REF STRATEGIC FRAMEWORK 2021 – 2030

ROMA EDUCATION FUND TEREZ KRT. 46, BUDAPEST

REF Strategic Framework (2021 – 2030)

1 Introduction

This document defines a new strategic direction for REF based on an assessment of (1) REF's operations (lessons learned, what works and what does not), (2) trends and approaches to promote inclusive education and counter discrimination (derived from consultations with experts) and (3) priorities to achieve its mission as defined by the Strategy Workgroup (SWG). The document has benefited from consultations with select donors.

The framework provides a simplified Theory of Change (ToC) showing the logic of how interventions contribute to achieving REF's mission. This ToC is further elaborated below.

2 Summary of Strategic Framework

2.1 Strategic orientation in a 'nutshell'

The programs of REF aim to reduce the gap in educational outcomes between Roma and non-Roma. REF program objectives are aligned and contribute directly to the Sustainable Development Goal No. 4 as defined by the UN, i.e.:

Ensure inclusive and equitable quality education and promote lifelong learning opportunities for all.

REF has developed programs along three strategic approaches that contribute to the overall goal:

a) supporting *individual* beneficiaries

b) working with and sensitizing education *systems* through advocating for the needs and interests of Roma

c) making REF a specialized *organization* for mobilizing the human potential of Roma and their contribution to teaching, including developing innovative methodologies.

The following table shows the vertical and horizontal logic of connection between the mission, objectives and methods, together with the intervention tools:

Levels:	Individuals	System	Organization	
Mission	*Contributing to closing the gap between Roma and non-Roma, by improving the experience and results of Roma and promoting inclusive education for all*			
Strategic objectives	Good learning outcomes and transition into labor market and public/political leadership	Inclusive, high-quality education system	REF recognized as resource / advocacy center	
Intermediate objectives	*1 Successful access* *2 Resilience* *3 Successful transition* *4 Community of committed, well educated Roma*	*1 Innovative models / alternative methods for successful learning* *2 CSOs / parents engage in reform* *3 State institutions foster reform* *4 Improvements in delivery of education (participation and transition)*	*1 Competence and competitive capacity* *2 Innovation* *3 Knowledge platforms*	***Cross cutting functions:*** - Advocacy - Research - Innovation - Monitoring and Evaluation *- Gender mainstreaming*
Approaches	*- Support inclusive schooling* *- Promote Roma identity and commitment*	*- Focus on quality* *- Teacher education* *- Advocacy*	*- Secure finances* *- Build capacity / competence* *- Foster cooperation*	
Interventions	• *Grant programs* • *Scholarships* • *Mentoring* • *Second chance* • *RomaVersitas*	• *Participation in reform processes*	• *Technical assistance*	

The logic of the strategy is:

- at the *individual* level, promoting access to education, achieving good learning outcomes and successful transitions into the labor market.

- at the *system* level, promoting change to a system which ensures access for all to inclusive, good quality education and is responsive to the demands and challenges Roma children/youth and their communities are facing.

- at the *organizational* level, to further develop REF into a well-recognized, specialized, /institution.

2.2 Context for the REF Strategic Framework

Th strategic framework builds on the following facts:

- Early childhood education, access to preschool and primary education are key investments for successful learning outcomes and personal development.

- While the enrollment gap between the mainstream population and Roma in primary education is minimal, the gap gradually widens at each subsequent level resulting in a significant gap at the tertiary level.

- There is evidence of a close correlation between the quality of education and the resilience of pupils, on the one hand, and the education outcomes at all levels of education.

- Schools that ensure quality of learning outcomes and deal effectively with the diversity of its pupils are successful in integrating Roma children. This requires improvements throughout the whole education system. Without such systemic change, the interventions of REF will hardly be sustainable.

- Despite the currently adverse socio-political situation regarding the concerns of Roma/minorities in a number of countries, seeking dialogue and cooperation with state institutions and working with local systems is indispensable for reforming the education system.

The strategic orientation of REF responds to these facts by focusing REF programs on promoting and protecting the interests of Roma in education and, by that, contributing to the development of high quality, inclusive education systems.

2.3 Strategic goals

Strategic goal 1:   *Development of human capital of Roma (individuals)*

REF interventions focus on the equal access of Roma children and youth to the public education system, and on their performance, as the basis for their transition into the labor market and public/political leadership. Beneficiaries will demonstrate commitment to the Roma cause and act as agents of change in or for their communities

Strategic objective 1   REF-supported Roma children and youth achieve good education results and consequently manage the transition into the labor market successfully

Intermediate objectives	1. Successful access to primary education and full participation in basic education
	2. Building the resilience of Roma pupils, and improving the awareness of parents
	3. Successful transition of Roma students to secondary education, tertiary education and the labor market
	4. Evolving community of young, committed, well-educated Roma, including a REF scholars community
Foci, Approaches	• REF promotes inclusive and quality models of education → Quality not quantity
	• REF actively intervenes against segregation in education, including preventing Roma children's enrollment in special schools
	• REF interventions can be conducted in segregated schools/ communities, if the reason for segregation is geographic –and not a between-school or between-classroom– segregation
	• Fostering resilience of students (e.g. stable teaching body and transformational leadership)
	• Employability/labor market orientation namely general skills for cognitive tasks (creative problem solving, cooperation, communication), starting at an early age
	• Promotion of Roma identity development and focus on people with a strong commitment to serve their community / Building pride as a REF scholar
	• Broadening the base of young people that have equal opportunity:
	o the selection process becomes more demanding, strong mentoring services help students to stay connected with their community, and
	o social network for participating students is promoted
	• Selection for scholarships will be conditional on applicants demonstrating proven leadership and community commitment
	• Scholarships that support transition to the next educational level
	• REF will demonstrate how the skills of Roma children increase with improved access and opportunities to participate, and how such improvements are advantageous for society

Strategic goal 2:	*Improving the quality and inclusiveness of education systems*

REF contributes to developing inclusive, high quality education systems

Strategic objective 2	Education systems in REF-supported countries are becoming more inclusive and of higher quality. This objective is highly dependent on the willingness of governments to pursue inclusive quality education. Therefore, approaches pursued will be context and country specific.
Intermediate objectives	1. Innovative approaches to inclusive, equitable education tested and, if successful, scaled up 2. Professional and civil society organizations (including parents) contribute to the reform of the education system 3. State institutions from the local to national level actively foster the reform of the education system 4. Improvements in the delivery of education, including responsiveness to labor market trends and needs

Foci, approaches	• REF will continue to focus on education systems, in spite of the current negative trends, by cooperating with state institutions or parts of the governments that are open to reform
	
	• REF will support and cooperate with civil society, including parents and professional organizations, and international actors enabling it to work outside the public systems where resistance is still strong.
	
	• Focus on policy making and policy implementation
	
	• Main objective should be quality of education, e.g.
	
	    o quality of teachers' education (respectively teachers' qualifications) and improvements in curricula development, focusing on promoting diversity and addressing discrimination and prejudice in education systems
	
	    o more Roma teachers → a priority for provision of scholarships
	
	    o child-focused learning environment
	
	• Education systems integrate dignified narratives for Roma culture and their contribution to the society in general

Strategic goal 3:	Establish REF as a recognized resource center / advocacy institution for the inclusion of Roma in the public education system

REF builds the competence and organizational capacity to advocate for the establishment of inclusive education systems, providing both technical advice and the effective management of a growing program providing direct support.

Strategic objective 3	REF is recognized as a resource center and advocate / is consulted for issues of inclusive education
Intermediate objectives	1. REF has the necessary competence and human resource capacity 2. REF tests innovative approaches together with relevant partners 3. REF has a knowledge platform providing up-to-date relevant information
Foci, approaches	• Secure finances to build up necessary capacity • Build the relevant competence • Foster cooperation and partnerships with relevant organizations (advocacy, research, funding) to strengthen REF's profile

2.4 REF Instruments and Interventions

REF will deploy the following instruments and interventions to achieve its goals:

2.4.1 Grant programs: Scaling up tested models and supporting innovative grant programs, with a focus on early childhood, pre-school and primary education

REF will scale up use of its proven models to impact a larger number of Roma beneficiaries and school systems, focusing primarily on ensuring successful transitions to the next educational level. REF will cooperate with key stakeholders and provide co-financing and pre-financing. To improve sustainability and to ensure a longer-term impact REF will endeavor to work through school, and other relevant authorities.

REF will pilot approaches outside the local public systems where cooperation with the authorities is not leading to results.

Foci, approaches	• Choose communities with:
	o potential to build up (social) power
	o Roma access to local councils (geography) or representation in local government (including Roma mayors)
	o strong civil society basis which can advocate for sustainable change during and after REF's intervention
	• Supporting schools, including community schools, in urban and rural areas

2.4.2 Mobilizing parents and secondary and tertiary students

REF supports programs for mentoring students at different levels, but also for mobilizing parents to embrace their responsibility to guide their children through the education system. RomaVersitas, which has focused on students and alumni of tertiary education will be expanded to the secondary level.

Foci, approaches	• Choose communities with:
	o strong and proactive parents' movements, and large Roma communities, who are aware of their rights
	o strong civil society basis which can advocate for sustainable change during and after REF's intervention
	o local government open to the Roma cause or with Roma mayor/councilors
	• Empowering parents and implementing partners so that they can advocate for and exercise their rights for systemic change promoting integrated, quality education to enhance self-esteem and the pride of Roma children
	• Innovation and demonstration, and scaling up of support for learning alongside the formal education system to build self-confidence, pride and resilience, (including incorporating the use of new technologies)
	• Leadership programs for children and youth
	• Skills for job interviews and key skills for certain industries (i.e. IT, languages)
	• Encouraging interested HR firms, media, companies to employ REF youth or help them launch start-ups
	• Public communications to promote positive stories of REF children and youth, parents, teachers, schools and communities

2.4.3 Scholarship programs

The focus of REF's scholarship program will shift towards selection of students who have proven a high level of commitment. The program will require investing relatively more, while the total number of scholarships may be reduced.

Foci, approaches	• Focus on people with a strong commitment to serve their community:
	o such candidates are not plentiful, and the selection process becomes more demanding
	strong mentoring services (e.g. through alumni) to help students to stay connected with their community
	social network for participating students
	scholarships awarded to those with proven leadership and community commitment, e.g. participation in REF gatherings, engagement in projects and campaigns of REF and REF partners
	• Focus on Roma teachers
	o scholarships with a focus on education, as well as activist and identity building approaches.
	o engaging Roma teachers to work with Roma children and youth and in schools with a high concentration of Roma
	• Scholarships that support pupil's continuation in school
	• Financial help to cover educational costs
	• Scholarships for REF beneficiaries;
	• Partnership with the best universities, including CEU, to provide partial or full scholarships

2.4.4 Implementation principles

Under the new strategy REF programs will be more integrated. Tools and indicators will be part of the biannual planning process, and the intermediate objectives in this document will serve as the framework to measure progress, at both output and outcome levels.

Given the importance of evidence-based approaches, REF will place more emphasis on building capacity for better collection of data, monitoring and evaluation in REF and with its partners.

2.5 Cross-cutting functions

REF programs are supplemented by cross cutting functions.

2.5.1 Advocacy

To promote and protect the interests of Roma in education (including combatting anti-Roma racism) and to contribute to the development of sustainable, inclusive, quality education systems, REF will engage in advocacy which:

- is evidence-based drawing on REF's operations and research. Research will be conducted on both country and context specific issues.

- works at local (e.g. school authorities, municipalities, districts), national (e.g. ministries, teacher colleges) and international levels (e.g. EU).

- relies on empowered parents and on committed Roma individuals, advocacy organizations and networks that already exist and those that may grow out of the scholarship program.

- initiates public discourse and provides policy proposals.

To strengthen advocacy REF will emphasize:

- Increased visibility of REF positions on education reform

- Working in strategic alliances

- Context mapping to identify opportunities to target interventions effectively

- Allocating resources to be able to act swiftly if new opportunities arise

Since advocacy involves fighting discrimination and advocating for the interests and rights of Roma children in education, conflicts are unavoidable, but will be handled constructively.

2.5.2   Research

To effectively advocate and to steer its programs, REF requires a sound monitoring and evaluation system supplemented with specific research. Research will focus on analysis (e.g. country assessments), providing evidence (e.g. impact assessments) and intelligence (e.g. gathering relevant information and data from existing research and from sources for statistical data) on issues relevant to promoting inclusive quality education for Roma.

REF will engage with relevant institutions to broaden research opportunities as well as conducting REF-specific research on targeted issues.

2.5.3 Monitoring and Evaluation (M&E)

REF will apply a results-based management approach as a tool to monitor and evaluate project/program interventions. Moreover, the REF monitoring framework will systematically centralize the process of data collection, allowing for a rigorous framework for the evaluation of project outcomes (through impact evaluations and other evaluation techniques) which smaller and shorter-term projects would otherwise not be able to accommodate. While the monitoring process will be mostly done by REF, evaluations will be conducted both internally and externally.

Advocacy, research, and monitoring and evaluation are the main functions for shaping the profile of REF as a resource center for the integration of Roma in public education systems.

2.5.4   Gender mainstreaming

REF research and M&E will differentiate how REF's interventions address the specific needs of boys and girls and men and women. gender mainstreaming will not only look at specific needs, but also address the socio-cultural discrimination factors against women, which are quite strong in Roma communities. Data provided from analysis and assessments will be shared as a part of advocacy efforts. These efforts will also contribute to REF's capacity as a

resource center and advocate for gender-sensitive policymaking for the full inclusion of Roma in public education systems.

2.5.5   Innovation

In collaboration with partners, REF will proactively pursue and support innovative approaches in all areas of its work. This will include, among others, the new area of integration into the labor market (improving employability and skills through job training programs) or forming a community of well-educated Roma committed to support necessary changes in the education system.

2.6   Geographic focus

With the context becoming more challenging in many countries, REF will continually assess how to realize its mission in different countries. Criteria to assess REF's geographical focus include:

- Capacity of NGOs to implement REF programs
- The presence of Roma officials and/or open-minded authorities
- Proportion of Roma residents
- Countries where REF can build on and benefit from the synergy with other organizations working on related issues

2.7   Distribution of funds

Given the shifts in the strategic framework, the distribution of funds will be guided particularly by the concentration of Roma population in a given locality. This requires further analysis and will include engagement with other development actors, and consideration of their geographic presence and priorities, as well as long-term prospects for cooperation and support to the jointly targeted localities.

2.8   Donor funding

EU funds (Pre-accession, Structural Funds, etc.), Norway Grants and other donor funds will contribute to the scaling up of REF programs and help create a positive impact by increasing the number of beneficiaries, enhancing REF's visibility and promoting systemic policy changes based on implementation of REF's proven approaches. REF will endeavor to influence and advocate for support to Roma issues with bilateral and multilateral donors based on REF's experience.

3 Theory of Change