to ensure on-going cooperation, coordination and information sharing between different stakeholders around teacher compensation issues? How can they be used effectively to discuss teacher compensation issues?
- What systems for and levels of teacher compensation existed before the crisis? Is it possible to build broadly on these systems in any interventions planned? If not, why?
- If building a parallel or different system to what existed before the crisis, what is the rationale for this and is it likely to be transferable in the longer-term so that the education authorities could take over the management and funding of any interventions in the future that are managed and funded in the short-term by agencies?
- Is there a recent or existing government (or other) benchmark system that can be followed by all agencies in relation to levels of pay according to qualifications and experience in teaching and conditions of payment covering maternity leave, annual holidays, etc.?
- If not, is it possible to develop a system that is reflective of living costs and government affordability in the longer-term?
- Are enhanced incentives needed in certain locations due to particular levels of hardship or to attract certain groups of teachers and skill sets to help build greater equity into the system? If so, is there a way for all stakeholders, including education authorities, to form a common agreement on which locations and types of teachers should be included, and levels of hardship allowances or incentives (cash, in-kind) that should be paid?
- How are teachers' incentives harmonised with those of people employed for other services and jobs to ensure that teachers are not lost to better paid but lower skilled jobs?

#### **Strengthening capacity for coordination**

- If education authorities do not have the capacity or commitment to manage and/or coordinate teacher compensation, is there a lead agency that can act as de facto coordinator or cluster leader as an interim measure?
- How can education authorities be strengthened in preparation for the role of ensuring long-term sustainable teacher compensation if they have not already taken on this role?

**Illustrative Strategy:** UNICEF Pakistan attracted female teachers (in a context where only female teachers are permitted to teach girls) to teach in a school for IDPs by paying them higher salaries than men and hiring their male relatives for other school jobs so that it was appropriate for the women to work outside of their homes and communities. This strategy of positive discrimination is context specific and should not be applied as a blanket policy.

*Source: Case Study 6.*

#### **Illustrative Strategy:**

Community-based classes that started with the support of the PACE-A project in Afghanistan are being gradually handed over to the formal MoE system. This has been done at provincial level and depends on the capacity and funds of the MoE. Sometimes a class is 'partially handed over' to the MoE, which provides the teacher's salary, while the NGO continues to provide training and materials. PACE-A devised a step-by-step process for partners to follow in order to complete the required MOE administration for registering community-based teachers of primary grades; the process was approved by the MoE at the central level. The completed information was submitted as the MoE finalised its budget so that community-based teachers could be added to the payroll.

*Source: Case Study 9.*

**Lesson learnt:** In 2006 when the Government of Southern Sudan took over the responsibility for teachers' salaries, there were no structures for an efficient implementation of a salary scheme. When the government released funds to state authorities for teachers' salaries, it was without clear statistics and salary scales for teachers. Some state authorities diverted funds to other projects or misappropriated them, leaving teachers unpaid for several months. These irregularities to the teacher compensation process in Southern Sudan left most teachers unhappy about not being paid regularly, being underpaid, or both. Due to the lack of proper statistics on teachers and low capacity in government offices, it has been difficult to determine what level of funds should be set aside for teachers in any given state. An important lesson learnt is that capacity building for ministries of education is critical to an efficient and satisfactory teacher compensation scheme.

Source: Case Study 15.

- Are exit strategies planned and coordinated between all stakeholders? In refugee contexts, has education been included in tripartite repatriation agreements?

### **A3 Monitor and enforce coordinated policy regarding teacher compensation:**

A policy needs to be implemented consistently across all stakeholders, accompanied by an associated monitoring framework that can be used in a transparent way to monitor and enforce compliance with the teacher compensation policy.

#### **Key points to consider:**

##### **Monitoring systems and procedures**

- What measures are being taken to ensure that consistent payscales are used by all stakeholders and that information is shared among stakeholders to harmonise any intervention?
- What measures are being taken to ensure teacher compensation interventions are broadly equitable and in line with the practice of education authorities and other agencies so as not to exacerbate competition?
- Within the monitoring framework, how can education authorities enforce the agreed policy and what are the consequences of stakeholders not adhering to the policy?
- Are teachers receiving compensation on time and at the expected level?
- Are payroll lists frequently updated to eliminate issues of 'ghost teachers'?
- How are education authorities encouraging transparency in the use of the policy and monitoring framework?

##### **Coordination policy and monitoring framework**

- Is there a common coordination policy and associated monitoring framework that can be used to draw out lessons learnt on how to strengthen partnerships in the practice of teacher compensation? If not, how can one be created?
- Is there an associated monitoring framework that can be used to enforce the policy and ensure equity and transparency of operations during implementation? If not, how can one be created and used effectively?

## **B. Guidance Notes on the Management and Financial Aspects of Teacher Compensation**

**B1** Recognise and respect that government and education authorities have the principal responsibility for ensuring teachers are compensated.

**B2** Develop an appropriate system for the identification and payment of teachers that is equitable, graduated and sustainable.

**B3** Identify appropriate systems for financial controls and payment mechanisms.

Governments are responsible for ensuring the right to education. Whilst this does not necessarily entail the funding and direct provision of education, governments are invariably the focal point of education services within a country.

Governments should establish employment conditions, but they are not able to predetermine salary scales if they are not the direct employer. Employment conditions, including salary scales, should be agreed upon through negotiations with teacher unions and other stakeholders, who in turn should also help to ensure their enforcement. Non-state education providers should where possible respect the minimum provisions for teacher employment established by the government. In practice, it is common to find teachers working outside of the government pay-scales with salaries set at the community level. As such, it is important to build consensus between all relevant stakeholders regarding who is eligible for compensation and what pay-scales are appropriate. This is especially true where non-state actors step in as a transitional measure to provide teacher compensation in situations where the state is unable or unwilling to provide this function. In this interim transitional period, building consensus in the compensation approaches adopted results in more sustainable solutions.

**B1 Recognise and respect that government and education authorities have the principal responsibility for ensuring teachers are compensated:**

Ensuring teachers are compensated is ultimately the role of the education authorities; in circumstances in which they are unable to fulfil this role, then other agencies involved in the provision of education may take on this responsibility for a temporary period of time, either directly or by supporting (central or local) education authorities. UN agencies, donors or NGOs should not remain the primary source of funding for teachers in government schools for extended periods of time<sup>5</sup> (for monetary or in-kind compensation). Where education programmes are wholly supported by donors, NGOs or local communities, actors should try to ensure that interventions are coordinated with existing policies and practices, are sustainable or have an appropriate exit strategy that is coordinated with other actors, especially the MoE.

**Key points to consider:**

**Non-government and community involvement in teacher compensation**

- What are the projected timescales for any non-government involvement in the provision of teacher compensation? If it is likely to be short-term, in what ways can international actors support education authorities to continue with the coordination and ownership of teacher compensation issues?
- In what ways are teachers' unions involved in consultations over compensation and ensuring that the rights of teachers are respected at all times?
- To what extent are communities involved as employers of teachers and what steps are being taken to reduce the resulting financial burden on communities?
- What measures have been taken to address how to transfer the responsibility for ensuring teachers are compensated back to the education authorities in situations where they are unable or unwilling to do this currently?
- How can lessons learnt and good practice developed during this interim period be used to plan for long-term, sustainable compensation mechanisms?

**Lesson learnt:** USAID in Ethiopia built the capacity of district education offices by encouraging a Memorandum of Understanding (MoU) between IRC and the district education office that agreed on a phased approach to outside funding. It was agreed that after the first year, the district regional education office would cover 25 percent of the teachers' compensation, 50 percent after year 2, 75 percent after year 3 and 100 percent after year 4. It has not been easy to achieve, as the contribution of many education offices is still not at the agreed level. The main challenge faced is that when the local education office takes over the payment of teachers' salaries, payments are often irregular and unpredictable. Maintaining a regular policy dialogue and follow-up to secure the timely payment has been one way that IRC has tried to overcome this challenge.

*Source: Case Study 2.*

**Illustrative Strategy:** NGO and government agencies in South Darfur have organised an inter-organisation working group to coordinate a payscale for teachers.

*Source: Case Study 4.*

**Illustrative Strategy:** UNHCR has an MOU with the Government of Tanzania to guide the amount refugee teachers are paid to avoid breaking government policy regarding refugees' compensation issues. All other actors now implement what was agreed and report to UNHCR.

*Source: Case Study 17.*

<sup>5</sup> However, in refugee contexts there is an exception to this Guidance Note, as it cannot be assumed that host governments will pay for camp education.

**Illustrative Strategy:** During the first few months after the 1994 genocide in Rwanda, before the government was able to take over the task of paying salaries, many aid organisations gave food rations to teachers. In 1995 UNICEF made a one-time contribution to teachers' salaries in Rwanda totalling US\$800,000. As the banking system was not yet re-established across the entire country, provincial education officials took millions of francs on buses to ensure teachers were paid in remote areas. UNICEF's method of paying teachers recognised and reinforced the government's authority.

Source: *Obura, 2003.*

**Illustrative Strategy:** In Uganda the Commonwealth Education Fund and local children's rights organisations have supported children to form child-monitoring committees. Members include children aged 7 to 14 who have received training to track education expenditure and hold their parents, School Management Committees (SMCs) and teachers accountable for the use of funds. Whilst this worked well in this context, it could place some young people in a vulnerable position in immediate post-conflict situations where there is heightened sensitivity and the possibility of easily slipping back into conflict.

Source: *Commonwealth Education Fund, 2008.*

### **Funding for the compensation of teachers**

- Are sufficient funds available to support teacher compensation in the short- and long-term? If not, have plans been put in place to address any shortfall?
- Is donor funding available and can this be used for recurrent costs such as salaries? If available, is this funding harmonised and predictable in line with Paris Declaration Recommendations? If not, what is being done to address this?
- Are there agreements amongst donors regarding the use of funds for recurrent costs or teacher compensation?
- What plans have been put in place with the donor community to minimise any funding gap between relief and development operations?
- What measures have been taken to try and ensure continuity of compensation, both during the current intervention and as part of any scheduled exit strategy? How have the government, NGOs and local community been involved in ensuring continuity?
- What approaches have been taken to maintain engagement and ownership of the MoE even when they are not directly providing funds, and to transfer responsibility for providing funds for state-employed teachers and staffing schools back to the government?

### **B2 Develop an appropriate system for the identification and payment of teachers that is equitable, graduated and sustainable:**

In situations of displacement, the identification of teaching personnel for payment is a significant challenge, as payroll systems may have broken down or may be ineffective, and formally qualified teachers may not have records of their service with them. Within the home country, displaced teachers may be registered on a payroll system but are no longer able to access their wages if they now work in non-registered camp schools. Refugee teachers and schools may not be formally recognised by the MoE within the host country and so remain ineligible for payment. In all contexts, actors should quickly ascertain a coordinated process to identify teachers, establish their credentials (if appropriate) and seek to establish an interim payroll system for teachers within their jurisdiction. Payment should take into account teachers' qualification levels and years of experience (if this can be validated). It should also be non-discriminatory and based on policies of equity in relation to gender, ethnicity, religion, disability and HIV status. The level of compensation should remain comparable to that within the local community (non-refugees) and home community (refugees and IDPs) and, ideally, to wages within equivalent sectors. To prevent teachers from leaving the profession, the base wage level should not be set below that of other skilled workers in the same situation and it should be sufficient to allow teachers to focus on their professional work and ensure continuity of service within the teaching profession, rather than necessitate seeking additional sources of income. At the same time, however, the wage levels should be affordable and sustainable.

### **Key points to consider:**

#### **Entitlement for compensation**

- Are there agreed criteria for defining entitlement for compensation? (Criteria should include information on the work schedule, duration, level of schooling, job role and qualification level. They should be based upon an agreed non-discrimination policy and also clarify any rights to, for example, maternity leave

and sick leave. Criteria should give consideration to making extended paid sick leave available to HIV-positive teachers as well as staff with other chronic or serious illnesses. They should also map individuals to the appropriate level of the payscale according to their qualification and experience.)

- Are these shared with both the MoE and with other agencies operating in the area?

**Issues related to the payroll**

- If unqualified teachers are not included within the formal payroll, are options available to them to access training and qualify as teachers?
- What mechanisms are in place to ensure that only active teachers remain on the payroll?
- Is there a mechanism in place to facilitate displaced teachers’ return, official (re-)employment and (re-)registering on the government payroll system? If not, what can be done to facilitate government response to address this issue?
- What efforts are being made to update payrolls so that they reflect accurate statistics on teachers, their level of education, experience and training received?

*\*It should be remembered that in situations where teachers have fled persecution, payroll lists need to remain secure with restricted access to ensure that they are not a means of identifying and targeting individuals.*

**Payscales (covering cash and other forms of compensation)**

- What is the existing (home) government payscale and can this be applied? If not, why is it not appropriate?
- Is the payscale on a par with salaries of workers in comparable sectors (for the national population or IDPs) or within the host country and/or the country of origin (for refugees)? If not, have measures been considered to minimise any negative impacts on repatriation?
- What are the projected impacts of the current payscale systems upon education budgets on refugees’/IDPs’ return? Is this sustainable?
- Does the level of compensation cover the average cost of living or are teachers leaving the profession or seeking a second job? If the latter, what other forms of employment are they seeking, and what is the difference in wages?
- Do budgets allow for the progression of teachers through the payscale as they become more qualified and experienced, and for volunteer teachers to access compensation (cash, in-kind) commensurate with their training?

**Illustrative Strategy:** In the Ngara region of Tanzania (1994-1996) the following payscale was adopted in camps for Rwandan refugees to attempt to ensure parity between refugee and locally recruited staff.

<b>Refugee staff</b>	Modest pay, supplemented with relief assistance in the form of food, health care and shelter
<b>Locally recruited national staff</b>	Slightly higher pay, but no relief assistance
<b>Specialist national teachers</b>	Higher payscale to attract personnel and to cover expenses if commuting or relocating

Source: Sinclair, 2002: 55.

**Illustrative Strategy:** The Government of the Islamic Republic of Afghanistan wanted “a single, predictable, accountable source of funding” to ensure it could provide recurrent funding for basic services (including education) that would be visible to the local population. A total of 24 donors provide funding to the Afghanistan Reconstruction Trust Fund (ARTF). At present, around 80 percent of all ARTF spending is for the Recurrent Window (funds used for salaries and other recurrent, regular expenditure). The ARTF is currently the only existing mechanism for coordination and its management committee includes the four major multilateral actors, thus contributing to a more effective and coordinated national policy dialogue.

Sources: DANIDA, 2005; Foster, 2007; Scanteam, 2005; and Scanteam, 2007.

**Lesson learnt:** In Timor-Leste a civil service payscale was developed during the transitional period. This included three levels of pay for primary, secondary and tertiary teachers. Head teachers did not receive supplementary pay or allowances for their additional duties, which resulted in some corruption as head teachers were responsible for school reconstruction budgets. Additionally, not recognising years of experience left experienced teachers unsatisfied.

Source: Nicolai, 2004.

**Lesson learnt:** One of the challenges in Tanzania was corruption in updating the names of the refugee teachers on the payroll. Names of teachers who had repatriated continued to be submitted by the heads of schools. As a result, there was strict follow up and daily update of names by the NGO rather than relying on the names presented by the heads of schools.

*Source: Case Study 17.*

**Lesson learnt:** Salary levels for Sierra Leonean and Liberian refugee teachers in Guinea and the Côte d'Ivoire were far above the wage rates of teachers who remained within Sierra Leone and Liberia during their civil wars. For Liberian refugees, salaries were as much as eight times the very low level the Liberian government could afford to pay. This acted as a huge disincentive for refugees to repatriate, and for those who did there was little incentive to remain in the teaching profession. Sierra Leonean refugees faced similar circumstances and Sierra Leone's MoEST chose to first facilitate the return of IDP teachers, who had remained on the payroll and were willing to work at the lower level.

*Sources: IIEP, 2006: 7; Sommers, 2004: 76.*

**Lesson learnt:** In Bukavu, DRC, teachers in NGO-supported schools received incentives up to US\$25 lower than those in state primary schools, due to budget constraints. Thus, when an opening arose in a formal school, the NGO teachers left to take the opportunity of the higher paid position. This underlines the need to coordinate pay scales to ensure retention of teachers.

*Source: Case Study 13.*

### **Teacher retention**

- What alternative ways to supplement teacher salaries and prevent attrition have been explored (e.g. have income-generating schemes or payment of school fees for teachers' children been considered)? (See section 3 of the Guidance Notes for further guidance on the use of incentives to increase teacher motivation.)
- What measures have been taken to ensure that qualified and trained teachers are not lost to other sectors and government departments where wages are higher?

### **B3 Identify appropriate systems for financial controls and payment mechanisms:**

Whilst banks may be the preferred mechanism for distributing teachers' salaries, this is often not feasible in situations of displacement and conflict, particularly in rural areas. Where banks cannot be used, an appropriate local solution should be sought to distribute both monetary and non-monetary forms of compensation. All systems should be accompanied by accountable and transparent monitoring and evaluation procedures.

#### **Key points to consider:**

#### **Payment systems**

- What is the role of the Ministry of Finance in payment systems for teachers and can the government payment system be used? If not, what are the alternatives?
- What disbursement systems exist for other parts of the civil service and can these be used to pay teachers?
- Is it possible to use the local banking system? If not, what other distribution arrangements are available that are safe to use? What mechanisms are currently used or were used prior to displacement or periods of fragility? Is it possible to revive or build upon such mechanisms? If not, stakeholders should agree upon a transparent and accountable system for dispersing funds.
- What are the strengths and weaknesses of current systems (e.g. do they provide systems for the collection of student fees that are open to exploitation)?
- Are systems reliable, transparent and secure? Who handles the money or in-kind payment? Are teachers paid on time and on a regular basis? Are teachers receiving the correct amount and how is this accounted for? If not, what improvements can be made to remove any potential opportunities for corruption?

#### **Community involvement in budgeting, payment, monitoring and evaluation**

- Have community involvement options such as the use of Parent-Teacher Associations (PTAs) and CECs been considered? Could such groups be trained in participatory budgeting<sup>6</sup> to encourage local engagement and accountability? Is local budget tracking linked to district and national tracking so that issues can be reported and comparisons can be made?
- What monitoring and evaluation procedures are in place? Are these evaluated externally?

<sup>6</sup> Participatory budgeting is a mechanism that brings local communities closer to the decision-making process around the public budget, thus making it more transparent.

A well-supported and motivated teacher is more likely to be effective in the classroom and to remain in the profession. Non-monetary compensation, in the form of in-kind payments and also professional and psychosocial support, complements monetary forms of compensation by addressing the holistic needs of teachers as both individuals and professionals. Non-monetary compensation should be seen as an integral part of teacher workforce development, recruitment and retention strategies. It provides a mechanism to address the specific needs of teachers, recognising that different groups, such as female teachers and HIV-positive teachers, are motivated by different forms of support. Community involvement in non-monetary compensation can be fundamental in shaping community perceptions of the role and status of teachers, and can increase teacher motivation. Unions also play a vital role supporting teacher rights and providing professional support to maintain motivation.

### C. Guidance Notes on Teachers' Motivation, Support and Supervision as Forms of Non-Monetary Teacher Compensation

- C1** Value the role of complementary forms of teacher motivation and support as important for teacher well-being.
- C2** Ensure the place of professional development and other aspects of training and support in contributing to teacher motivation.
- C3** Institute appropriate management, supervision and accountability systems for teachers.

#### C1 Value the role of complementary forms of teacher motivation and support as being important for teacher well-being:

Both monetary and non-monetary compensation are vital to ensure a safe and positive professional environment and motivate teachers, thus enabling them to fulfil their basic needs and remain within the profession. Providing this support is the role of all stakeholders including education authorities, donors, NGOs, communities, teachers' unions, PTAs and CECs.

#### Key points to consider:

#### *The involvement of teachers and head teachers in discussions on motivation and incentives*

- Are the voices of teachers regarding incentives and motivation incorporated into planning processes, programme design and implementation, both directly and through teachers' unions?
- Do teachers supplement their incomes through agricultural production, trade or giving private lessons? If so, does this extra work interfere with their teaching?
- What non-monetary incentives would teachers value?
- To what extent do poor classroom conditions (lack of textbooks, etc.) cause teachers to leave the profession or lose motivation? Do teachers have a complete set of textbooks and other necessary education tools for their own use?
- Are head teachers well prepared for taking leadership and motivating teachers under difficult conditions?

**Illustrative Strategy:** In Conakry, Guinea, once the Ministry of Finance has finished preparing salaries, they are deposited directly into the bank accounts of beneficiaries. Where bank accounts are unavailable, salaries are transferred via district offices. Accountability is assured through salary slips.

Source: Case Study 14.

**Illustrative Strategy:** War Child Holland disperses funds to local NGOs, making all staff aware of the amount received and how it should be distributed. War Child staff then conduct audits twice a year.

Source: Case Study 13.

**Illustrative Strategy:** Under the PACE-A project in Afghanistan many SMCs collect a small fee from each child to pay the teacher. Monitoring and verification that teachers are receiving compensation is achieved through signed receipts bearing signatures of the teacher and the SMC chairperson as well as the teacher's time sheet. These documents are collected and are calculated as a cost share for the project.

Source: Case Study 9.

**Illustrative Strategy:** In Southern Somalia community contributions are both in cash and in-kind. All the contributions are given to Community Education Committees (CEC), whose secretary keeps record of the contributions and payments. If a community member's contribution is in-kind (e.g. 2 kg of maize seed), the CEC sells it or it is given to the teacher, provided it is the equivalent amount. Teachers sign on receipt of their payments.

Source: Case Study 7.

**Illustrative Strategy:** SCUUK in the DRC held meetings with SMCs to establish income-generating activities to ensure continuous cash flow for vulnerable children's school fees and other school expenses, so that funds to compensate teachers were not used elsewhere.

Source: Case Study 1.

**Illustrative Strategy:** In the absence of a functional government in Southern Sudan, PTAs and community groups motivated volunteer teachers through incentives such as maize, millet, beans, goats and chickens. During the most severe food shortages the teachers were included in the school-feeding programme provided by the World Food Programme.

Source: Case Study 16.

**Illustrative Strategy:** In the DRC, SCUUK compiled a teachers' kit that included teaching and personal items, such as a daily snack for teachers and clothing. SCUUK also arranged for the training of teachers, the provision of furniture and rehabilitation of schools in South Kivu and North Kivu.

Source: Case Study 1.

**Illustrative Strategy:** The PACE-A project in Afghanistan created an SMC discussion guide to provide guidance on how to have challenging discussions with communities about issues of teacher compensation.

Source: Case Study 9.

## Types of incentives

- What forms of incentives are offered in addition to monetary or non-monetary compensation? Are these regularly available?
- What mechanisms have been put in place to ensure that incentives are followed up so that levels of motivation do not fall?
- What effect do current compensation practices have upon the recruitment and retention of teachers?

## The role of different incentives

- Is consideration given to the role of both financial and non-financial incentives by the education authorities, communities and agencies providing for teachers' psychosocial well-being as well as their physical needs (e.g. efforts to build community respect for teachers and elevate their standing in the community)?
- Has the use of incentives to attract and/or retain specific groups in the teaching profession been explored (e.g. the provision of childcare or support with school fees to encourage employment of female teachers, or ensuring that HIV-positive teachers who are in need of anti-retroviral therapy are able to access affordable and confidential health, treatment, care and support services)?
- What teacher compensation incentives exist? Is the community providing or complementing existing incentives? How have community initiatives been integrated and coordinated with what other stakeholders are doing?
- How have local initiatives been supported to encourage sustainable community support (e.g. income-generating projects or the use of community contributions)?
- Are teachers working in a safe and professional environment with adequate resources?
- How are communities, teachers' unions, PTAs, SMCs and CECs providing motivational support to teachers?
- How can existing approaches be built upon to ensure improved psychosocial well-being of teachers?

## C2 Ensure the place of professional development and other aspects of training and support in contributing to teacher motivation:

While teachers need to be paid a professional wage in order to remain in the profession, other forms of non-monetary incentives, particularly those which improve teachers' skills and improve learning outcomes, such as pre-service and in-service training, may be effective in keeping the teaching force motivated even if the level or reliability of compensation is below desired levels. Opportunities to receive training should be needs-based and non-discriminatory.

### Key points to consider:

#### *The involvement of teachers and head teachers in their own professional development*

- Are the voices of teachers regarding professional development incorporated into planning processes, programme design and implementation, both directly and through teachers' unions?

- What role are head teachers and teachers' unions playing in ensuring that teachers are consulted and that their views are communicated to policy-makers?

### **Opportunities for professional development and other aspects of training and support**

- What opportunities exist for supporting and training teachers for weekly meetings, professional development or mentoring opportunities? How do these opportunities compare to those provided to workers in other sectors?
- Are there opportunities for peer networking, sharing and mentoring amongst teachers? How do these opportunities compare to those provided to workers in other sectors?
- Do the facilities and physical environment (staff room, latrines, etc.) support teachers' identity as professionals?
- Are incentives also used as opportunities for education authorities, local communities and agencies to provide stipend payments (e.g. payment for attending regular training courses, in circumstances where they are not formally able to provide salaries)? If so, are stipend rates coordinated between agencies and the MoE and do they take into consideration sustainability and incentive issues?
- Are training courses adapted to specific post-conflict/post-crisis settings?
- What accreditation and certification processes are in place to ensure that training is formally recognised by education authorities? Have in-service training programmes been harmonised and structured so that they lead to recognised teacher qualifications (even if they incorporate additional components needed in crisis and post-conflict situations)?
- To what extent do teachers have access to teaching and learning materials for their own professional development? How can this be improved?

### **C3 Institute appropriate management, supervision and accountability systems for teachers:**

Effective systems of management, supervision and accountability are vital for providing professional support, maintaining teacher motivation, upholding teaching quality and helping to advocate for teacher compensation. Job descriptions, descriptions of working conditions and codes of conduct<sup>7</sup> assist in professionalising the role that teachers play in the community. They also define the services expected from teachers in return for compensation from communities, education authorities and non-state actors, as well as provide a framework for appropriate and expected teacher behaviour.

#### **Key points to consider:**

##### **Working with local organisations**

- What approaches have been taken to work with teacher support groups, such as unions, teacher clusters and PTAs, SMCs and other community education structures and school owners to ensure that teachers receive encouragement and support?

**Illustrative Strategy:** World Vision's programme in Somalia strives to motivate teachers and solicit professionalism through (i) the provision of incentives to complement the community's contributions; (ii) community profiling, whereby the role and importance of teachers have been explained and thus raised within the communities; (iii) providing training and mentoring for the teachers; (iv) providing teachers with agricultural inputs for their farms; and (v) providing school materials for teachers. World Vision has worked to empower the CECs to closely supervise and monitor teachers, including through home visits, and to minimise dropout.

*Source: Case Study 7.*

**Illustrative Strategy:** The Sierra Leone Teachers Union engages in annual negotiations with the MoEST on issues of teacher compensation, status and contracts.

*Source: Case Study 10.*

**Illustrative Strategy:** In South Darfur, a code of conduct was used for teachers of a USAID adult literacy programme. It was applied to ensure that teachers and educational personnel promoted a positive learning environment and the well-being of learners. This included outlining the need for teachers to maintain self-control and moral ethical behaviour; to participate in creating an inclusive environment; and to maintain a safe environment free from harassment, abuse, violence and discrimination.

*Source: Case Study 4.*

<sup>7</sup> Noted as a core provision in the ILO/UNESCO Recommendations Concerning the Status of Teachers, articles 61-84, and in the INEE Minimum Standards for Education in Emergencies.

**Illustrative Strategy:** The PACE-A project in Afghanistan provided teachers with a job description and code of conduct, both of which were discussed with the teacher and SMC members to help clarify the functions of the teacher. The code of conduct was adapted from the sample code contained within the INEE Minimum Standards handbook through a consultative process with other NGO community-based education providers. This code of conduct is being used by other agencies as well.

*Source: Case Study 9.*

**Illustrative Strategy:** In 2004, with support from UNICEF, the MoE established an IDP school in Zam Zam camp in Darfur, Sudan. Initially, available teachers were mostly volunteers recruited by the Parent-Teacher Committee (PTC) who were usually not paid salaries. Qualified teachers were not available in the camp and therefore the MoE provided some teachers from El Fasher town who commuted daily to and from work in Zam Zam. The MoE did not initially recognise the volunteer teachers as this was contrary to MoE policy. Volunteer teachers were not paid and therefore went on strike and schools closed for over a month. In response, UNICEF proposed a government-owned in-service teacher training programme. The MoE, in collaboration with the PTC, identified volunteer teachers with requisite qualifications who required training. The MoE and UNICEF worked out details of the training, including budgetary requirements.

*Source: Case Study 8.*

- What role do these local organisations play in networking together and advocating with government and education authorities for appropriate and equitable teacher compensation to ensure that the basic needs and rights of teachers are met?
- What efforts are made to ensure that these local organisations continue to be actively involved in issues pertaining to school management and teaching/learning in the long-term?
- Is there a plan to support unqualified teachers to gain qualifications as the system develops?

### **Codes of Conduct**

- Is an appropriate code of conduct in place which has been translated into local languages, explained to teachers, head teachers, school owners and PTAs/CECs and agreed upon and signed by teachers? Is this based upon government policy (if in place)? (See sample code of conduct in the INEE Minimum Standards Handbook for further guidance.)
- What mechanisms are in place to enforce the code of conduct and to deal with any breaches in the code of conduct?
- How can local education authorities, teacher associations and unions be strengthened in developing, monitoring and reporting on codes of conduct to help enforce quality and standards?

### **Monitoring, evaluation and accountability**

- What assessment tools are used to monitor teacher performance and provide feedback?
- What mechanisms are in place to maintain accountability for non-performance, both in terms of attendance and also quality of teaching? How has it been ensured that such a system is equitably administered?
- What systems are in place to regulate and monitor teachers' working hours, class sizes, classroom conditions and teacher-student ratios (e.g. job descriptions, conditions of work, etc.)?

### **Role of national, local and school-level involvement in teacher motivation**

- What role do head teachers and school administrators play in providing a positive and professional environment to support and encourage teachers? Do head teachers receive appropriate training and support for leadership in the crisis or post-conflict situation?
- Does a local or national system exist, overseen by the MoE, to sustain teachers and their motivation? If not, how can this be developed? If it does, how can it be developed so that it is more effective?

### **Working with strategic partners**

- Apart from the MoE, what other Ministries have been involved in supporting the welfare of teachers? Are Ministries such as Health (e.g. on accessing treatment for HIV) and Labour (e.g. on workplace policies) involved to ensure comprehensive support?

**Table 2: Summary of INEE Guidance Notes**

GUIDANCE NOTES	BENEFITS	CHALLENGES	POTENTIAL STRATEGIES
<b>Policy and Coordination of Teacher Compensation</b>			
<p><b>1. Undertake collection of reliable data and information related to teacher compensation.</b></p>	<ul style="list-style-type: none"> <li>Intervention is more likely to be relevant to the needs of the community, to be sustainable over time, and to have a greater positive impact if based on accurate information.</li> </ul>	<ul style="list-style-type: none"> <li>Time pressure to intervene quickly due to the emergency can result in not taking enough time to collect the necessary baseline information and assess the local context.</li> <li>In deteriorating or arrested development contexts, finding baseline information when systems and structures have broken down and the population been displaced may be very challenging.</li> <li>Access to relevant and accurate data to inform entry points may be a challenge.</li> </ul>	<ul style="list-style-type: none"> <li>Coordination of initial data collection/needs analysis.</li> </ul>
<p><b>2. Develop coordinated policy regarding teacher compensation.</b></p>	<ul style="list-style-type: none"> <li>Likely to lead to a more efficient and effective use of resources with less duplication and greater impact in the medium- and long-term.</li> <li>Creates less competition between agencies and more sustainability in the provision of teacher compensation.</li> <li>Might lead to the retention of government teachers.</li> </ul>	<ul style="list-style-type: none"> <li>Where there are many actors, setting up coordination mechanisms can be very time-consuming and can take staff time away in the short-term from service delivery.</li> <li>Agencies have a variety of policies on whether or not they are willing to 'pay' teachers and whether this is in cash, in-kind or through stipends. Where there are those who pay salaries and those who do not, this may create barriers to a harmonised system.</li> </ul>	<ul style="list-style-type: none"> <li>Use of existing coordination mechanisms (such as Cluster mechanisms) to discuss teacher compensation issues, maybe involving formation of education or compensation sub-committees.</li> <li>Establishment of agreements between education stakeholders on appropriate compensation levels, particularly within IDP and refugee camp settings.</li> <li>Inclusion of agreements on teacher compensation within project approvals and/or MoUs between education authorities and implementing partners for education programmes.</li> <li>Donor harmonisation on teacher compensation and eligibility of funding to cover costs.</li> <li>Where agencies are not able to harmonise, a ceiling could be set at a moderate level so as not to distort the market while giving agencies flexibility along a range of payscales.</li> <li>Phased handover from NGOs, communities to education authorities.</li> </ul>

GUIDANCE NOTES	BENEFITS	CHALLENGES	POTENTIAL STRATEGIES
<p><b>3. Monitor and enforce coordinated policy regarding teacher compensation.</b></p>	<ul style="list-style-type: none"> <li>Encourages government to take lead responsibility in coordinating the provision of education, particularly acting as decision-maker in relation to teacher compensation policy.</li> <li>Enables a smoother transition from agency-managed to government-managed teacher compensation, especially if government has the ability to coordinate.</li> </ul>	<ul style="list-style-type: none"> <li>Particularly in deteriorating or arrested development contexts, the government may not be interested in or willing to work with agencies and there may be issues of legitimacy of the government particularly in conflict-affected fragile states.</li> <li>In refugee contexts, the host government may not be interested in or willing to work with agencies providing educational support to non-nationals, particularly in resource-poor contexts where there can be a perception that refugees receive better quality services than nationals.</li> </ul>	<ul style="list-style-type: none"> <li>If government is not able to coordinate, utilise existing donor coordination mechanism where these exist or create a suitable mechanism to address this issue.</li> <li>Establishment of a focal point for coordination, preferably the education authority, but if not then another lead agency or inter-agency working group or committee.</li> </ul>
<b>The Management and Financial Aspects of Teacher Compensation</b>			
<p><b>1. Recognise and respect that government and education authorities have the principal responsibility for ensuring teachers are compensated.</b></p>	<ul style="list-style-type: none"> <li>Enables a more coherent national approach to teacher compensation with strong government ownership.</li> <li>Enables all funds to be coordinated around a common framework.</li> </ul>	<ul style="list-style-type: none"> <li>In many fragile states, even where governments are willing, they may not have the capacity to take responsibility for the teacher compensation process for some time.</li> <li>In many fragile states, governments may not have the capacity to manage funds for teachers in government schools due to weak public financial management systems and corruption, and thus have to rely on agencies to manage and distribute these funds in the short- to medium-term.</li> </ul>	<ul style="list-style-type: none"> <li>Use of (pooled) donor funding (or budget support) to fill short-term funding gaps and ensure continuity of payment to teachers. Where possible this should take place through existing government public financial management systems.</li> <li>Coordination of initial data collection/needs analysis.</li> </ul>
<p><b>2. Develop an appropriate system for the identification and payment of teachers that is equitable, graduated and sustainable.</b></p>	<ul style="list-style-type: none"> <li>Likely to lead to the most suitable individuals being selected for teaching.</li> <li>Creates sustainability of any payscale developed and used when it is transferred across to the government.</li> </ul>	<ul style="list-style-type: none"> <li>Refugee teachers may not be formally recognised by the MoE within the host country even if they are the most appropriate ones to teach.</li> <li>In the absence of a functioning government, individual/ clan/ethnic interest may hinder objective identification of teachers.</li> <li>In situations of state neglect or incapacity, finding a baseline to work with may prove challenging and developing a payscale that is affordable to governments in the medium-term may be difficult.</li> <li>Where host governments do not permit the formal payment of refugee teachers in camps, it is difficult to ensure an equitable payscale between refugee and national teachers.</li> </ul>	<ul style="list-style-type: none"> <li>Regular teacher surveys to review payroll lists and to monitor that teachers are receiving compensation.</li> <li>Active involvement of teacher unions to advocate on behalf of teachers regarding their compensation, status and contracts.</li> </ul>

GUIDANCE NOTES	BENEFITS	CHALLENGES	POTENTIAL STRATEGIES
<b>3. Identify appropriate systems for financial controls and payment mechanisms.</b>	<ul style="list-style-type: none"> <li>Makes payment systems transparent and reduces the risk of corruption or mismanagement of funds.</li> <li>Increases likelihood of ensuring teachers are on pay-rolls and paid regularly.</li> </ul>	<ul style="list-style-type: none"> <li>There may be limited capacity for the government to develop or use appropriate systems for payments and financial control.</li> <li>In situations of state collapse, the banking system may not be functioning sufficiently well to be used.</li> <li>In contexts where IDP and refugee teachers need to be paid, IDPs may not be able to use their bank accounts to collect their salaries, and refugees may be denied bank accounts in a host country.</li> </ul>	<ul style="list-style-type: none"> <li>Use of pay-slips and/or signed receipts to guarantee that teachers receive payments.</li> <li>Use of community/school-based accounting to monitor payments.</li> </ul>
<b>Teachers' Motivation, Support and Supervision as Forms of Non-Monetary Teacher Compensation</b>			
<b>1. Value the role of complementary forms of teacher motivation and support as being important for teacher well-being.</b>	<ul style="list-style-type: none"> <li>Increases teachers' motivation and commitment even in situations where they are not (yet) formally receiving a salary or where the salary is very low.</li> <li>Better classroom conditions improve teacher morale and student learning and retention.</li> </ul>	<ul style="list-style-type: none"> <li>There may be a variety of levels of motivational support provided by different stakeholders creating competition and jealousy.</li> </ul>	<ul style="list-style-type: none"> <li>Provision of funding or resources for school rebuilding, furniture, textbooks, etc.</li> <li>Use of community-based income-generating projects and/or agricultural support to provide resources in interim periods. This can be supported by rights-based, awareness raising training with community members.</li> </ul>
<b>2. Ensure the place of professional development and other aspects of training and support in contributing to teacher motivation.</b>	<ul style="list-style-type: none"> <li>Increases teachers' sense of being valued particularly where monetary support is limited.</li> <li>Provides teachers with new skills or strengthens existing skills, thus providing the potential for future career progression.</li> </ul>	<ul style="list-style-type: none"> <li>There may be limited capacity and/or funds to provide professional development or mentoring to teachers particularly if they are working in remote and very poor communities or in communities adversely affected by natural disasters conditions or conflict.</li> </ul>	<ul style="list-style-type: none"> <li>Provision of training to unqualified teachers, which leads to certification; supported by stipends or allowances where necessary.</li> <li>Use trained teachers to facilitate training or to mentor other teachers to avoid loss of trained teachers because of their new credentials.</li> </ul>
<b>3. Ensure appropriate management, supervision and accountability systems are in place for teachers.</b>	<ul style="list-style-type: none"> <li>Creates more effective teachers and more satisfied students.</li> <li>Builds community trust and respect for teachers which should help in mobilisation of community resources to teachers.</li> <li>Brings greater involvement and thus ownership of teacher organisations and communities in any intervention.</li> </ul>	<ul style="list-style-type: none"> <li>Where capacity and will are weak, ensuring appropriate accountability structures for teachers are not only in place, but also regularly used, can be challenging. Senior supervisory staff may not be available.</li> <li>The role of PTAs, SMCs and unions in monitoring and enforcing standards may be very weak or non-existent in some situations, the latter particularly so in refugee or IDP contexts.</li> </ul>	<ul style="list-style-type: none"> <li>Use of community members (from PTAs/SMCs/CECs) in undertaking school and home visits.</li> </ul>

# Appendix 1: Rationale for and Background to the Development of INEE Guidance Notes on Teacher Compensation

## Context and rationale for developing the INEE Guidance Notes

Providing quality education in fragile states, situations of displacement and post-crisis reconstruction is critical for both the short- and long-term safety and well-being of children and youth. Situations of humanitarian disaster and displacement are unique in a number of ways; first, the disruption of all facets of life among the displaced necessitates the immediate protection, support and early return to normalcy that the early provision of education can provide; second, communities have lost educational materials, infrastructure and personnel through physical displacement; and third, the international community—including donor governments, the UN and international NGOs often fill the role(s) of the state in providing basic social services.

Along with structures, supplies, curricula and furniture, appropriately qualified teachers are critical for the provision of quality, protective education. However, in fragile states, situations of displacement and post-crisis recovery, teachers are often underpaid or not paid at all. Meanwhile, there are no policies or guidelines that exist on teacher remuneration in these contexts. This has led to inconsistencies in the eligibility for, amount and frequency of teacher stipends among and within NGOs, government ministries and UN agencies. In the long-term, these insufficiencies and inconsistencies can lead to a brain drain from the teaching force, thus weakening education systems. Non-payment of salaries can also contribute to social unrest, and to learning situations in which children are vulnerable to exploitation.

To address the difficult issues of teacher compensation in fragile states, situations of displacement and post-conflict recovery, the International Rescue Committee, the International Save the Children Alliance and the Women's Refugee Commission, on behalf of the Inter-Agency Network for Education in Emergencies (INEE), organised a roundtable seminar on teacher compensation on 11 October 2006. The purpose of the event was to bring together diverse stakeholders, including technical experts and field staff from NGOs, UN agencies and bilateral and multilateral donors to address the following three objectives:

1. Identify and discuss challenges to providing consistent, equitable compensation to teachers;
2. Share and examine promising practices in compensating teachers that can be replicated or brought to scale; and
3. Identify next steps and ways forward in addressing teacher compensation.

The roundtable was hosted by the World Bank with support from USAID and UNICEF. The one-day meeting provided a forum for discussing challenges to adequately compensating teachers in various settings, sharing promising practices, lessons learnt and identifying common themes to set the agenda for future work in this area. Presentations included an overview of the issues and case studies from Liberia, Southern Sudan and Darfur highlighting challenges, solutions and good practices. Working groups discussed the following themes:

1. Teacher motivation;
2. Government structures, policies and regulations, and roles and responsibilities of non-state implementing actors; and
3. Donor strategies, funding mechanisms and donor benchmarks/codes of conduct.

The roundtable culminated in a discussion of findings and recommendations, which highlighted the need for more research on existing experiences and good practices on teacher compensation, as well as the need to develop a clear set of guidance notes through broad-based research, consultation and collaboration. In both of these efforts, participants strongly agreed that moving this issue forward requires a collective effort of donor agencies, UN agencies, governments, NGOs, communities and teachers' representatives.

## Commissioning the writing of the INEE Guidance Notes

As a result of the recognition of the need to develop INEE Guidance Notes on Teacher Compensation, the Women's Refugee Commission, on behalf of INEE and in consultation with the co-sponsors of the initiative (the Interna-

tional Rescue Committee, the International Save the Children Alliance, the Women's Refugee Commission, UNESCO, UNICEF and UNHCR), hired a team of consultants from CfBT Education Trust to build upon findings developed at the 2006 Roundtable, as well as other key documents to develop a set of draft Guidance Notes for compensating teachers in fragile states, refugee, IDP and returnee contexts.

### **Consultative process to develop the INEE Guidance Notes**

In developing the draft Guidance Notes, the consultant team built upon the findings of the 2006 Roundtable, as well as the strategies and lessons learned on teacher motivation and compensation within key documents, including UNESCO's and the International Labor Organisation's Recommendation Concerning the Status of Teachers; the INEE Minimum Standards; the UNESCO IIEP Guidebook for Planning Education in Emergencies and Reconstruction; and the INEE Good Practice Guides. Furthermore, good practice and lessons learnt were culled from a series of case studies on teacher compensation prepared by INEE members around the world: Afghanistan, the DRC, Ethiopia, Guinea, Pakistan, Sierra Leone, Somalia, Sudan, Tanzania, the Thai-Burma border and Uganda.

Once drafted, the INEE Guidance Notes were shared with a diverse group of Resource Experts via e-mail and also in person through a series of consultative workshops in New York, Washington DC, London, Paris, Niamey (Niger) and Istanbul. ActionAid, Save the Children UK, UNESCO, UNICEF, the World Bank and the Women's Commission for Refugee Women Children served as hosts for the various workshops. Resource Experts and participants at the workshops included representatives from conflict-affected communities and government ministries, teachers, field staff from international and local NGOs, UN agencies, donors and experts from other civil service sectors. The consultant team from CfBT Education Trust incorporated feedback from these workshops and individual input into a newer version of the Guidance Notes in order to create an improved, more comprehensive and relevant tool to address teacher compensation challenges.

### **Dissemination and final use of the INEE Guidance Notes**

The finalised INEE Guidance Notes will be widely disseminated through multiple channels, including workshop participants' organisations and the INEE listserv and website. They will be developed under the INEE logo and, therefore, will not be "owned" by one agency or country but by all INEE members. The consultants from CfBT Education Trust will help to develop a strategic dissemination and advocacy strategy, in conjunction with INEE and the initiative's co-sponsors, for encouraging the use of the INEE Guidance Notes as standard practice, as well as sharing lessons learned and other feedback to strengthen the INEE Guidance Notes in the future. After a period of piloting in the field (September 2008 — March 2009), the Guidance Notes will be reviewed once more and launched at the INEE Global Consultation, 31 March — 2 April 2009, in Istanbul, Turkey.

## Appendix 2: Foundational Principles — Legal Frameworks and International Commitment

These INEE Guidance Notes are situated within a range of important legal frameworks and international commitments that have some relation to issues surrounding teacher compensation or educational interventions in fragile states, including:

- The 2007 DAC Principles for Good Engagement in Fragile States and Situations
- The 2006 EFA-FTI Progressive Framework
- The 2006 INEE Good Practice Guide on the Compensation and Payment of Educational Staff
- The 2006 UNICEF Resource Tool Kit for Education in Emergencies
- The 2005 Paris Declaration on Aid Effectiveness
- The 2004 INEE Minimum Standards for Education in Emergencies, Chronic Crises and Early Reconstruction (INEE Minimum Standards)
- The 2002 IIEP Chapter 16 on Teacher Motivation, Compensation and Working Conditions within the UNESCO Guidebook for Planning Education in Emergencies and Reconstruction
- The 2002 UNESCO Guidelines for Education in Situations of Emergency and Crisis
- The 2002 UNHCR Education Field Guidelines
- The 2000 UN Security Council Resolution 1325 on Women, Peace and Security
- The 1996 and 1966 UNESCO/ILO Recommendations Concerning the Status of Teachers
- The 1995 Beijing Platform for Action
- The 1979 UN Convention on the Elimination of All Discrimination Against Women (CEDAW)
- The 1951 UN Convention on Refugees
- The 1966 International Covenant on Economic, Social and Cultural Rights (ICESCR)
- The 1966 International Covenant on Civil and Political Rights (ICCPR)
- The 1965 International Convention on the Elimination of All Forms of Racial Discrimination (ICERD)

From these frameworks and commitments, the following foundational principles have been drawn together and will form the basic guiding principles that are assumed in the INEE Guidance Notes under the three policy areas outlined below.

### Policy and Coordination of Teacher Compensation

1. *Assess the local context before taking action and use this as the reference point when determining funding modalities and appropriate salary scales* (DAC Principle 1; IIEP Chapter 16, p.5).
2. *Coordinate all stakeholders involved in the provision of education* (INEE Minimum Standards, p.67; UNESCO/ILO Recommendations, p.31 para 10k; DAC Principle 8; EFA-FTI Progressive Framework; Paris Declaration Indicators 4, 9 and 10; UNHCR Education Field Guidelines, section 2.3.1; UNICEF's (2006) Resource Tool Kit for Education in Emergencies, p.6-7 and Section 3.2; UNESCO's Guidelines for Education in Situations of Emergency and Crisis, p.34).
3. *Coordinate as far as possible with government structures and what existed before the crisis focussing on building government capacity but looking for options for constructive change* (DAC Principle 3; Paris Declaration, Article 21).

4. *Avoid multiple levels of pay for the same type and qualification of teacher amongst different organisations and between nationals and refugees, i.e. coordinate payscales* (INEE Minimum Standards, p.67; IIEP Chapter 16, p.7).
5. *Act quickly but ensure the long-term sustainability of adopted payscales* (DAC Principle 9; IIEP Chapter 16, p.5).

### **The Management and Financial Aspects of Teacher Compensation**

6. *Develop an interim payscale and conditions of service that will encourage teachers to return to work whilst not undermining the existing government payscale. This should be sustainable by donors and government in the short-, medium- and long-term* (INEE Good Practice Guide, p.30; IIEP Chapter 16, p. 5; EFA-FTI Progressive Framework).
7. *Be inclusive and avoid all types of discrimination* (DAC Principles 2, 6, 10; ICESCR art. 6, 7, 8, 13; ICCPR article 22; ICERD article 5, e(i)(ii)), including non-discrimination in access to employment (ICECSR, article 13, 2(e) and General Comment 13). Specifically, avoid gender discrimination (Resolution 1325; CEDAW, Articles 2, 3, 10 and 11; Beijing Platform for Action pre-amble, paragraphs 27, 30 and Chapter IV Strategic Objectives and Actions section B); avoid discrimination against IDPs (Guiding Principles on Internal Displacement, Principles 1, 2, 4, 22, 23); and avoid discrimination against refugees or nationals (1951 UN Convention on Refugees Articles 3, 17 and 24; UNHCR Education Field Guidelines, section 2.2.8) actively promoting equal employment and pay rights for all these groups of teachers.
8. *Teacher compensation levels should start low and stay low to ensure long-term sustainability and affordability by government* (INEE Good Practice Guide, p.30).
9. *Outline clear contractual arrangements and terms and conditions which include compensation (monetary or non-monetary) reflecting qualification and years of experience (if these can be verified), equal opportunities on the basis of gender, ethnicity, religion or disability, the assumption that payments will be made in a timely manner and that rural or hardship allowances will be paid where relevant* (INEE Minimum Standards, p.63; Bennell and Akyeampong, 2007, p.57-8).

### **Teachers' Motivation, Support and Supervision as Forms of Non-Monetary Teacher Compensation**

10. *Use monetary and non-monetary forms of payment to encourage teachers' motivation and support including community participation* (IIEP Chapter 16, p.8).
11. *Undertake appropriate training of teachers* (INEE Minimum Standards, p.64; UNHCR Education Field Guidelines, section 2.2.5).
12. *Draw teachers wherever possible from the affected population so that children can learn in their country of origin's language of instruction* (INEE Minimum Standards, p.63).
13. *Use regular hiring practices including job descriptions and codes of conduct* (INEE Minimum Standards, p.63; IIEP Chapter 16, p.8; UNHCR Education Field Guidelines, section 2.2.3).
14. *Follow transparent processes for the recruitment and selection of teachers* (INEE Minimum Standards, p.63; UNHCR Education Field Guidelines, section 2.2.1).
15. *Ensure appropriate supervision of teachers including performance appraisals and opportunities for continuous professional development* (INEE Minimum Standards, p.64).

## Appendix 3: DAC Categories and Donor Funding Mechanisms

Table 3: DAC Categories, Definitions, Examples and Donor Funding Mechanisms

DAC CATEGORY	DEFINITION AND STATE OF GOVERNMENT	EXAMPLES	MOST LIKELY DONOR FUNDING MODALITY	DISBURSEMENT CHANNEL	LINKS BETWEEN FUNDING MODALITY AND TEACHER REMUNERATION
1. Deteriorating.	Conflict or risk of conflict; weakening capacity and/or weakening will.	Zimbabwe, Myanmar.	Project support; humanitarian aid.	Through donors, NGOs or UN agencies.	Unlikely to be long-term or to include substantial component to cover teachers' salaries, but could cover actual remuneration or remuneration in-kind of small groups of teachers funded through NGO or UN pilots if state support to teachers has collapsed either nationally or in certain geographical areas of the country.
2. Arrested development.	Varied capacity; lack of will; state not using its capacity for pro-poor development.	Somalia.	Project support; humanitarian aid.	Through NGOs or UN agencies.	As above.
3. Post-conflict reconstruction.	Risk of conflict; low capacity; low or high will.	Afghanistan, Southern Sudan.	Mixture of projects, trust funds, budget support and pooled funding.	Through UN agencies, Multi-Donor Trust Funds (MDTFs) managed by UN or World Bank, donor-managed pooled funding or individual projects.	If budget support, pooled funding or MDTF, then potential to cover teachers' salaries through recurrent funding window
Possibility of being post-conflict; low capacity; high will.	Sierra Leone, Cambodia, Rwanda, Yemen.	Budget support and pooled funding.	Through pooled funding or direct budget support managed by recipient government.	Strong potential to cover teacher's salaries through recurrent funding.	

## Appendix 4: Good Practice Process of Compensating Teachers<sup>8</sup>

The table below offers a framework for understanding typical progression from interim arrangements made during or immediately after a crisis, towards establishment of a sustainable system. It is based on a review of experience in a range of different situations, and offers an illustrative framework to track progress.

**Table 4: Framework for Good Practice Process of Compensating Teachers**

	INTERIM ARRANGEMENTS	TRANSITION MECHANISMS <sup>9</sup>	LONG-TERM TARGET
<b>Refugee schools</b>	<ul style="list-style-type: none"> <li>• NGOs/UN agencies often playing key role, both in education provision and teacher compensation.</li> <li>• Donor funding via humanitarian aid or project support.</li> <li>• Teachers provided with standardised stipends/incentives from NGOs/UN agencies; with training for teachers (especially under-qualified teachers).</li> <li>• Standardised approaches to compensation reviewed for transition into sustainable plans, considering pay sales for teachers trained during displacement, the use of appropriate incentives to minimise 'brain drain' and coordination with non-formal education.</li> <li>• Communities take active role and contribute to educational activities (e.g. mobilisation of children) in the camps or settlement sites.</li> </ul>	<ul style="list-style-type: none"> <li>• Dialogue between donors/NGOs/UN agencies, host and home governments.</li> <li>• Donor funding via humanitarian aid or project support with transition to trust funds and pooled funding in protracted situations.</li> <li>• Support from the diaspora communities.</li> </ul>	<ul style="list-style-type: none"> <li>• Communication between donor, NGO and home government on facilitating repatriation of teachers and integration into national payscales and payrolls.</li> <li>• Donor funding via project support, trust funds or pooled funding to host governments in protracted situations.</li> <li>• Support from the diaspora communities.</li> </ul>
<b>IDP schools</b>	<ul style="list-style-type: none"> <li>• As above, except government also playing a key role in education provision and teacher compensation.</li> <li>• Where possible and applicable, arrangements made for reallocation of relevant funding to locations to which government teachers have been displaced, and for their service there.</li> </ul>	<ul style="list-style-type: none"> <li>• Phased handover from NGOs back to the government (local/district education offices).</li> <li>• Teachers register on regular salary system and payroll to support full reintegration on return.</li> <li>• Donor funding to government via humanitarian aid or project support with transition to trust funds and pooled funding in protracted situations.</li> </ul>	<ul style="list-style-type: none"> <li>• As above but in relation to relocating teachers rather than repatriating them.</li> <li>• Government managing teacher compensation process</li> </ul>

<sup>8</sup> Given the importance of linking these Guidance Notes on Teacher Compensation to the wider Education for All initiative, this table is inspired by the EFA-FTI Progressive Framework and the table headings follow those in the EFA-FTI Progressive Framework which has been put together in relation to supporting education in fragile states.

<sup>9</sup> It is not assumed that the transition is chronological from interim arrangements to transition mechanisms as in some contexts, the interim arrangements could be very similar or the same as transition mechanisms and ideally some of the transition mechanisms may be in place from the beginning of the crisis. This table reflects how the transition should be made if interim arrangements are in place and transition to a longer-term more stable state is possible.

	INTERIM ARRANGEMENTS	TRANSITION MECHANISMS <sup>9</sup>	LONG-TERM TARGET
<b>Schools in re- turnee areas</b>	<ul style="list-style-type: none"> <li>• Funding from donor-funded project support, trust funds, budget support or pooled funds.</li> <li>• Teachers provided with government salaries where possible or supported with standardised stipends/incentives from NGOs and/or communities (via CECs or SMCs).</li> </ul>	<ul style="list-style-type: none"> <li>• Interim salary structure, payroll and management information systems.</li> <li>• Establishing systems for accreditation, recruitment, management and conduct, including accreditation of teachers trained during displacement (with UN/NGO technical support).</li> <li>• Community role in supporting teacher (compensation and supervision) maintained.</li> <li>• Funding from trust funds, budget support or pooled funds and government budget.</li> </ul>	<ul style="list-style-type: none"> <li>• National teacher salary scale and payroll and management information systems.</li> <li>• Community role in supporting teacher maintained.</li> <li>• Funding from donor trust funds, budget support or pooled funds and government budget.</li> <li>• Government managing teacher compensation process.</li> </ul>
<b>Schools for the population at large</b>	<ul style="list-style-type: none"> <li>• Teachers provided with government salaries where possible or supported with standardised stipends/incentives from NGOs and/or communities (via CECs or SMCs).</li> <li>• State retains lead role in providing compensation, supported by donors/NGOs/UN agencies where applicable.</li> <li>• Donor funding via humanitarian aid or project support</li> </ul>	<ul style="list-style-type: none"> <li>• Phased handover from NGOs back to the government (local/district education offices).</li> <li>• Interim salary structure, payroll and management information systems.</li> <li>• Community role in supporting teacher (compensation and supervision) maintained.</li> <li>• Funding from donor project support, trust funds, budget support or pooled funds and government budget.</li> </ul>	<ul style="list-style-type: none"> <li>• As above.</li> </ul>

## Appendix 5: Potential NGO Strategies

**Table 5: Potential NGO strategies in disaster and post-conflict situations in which governments are unable to pay teachers a liveable wage**

		POSITIVE IMPACTS	NEGATIVE IMPACTS
Strategies to assist the government			
<b>NGO pays teachers and school administrators full or partial salary while government becomes established</b>		<ul style="list-style-type: none"> <li>• Education system starts and a maximum number of children are attending school.</li> </ul>	<ul style="list-style-type: none"> <li>• Undermines government authority.</li> <li>• Unsustainable and raises the question of when the government will be able to pay salaries.</li> <li>• May create disincentive for teachers to continue after NGO programme ends.</li> </ul>
<b>NGO advocacy with local government to compensate teachers</b>		<ul style="list-style-type: none"> <li>• Additional pressure on the government to pay teachers.</li> <li>• Identification of whether the problem is financial (i.e. lack of money) or administrative (e.g. no computers to compile payroll or transportation to deliver salaries to schools).</li> <li>• Identification of alternative means to support teachers. In some countries, teachers and civil servants are given an allocation of farmable land instead of monetary compensation.</li> </ul>	<ul style="list-style-type: none"> <li>• Possible loss of political capital and leverage on a very complicated and political issue.</li> </ul>
<b>NGO advocacy with donors</b>		<ul style="list-style-type: none"> <li>• Pressure on the local government separate from NGOs.</li> <li>• Possible attention and assistance.</li> </ul>	<ul style="list-style-type: none"> <li>• Possible loss of political leverage.</li> </ul>
In the interim, strategies to support communities			
<b>School fees</b>		<ul style="list-style-type: none"> <li>• Sustainable.</li> <li>• Typically part of the pre-conflict culture.</li> <li>• Some children might be able to attend school.</li> </ul>	<ul style="list-style-type: none"> <li>• Some children might not be able to attend school.</li> <li>• Fees might not provide adequate income to teachers.</li> </ul>
<b>School agriculture or income generation projects (cash crop, animal husbandry, bees)</b>		<ul style="list-style-type: none"> <li>• Sustainable (but often ineffectual since school administration, parents and teachers may not be good managers of income-generation projects).</li> <li>• Typically part of the pre-conflict culture.</li> <li>• Educational opportunity in regard to teaching agriculture, business and animal husbandry.</li> </ul>	<ul style="list-style-type: none"> <li>• Students, often of one gender, are sometimes used for labour in the school fields, taking away from the time they could be studying.</li> <li>• Takes school administrators' time away from education.</li> </ul>
<b>Teacher housing incentives (building houses for returning teachers)</b>	<b>On school compound</b>	<ul style="list-style-type: none"> <li>• Can enhance schools' permanent capital.</li> </ul>	<ul style="list-style-type: none"> <li>• May hinder permanent settlement of families since they are living on school property.</li> <li>• Creates a precedent for returning teachers and other professionals.</li> </ul>
	<b>Off school compound</b>	<ul style="list-style-type: none"> <li>• Enhances community and family return after displacement.</li> </ul>	<ul style="list-style-type: none"> <li>• Disadvantages teachers who stayed during the crisis.</li> </ul>

	POSITIVE IMPACTS	NEGATIVE IMPACTS
<b>Paying school teachers for additional work on NGO-sponsored supplementary education projects, such as adult literacy</b>	<ul style="list-style-type: none"> <li>• Provides services for other portions of the population.</li> <li>• Lays the groundwork for these being included in the national agenda.</li> </ul>	<ul style="list-style-type: none"> <li>• Can create very distorted system, where sometimes teachers work for better pay in the evenings and deliberately avoid teaching in daytime to create a demand.</li> <li>• IPotentially overworks teachers and school administrators.</li> <li>• Potentially unsustainable by the community and by the government.</li> </ul>
<b>Creation of a mentoring system for teachers in which mentoring teachers receive an incentive</b>	<ul style="list-style-type: none"> <li>• Increases the quality of education.</li> </ul>	<ul style="list-style-type: none"> <li>• Unsustainable.</li> <li>• Assists few teachers financially.</li> </ul>

Source: Adapted from INEE Good Practice Guide on Compensation and Payment of Educational Staff.

## Appendix 6: List of Documents Consulted

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**Case Study 2:** International Rescue Committee (IRC) Education Programme in Ethiopia. Prepared by Bahereh Smith, Education & Community Services Coordinator, IRC Ethiopia Program.

**Case Study 3:** Jesuit Refugee Service (JRS) in Adjumani, Northern Uganda. Prepared by Susan Njenga, Coordinator of the Resource Base for Refugee Education, JRS.

**Case Study 4:** Development Alternatives Incorporated, USAID-funded programme in Mukjar District, South Darfur, Sudan. Prepared by Um Elhassan Yousef Gifoon, Program Development Officer, Development Alternatives Incorporated.

**Case Study 5:** World Education Programme in Tak Province, Thailand-Burma Border (Thailand). Prepared by Fred Ligon, Director, World Education.

**Case Study 6:** UNICEF IDP programme in Maira Camp, Shangla District, North-West Frontier Province, Pakistan. Prepared by Hugh Delaney, Education Specialist, UNICEF Pakistan.

**Case Study 7:** World Vision Education Programme in Bualle District, Middle Juba Region, Southern Somalia. Prepared by Jacqueline N. Wattimah, Education Officer, World Vision International, Somalia Programme.

**Case Study 8:** UNICEF Education Programme in Darfur, Sudan. Prepared by Jill Zarchin, Chief, Education and Gender Equality Programme, UNICEF.

**Case Study 9:** Partnership for Advancing Community Education in Afghanistan (PACE-A) Project. Prepared by Helen Stannard, Deputy Chief of Party, IRC (which is a member of the consortium with the project Partnership for Advancing Community Education in Afghanistan).

**Case Study 10:** ActionAid research on teacher wage caps in Sierra Leone. Prepared by Akanksha A. Marphatia, Senior Education Policy and Research Coordinator, ActionAid.

**Case Study 11:** Teaching well? Educational reconstruction efforts and (non) salaries for teachers in postwar Liberia. Powerpoint presentation by Janet Shriberg, IRC/Teachers College, Columbia University and Rebecca Winthrop, IRC.

**Case Study 12:** Teacher compensation: A challenge for Southern Sudan. Powerpoint presentation.

**Case Study 13:** War Child Education Programme in Bukavu, Democratic Republic of Congo (DRC). Prepared by Eveline Jansveld, Methodology Specialist Head Office, and Nicola Reiss, Programme Development Manager DRC.

**Case Study 14:** IRC Programme in Guinea Conakry. Prepared by Aissatou Balde, Child and Youth Protection and Development (CYPD) Program Coordinator, Côte d'Ivoire.

**Case Study 15:** Norwegian Refugee Council (NRC) Programme in Southern Sudan. Prepared by Mary Ombaka, Education Project Manager, NRC, Southern Sudan.

**Case Study 16:** Save the Children Sweden Programme in Southern Sudan. Prepared by Rose Wahome, Education Program Officer, Save the Children Sweden.

**Case Study 17:** FPCT/Fida Refugee Programme in Ngoma, Tanzania. Prepared by Ihano Nestory, Education Supervisor, FPCT/Fida Refugee Programme.

**Case Study 18:** A Series of Four Save the Children Alliance Education Programmes in Sudan. Prepared by Jenny Garbutt.

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