EDUCATION REPORTING GUIDANCE

Fiscal Year 2023

August 2023

CONTENTS

ACRONYMS AND ABBREVIATIONS

ADS	Automated Directives System
EG	Economic Growth-Related Standard Indicator
EHEI	Engaging Higher Education Institutions
ES	Education-Related Standard Indicator
FY	Fiscal Year
HEI	Higher Education Institution
OU	Operating Unit
PIRS	Performance Indicator Reference Sheet(s)
PPR	Performance Plan and Report
QN	Qualitative Narrative
SPSD	Standardized Program Structure and Definitions
USAID	United States Agency for International Development
USG	U.S. Government

INTRODUCTION

This document synthesizes United States Agency for International Development (USAID) education reporting guidance for Missions and other Operating Units (OUs). The most recent version of this guidance can always be found on the Education Reporting Toolkit.

PURPOSE AND AUDIENCE

The primary audience for this guidance is technical and program staff from USAID Missions and other OUs who manage education-related programming and reporting, regardless of funding source. Using the U.S. Government's (USG) Standardized Program Structure and Definitions (SPSD) for foreign assistance, education-related programming can be broken down into ES.1 Basic Education, ES.2 Higher Education, and EG.6 Youth Workforce Development. This guidance may also be of interest to those in fields such as child protection, youth empowerment, or higher education engagement, among others. Portions will be of interest to implementing partners, particularly the standard and supplemental indicators.

This guidance aligns with the USG Strategy on International Basic Education, USAID's Education Policy, and the Education Policy Program Cycle Implementation and Operational Guidance. It is designed to meet USAID's reporting obligations under this policy framework. Although this document discusses topics associated with the Performance Plan and Report (PPR), it does not replace existing PPR guidance or USAID monitoring policy in Automated Directives System (ADS) 201. It highlights and adds context to existing guidance to facilitate strong reporting on the results and achievements of USAID's education-related programming.

ADDITIONAL RESOURCES

In addition to this guidance, readers are strongly encouraged to consult the Education Reporting Toolkit, hosted online on EducationLinks. It contains a complete list of all new and revised indicators and Key Issue Narratives, as well as Performance Indicator Reference Sheets (PIRS).

The Helpdesk is a direct line of communication to monitoring and evaluation professionals at the Center for Education. Readers are encouraged to reach out with any questions or concerns they have about education reporting requirements. They are also encouraged to document challenges and best practices they uncover while working with reporting materials—indicators, narratives, and PIRS—and to share feedback with the Center through the Helpdesk.

KEY CHANGES

The Center for Education has revised the indicators and narratives that are collected through the PPR. These revisions are meant to reduce and simplify the reporting burden for OUs engaged in education-related programming. The revisions also give OUs more leeway to adapt standard indicators to their context and keep PPR expectations relevant to USAID's external reporting obligations. Exhibit 1 lists key changes for fiscal year (FY) 2023.

> Revisions this year are meant to reduce the reporting burden on OUs.

Exhibit 1: List of Key Changes for FY 2023

CHANGE	REASON FOR CHANGE
Drop eight standard indicators (**ES.1-2, ES.1-13, ES.1-48, ES.1-54, ES.1-55, ES.1-58, EG.6-11, EG.6-14**).	These are not necessary for portfolio-level reporting or are addressed through changes to related indicators.
Drop approximately 200 standard indicator disaggregates such as numerators, denominators, ages, and cross-disaggregates.	These are not necessary for portfolio-level reporting.
Add the disaggregate "learners experiencing marginalization, as contextually defined" to applicable indicators.	Give OUs better flexibility to represent their context-specific approach to empowering these populations.
Add the disaggregate "females affected by crisis or conflict" to applicable indicators.	This is a frequent talking point that the Center currently cannot address.
Edit **ES.1-1** to broaden its applicability from grade 2 to any grade between grades 1 and 9.	Give OUs more flexibility to report at the grade level that matches their programming, and to make it possible to drop **ES.1-2**.
Edit **ES.1-1** to add a set of disaggregates that are currently reported through **ES.1-48**.	Consolidate what is useful about **ES.1-48** into **ES.1-1** and eliminate an otherwise redundant indicator.
Add **ES.1-60**, a new standard indicator for math learning outcomes.	Missions engaged in math programming can use this indicator to represent their work.
Add (de-archive) **EG.6-3** to replace **EG.6-14**.	**EG.6-3** is less burdensome for OUs to measure and is sufficient to address USAID reporting needs.
Add (de-archive) **ES.1-10** to replace **ES.1-55**.	**ES.1-10** is less burdensome for OUs to measure and is sufficient to address USAID reporting needs.
Include these disaggregates in all person-level indicators: male, female, neither, and disaggregates not available.	Align with ADS 201sap.

INDICATORS

STANDARD INDICATORS

Standard foreign assistance indicators are a type of performance indicator to facilitate portfolio-level reporting. They are useful for this purpose because they are (in principle) representative of USAID's portfolio as a whole, and because definitions are consistent and known. The Center for Education and other Washington Bureaus have defined standard indicators to collect data from OUs using common methods and definitions. This allows us to aggregate and compare results from education programming across OUs.

> Standard indicators allow the Center to aggregate and compare results across OUs.

Full PIRS for active standard indicators for education programming can be found in the Compendium of Standard Indicators, which is available on EducationLinks.

SUPPLEMENTAL INDICATORS

Supplemental indicators are a category of indicators that were pioneered by the Center for Education in 2018 in an attempt to bring some of the benefits of standardization to non-aggregatable custom indicators. Supplemental indicators do not need to be reported in the PPR and will not be used for aggregate reporting. Supplemental indicator PIRS are offered as a resource to OUs who wish to capitalize on accumulated knowledge of best practices and avoid the need to "reinvent the wheel" of developing technically sound PIRS and methodologies for priorities that are not a match for standard indicators.

> Supplemental indicators do not need to be reported in the PPR and will not be used for aggregate reporting.

A Compendium of Supplemental Indicators is available on EducationLinks.

CUSTOM INDICATORS

Custom indicators cannot be assigned, and OUs are not obligated to report them. Custom indicators do not have a standard definition. OUs may voluntarily report custom indicators via the PPR if they see reason to do so. Custom indicators generally are not useful for portfolio-level reporting because they cannot be assumed to be representative of the portfolio as a whole, because indicator definitions are not known to the Center, and because definitions are unlikely to be consistent across OUs.

DISAGGREGATES

Disaggregates are a way of breaking out data by categories of strategic priority. Reporting of disaggregates facilitates reporting on marginalized or vulnerable populations, such as learners with disabilities or learners affected by crisis or conflict. Every disaggregate listed in standard indicator PIRS addresses a specific USAID policy or reporting commitment.

Disaggregates vary from indicator to indicator, but several common disaggregates are associated with many indicators. These include sex, persons with disabilities, and individuals affected by crisis or conflict. The PIRS for each indicator explains when OUs should report on these and other disaggregates.

This year, the Center has added two new disaggregates, while dropping many others that are not necessary for portfolio-level reporting. The first disaggregate, "learners experiencing marginalization, as contextually defined," will give OUs more flexibility to represent their context-specific approach to empowering these populations. The second, "females affected by crisis or conflict," will help the Center address a frequent talking point. Exhibit 2 summarizes common disaggregates for OUs to consider.

Exhibit 2: Common Types of Disaggregates

Sex	Persons with disabilities
Individuals affected by crisis or conflict	Learners experiencing marginalization, as contextually defined
Females affected by crisis or conflict	

For more information, a Compendium of Disaggregates is available on EducationLinks.

QUALITATIVE NARRATIVES

SPSD Narratives, Key Issue Narratives, and Indicator Performance Narratives are collectively referred to as qualitative narratives (QNs). These narratives help the Center for Education understand and communicate aspects of programming and achievements that are not easily conveyed through numbers, such as systems strengthening and partnerships development.

> Qualitative narratives help the Center understand aspects of programming that are not easily conveyed through numbers.

We build a catalog of narrative excerpts that we use for a variety of purposes, such as reporting on Congressional directives, developing talking points, addressing inquiries, and producing communications materials. We also use information from the narratives to adapt our technical assistance offerings to match the programming focus and needs of OUs. You can find complete instructions and formatting preferences for education QNs in the Compendium of Qualitative Narratives. Education QNs include:

- The **ES.1 Basic Education SPSD Narrative**, which is used to describe programming and achievements that relate to basic education programming, as defined in the USAID Education Policy and Implementation Guidance.

- The **ES.2 Higher Education SPSD Narrative**, which is for reporting results of the Education Policy and other programming designed to **strengthen the capacity of higher education institutions (HEIs) to be central actors in development by conducting and applying research, delivering quality education, and engaging with communities.** This narrative should be reported regardless of whether ES.2 or other SPSD area funds were used.

- The **Engaging Higher Education Institutions (EHEI) Key Issue Narrative**, which is a cross-cutting narrative and is applicable regardless of technical sector or funding stream. It focuses on monitoring results against the Education Policy and reporting programming where **HEIs are a development partner in efforts to advance any development objective.**

> Use the **ES.2 Higher Education SPSD Narrative** when strengthening the capacity of HEIs to be central actors in development.
>
> Use the **EHEI Key Issue Narrative** when HEIs are a partner or resource for advancing development objectives in any sector.

ANNEX 1: RESOURCES FOR EDUCATION REPORTING

EDUCATION REPORTING INFORMATION AND ASSISTANCE

Education Reporting Toolkit

Helpdesk

INTERNATIONALLY LINKED BENCHMARKING

- Global Proficiency Framework (GPF)
- Policy Linking for Measuring Global Learning Outcomes

DISTANCE LEARNING

- Toolkit for Designing a Comprehensive Distance Learning Strategy
- Delivering Distance Learning in Emergencies: An Overview

CRISIS AND CONFLICT

- Indicators for Conflict-Sensitive Programs
- Rapid Education and Risk Analysis (RERA) Toolkit
- Equity of Access Indicator Guidance
- Social and Emotional Learning and Soft Skills
- Returning to Learning during Crises: Decision-making and Planning Tools for Education Leaders
- Analysis of Indicators Used in USAID Education Projects in Crisis and Conflict Environments
- Data Collection and Evidence Building to Support Education in Emergencies
- Safer Learning Environments (SLE) Assessment Toolkit

EQUITY AND INCLUSION

- Advancing Gender Equality in and through Education Data Brief
- Integrating LGBTQI+ Considerations into Programming
- School-Related Gender-Based Violence Measurement Toolkit
- Youth and Gender Analysis Toolkit
- Gender Equality and Inclusiveness in Learning Materials

PERSONS WITH DISABILITIES

- [Advancing Disability Inclusive Education Data Brief](#)
- [Disability Communication Tips](#)
- [How-To Note: Collecting Data on Disability in Education Programming](#)
- [Disability Identification Tool Selection Guide](#)
- [How-To Note: Disability Inclusive Education](#)
- [USAID Standards for Accessibility](#)

PRE-PRIMARY

- [Developing High-Quality Pre-Primary Programs: USAID Education How-to-Note](#)

YOUTH

- [Standard Indicator Resources: Measuring Quality of Employment](#)
- [Global Impact Investing Network (GIIN) Quality Jobs Framework](#)
- [How to Measure Skills for Youth Workforce Development](#)
- [Integrating Mental Health and Psychosocial Support into Youth Programming: A Toolkit](#)
- [Toolkit for Measuring Employment and Earnings Using the Workforce Outcomes Reporting Questionnaire (WORQ)](#)
- [YouthPower WORQ Discussion Group](#)
- [Key Soft Skills that Foster Youth Workforce Success](#)
- [Key Soft Skills for Cross-sectoral Youth Outcomes](#)
- [Getting Employment to Work for Self-Reliance: A USAID Framework for Programming](#)

HIGHER EDUCATION

- [Higher Education Program Framework](#)
- [USAID Education FY 2021 Data Brief: Advancing Higher Education](#)
- [USAID Higher Education Programming Map](#)
- [Guidance on Monitoring, Evaluation and Learning (MEL) in USAID Scholarship Activities](#)
- [Higher Education Storytelling Toolkit](#)

PRIVATE SECTOR ENGAGEMENT (PSE)

- [PSE MEL: Standard Agency PSE Indicators and Harmonizing Indicator Tool](#)
- [EducationLinks PSE Main Page](#)

CLIMATE CHANGE

- [Mapping Education and Climate Change Indicators](#)