



EDUCATION REPORTING GUIDANCE: FREQUENTLY ASKED QUESTIONS

WHY ARE THERE NEW REPORTING REQUIREMENTS AND WHY ARE THESE CHANGES HAPPENING NOW?

In 2018, USAID published two key documents: the U.S. Government Strategy on International Basic Education and the USAID Education Policy. These documents help guide and define the purpose of education programming, while calling for a renewed emphasis on measuring learning outcomes for a broad set of skills. This requires changes to education reporting, beginning in 2019, to enable USAID's Bureau for Development, Democracy and Innovation/Center for Education (DDI/EDU) to tell a complete story of collective ambitions and achievements of USAID education programming.

WHERE CAN I FIND THE NEW AND REVISED INDICATORS?

The [Education Reporting Toolkit](#) features the Education Reporting Guidance and is hosted online at EducationLinks. The toolkit contains a listing of all new and revised indicators, Performance Indicator Reference Sheets (PIRS), Standardized Program Structure and Definitions (SPSD) Program Area Narratives, and Key Issue Narratives.

WHAT DO WE DO WITH OUR EXISTING ACTIVITIES? DO WE NEED TO INCORPORATE THESE CHANGES NOW?

DDI/EDU understands that a full transition to the new reporting requirement and indicators will take time, and highly encourages USAID Operating Units (OUs) to transition to the new indicators as quickly as reasonable to make sure we are telling a complete story.

Although new indicators may be assigned during the Performance Plan and Report (PPR), an individual Mission's timeline for transition will depend on various factors, such as what data are collected for existing activities. The Contracting/Agreement Officer's Representative (COR/AOR) and the Implementing Partner should work together and consult existing guidance to determine the best course of action. If a contract or agreement mandates the use of an Archived Indicator, in the absence of a modification, the activity can continue to report on that indicator, despite its archived status. The [Helpdesk](#) is available to answer further questions.

WHAT IS REQUIRED FOR NEW ACTIVITIES?

The new reporting requirements must be reflected in the Performance Monitoring and Evaluation Plan (PMEP) for new awards.

MY INDICATOR WAS ARCHIVED. NOW WHAT?

Programs may still report on indicators that were archived, using them as Custom Indicators, but results reported through Archived Indicators will not be included in aggregate reporting to Congress. Archived Indicators should only be used if an OU is unable to transition to a new indicator. Contact the [Helpdesk](#) for help handling your individual situation.

WHAT HAPPENED TO THE DATA CALL?

The PPR will be DDI/EDU's main reporting mechanism starting in 2019; the Data Call used with the previous USAID Education Strategy (2011–2015) has been retired.

Missions and Implementing Partners will still be asked to help DDI/EDU with current tasks, such as submitting datasets and learning assessments to the [Development Data Library](#) and updating an activity roster to inform backstopping support.

HOW SHOULD USAID OUS APPROACH TARGET SETTING?

There has been a shift from a top-down, USAID/Washington-led exercise to a bottom-up, Mission-led approach to target setting. Missions should report targets for all indicators in the PPR, even if the target is zero. The [Automated Directive System \(ADS\) 201](#) currently provides general guidance on target setting. Education-specific guidance on target setting can be found in the [Target Setting Guide for USAID Mission Education Offices](#), which builds on general guidance available through ADS 201.

WHAT IS THE DIFFERENCE BETWEEN STANDARD AND SUPPLEMENTAL INDICATORS?

DDI/EDU assigns Standard Foreign Assistance Indicators (Standard Indicators) to OUs. OUs are required to report Standard Indicators that are relevant to their programming.

Supplemental Indicators respond to the priorities of the Education Policy and focus on topics such as numeracy skills, teacher quality, social-emotional skills, and an expanded range of youth workforce skills. Although DDI/EDU does not assign these indicators to OUs, OUs are strongly encouraged to use them because they help tell a more complete story of USAID's education programming worldwide and ensure programs reach intended beneficiaries. PIRS for both types of indicators are available in the [Education Reporting Toolkit](#).

WHY ARE THERE MORE DISAGGREGATES AND HOW DO I KNOW WHICH ONES TO USE?

Disaggregates are essential to making sure programs reach their intended beneficiaries, and to monitor USAID's engagement with children and youth who are marginalized and vulnerable. While not all disaggregates are mandated, DDI/EDU includes them in reporting requirements because the information

they provide is central to the Education Policy and USAID's education work that promotes equity and inclusion.

Disaggregates are a way of breaking out data by key categories of interest, such as demographic characteristics. Under the new education reporting requirements, disaggregates have been updated across indicators to facilitate reporting on marginalized or vulnerable populations and to meet requirements of the policy and the USG Education Strategy. Complete reporting of disaggregates is essential for accurate reporting and for tracking USAID's achievements in equity and inclusion.

Missions should report on disaggregates as applicable to their programming.

SEX DISAGGREGATES

Disaggregation by sex is required for all individual-level data.

GEOGRAPHY

Per [ADS 201](#), it is recommended that indicator data be disaggregated by a geographical level that is feasible and useful for management purposes.

CRISIS- AND CONFLICT-AFFECTED INDIVIDUALS

OUs should report on these disaggregates if they work in crisis- and conflict-affected countries or areas, or with crisis- and conflict-affected populations in any context. If the total sum of an indicator is composed of crisis- and conflict-affected individuals, the aggregate value of the indicator should match the crisis and conflict disaggregate figure.

We encourage Missions to not use this disaggregate for beneficiaries affected solely by the COVID response. We would instead encourage the flagging of that data through the Current/Future Year Indicator Narrative for the specific relevant indicator.

PERSONS WITH DISABILITIES

OUs should report on these disaggregates for the ES.I Standard Indicators if they have activities that focus specifically on children with disabilities as target beneficiaries or sub-beneficiaries. For EG.6 indicators, report these disaggregates for all participants age 18 years or older, regardless of the activity's focus or target group.

Consult the PIRS for more information on using disaggregates with specific indicators and contact the [Helpdesk](#) with questions about the reporting requirements for your specific context.

WHERE CAN I LEARN MORE ABOUT SETTING INTERNATIONALLY LINKED BENCHMARKS IN EARLY GRADE READING AND MATH?

USAID, in conjunction with UNESCO Institute of Statistics and other key partners, has developed a [Global Proficiency Framework](#) that outlines globally agreed upon minimum standards for proficiency in reading and math along with guidance for a relatively low-cost approach to set internationally linked benchmarks in early grade reading and math called [Policy Linking](#). This approach allows countries to continue using their current assessment systems and requires that benchmarks be set by local teaching

and language experts.

DOES THIS REPLACE PPR GUIDANCE AND ADS MONITORING POLICY?

No. These changes are intended to complement, not replace existing guidance on the PPR or the monitoring policy in ADS 201.

COVID HAS MADE IT IMPOSSIBLE TO MEET MY ORIGINAL EDUCATION INDICATOR TARGETS. WHAT DO I DO?

Missions should report on any key output or outcome data achieved at the activity or project level for the full fiscal year. If that data falls short of the Mission's original target, the Mission should use the deviation narrative for that indicator to explain how COVID has prevented the achievement of the original targets.

Missions should also think about their indicator outyear targets in light of any COVID-related programming changes. We encourage Missions to set targets for outyears that best reflect what is possible with their current and planned portfolio of programming.

We want to encourage Missions to avoid dropping education indicators unless those indicators are no longer applicable for any current or future programming.

HOW DO I QUALITATIVELY EXPLAIN OR REPORT COVID-RELATED SHIFTS IN EDUCATION PROGRAMMING?

Missions should use the Basic Education and Higher Education Program Area Narratives to summarize changes made to education programming as a result of the COVID crisis. Where applicable, Missions should also use other relevant Key Issue Narratives to report on programming.

Example of Key Issue Narratives that might be relevant for COVID-related shifts in education programming include:

- Engagement of Higher Education Institutions
- Relief and Development Coherence
- Countering Violent Extremism
- Focused Resilience
- Gender Equality/Women's Empowerment-Secondary
- Gender-Based Violence
- Gender-Based Violence: Child, Early and Forced Marriage
- Trafficking in Persons
- Inclusive Development: Participation of People with Disabilities
- Science, Technology and Innovation
- Research
- Water, Sanitation and Hygiene
- Youth Development
- Adaptation

For example, if a Mission shifted its basic education programming from in-person classroom instruction to a distance learning program, it should be noted in the Basic Education Program Narrative. If Missions have paused their youth workforce and higher education programming, that should be captured in the Youth Development Key Issue Narrative and the Higher Education Program Area Narrative. Another example that should be reported in the relevant narrative is when an activity changes the content of an education program such as the addition of interventions to address psychosocial needs of learners and educators or the addition of school-based WASH interventions.

Along with reporting programming shifts, DDI/EDU would like to encourage Missions to use the relevant Program Area and Key Issue Narratives to report any education sector-related learning, particularly where they contribute to answering priority question in [Education Sector Learning Agendas](#), that has happened as a result of COVID-related decision-making and programming.

Please see below for information about how to use existing indicators to capture achievements and progress during COVID-19.

HOW DO I REPORT DATA FROM COVID-RELATED SHIFTS IN EDUCATION PROGRAMMING?

Missions should continue to use the education Standard Indicators where applicable and possible to meaningfully monitor and measure the status of inputs, outputs, or outcomes in the context of COVID-19. For activities utilizing distance learning modalities, many of the existing Standard Indicators are still applicable (e.g., ES.I-3, ES.I-4, ES.I-6, and others) and new indicators (e.g., ES.I-58) are being developed. If needed, a Mission may add an existing Standard Indicator to their PPR in order to report against the achievements of an education program in the context of COVID-19. Where Missions are using Standard Indicators to report against COVID-related programming, we encourage the use of the Current/Future Year Indicator Narrative to flag this data.

Where the education Standard Indicators are not applicable, Missions should develop custom indicators that best monitor and evaluate the implementation or performance of COVID-related programming.

Any education activity that has received COVID-19 supplemental funding under the USAID and State Department Strategy for Supplemental Funding to Prevent, Prepare for, and Respond to Coronavirus Abroad is required to report against the relevant or applicable indicators from the Strategy's MEL Framework. The list of those missions can be found [here](#).

WHERE CAN I GET MORE HELP?



The [Education Reporting Toolkit](#) is a companion to the guidance document and is hosted online at EducationLinks. The toolkit contains a listing of all new and revised indicators, PIRS, SPSD Program Area Narratives, and Key Issue Narratives.



DDI/EDU has set up a [Helpdesk](#) to create a direct line of communication to monitoring and evaluation professionals who can answer questions about the reporting requirements. Please email questions to the Helpdesk.