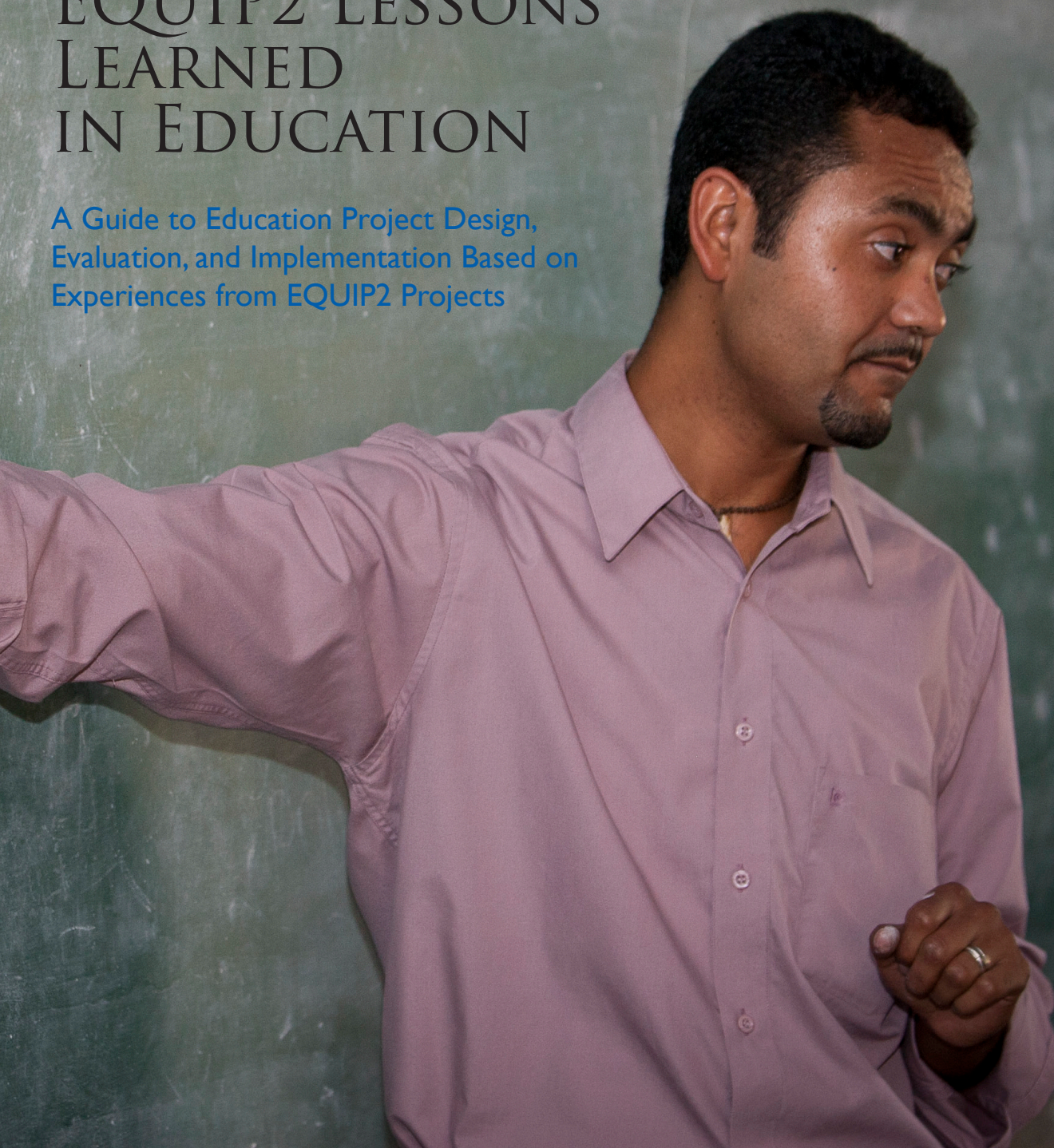


EQUIP2 LESSONS LEARNED IN EDUCATION

A Guide to Education Project Design,
Evaluation, and Implementation Based on
Experiences from EQUIP2 Projects



USAID
FROM THE AMERICAN PEOPLE





CONTENTS

Introduction	7
The Context of the Studies	8
Research Methodology	10
Lessons for Project Design, Implementation, and Evaluation	13
Lessons for Leadership	16
Concluding Remarks	19
References	21

EQUIP2: Educational Policy, Systems Development, and Management is one of three USAID-funded Leader with Associates Cooperative Agreements under the umbrella heading Educational Quality Improvement Program (EQUIP). As a Leader with Associates mechanism, EQUIP2 accommodates buy-in awards from USAID bureaus and missions to support the goal of building education quality at the national, sub-national, and cross-community levels.

FHI 360 is the lead organization for the global EQUIP2 partnership of education and development organizations, universities, and research institutions. The partnership includes fifteen major organizations and an expanding network of regional and national associates throughout the world: Aga Khan Foundation, American Institutes for Research, CARE, Center for Collaboration and the Future of Schooling, East-West Center, Education Development Center, International Rescue Committee, Joseph P. Kennedy, Jr. Foundation, Michigan State University, Mississippi Consortium for International Development, ORC Macro, Research Triangle Institute, University of Minnesota, University of Pittsburgh Institute of International Studies in Education, Women's Commission for Refugee Women and Children.

EQUIP2 LESSONS LEARNED IN EDUCATION SYNTHESIS

A Guide to Education Project Design, Evaluation, and
Implementation Based on Experiences from EQUIP2 Projects

Stephanie Lehner
2012

This paper was made possible by the generous support of the American people through the United States Agency for International Development (USAID) under Cooperative Agreement No. GDG-A-00-03-00008-00. The contents are the responsibility of FHI 360 through the Educational Quality Improvement Program 2 (EQUIP2) and do not necessarily reflect the views of USAID or the United States Government.

Huge investments are made every year in the form of bilateral and multilateral development assistance in an effort to support governments to improve the provision, quality, and efficiency of education systems worldwide. In 2011 alone, USAID allocated over \$520 million to education programming and reiterated their commitment to supporting education system improvements into the future through the USAID Education Strategy 2011-2015 (USAID 2011). Continuing with project modality as a means of delivering education development assistance, USAID's strategy advocates for an approach where project design is country-led and integrates a variety of interventions that: engage and network with the full constituency of stake-holders across many levels of the education system; provide forums for discussion, consensus, and policy dialogue; develop and maintain mechanisms, standards, and procedures to support the processes of the reform; and build the human, resource, and infrastructure capacity to sustain and scale-up the reform. An emphasis on improving and enhancing the evaluation of these programs underscores USAID's intent to focus on projects and activities that, based on evidence, are effective, relevant and efficient. Moreover, the strategy stresses that all future education investments must be more strategically aimed at not only achieving measurable and sustainable education outcomes, but also where possible maximum impact and scale.

This approach to education projects and how it supports the goals of sustainability, impact, and scale has been the topic of two recent USAID EQUIP2 papers: *Power of Persistence* (Gillies, 2010); and *Education Reform Support Today* (DeStefano & Crouch, 2006). In these studies, the authors explore what is currently understood about the nature of education system reform. Taking a systems perspective, they describe the technical, institutional, and political dynamics that characterize long term system change and the points of leverage within the system that enable or discourage this change to take place. From this perspective, like the USAID Strategy, both papers support a systems approach to donor assistance that integrates activities to: generate and share policy-driven data, research and analysis; encourage dialogue and communication; and build capacity. These papers recognize and draw attention to the many challenges associated with adopting an integrated systems approach within a dynamic, complex, and politically charged education system. Specifically, they caution that projects that aim to affect sustainable system change will not follow a simple linear path, but that progress and results may be unpredictable. Therefore, while this integrated approach to project design reflects the literature on best practice, the question of how these strategies are practically implemented to achieve the intended

outcomes of measurable and sustainable results through effective, relevant, and efficient projects requires additional attention.

We need to know more about HOW to implement projects and activities so that we achieve measurable and sustainable results through effective, relevant, and efficient projects.

Traditional program evaluations typically provide information on what projects achieved (e.g., results, impact, sustainability), but questions of ‘how’ projects operated – e.g. how decisions were made, how relationships were built, how groups were identified and engaged, how complex implementation challenges were dealt with, how opportunities and obstacles impacted on project progress, how data was used to leverage support - are frequently left undocumented (Chapman & Quijada, 2008).

To begin to look more closely at this issue, the USAID-funded EQUIP2 program set out to conduct a series of studies to increase and share knowledge about how projects are designed, implemented, and evaluated, who is involved, what contexts exist, and what approaches enabled or constrained project implementation in an increasingly Ministry-led environment. For projects taking place at the systems, and policy level, EQUIP2 (USAID Education Quality Improvement Project2 – Systems, Management, Policy and Information) was tasked with documenting the lessons learned as projects were implemented in a wide variety of programs across the world.

This paper serves to introduce this complete set of studies, the methodology used to gather and analyze information, and to provide a summary overview of the main lessons learned for leadership, project design, implementation and evaluation. The conclusion draws on these lessons to briefly discuss how they can usefully guide and inform future projects and programs as USAID embarks on its Education Strategy 2011-2015 and acts as a segue into the more detailed project reviews that follow.

THE CONTEXT OF THE STUDIES

EQUIP2 carried out five separate studies. Each study focused on how projects/activities were implemented in one of five key technical areas, specifically: EMIS/DEMIS; policy dialogue; teacher professional development; learner assessment; and decentralized management. EQUIP2 selected three or four projects that had implemented activities in each technical area for each study as seen in Table 1.

Table 1. Project Activities Reviewed

		Country	Timeframe	Budget \$M	Project activity under review
		TECHNICAL AREAS	EMIS/ DEMIS	Malawi	2003-2012
Uganda	2003-2008			1.5	Improve & strengthen EMIS
Zambia	2004-2011			26.5	Improve EMIS, develop DEMIS
Policy Dialogue	Guatemala		2004-2011	12.4	Increasing investment in education
	El Salvador		2005-2012	11.4	Wide ranging policy dialogue support
	Zambia		2004-2011	26.5	Wide ranging policy dialogue support
Teacher Professional Develop- ment	Djibouti		2003-pres- ent	21.4	In-service & Pre-service
	Liberia		2006-pres- ent	77.2	In-service & Pre-service
	Pakistan		2008-pres- ent	57.9	Pre-service/tertiary insti- tutes
Learner Assessment	Namibia		2005-pres- ent	14.1	Literacy, numeracy, sci- ence, primary
	Ghana		2004-2007	1.3	National basic education assessment
	Egypt		2004-2011	51.6	National end of grade assessment
	Honduras		2004-2011	20.1	Spanish and math, grades 7-9
Decentral- ized Man- agement	Egypt		2004-2009	51.3	Strengthen decentralized management
	Georgia		2005-2008	6.8	Strengthen school man- agement
	Mali		2004-pres- ent	27.0	Support decentralized decision making
	Malawi	2009-2012	11.6	Strengthen decentralized management	

Within each study, projects varied in length from short interventions funded over only a few months, to longer projects that spanned several years. As with time, the budgets on each project differed widely both in terms of annual allocations as well as overall program funding. The range of countries, their geographic and population size in which projects took place differed, as did the place of the program within the reform processes of the country. Each was influenced to varying degrees by the economic, political, religious, and cultural dynamics of each location.

RESEARCH METHODOLOGY

The principal objective of these studies was to gain insights from experienced development practitioners and draw practical lessons learned for designing, implementing, and evaluating projects in each of the technical areas described in the table above. The case studies were not meant as evaluations and the reviews were not intended to conclude as to whether particular projects/activities were successful. Rather, the qualitative method was designed to investigate the why and how of project implementation.

Preparation of interview protocol, summary/matrix, consent form for each project

The main methods used in each study were interviews and document review. To prepare for the study, an interview protocol was developed and piloted. A summary and matrix for each country case was also developed based on information taken primarily from the Request for Applications (RFA) and proposals, to be used as a reference point during the interviews. A consent form, to be signed by each interviewee, was also prepared, in accordance with human subjects protection regulations. Key topics raised in the interview protocol are summarized in Figure 1.

Interviews carried out using the protocol and summary documents

The interview protocol was used to carry out interviews of approximately an hour-and-a-half each. Between 3 and 11 individuals were interviewed from each project including where possible: (1) USAID staff involved in the design of the RFAs and in overseeing project implementation; (2) FHI 360 and sub-contractor staff who prepared EQUIP2's proposal in response to the RFA, implemented the project, and backstopped the project from the United States; and (3) where possible, host-country counterparts who implemented the project.

Figure 1. Topics Addressed in Interview Protocol

1. The project's development hypothesis related to the technical area (how the activities would achieve the intended project goals), the assumptions underlying the hypothesis, and their validity.
2. Key project activities related to the theme: what they were; why they were selected; the assumptions linked to the activities and their validity; whether the activities led to the outcomes one expected; if not, why.
3. Adequacy of time frame and funding for what the EQUIP2 project wanted to accomplish related to the theme.
4. Extent to which the project focused on building sustainability, and whether it was achieved.
5. Whether the project led to outcomes that were expected and, if not, why.
6. Adjustments made, if any, to activities, budget, and time frame.
7. Project monitoring and evaluation: indicators selected to assess project impact and track activity progress related to the theme; which were most useful and why; how the information collected was used; are there other indicators that would have been more useful.
8. Successes and challenges related to the theme: aspects of the project that were most successful and why; biggest challenges encountered in managing the project and how addressed.
9. Ability to adapt to changing circumstances, reprogram, or change aspects of the program.

Other sources of information accessed

To supplement the interviews, which served as the primary information source, several documents were reviewed for each project: RFAs, end of project reports (where available), and quarterly, semi-annual, and/or annual reports, and, where possible, monitoring and evaluation (M&E) plans and available M&E reports.

Where necessary, country searches were conducted via Google to identify, download, and review relevant documents on the country context for each country. In some cases, basic statistics (education and other) were obtained from the United Nations Human Development Report and from the World Bank's education statistics database.

Those already interviewed were sought out as needed to clarify points from the interview, obtain additional information, and/or to triangulate information obtained from other interviews. In a couple of instances, other individuals directly or indirectly involved with the EQUIP2 programs were sought out to obtain additional, primarily contextual, information.

Analyses carried out

A summary of the interviews was prepared for each project. This summary listed what each individual had to say on each of the main interview topics

and looked for commonalities as well as differences in responses across interviews on given topics.

The interview summary, plus information from the documents and online resources, served as the basis for preparing an EQUIP2 Lessons Learned paper that brought together the common threads and lessons learned from each country project within each technical area. The lessons and insights from each of these case studies were then analyzed and synthesized to create this lessons learned synthesis paper.

It is important to stress that the projects that formed the basis of these studies were not necessarily successful in meeting their objectives (this was not intended as an evaluation of performance). Interviewees were encouraged to speak candidly about both project successes and failures in terms of implementation strategies. Therefore, the lessons learned from these studies are not necessarily derived from what was done, but in some cases from what was not done.

A summary of the main findings

“The highest impact of donor contribution is not necessarily so much the tangible products as the donor’s role in affecting positive system dynamics.” (Gillies, 2010, p.146)

Central to all of the reviews was a consensus that impact was more than just a measure of the concrete outcomes and results but included the degree to which sustainability, ownership, and scaling-up was achieved and institutionalized. Emphasizing the distinction between sustaining the tangible project outcomes as compared to the process of change, interviewees discussed how ownership was at the root of the reform process. Ensuring ownership meant that project and donor leadership had to take on the role of engaging and accompanying a Ministry-led process. Where scaling-up

The studies did not seek to evaluate how successful projects or activities were. The lessons learned from these studies were derived from the comments of development professionals involved in each project as they reflected on how projects were designed, implemented, and evaluated. This included reflections on both what was done and what was not done.

was part of the project objectives, this relied on realistic timeframes, appreciation of diversity and the need to not just scale up the reform, but rather to scale up the entire process of the reform employing and anticipating flexibility and adaptability to different regions, districts, schools, cultures, politics, economics, and cultures. The lessons for project design, implementation, evaluation and leadership centered on this consensus. Affecting the positive system dynamics needed to produce not only tangible results, but also these

important outcomes, required not only an integrated project design, but also a particular type of leadership.

The overall lessons learned in this introductory paper are grouped into two sets. The first summarizes the lessons for the design, implementation, and evaluation of education reform support activities that lead to sustainable change, positive system dynamics for further reform, ownership, impact, and scaling-up of innovations. The second tries to draw a clear picture of the qualities, capacities, motivations, and commitment required of project leadership for donor support to impact on education system reform, emphasizing the challenges, and the varied roles that host country, donor, and project leadership must play if any program hopes to be country-led and aims to affect change that is sustainable. For lessons learned specific to each of the key technical areas, the reader should refer to each individual study.

LESSONS FOR PROJECT DESIGN, IMPLEMENTATION, AND EVALUATION

1. For sustainable reform, the design of projects must include an integrated set of mutually reinforcing activities that address the related political, technical, and institutional dynamics of the system. Many of the projects recognized a need to adopt a systems approach that more than just prioritized efforts to build the capacity and infrastructure of specific parts of the education system, even if they were unable to adopt this approach. Through ongoing assessment and evaluation of the political, technical, and institutional dynamics within which the project operated, the design of activities needed to identify and address the incentives and constraints within the related structures, mechanisms, systems, and policies. However, a comprehensive approach that included such diversity of activities

In Djibouti, Projet AIDE was designed to improve pre- and in-service teacher education and build teacher resource centers. This design quickly broadened to include activities to improve teaching and teacher training policies and strengthen the delivery systems. However, due to a finite amount of resources (time, personnel, and funding), as this broader approach evolved it brought with it the need to prioritize activities and make significant trade-offs. Initially, under pressure from the Ministry, time and resources were allocated to developing high-visibility products, i.e., manuals and buildings. Despite being seen as a major gap in the implementation strategy, activities to develop professional development programs and improve systems and policies were postponed until more resources were available and staff had time to focus on these areas.

Source: Gingsburg, M., Rose, J. & Adelman, E. (2011). *EQUIP2 Lessons Learned in Designing and Implementing Programs Focused on Professional Development: A Review of Associate Awards in Djibouti, Liberia, and Pakistan*.

introduced a greater degree of complexity to the implementation of the reform and was limited by the financial and human resources available. Strategically planning and prioritizing activities to best sequence and coordinate activities is essential to ensure scarce resources are most effectively utilized and points of leverage used to the best advantage.

2. Wide engagement of stakeholders at all levels of the system is essential

The BECAS project in Ghana was expected to develop a national assessment program in three years. This short timeframe for project implementation did not allow time for the implementing partner to develop a relationship with the Ministry, for the project to advocate for the usefulness of assessment data, or for proper local capacity building to take place. As a result, the new national assessment was not well understood or appreciated by the Ministry who ultimately refused to allocate additional education funds to sustain the assessment system long term.

Source: Kuan, L. (2011). *EQUIP2 Lessons Learned in Education Student Assessment: A Guide to Education Project Design, Evaluation, and Implementation Based on Experiences from EQUIP2 Projects in Egypt, Ghana, Honduras, and Namibia.*

if the goal of ownership is to be achieved. System reform is extremely difficult and involves the cooperation of many different groups of people within and outside the education system. Engendering their support and commitment to the reform was a central concern for many projects. Activities that provide opportunities for these groups to learn about the reform, provide input into the design of the reform, and evaluate its impact also have the potential to create local ownership, establish consensus, and build support and wide-spread buy-in for the reform efforts. This is critical in any reform that aims to have large scale impact and long term sustainability.

3. Gathering, presenting, and sharing information and data can be a powerful tool in project implementation. Timely access to policy-driven, good quality data and information can provide a powerful way of building project credibility, highlighting the importance of a reform to the various stakeholder groups, and guiding project activities. However, gathering, analyzing, and presenting data is not a simple task. Moreover, to make the process of data gathering and use sustainable requires that projects build the capacity and systems within the country to carryout and utilize data themselves. This requires significant time and resources.
4. Project timeframes need to factor in how long it takes to build credibility, develop relationships with country counterparts, engage with stakeholders, strengthen capacity and infrastructure, and identify and address incentives and constraints. Education reform is a continually evolving process that takes place outside the usual project timeframe

of 3-5 years. Affecting change within this process requires a timeframe that is realistic. Projects must not only focus on achieving short term goals within tight timeframes, but also ensuring the longer term goals of sustainability and institutionalization are achieved. In increasingly country-led projects in particular, it is essential to allow space and time for an evolving process of project design, implementation, and evaluation.

5. Scheduling the release of sufficient resources to accompany the implementation of activities is a key determinant of project progress and effectiveness. Because a systems approach recognizes the multi-faceted layers of reform, activities are sometimes unpredictable and new resources can be required at short notice as the process of reform emerges. These moments can prove critical to ensuring the process continues and the project team builds credibility and trust with stakeholders at opportune moments. However, although there is a strong case for being responsive to country needs, a balance needs to be struck between the desire to design short term activities that produce immediate results and longer term strategies that provide the enabling conditions for sustainability, ownership, and scaling up.

6. Monitoring and evaluation is an essential tool that should be embedded within the Ministry systems. Monitoring and evaluation of project impact and progress is a critical element both in terms of reporting results, and evaluating project design and implementation of processes. Moreover, since sustainability of the processes of reform rather than merely the outcomes of the reform were deemed equally important, M&E had to address the identification of indicators that captured the processes, structures, relationships, and mechanisms

Early on, the Zambia project team found it difficult to reconcile the need to report on numerical indicators required by USAID's Performance Monitoring Plan with the need to develop an M&E system within the MOE that could meaningfully measure specific project successes in an overwhelmingly country-led process. Therefore, with USAID approval and support, the MOE and project team designed an M&E system that would tell a story about the impact of policy dialogue support on education quality in Zambia. The PMP and the reports it generated did not tend to emphasize numerical targets, but more the changes to the system and the progress made within the process of dialogue through a narrative. This approach relied heavily on the support and involvement of the USAID AOTR, who was closely positioned to the project and understood and could use the reports effectively to report on progress and impact within the USAID arena.

Source: Lehner, S. (2011, p.19). *EQUIP2 Lessons Learned Designing, Implementing, and Evaluating Programs Focused on Policy Dialogue: A Review of USAID-funded EQUIP2 Associate Awards in Zambia, Guatemala, and El Salvador.*

that facilitated the extension of these aspects of the reform effort. Where these M&E functions were embedded in a ministry-led system, results had the capacity to influence and guide the system after the project had ended.

These lessons learned point to a need for the design, implementation, and evaluation plans to anticipate the complexity of the context and a degree of unpredictability in how the project progresses. Where possible, an open and adaptable design that allows for flexible implementation of activities is advisable. To ensure that this flexibility does not lead project impact away from the intended outcomes, monitoring and evaluation needs to be grounded in a clear development hypothesis that provides timely data and information about process and impact that informs decisions throughout implementation. To ensure that the project can be implemented within budget but not constrained by budget modalities, the donor must ensure that funding allocations can support the planned activities, flexible timelines, and at times unpredictable burn rates.

LESSONS FOR LEADERSHIP

1. Sustainability of a reform will to a large extent depend on the political will and commitment of the host country leadership, as well as leaders and managers at all levels of the system. Assessment of this commitment before, during, and after project implementation should be an important aspect of project design. Where commitment is weak or non-existent, project activities must initially focus on building support by providing potential key supporters of the reform with the kind of information and data that provides a rationale for project activities, as well as developing supportive relationships with key leaders. Since political will and commitment is often a personal attribute of individual leaders, rather than an institution, there is a need to anticipate changes in leadership and staff turnover. USAID, as donor, can play a vital role in facilitating relationship development after leadership change and ensuring that country commitment to reform is to the extent possible, institutionalized, and non-partisan.
2. Capacity building is important to ensure that leaders at all levels have the technical and managerial ability to design, implement, evaluate, and sustain reforms. As with political will and commitment, when leaders and managers have the technical and management capacity for the reform, support can be more immediately effective. However, where this capacity is weak (particularly in fragile, post-conflict countries, or countries where dictatorial leadership styles and systems predominate),

project support must work to identify and develop the technical and management capacity throughout the system so that the reform effort can be implemented. Because the pool of technical and management expertise may be relatively small, there is an additional need to plan for continued capacity building to offset the disruptions caused by inevitable staff turnover.

3. Project and donor leadership needs to show patience and persistence to ensure measurable and sustainable outcomes. The evidence from these studies as well as previous EQUIP2 papers (Gillies, 2010; DeStefano & Crouch, 2006), indicate that for projects that take a systems approach in a Ministry-led environment and employ strategies to engage large numbers of people, achieving tangible results and institutionalizing sustainable reform processes will take time and experience many set-backs. Remaining focused on the development hypothesis, clear about the short term and long term objectives of the assistance, and allowing time for new project directions to emerge and adapt is an essential part of leading this type of project.
4. Project and donor leadership must be flexible and adaptable, so that activities are responsive to a country-driven agenda when at all possible. Coupled with a need for patience and persistence, is the need for leadership to allow for a country-led process that is non-linear and at times unpredictable. Being able to adapt and be responsive to new realities that emerge throughout the project is a critical characteristic of leadership, both project and donor, in projects that strive for sustainable processes, country ownership, and large scale impact.
5. The credibility of project and donor leadership is dependent on the level of technical excellence made available and how responsive it is to country needs. Because the key motivations for reform are often political and varied, and system reform can take many different routes and affect many different system parts, the combination of donor and project leadership

In Egypt, USAID and EQUIP2 learned early on that, although they could establish an agenda and targets for decentralization, they controlled neither. Changes in ministers of education opened new opportunities and demands for assistance ... but not exactly in the way that USAID and (EQUIP 2) had anticipated. USAID and EQUIP2 wisely decided to “go with the flow.” In so doing, they built an atmosphere of respect and trust with key counterparts and were able to accomplish a number of intermediate targets that were not anticipated when (the project) was designed. In the words of an interviewee, “The success of efforts in Egypt were based in large part on the extent to which the project could be responsive, change directions quickly, and take advantage of windows of opportunity.”

Excerpt from: *Bernbaum, M. (2011, p.37). EQUIP2 Lessons Learned in Education Decentralization: A Guide to Education Project Design Based on Experiences from EQUIP2 Projects in Egypt, Georgia, Mali, and Malawi.*

must be able to draw on the appropriate technical expertise to inform decision making, respond to the needs of the country, and to help re-direct project support when necessary.

6. The project and donor team must be able to develop relationships of trust and mutual respect (within the MOE, outside, with other donors). Developing a relationship of trust between the project, donor, and country staff is a challenging but essential element of all projects. Early on in the initial stages of project implementation, project and donor leadership must be cautious in establishing the role of the project. In order to develop country-led processes and concepts of ownership, project teams must engage with the Ministry leaders and adopt an approach that accompanies them as they develop and direct project activities. Embedding project staff within the Ministry of Education offices can help to facilitate a closer collegial relationship between project and Ministry staff and allow for a greater degree of responsiveness, and of knowledge and understanding about what is needed.

“The most effective part (of any activity) was ... sitting down together and solving a problem. By being a part of a team you all learn from each other. It’s not a one-way thing, you debate, argue, and a better product emerges. As advisors, we tried not to work independently but we were prepared to work within the realities of the MOE environment. We were a part of the team and we worked under the direction of the MOE leadership, even if that meant working together with MOE colleagues on a last minute assignment late at night or over the weekend.” Sri Perrera, EMIS Advisor, Zambia.

Source: Bernbaum, M. (2012, p. 32). EQUIP2 Lessons Learned in Education Management Information Systems (EMIS): A Guide to Education Project Design Based on Experiences from EQUIP2 Projects in Uganda, Zambia, and Malawi.

These lessons learned highlight the complex and critical relationship between country, project, and donor leadership in project design, implementation, and evaluation. To support the building of these relationships during project design and implementation requires time, patience, and a particular choice of project leadership where technical assistance and resources support and accompany a country-led process. Where there is an intention to develop a country-led project, the design needs to analyze and acknowledge the constraints and opportunities in local leadership at all levels of the system, and where necessary take steps to build technical and management capacity strategically through carefully designed project activities. The timeline for achieving tangible results, in this context, needs to be realistic. Where pressure to produce results is unrealistic, the ideal of a country-led and country-owned project that achieves sustainable, scalable impact will be compromised. The role of the donor and their relationships and participation

in the project are therefore critical aspects to consider. Excellent and regular communication among implementers, donor, and beneficiaries is essential where a Ministry-led process is the goal and establishing mechanisms to support this must be part of project planning.

This summary of the main findings gives a very brief overview of how project leadership, design, implementation, and evaluation strategies across many different technical areas can best support any Ministry-led process of reform that will result in not only tangible results and outcomes, but also the system dynamics that lead to sustainability, and large scale impact. The overwhelming message of these reviews is that supporting education reform in a way that leads to sustainability of processes as well as results, ownership of the reform, and scalable impact is an immensely challenging yet doable endeavor.

CONCLUDING REMARKS

The lessons learned presented in this introductory paper simplify and generalize the findings from the five reviews that follow. However general, they do provide some useful pointers in the continued effort to further develop our understanding of effective, relevant, and efficient development assistance. For real and lasting change to take place and for the process of informed reform to continue, project activities must address the political, technical, and institutional dynamics of the system. A comprehensive approach that engages the whole network of people involved and impacted by the reform, builds capacity (human, resource, and infrastructure), addresses the policies, structures and mechanisms that provide the framework to support the reform, and carefully evaluates and adapts the processes is essential for this to take place. As USAID continues to embark on their Strategy 2011-2015, these findings stress that every effort should be made to balance the need for tangible impacts on student learning with the need to create the processes and structures within the system that enable sustainable change and change processes at all levels of the system to exist beyond the timeframe of the project. This balance can only be achieved through the thoughtful design, implementation, evaluation, and leadership of projects that consider both the ‘what’ of has to be done and the ‘how’.

In this introductory paper, a summary of the most striking lessons learned are presented. The individual case studies that follow provide more detailed descriptions about the strategies, activities, and events that characterized individual projects in each reform area (i.e. decentralization, policy dialogue, learner assessment, teacher professional development, and EMIS/DEMIS). They examine more closely the specific political, technical, and

institutional dynamics that projects worked within, to accompany a process of education system development that was for the most part country-led. An effort has been made to avoid giving a one-fits-all solution, but rather enough detail and analysis that the reader can explore patterns and incidents and derive useful guidance to inform the future “how” of project design, implementation, evaluation, and leadership.

Bernbaum, M. (2012). *EQUIP2 Lessons Learned in Education Management Information Systems (EMIS): A Guide to Education Project Design Based on Experiences from EQUIP2 Projects in Uganda, Zambia, and Malawi*. Washington, DC: EQUIP2 USAID, FHI360.

Bernbaum, M. (2011). *EQUIP2 Lessons Learned in Education Decentralization: A Guide to Education Project Design Based on Experiences from EQUIP2 Projects in Egypt, Georgia, Mali, and Malawi*. Washington, DC: EQUIP2 USAID, FHI 360.

Chapman, D. & Quijada, J. (2008). *An Analysis of USAID Assistance to Basic Education in the Developing World 1990-2005*. Washington, DC: EQUIP2 USAID, FHI 360.

DeStefano, J. & Crouch, L. (2006). *Education Reform Support Today*. Washington, DC: EQUIP2 USAID, FHI 360.

Gillies, J. (2010). *Power of Persistence, Education System Reform and Aid Effectiveness, Case Studies in Long Term Education System Reform*. Washington, DC: EQUIP2 USAID, FHI 360.

Gingsburg, M., Rose, J. & Adelman, E. (2011). *EQUIP2 Lessons Learned in Designing and Implementing Programs Focused on Professional Development: A Review of Associate Awards in Djibouti, Liberia, and Pakistan*. Washington, DC: EQUIP2 USAID, FHI360.

Kuan, L. (2011). *EQUIP2 Lessons Learned in Education Student Assessment: A Guide to Education Project Design, Evaluation, and Implementation Based on Experiences from EQUIP2 Projects in Egypt, Ghana, Honduras, and Namibia*. Washington, DC: EQUIP2 USAID, American Institutes for Research.

Lehner, S. (2011). *EQUIP2 Lessons Learned Designing, Implementing, and Evaluating Programs Focused on Policy Dialogue: A Review of USAID-funded EQUIP2 Associate Awards in Zambia, Guatemala, and El Salvador*. Washington, DC: EQUIP2 USAID, FHI360.

The EQUIP2 Lessons Learned in Education Series: Guides to Education Project Design, Implementation, and Evaluation Based on Project Reviews of USAID-funded EQUIP2 Associate Awards. Topics in this series include:

- Decentralization
- Education Management Information Systems (EMIS)
- Policy Dialogue
- Student Assessment
- Teacher Professional Development

For more information, please contact:

USAID

Patrick Collins
EGAT/ED/BE, USAID Washington
1300 Pennsylvania Ave., NW
Washington, DC 20532
Tel: 202-712-4151
Email: pcollins@usaid.gov

FHI 360

Audrey-marie Schuh Moore
EQUIP2 Project Director
1825 Connecticut Ave., NW
Washington, DC 20009
Tel: 202-884-8187
Email: aumoore@fhi360.org
Web: www.equip123.net