FISCAL YEAR 2023 COMPENDIUM OF QUALITATIVE NARRATIVES FOR EDUCATION PROGRAMMING

August 2023

INTRODUCTION

The Performance Plan and Report (PPR) is an annual data call for performance information from all Operating Units (OUs) in the U.S. Agency for International Development (USAID) and the Department of State that implement foreign assistance programs. The purpose of the PPR is: (1) for all OUs to convey progress against strategic objectives using foreign assistance, and (2) for Washington Bureaus to collect necessary data to conduct their internal learning and external reporting.

The USAID Center for Education maintains this compendium as a resource for field Missions and other OUs who seek a single list of qualitative narratives (QNs) that are applicable to monitoring and reporting progress towards international education foreign assistance objectives, including the U.S. Government (USG) Strategy on International Basic Education and the USAID Education Policy. QNs collectively include Standardized Program Structure and Definitions (SPSD) Narratives, Key Issue Narratives, and Indicator Performance Narratives. These narratives help the Center understand and communicate aspects of programming and achievements that are not easily conveyed through numbers. The compendium includes instructions about how to report on each narrative. 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.**

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 indicators, PIRS, and qualitative narratives.

The Center maintains a Helpdesk as a direct line of communication to monitoring and evaluation professionals who can answer questions about reporting requirements. Please email questions to the Helpdesk.

SPSD PERFORMANCE NARRATIVES

ES.1 BASIC EDUCATION

The Center for Education uses the contents of this qualitative narrative to understand Agency-wide programming and achievements related to basic education programming as described in the [USAID Education Policy and Implementation Guidance](#). We use information from this narrative to produce [Agency-level](#) and [Government-level](#) reports that address statutory requirements, such as the [READ Act](#). We build a catalog of narrative excerpts[1] that we use to address inquiries, develop talking points, and produce [communications materials](#). We also use information from the narratives to adapt our technical assistance offerings to match the programming focus of OUs.

Instructions: Please describe programming and achievements related to basic education programming as defined in the [USAID Education Policy and Implementation Guidance](#). Please do not provide information that is procurement sensitive or Sensitive But Unclassified (SBU).

- Provide the names of individual USAID-supported basic education activities and, for each activity, describe interventions and results achieved during the fiscal year.

If not already addressed in the above, please…

- Name the specific, measurable learning and educational outcome(s) the OU is working to advance, even if no measurement or program contribution took place during the year.
- Describe USAID efforts, and results achieved, to strengthen system capacity, improve performance, and advance partner country ability to sustainably finance and equitably deliver services.
- Describe USAID efforts, and results achieved, to build partnerships that catalyze non-USAID funds or improve the effectiveness and sustainability of USAID programs. Please highlight USAID coordination with other U.S. government agencies, other donors, and the private sector.
- Describe USAID efforts, and results achieved, to strengthen equity and inclusion for individuals experiencing marginalization. As applicable, please discuss equity and inclusion related to sex, gender, disability, LGBTQI+, and contextually-specific dimensions of marginalization.

Formatting preferences (not required): Within the narrative, focus on short stand-alone passages or bullets of one to four sentences. Make each passage specific to one issue/priority or one activity. Use direct, active language and keywords so that the purpose of the passage is clear. If you prepare the narrative in this manner, it will be easiest for us to use without the need for further clarification.

Please do not use the automatic formatting features in Microsoft Word or Google Docs. This formatting is often destroyed by the time we view it in FactsInfo. Instead, please hard code your formatting. For example, press 'enter' for each new line and type '1),' '2),' and '3)' for each numbered item in a list.

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[1] The catalog of narrative excerpts contains information marked SBU, and is available to USAID staff upon request.

ES.2 HIGHER EDUCATION

The Center for Education uses the contents of this qualitative narrative to understand Agency-wide programming and achievements that advance higher education programming as described in the [USAID Education Policy and Implementation Guidance](#). Stakeholders across the Agency use information from the narrative to prepare the annual Title XII Report to Congress and the annual Minority Serving Institution (MSI) report, and to report on Congressional directives on higher education partnerships. We build a catalog of narrative excerpts[2] that we use to address inquiries, develop talking points, and produce [communications materials](#). We also use information from the narrative to adapt our technical assistance offerings to match the programming focus and needs of OUs.

The Higher Education narrative is for reporting results of the Education Policy and other programming designed to **strengthen the capacity of 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 separate EHEI narrative should be used to report programming where **HEIs are a development partner in efforts to advance any development objective**.)

An HEI is an organization that provides educational opportunities that build on secondary education, providing learning activities in specialized fields. It aims at learning at a high level of complexity and specialization. Higher/tertiary education includes what is commonly understood as academic education but also includes advanced vocational or professional education. This may include public or private universities, colleges, community colleges, academically-affiliated research institutes, and training institutes, including teacher training institutes.

Instructions: The narrative should include the following. Please do not provide information that is procurement sensitive or SBU.

1. Names of activities and brief descriptions of their interventions and results over the past fiscal year, including **names of the HEIs** reached.
2. A description of efforts and outcomes related to USAID individual, organizational, and systems strengthening to develop capacity, enhance resilience, improve performance, and advance partner country ability to sustainably finance and equitably deliver services that support the country's self-reliance. Such outcomes may be linked to the Education Policy priorities most directly related to higher education or other sector priorities relevant to higher education.

This narrative may also include a description of programming with HEIs that is not specifically included in the list above.

Formatting preferences (not required): Within the narrative, focus on short stand-alone passages or bullets of one to four sentences. Make each passage specific to one issue/priority or one activity. Use direct, active language and keywords so that the purpose of the passage is clear. If you prepare the narrative in this manner, it will be easiest for us to use without the need for further clarification.

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KEY ISSUE NARRATIVES

ENGAGING HIGHER EDUCATION INSTITUTIONS

The EHEI narrative is for reporting results of programming in which **HEIs are central actors or development partners for advancing USAID development objectives, regardless of whether the development objective relates to education**. This cross-cutting key issue is applicable regardless of technical sector or funding stream.

(The separate Higher Education performance narrative is for reporting results of the Education Policy and other reporting results from programming that **strengthens the capacity of HEIs to be central actors in development by conducting and applying research, delivering quality education, and engaging with communities**.)

USAID engagement with HEIs crosses all program areas and includes a range of activities such as scholarship programs, engaging HEIs in activity implementation or research, and institutional strengthening of individual HEIs and of higher education systems.

This narrative must include activities where either a **U.S., third-country, and/or host-country** HEI is engaged in one or more of the following ways:

- As an implementing partner, either as a prime or sub awardee.
- As a member of a partnership or consortium.
- As a technical resource, conducting training or education at HEI(s) or by HEI faculty/staff in support of host-country development objectives.

In activities where some HEIs are engaged in interventions as a partner and others are beneficiaries of interventions, only the activities, results, and outcomes of the partnership engagement should be described in this narrative. Activities where HEIs are beneficiaries should be reported under the ES.2 Higher Education SPSD narrative.

Instructions: The narrative must include the following. Please do not provide information that is procurement sensitive or SBU.

1. Names of activities and brief descriptions of their interventions over the past fiscal year. The **names of the HEIs** must be included.
2. For each activity, a description of results and outcomes (e.g., achievements, challenges) of HEI engagement over the past fiscal year.
3. Descriptions of the most significant results and/or changes in the country that is the focus of HEI engagement, as they pertain to the following objective:
   a. HEIs have the capacity to be central actors in development by conducting and applying research, delivering quality education, and engaging with communities.

This narrative may also include a description of engagement with HEIs that is not specifically included in the list above.

Formatting preferences (not required): Within the narrative, focus on short stand-alone passages or bullets of one to four sentences. Make each passage specific to one issue/priority or one activity. Use

direct, active language and keywords so that the purpose of the passage is clear. If you prepare the narrative in this manner, it will be easiest for us to use without the need for further clarification.

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> Use the EHEI Key Issue Narrative when HEIs are engaged as partners, members of consortiums, or technical resources. These HEIs can be based in the United States, a third country, or the host country.

OTHER CROSS-CUTTING ISSUES

A number of other Key Issue Narratives could be applicable to programming in the education sector:

- Child, Early, and Forced Marriage
- Children in Adversity
- COVID-19 Pandemic Response
- Disability Inclusive Development: Participation of Persons with Disabilities
- Gender-Based Violence
- Gender Equality/Women's Empowerment-Primary
- Gender Equality/Women's Empowerment-Secondary
- Public-Private Partnerships
- Science, Technology, and Innovation (STI)
- Youth Development and Emerging Leaders

Although the Center for Education does not "own" these narratives, we use education-related contents from these narratives in our reporting.