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Long-term Assistance and Services for Research (LASER)
Partners for University-Led Solutions Engine (PULSE)

Multi-Country Study on Inclusive Education (MCSIE) Malawi Interim Report

SUPPLEMENT TO AGREEMENT NO. AID-7200AA18CA00009

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June 10, 2022

Submitted: February 1, 2023

This publication was made possible through support provided by the Innovation, Technology and Research Hub of the U.S. Agency for International Development, through the LASER PULSE Program under the terms of Cooperative Agreement No. 7200AA18CA00009. The opinions expressed herein are those of the author(s) and do not necessarily reflect the views of the U.S. Agency for International Development.”.



Acknowledgements

LASER (Long-term Assistance and Services for Research) PULSE (Partners for University-Led Solutions Engine) is a \$70M program funded through USAID's Innovation, Technology, and Research Hub, that delivers research-driven solutions to field-sourced development challenges in USAID partner countries.

A consortium led by Purdue University, with core partners Catholic Relief Services, Indiana University, Makerere University, and the University of Notre Dame, implements the LASER PULSE program through a growing network of 3,000+ researchers and development practitioners in 74 countries.

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This document was developed with the support of the U.S. Agency for International Development (USAID) through the Multi-Country Study on Inclusive Education (MCSIE). Its development has been a collaborative undertaking between Inclusive Development Partners (IDP) staff and consultants, the University of Massachusetts-Boston, and Invest in Knowledge (IKI). The lead authors of the document are Christopher Johnstone, Ashley Stone, Eileen Dombrowski, Anne Hayes, Valerie Karr, Brent Elder, Emily Kochetkova, and Christa Preston.

IDP would like to thank the USAID headquarters teams who actively engaged in the study's design and review. Thank you to Leah Maxson for her review and insights and to Rebecca Pagel, Elena Walls, Brian Bingham, Kevin Roberts, Corrie Sutherland, and Josh Josa for their support on this document and on the MCSIE evaluation in general. Additional thanks to Odala Banda, Christine Veverka, Heather Rice, and Mary Chitsulo at USAID Malawi for their support throughout the MCSIE study. We also extend our thanks to the entire Reading for All Malawi (REFAM) project team for their generous time and support in sharing information and their experiences. We also appreciate the support of the LASER team from Purdue University and would like to acknowledge Pamela McClure, Betty Bugusu, and Yuehwern Yih. Lastly, we would like to thank Catherine Frazier for reviewing and editing this document.

IDP would like to honor the work of Rebecca Rhodes and all her contributions to the MCSIE project. She was a respected and valued member of the team and will be sincerely missed.

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Acronyms

ACR IDIQ	All Children Reading Indefinite Delivery Indefinite
Quantity BLV	Blind/Low Vision
COP	Chief of Party
COVID-19	Coronavirus Disease of 2019
CRPD	Convention on the Rights of Persons with Disabilities
DHH	Deaf/Hard of Hearing
DSNE	Department of Special Needs Education
EGR	Early Grade Reading
EGRA	Early Grade Reading Assessment
EGRP	Early Grade Reading Program
EMIS	Educational Management and Information System
EQ	Evaluation Question
FEDOMA	Federation of Disability Organizations in Malawi
FGD	Focus Group Discussion
GESI	Gender Equity and Social Inclusion
IDP	Inclusive Development Partners
IRB	Institutional Review Board
IEP	Individualized Education Plan
IKI	Invest in Knowledge Initiative
J&A	Juarez & Associates
KII	Key Informant Interview
LASER PULSE	Long-Term Assistance and Services for Research Partners for University- Led Solutions Engine
LD	Learning Difficulty
MANAD	Malawi National Association of the Deaf
MCSIE	Multi-Country Study on Inclusive Education
MEL	Monitoring, Evaluation, and Learning
MERIT	Malawi Early Grade Reading Improvement Project
MoE	Ministry of Education
MSL	Malawian Sign Language
MUB	Malawi Union of the Blind
NGO	Non-Governmental Organization
NRP	National Reading Program
OPD	Organization of Persons with Disabilities
PODCAM	Parents of Disabled Children Association of Malawi
RC	Resource Center
REFAM	Reading for All Malawi
SNA	Social Network Analysis
SNE	Special Needs Education
TOR	Terms of Reference

ToT	Training of Trainers
TWG	Technical Working Group
UDA	Universal Design for Assessment
UDL	Universal Design for Learning
UNESCO	United Nations Educational, Scientific, and Cultural Organization
USAID	U.S. Agency for International Development
YESA	<i>Yesani Ophunzira</i> (Assess the Learners)

Executive Summary

The U.S. Agency for International Development (USAID) has demonstrated a vested commitment to supporting education for all learners globally, including learners with disabilities. This commitment is reflected in the 2018 USAID Education Policy (USAID, 2018b) and the 2019–2023 U.S. Government Strategy on International Basic Education (USAID, 2018a). In line with this commitment, USAID has funded projects and programs that support early grade learning for students with and without disabilities, such as those in Cambodia, Malawi, and Nepal. It is against this backdrop that the Multi-Country Study on Inclusive Education (MCSIE) aims to generate evidence and lessons learned around the implementation of inclusive early grade reading (EGR) programs. This report describes findings to date in the case of Malawi, specifically the Reading for All Malawi (REFAM) activity, and spans information collected May 2020–April 2022.

Evaluation Background and Purpose

USAID is partnering with Inclusive Development Partners (IDP), through the Long-Term Assistance and Services for Research Partners for University-Led Solutions Engine (LASER PULSE) mechanism led by Purdue University, to conduct a four-and-a-half-year evaluation of three USAID inclusive education activities in Cambodia, Malawi, and Nepal. This evaluation effort, referred to as MCSIE, seeks to derive lessons learned about what is working, for whom, and in what context to sustainably advance teaching and learning outcomes for children with disabilities in the target countries.

In the case of Malawi, IDP has collaborated with the research organization Invest in Knowledge Initiative (IKI) to evaluate inclusive education efforts within the REFAM activity. REFAM focuses on improving reading outcomes among children with disabilities and is aligned with Malawi's National Reading Program (NRP). Since REFAM's inception in 2019, activities have included participating in a national technical working group (TWG) on inclusive education; developing training in the areas of individualized education plans (IEPs), screening, coaching, and Universal Design for Learning (UDL); focusing on deaf education; and developing and pretesting adapted versions of the early grade reading assessment (EGRA) for learners who are deaf or hard of hearing, are blind or have low vision, or have learning difficulties.¹ The EGRA activity has also included developing tools to assist with standardizing Malawian Sign Language (MSL) for the adapted EGRA and for future use in schools and resource centers (RCs) for students who are deaf.

Methodology

This report is an interim snapshot of REFAM's activities related to inclusive education through April 2022. IDP is using a process-evaluation design to develop individual case studies of the

¹ The term *learning difficulties* is one used by the Government of Malawi and broadly refers to any student who has difficulty achieving proficiency in the national curriculum and whose difficulty is not related to a sensory impairment. MCSIE uses the term in this document because it is relevant to the Malawi policy context.

inclusive education system in each country and to show how the USAID-funded interventions have affected the respective systems. Five key themes provide a framework for the study and have helped to structure this report: (1) the process of setting up and implementing the project, (2) the screening and identification of learners with disabilities, (3) the teacher training models supporting learners with disabilities, (4) the inclusive instructional models to improve reading outcomes, and (5) the activity's unintended consequences.

To shed light on the core themes and findings in Malawi, IDP conducted an extensive review of 102 project documents. IDP conducted five focus groups (n=6-8 participants) and 16 individual interviews with inclusive education training participants. In addition to these post-training interviews, IDP also conducted key informant interviews (KIIs) with implementing partner staff (n=5), national government stakeholders (n=5), district-level stakeholders (n=12), national organizations of persons with disabilities (OPDs) (n=3), and twelve family focus groups (n=3-8). In October 2021, MCSIE also conducted observations of resource centers (n=59), interviewed head teachers (n=57) and teachers (n=55); this data is still being analyzed at the time of this report and will be available in the endline report. Finally, MCSIE partners observed trainings for UDL, IEPs, screening, and deaf education. To reach initial responses to the evaluation questions for this report, IDP performed data analysis through qualitative deductive coding, evaluative rubrics and checklists, and descriptive analyses. This approach was subject to limitations, including a largely remote data collection process due to the COVID-19 pandemic and an inability to hold data validation meetings in person in Malawi. Additional updates may be provided to this draft after submission.

Answering the Evaluation Questions

For each of the study's five themes, USAID generated an evaluation question (EQ) to inform the project of both individual country programs as well as programming across the three countries. As this is an interim report, IDP has not drawn final conclusions. Initial responses to the EQs are based on data collected until April 2022².

1. **Process:** What worked well/poorly in the process of setting up an efficient, effective, and sustainable system to focus on improving the quality of education for learners with disabilities?

Answer: REFAM interviews reflected a willingness to foster and develop networks around inclusive education, which staff believed raised the national profile of inclusive education. REFAM invested time and resources (including facilitating meetings) to link with key development actors and ministerial officials to have ongoing conversations around inclusive education. In addition to these "horizontal" and "vertical" connections (i.e., with other development partners and ministry officials), REFAM developed connections with

² As mentioned above, this does not include the classroom observations or interviews with head teachers and teachers. This data will be included in a MCSIE endline report.

Yesani Ophunzira (Assess the Learners or YESA) and the Malawi Early Grade Reading Improvement Project (MERIT), which were two other USAID- funded projects that focused on literacy. REFAM leaders reported that leveraging connections allowed the project to align its work with other initiatives in Malawi. REFAM's commitment to hiring local staff with a deep knowledge of the Malawian education context established practices that contributed positively to local capacity building and sustainability of project activities.

- 2. Screening and Identification:** What methods worked best to identify learners with disabilities?

Answer: Quarterly and annual reports noted that REFAM was not involved in screening children directly. REFAM trained teachers in general screening concepts as well as introduced a checklist of general characteristics of children who may be blind or low vision, deaf or hard of hearing, or experience other learning difficulties. In total, trainees were exposed to four screening tools. The first three were checklists already being used in Malawi's schools and approved by the Government of Malawi, which aimed to identify if further identification assessment is needed for children who may be blind or have low vision, deaf or hard of hearing, or have learning difficulties. REFAM also introduced a fourth tool that was developed by partner Sandi Thandiza. This instrument was locally developed in Malawi and focused primarily on developmental milestones. At trainings, all recipients received copies of all tools and were instructed to use them in schools to screen children, but no further tracking of how they were implemented was undertaken by REFAM.

- 3. Training:** What training model(s) worked best to provide teachers with the resources and support they need to best meet the needs of learners with disabilities?

Answer: Training of instructional models that were broadly inclusive, but not necessarily for students with specific disabilities, was effective. Interview data revealed participants, who were primarily district-level MoE officials, OPDs, and Resource Centre teachers, had positive attitudes about inclusion and made connections between instructional training content and inclusive education classroom strategies. REFAM maintained a broad inclusive approach to trainings by introducing topics such as coaching and UDL, as described in their training manuals. This broad inclusion focus allowed for training conversations to focus on *how* inclusive education can be implemented instead of *if* it should be implemented, according to observations.

4. **Instruction:** What instructional models worked best to improve classroom instruction and reading outcomes among learners with disabilities?

Answer: There was little available data at the time of this report to provide preliminary findings in relation to this EQ, because REFAM's overall timeline was disrupted by the COVID-19 pandemic and MCSIE classroom-level data analysis is ongoing. Because there was no follow-up data in REFAM's quarterly or annual reports, the timeframe for when information will trickle into classrooms and how it will be used is unclear. MCSIE-collected data and analysis of REFAM's EGRA will be available in the endline report to answer questions related to what models worked best to support learners with disabilities. With these limitations, the MCSIE team focused its attention on REFAM's efforts to prepare for learning assessments via the EGRA. REFAM adapted the EGRA to be accessible for children who are blind or have low vision, who are deaf or hard of hearing, and who have learning difficulties. Interviews with REFAM staff, however, revealed that the adaptation process was very resource-intensive and that it is unclear whether using the tools will be sustained in schools.

5. **Unintended consequences:** Were there any unintended consequences of the activity? What were they?

Answer: As the project is ongoing, assessing the unintended consequences—both positive and negative—is difficult at this time. However, based on the initial findings, potential unintended consequences may exist and will be explored in more detail at later stages of the MCSIE evaluation. The potential unintended consequences include:

- As a result of COVID-19, a new model for online engagement was piloted to enable REFAM to communicate with government officials and training participants.
- A focus on district-level stakeholders will make measuring impact at the classroom level difficult.
- While the high-level networking focus of the project was valuable, the project may have missed opportunities to learn from innovations occurring at the school-level: in classrooms and from teacher perspectives.
- EGRA development activities exposed larger systemic issues that needed to be explored within the deaf education system in Malawi, such as a lack of a standardized sign language.

The findings to support these answers as well as more information on the possible unintended consequences are detailed in the full report. In addition, the report provides short-term actionable recommendations as well as future programming recommendations and next steps for MCSIE research.

Recommendations

Inclusive education is a new area for many donors and implementing partners, and findings from this report help build the evidence base by highlighting lessons learned and programmatic aspects that should be replicated in the future. Initial recommendations based on the interim findings for each evaluation question are listed below in two parts: short-term actionable recommendations that can be considered by USAID and REFAM, and future programming recommendations that can be considered broadly by USAID when planning and designing upcoming solicitations.

1. Process

Short-term actionable recommendations:

1. Prioritize networking building and collaboration with relevant stakeholders.
2. Inclusive education and national context experience must be required for staff in similar projects.
3. Ensure OPDs are paid for their knowledge, time, and expertise.

Future programming recommendations:

1. Develop evaluation strategies to identify the importance of social networks.
2. Look to multiple stakeholders for sustainability but valorize adaptability and evolution.
3. Consider the local context when designing solicitations.

2. Identification

Short-term actionable recommendations:

1. Examine how teachers use (or don't use) screening materials.
2. Investigate and follow governmental procedures for confidentiality and consent.
3. Follow-up support is needed.

Future programming recommendations:

1. Plan for follow-through on all trainings.
2. Evaluate instruments.
3. Consider developing universal screening instruments.
4. Monitor and embed actions to increase gender parity.

3. Training

Short-term actionable recommendations:

1. Maintain a focus on inclusive education, not limitations of students with disabilities.
2. Consider hybrid training or virtual training with layers of support.
3. Follow up with participants after training sessions to ensure implementation.

Future programming recommendations:

1. Develop an "inclusion first" training agenda.
2. Require post-training follow-up.

4. Instructional Approaches

Short-term actionable recommendations:

1. Allow ample time for the process of EGRA adaptation.
2. Conduct a sign language and braille assessment in country before developing an adapted EGRA.
3. Develop rules and policies for assessment participation.

Future programming recommendations:

1. Rather than creating alternate EGRAs, consider accessible formats, UDA principles, and accommodations.
2. Consider return on investment for adapting and utilizing EGRAs for small projects.
3. Focus on EGRA format-based versions, not population-based versions, in solicitations and task orders.

The findings to support the evaluation question answers are detailed in the full report. In addition, the report provides short-term actionable recommendations as well as future programming recommendations and next steps for MCSIE research. All findings and recommendations listed in the Executive Summary and detailed in the full report are not final conclusions. Subsequent data analysis and reporting will cover project documentation that has not yet been reviewed and project activities from May 2022 through project close date to produce final findings and recommendations and will be available in a subsequent report.

Introduction

This section of the report provides an overview of the MCSIE evaluation's purpose, the REFAM project activity, and this interim report.

Purpose of Evaluation

The U.S. Agency on International Development (USAID) is partnering with Inclusive Development Partners (IDP), through the Long-Term Assistance and Services for Research Partners for University-Led Solutions Engine (LASER PULSE) mechanism led by Purdue University, to conduct a four-and-a-half-year evaluation of three USAID inclusive education activities in Cambodia, Malawi, and Nepal. These inclusive education activities represent USAID's most concerted effort to date to build systems to ensure students with disabilities have access to quality education. The Multi-Country Study on Inclusive Education (MCSIE) seeks to derive lessons learned about what works, for whom, and in what context to sustainably advance teaching and learning outcomes for children with disabilities in the target countries. Toward this goal, IDP is using a process-evaluation design to develop individual case studies of the inclusive education system in each country and to show how the USAID-funded interventions have affected the respective systems. Five key themes provide a framework for the study: process, identification, training, instruction, and unintended consequences.

USAID and its partners will use the MCSIE evaluation to inform adaptations to its inclusive education activities in Cambodia, Malawi, and Nepal and to plan for new inclusive education programming globally. The data for this report was collected in real time, and the findings are not indicative or predictive of future project activities or final project outcomes. Evaluations of this type should be considered part of an iterative and responsive research methodology that generates knowledge over time. The following report outlines initial evaluation findings from Reading for All Malawi (REFAM), while cross-national comparisons will be made at MCSIE's endline phase.

Overview of Reading for All Malawi's Inception and Current Programming

USAID's REFAM activity was awarded to Juarez & Associates in early 2019. The task order totaled \$2.9 million, (later raised to \$3.6 million) to cover fixed fees and reimbursable costs.

According to the task order,

"REFAM aims to provide a scalable model of an intervention to teach reading to learners with disabilities in one of sub-Saharan Africa's poorest countries, thereby refining an intervention under the umbrella Malawi National Reading Program." Its original theory of change stated:

If Malawian learners with disabilities benefit from: (a) services provided by an engaged and informed ministry, (b) reading instruction and materials targeted to their needs and abilities, and (c) tutoring and support from their families and communities, then they will better learn how to read and prosper in school. (REFAM, 2019, Annual Report FY19)

Due to delays in obtaining registration to work in Malawi and slowdowns caused by the COVID-

19 pandemic, REFAM's original end date of July 11, 2021 was extended through August 31, 2022, and its project scope was modified. The original task order required the following: early screening documents development, reading materials development, improved teaching practices, awareness raising, community support increases for children with disabilities, and family engagement improvements related to literacy. Because of the registration delays encountered and COVID-19 impacts, USAID and REFAM pivoted the project's focus to: policy-level engagement (national technical working group [TWG] participation) and development of trainings and/or toolkits for the Educational Management and Information System (EMIS), coaching, screening, and Universal Design for Learning (UDL). REFAM also adapted early grade reading assessments (EGRAs) for children with disabilities and subsequently provided deaf education training.

Purpose of Interim Report

MCSIE is comprised of three phases: (1) inception, (2) interim data collection, and (3) endline data collection.³ During the inception phase, IDP developed a framework that sought to identify promising practices in inclusive education that are both contextualized and aligned at the local level and to identify where gaps exist in practice. To familiarize IDP, local partners, and stakeholders with MCSIE, IDP conducted an initial inception visit to each of the three countries, including an inception visit to Malawi (December 2–7, 2019).

Since MCSIE's start date began after REFAM implementation commenced in Malawi, IDP was unable to collect data during the start-up and early implementation phases. IDP proposed an interim report as an alternative to an initial or midline report due to the restrictions imposed by the COVID-19 pandemic, which put a halt on all in-country data collection for the MCSIE team and delayed many of REFAM's activities. This interim report includes a review of secondary source data from the implementing partner, implementing partner interviews, a pre-post survey of teachers who received EGRA training, and key informant interviews (KIIs) and focus group discussions (FGDs) with REFAM staff, government stakeholders, and organizations of persons with disabilities (OPDs). The collection of household survey data was canceled due to difficulties with the local institutional review board (IRB) and was replaced with family focus group discussions (FGDs) conducted at school. Comparative case study interviews and a follow-on round of KIIs will be conducted during a site visit scheduled for June 2022 and will be included in subsequent reports.

This interim report seeks to provide a snapshot of the available evidence to answer each of the five areas of inquiry or evaluation as they pertain to REFAM. The report also serves to shed light on the status of inclusive education programming for relevant stakeholders in Malawi, others within the USAID network, and global stakeholders who would like to learn from the evidence generated.

³ These phases are subject to change based on the COVID-19 pandemic and shifts in data collection plans and project end dates.

Methodology

This methodology section provides a general overview of the methods used to obtain data for the report, including information on data collection and analysis methods, the role of evaluative rubrics and checklists, and the limitations of this study.

General Overview

For each of the study's five themes, USAID generated an evaluative question (EQ) to inform the project of individual country programs as well as programming across the three countries:

1. **Process:** What worked well/poorly in the process of setting up an efficient, effective, and sustainable system to focus on improving the quality of education for learners with disabilities?
2. **Identification:** What methods worked best to identify learners with disabilities?
3. **Training:** What training model(s) worked best to provide teachers with the resources and support they need to best meet the needs of learners with disabilities?
4. **Instruction:** What instructional models worked best to improve classroom instruction and reading outcomes among learners with disabilities?
5. **Unintended consequences:** Were there any unintended consequences of the activity? What were they?

Although not part of the original EQs, this study also examines for whom the programs work or do not work and what specific contextual factors may influence successes or create barriers.

Methods

For this report, IDP and Invest in Knowledge Initiative (IKI) conducted KIIs, FGDs, and surveys; observed training events; and reviewed project materials. Primary data was collected and analyzed from October 2020–April 2022. Findings from this data should be considered formative in nature as the project activities are currently ongoing. Below provides a summary of these methods (see more details in Annex A):

- **Key informant interviews.** The MCSIE team conducted 16 KIIs of screening and coaching training participants in March 2021. MCSIE also conducted interviews with the implementing partner (4), national government officials (5), district government officials (12), and OPD representatives (4) in March 2022. See Annex B for a list of interviewees.
- **Focus group discussions.** The MCSIE team conducted five post-training FGDs with a total of 38 individuals. Among these, four FGDs focused on REFAM's inclusive deaf education training and one focused on screening and identification, special needs teachers as coaches, and parental engagement training. MCSIE also conducted 12 parent focus groups with 77 individuals during school observation periods in October 2021.

School observation focus group data will be included in the endline report. See Annexes C and D for details about participants.

- **Surveys.** MCSIE received pre-post data from REFAM after inclusive education trainings. In project meetings, stakeholders (including REFAM, USAID, and MCSIE) agreed that two separate surveys would place undue burden on participants, so REFAM added a limited number of MCSIE items to their surveys. MCSIE received four pre-post datasets with 59 - 356 participants; analysis of this data will be included in the endline report. In addition, MCSIE surveyed REFAM staff; because REFAM's staff is small, MCSIE was able to interview the entire project staff. MCSIE's REFAM staff survey can be found in Annex E.
- **Training observations.** IKI observed at least one session of all REFAM trainings, either on site or virtual. To standardize data collected across sites, MCSIE used a training observation form in all countries. This form can be found in Annex G.
- **Material review.** In total, the evaluation team reviewed 102 official project documents, including training materials, screening materials, datasets, and project reports. Some documents were brief, such as event participant lists or job descriptions, while others were much longer, such as various reports. Annex F provides a full list of referenced materials and project documents reviewed for this project.

To provide a consistent set of evaluation criteria to help IDP staff draw conclusions, staff used a series of evaluative rubrics to identify strengths and potential gaps in activities related to REFAM's overall processes as well as screening, training, and EGRA activities. Because of the COVID-19 pandemic and timing restrictions, the total number of training offerings was limited, but IKI was able to observe nearly all of them. In addition to training observation data and training recipients' surveys, IDP used evaluative rubrics to initially assess activities based on available data and followed up in KIIs and FGDs to clarify issues or ask questions that emerged from the survey, rubrics, and/or project reports.

To support local data collection, IDP's international research team conducted remote enumerator training with IKI staff on topics such as FGDs, classroom observation protocols, and KII administration in both 2020 and 2021. These trainings introduced MCSIE; familiarized IKI with the data collection tools and procedures; provided a how-to training for conducting KIIs, FGDs, and observations; reviewed ethical considerations; and provided time for interview skills practice. The training also provided background on the REFAM project and its related activities.

Limitations

Because of ongoing project activities and project changes due to the COVID-19 pandemic, IDP worked closely with IKI to ensure in-person data collection of trainings and observations still occurred. This included observations of virtual events, classroom observations (when schools reopened), virtual interviews, and face-to-face interviews. IDP triangulated findings from data

collection with relevant secondary source information available in the research.

REFAM's deliverable schedule also changed frequently during the evaluation period due to challenges that will be described below, but the MCSIE team was able to attend observable activities. This was due to IKI's capacity to marshal organizational resources, sometimes on very short notice, to observe training activities and conduct follow-on interviews.

Finally, readers should note that the use of data collected from quarterly, annual, and workshop reports and post-hoc KIIs has its limits. Although IDP was able to identify programmatic successes and challenges through secondary source data, the reasons behind programmatic decisions were not always provided in reports. The purpose of the KIIs and FGDs was to shed light on decision points not always readily apparent in secondary source materials.

Findings

Process

This section provides initial answers with supporting findings to the evaluation question on process as well as short-term actionable and long-term strategic recommendations.

Evaluation Answer and Supporting Findings

EQ1: What worked well/poorly in the process of setting up an efficient, effective, and sustainable system to focus on improving the quality of education for learners with disabilities?

Answer: REFAM interviews reflected a willingness to foster and develop networks around inclusive education, which staff believed raised the national profile of inclusive education. REFAM invested time and resources (including facilitating meetings) to link with key development actors and ministerial officials to have ongoing conversations around inclusive education. In addition to these “horizontal” and “vertical” connections (i.e., with other development partners and ministry officials), REFAM developed connections with *Yesani Ophunzira* (Assess the Learners or YESA) and the Malawi Early Grade Reading Improvement Project (MERIT), which were two other USAID- funded projects that focused on literacy. REFAM leaders reported that leveraging connections allowed the project to align its work with other initiatives in Malawi. REFAM's commitment to hiring local staff with a deep knowledge of the Malawian education context established practices that contributed positively to local capacity building and sustainability of project activities.

- **REFAM recruited a well-balanced team with extensive experience with inclusive education within Malawi.** Staff reported that staffing decisions prioritized employing an in-country staff with experience with inclusive education projects in Malawi. KIIs with REFAM staff indicated that finding locally available personnel was a priority, but sought external expertise for specific deliverables (UDL, EGRA, etc.). According to a MCSIE

survey of the implementing partner, two of the three in-country core staff had previous experience with international inclusive education or deaf education projects in Malawi. At the outset of the project, one core staff member had previous experience in Malawi, and two core staff had inclusive education experience in Malawi. During a key staff transition, new core staff were hired quickly with the requisite years of experience leading international development projects as well as professional experience in inclusive education projects. REFAM's hiring of core staff with a deep knowledge of the Malawian education context, disability, and inclusive education is an exemplary practice in project implementation and building local capacity for sustainability.

- **OPD engagement was both a strength of this project and area for future consideration.** REFAM staff described positive relationships with OPDs. Project documentation indicates REFAM collaborated with six different OPDs, three of which were primarily utilized for project implementation and include: Malawi National Association of the Deaf (MANAD), Malawi Union of the Blind (MUB), and Parents of Disabled Children Association of Malawi (PODCAM). These organizations were included in strategy sessions, participated in and aided in the facilitation of trainings, and periodically presented information to stakeholders alongside REFAM. REFAM was able to provide some financial incentives to these organizations for their contributions but was not able to formally hire these organizations as consultants.

KIIs with OPD partners indicated that the relationship with REFAM strengthened the capacity and connections of organization members involved, but also had limitations. One KII with an OPD indicated that OPD contributions were expected, but contributions were uncompensated due to lack of a consulting agreement. Another KII indicated that REFAM treated OPD members as experts but did not collaborate with them consistently throughout and across project activities causing the OPD to question the sustainability of project activities. Participation of OPDs is essential for contextualizing projects, but expectations that this participation should be done without organizational remuneration can create a structural power imbalance, rather than transformative, relationship between OPDs and USAID projects.

- **Quarterly reports and KIIs revealed that REFAM creatively addressed project deliverables that were difficult to complete due to a lack of infrastructure.** Although REFAM staff KIIs highlighted the connections that the project developed in Malawi, annual reports and work plan edits showed the project encountered challenges in executing deliverables due to external circumstances. The COVID-19 pandemic was cited in quarterly reports and staff KIIs as the most frequent reason for delays. However, additional delays were experienced for contextual reasons. For example, REFAM reported challenges with adapting the EGRA for children who are deaf or hard of hearing because of the lack of standardization in MSL, so staff focused primarily on efforts to

standardize MSL prior to adapting the EGRA. REFAM also requested modifications to its task order related to revising curriculum at Montfort College (due to development of an inclusive education course being undertaken in 2017-2018 by another development partner and being of high quality and relevance) and to developing a mobile platform to disseminate inclusive education information (due to limited access by the target audiences). In addition, REFAM's trainings ended up taking a hybrid, decentralized approach, leveraging both virtual platforms and in-person trainings to carry out activities. This required using a digital platform and repository and creating a training follow-up communication channel through WhatsApp groups. REFAM's ability to identify creative solutions to address external and structural barriers to achieve project deliverables is a strength of the project.

Short-Term Actionable Recommendations

Current and future implementing partners working in the field of inclusive education should consider the following short-term recommendations regarding the process .

- 1. Prioritize networking building and collaboration with relevant stakeholders.** A well-defined and planned project design alone does not ensure success or sustainability of development projects. As development projects in the education sector continue to become more inclusive of learners with disabilities or focus specifically on meeting the needs of learners with disabilities, networking and collaborating with relevant stakeholders will be essential. REFAM's commitment to building their network with non-USAID development partners, local OPDs and organizations working in the inclusive education sector, in addition to their close collaboration with government officials and other USAID projects, positively contributed to project implementation. REFAM was able to reduce duplication of efforts, extend the reach of project interventions, and maximize capacity building opportunities. Current and future implementing partners should prioritize networking and collaboration to continue building upon existing work to move the agenda for learners with disabilities forward.
- 2. Inclusive education and national context experience must be required for staff in similar projects.** Education project experience alone does not prepare any staff member for an inclusive education project. REFAM's strategic hires of staff who had both inclusive education and contextual knowledge provides an example of how a small but knowledgeable and committed staff can be influential at a national level. It is often difficult, however, to find applicants with such knowledge, skills, and dispositions. Complex projects such as REFAM that span multiple units within the Ministry of Education and civil society will also require adequate staffing to improve opportunities for sustained impact.
- 3. Ensure OPDs are paid for their knowledge, time, and expertise.** Although REFAM worked closely with OPDs, they were unable to hire OPDs as consulting organizations in

ways in which other consultants and partners were used. OPD participation in USAID programming is important, but it is more important that OPDs are adequately compensated for their time, expertise, and contributions in the same way that other organizations are. OPD members' labor should be considered a consultative endeavor and be compensated at appropriate rates. USAID projects risk losing cooperation with this important stakeholder group if their contributors are not compensated in ways similar to other project consultants.

Future Programming Recommendations

The following recommendations could provide opportunities to learn from and strengthen future inclusive education programs. These recommendations may be beneficial to donors, implementing partners, and OPDs working to advocate for inclusive education nationally and internationally.

- 1. Develop evaluation strategies to identify the importance of social networks.** Development programs have historically focused on deliverables. Such a focus is important and holds implementing partners accountable for providing the services they promised. However, there is qualitative and quantitative value in networks. USAID projects should be encouraged to integrate themselves into national conversations with other development partners, including with governmental and non-governmental organizations. For example, such engagement can be done through local education groups, education donor partner groups, and education sector reform conferences. The elevation of inclusive education messaging through the participation in high-level conversations and informal networking is a positive outcome that is difficult to measure in a deliverable framework but may be a strong facilitator of inclusive education commitments in countries.
- 2. Look to multiple stakeholders for sustainability but valorize adaptability and evolution.** Training of trainers (ToT) models have mixed results in studies (Dichaba & Mokhele, 2012; Karalis, 2016), and it may be difficult to know without a post-program evaluation how sustainable a project was. Further, pedagogies, policies, and people change over time. In this regard, USAID may consider focusing on the adaptability and evolution of inclusive education in a country as a measure of success rather than sustainability of a particular program that would make interventions static in time while the rest of the educational context evolved. For example, a USAID project may introduce materials or pedagogies. Successful sustainability of the project may be reflected if and when new materials and pedagogies are developed in the country that help facilitate the evolution of inclusive education. When viewed through the lens of progressive realization of educational rights for children with disabilities, the development of context-specific knowledge may be more useful over time than sustained project knowledge. Therefore, a goal for future programming may be to develop and measure stakeholders' capacity to take programming to new levels through local innovation, rather than to hope a previous

program's learning was sustained and replicated through ToTs. One way to initiate such sustainability is to have discussions at the beginning of any activity regarding sustainability.

- 3. Consider the local context when designing solicitations.** A progressive realization framework, like that described in the Convention on the Rights of Persons with Disabilities (CRPD), allows for *any* point of entry, but expects that policies and practice aim toward full inclusion. Different countries have different histories and contexts, and these differences require USAID solicitations to match expectations for deliverables with current needs, contextualized expectations, and logical next steps toward progressive realization of inclusivity. Future solicitations may consider, for example, greater investment in structures that support students with disabilities in the general education classroom (rather than focusing entirely on Resource Centre development).

Screening and Identification

This section provides initial answers with supporting findings to the evaluation question on screening and identification as well as short-term actionable and long-term strategic recommendations.

Evaluation Answer and Supporting Findings

EQ2: What methods worked best to identify learners with disabilities?

Answer: Quarterly and annual reports noted that REFAM was not involved in screening children directly. REFAM trained teachers in general screening concepts as well as introduced a checklist of general characteristics of children who may have low vision, be hard of hearing, or experience other learning difficulties.⁴ In total, REFAM adapted and introduced four screening tools. The first three were checklists already being used in Malawi's schools and approved by the Government of Malawi, which aimed to identify if further identification assessment is needed for children who may be blind or have low vision, deaf or hard of hearing, or have learning difficulties. REFAM also introduced a fourth tool that was developed by partner Sandi Thandiza. This instrument was locally developed in Malawi and focused primarily on developmental milestones. At trainings, all recipients received copies of all tools and were instructed to use them in schools to screen children, but no further tracking of how they were implemented was undertaken by REFAM. In addition to the main finding regarding screening training, several sub-findings are listed below.

- **REFAM trained teachers to conduct screening (no screening was conducted by REFAM).** In alignment with its broader training approach, REFAM trained teachers and head teachers from every district in Malawi. REFAM used a training-of-trainer (ToT) model

⁴ As noted previously, the term *learning difficulties* is one used by the Government of Malawi and broadly refers to any student who has difficulty achieving proficiency in the national curriculum and whose difficulty is not related to a sensory impairment. MCSIE uses the term in this document because it is relevant to the Malawi policy context.

for delivery, Data on how screening rolled out in Malawi post-training will be collected during the IDP trip to Malawi in June 2022.

- **Post-training interviews revealed that screening checklists were simple and easy to use; however, the Sandi Thandiza tool was more complex.** According to participant interviews, three checklists shared by REFAM were simple and easy to use, with plain language and forms that could be redistributed (data could be collected on a separate sheet of paper). However, the Sandi Thandiza tool was more complex. Post-training interviews suggested that the tool used simple images and language, but it was several pages long and required more time to use than checklists. The rationale for use of a developmental milestone tool was not clear in documentation in relation to the three disability areas prioritized by REFAM and the ministry. IDP was informed that the developmental milestone tool was previously used in a GIZ-funded education activity that included screening and identification tasks and the tool had some buy-in from the MoE. A 2019 interview with Sandi Thandiza found that this organization provides a range of therapies, including speech, occupational, and physical. Developmental milestones data appeared to align with that organization’s mission, but it is unclear how milestones fit a broader screening mission in schools. Participants received copies of all tools, but there is no available data on checklists in relation to how they align with other international tools. According to MCSIE inception interviews, Sandi Thandiza data is proprietary and confidential.
- **REFAM provided guidance on consent and confidentiality in their trainings but no specific materials for documenting consent.** REFAM’s training specifically focused on confidentiality and consent. A review of training materials suggested the project did not provide specific forms to document parent consent for screening; however, the training noted that consent was necessary and that keeping screening findings confidential was imperative. Further investigation is needed to understand how these practices align with Malawi policies. IDP will review national policies on consent for screening in advance of endline reporting.
- **There is no data on screening results.** REFAM oriented participants on how to use screening tools and provided 90 minutes for participants to practice their usage (trainees practiced with one another, not children). Teachers and head teachers were then expected to screen children in schools. District reports have captured how screening was rolled out by school personnel. At present IDP does not have data on how teachers implemented any screenings after the training, and if those screenings resulted in any referrals for further assessment. IDP will obtain this data through district reports for the endline evaluation. In interviews conducted for this evaluation, two district-level Ministry of Education (MoE) officials identified resource constraints for screening, ranging from a lack of SNE teachers to conduct screening to a lack of travel funds for existing SNE teachers

to travel from school to school. Additional screeners, such as general education teachers, may alleviate the screening burden on SNE teachers, but there was no data in quarterly or training reports or interview data to indicate this occurred.

- **Screening training was not balanced by gender.** REFAM reached 511 participants in their screening training. According to training observations and quarterly reports, this training successfully reached all of Malawi's districts. Although numbers were robust, male teachers formed the majority of participants. These demographics mirrored teacher data in Malawi. Among the 511 participants, 61% identified as male. The United Nations Educational, Scientific, and Cultural Organization (UNESCO) Institute of Statistics data indicates that 55% of Malawi's primary education teachers are male, but Malawi government data indicates that males outnumber females in both administrative and teaching ranks, sometimes by a 2:1 ratio (Ministry of Education, 2021). Data indicate that training participation, although unbalanced, reflects demographic trends in Malawi.

Short-Term Actionable Recommendations

REFAM and other implementing partners working in the field of inclusive education should consider the following short-term recommendations regarding screening and identification.

1. **Examine how teachers use (or do not use) screening materials.** Although teachers had a chance to use both the screening checklists and Sandi Thandiza tools in the workshop, it would be useful to know which tools are providing the best information in relation to children's assessment and referral. The government-approved checklists were hailed as easy to use, but are not validated and, therefore, may over- or under-identify children and may need further assessment. The Sandi Thandiza tool is more complex but has undergone validation testing through the organization, according to a KII with Sandi Thandiza staff. However, it is unknown how the tool responds to teacher usage for screening purposes. KIIs with REFAM staff revealed a desire to not duplicate efforts within Malawi related to screening and to use existing tools. A transparent evaluation process and clear guidance for participants for how to select tools, however, could increase stakeholder and international confidence in these results. This process could include facilitation of expert reviews of tools and studies of effectiveness for supporting inclusive education. Further, no matter what tool is selected, collecting usability data will help explain patterns in screening, referral, and assessment.
2. **Investigate and follow governmental procedures for confidentiality and consent.** REFAM trainings provided an overview of confidentiality and consent but did not provide any forms or formal tools to seek consent. A good practice for future programs would be to liaise further with MoE officials to align confidentiality and consent forms (or non-use of forms) with national policy.

- 3. Follow-up support is needed.** To ensure training leads to effective implementation of screening and referral, current and future programming activities would require a more substantial commitment to follow-up support. To ensure screening is occurring (and is occurring in a way that it was designed), follow-up information and visits are needed. MCSIE conducted some of these follow-up visits and will include them in the endline report but including internal post-workshop follow-up may support a better return on investment in time and resources for both implementing partners and teachers who participated in the project.

Future Programming Recommendations

The following long-term recommendations could provide opportunities to learn from and strengthen future inclusive education programs. These recommendations may be beneficial to donors, implementing partners, and OPDs working to advocate for inclusive education nationally and internationally.

- 1. Plan for follow-through on all trainings.** REFAM met the USAID requirement and conducted a two-day training on screening. During this training, a wide range of issues were covered for participants. REFAM's hope, outlined in training documents, was that participants would go immediately into schools and train others or directly implement what they were taught. In addition to providing training on screening, USAID projects should plan for ongoing support, consultation, and data collection on how screening tools are being used and what impact they are having on schools and communities. This is especially important to avoid mischaracterizing children through inaccurate screening or neglecting children who may need further assessment.

In an ideal scenario, screening is used to learn about students so instructional supports can be put into place. Future programming should track usage of screening tools and understand the impact on children's educational programming. Training on tools alone does not provide any information on the ways in which screening efforts supported inclusive education,

- 2. Evaluate instruments.** REFAM aligned its tool choices with those previously used in Malawi and those preferred by the MoE. Such alignment is strategic and does not disrupt activities that are already in place in host nations. However, USAID-funded programs can provide added value to screening efforts already in country through instrument validation studies. These studies will likely result in small adjustments to screening tools (as is common with screening tool evaluations). If backed by data, adjustments to existing tools may be welcomed by ministries of education. Studies of screening tools may focus on (but should not be limited to) screening-to-referral instances by school and district, disaggregated referral data to examine under- and over-identification, and the comprehensibility of instruments by students.

3. **Consider developing universal screening instruments.** An important lesson learned from the REFAM experience is that screening instruments can be short and easy to use for teachers. In this project, however, knowledge about screening was limited to training participants. Future programming should consider partnering with governments to provide and distribute easy-to-use screening instruments that can be used by all teachers in all schools. One way to ensure that all children have access to screening is through the development of universal screening instruments that can be used for all children in all schools.
4. **Monitor and embed actions to increase gender parity.** Males were over-represented in REFAM trainings but are over-represented in general for teaching positions in primary schools. Therefore, future projects can examine both overall structures of gender parity as well as prioritize such representation in USAID-funded activities.

Instructional Training

This section provides initial answers with supporting findings to the evaluation question on training as well as short-term actionable and long-term strategic recommendations.

Evaluation Answer and Supporting Findings

EQ3: What training model(s) worked best to provide teachers with the resources and support they need to best meet the needs of learners with disabilities?

Answer: Training of instructional models that were broadly inclusive, but not necessarily for students with specific disabilities, was effective. Interview data revealed participants, who were primarily district-level MoE officials, OPDs, and Resource Centre teachers, had positive attitudes about inclusion and made connections between instructional training content and inclusive education classroom strategies. REFAM maintained a broad inclusive approach to trainings by introducing topics such as coaching and UDL, as described in their training manuals. This broad inclusion focus allowed for training conversations to focus on *how* inclusive education can be implemented instead of *if* it should be implemented, according to observations.

- **Training topics reinforced inclusive education in line with a social model of disability.** The training topics provided by REFAM centered on the concept of inclusive education, as articulated in the Convention on the Rights of Persons with Disabilities. In this way, information shared with participants was designed to reinforce ways to improve inclusive education. Specific topics included UDL, IEPs, coaching, deaf education/MSL, and parent engagement. Each training topic described how the topic itself could be used to facilitate inclusion for children with disabilities, rather than highlight why it may be difficult to include these children. In general, these trainings followed a “social model of disability” approach that examines the environmental barriers to inclusion, rather than

focusing on what limitations may be present in people with disabilities.

- **District-level ministry officials, OPDs, and resource centre (RC) teachers were the main participants in training.** Although trainings had an explicit focus on inclusion, general education and itinerant teachers were the minority of trainees.⁵ According to interviews, REFAM focused its efforts on two groups to provide coaching and mentorship for general education teachers to support inclusion. The first were district-level MoE desk officers, and the second were RC teachers. RC and other specialist teachers who are Montfort graduates work in centers that are either attached to general education schools or are standalone units. REFAM conducted training for itinerant teachers in May 2022, who will also support coaching and mentoring for general education teachers, but data was not available for analysis in this report. The strategy was designed to provide a layer of support for inclusion in districts through building sustainable expertise, but it is unknown at this point whether this strategy succeeded or whether it would have been more effective to train general education teachers directly. There is no sustainability data on this topic beyond verbal commitments from participants in post-training interviews. The different types of teachers to receive inclusive education training will continue to be examined in the endline report.
- **OPDs were consulted and, at times, were trainers and participants in trainings.** OPDs were consulted during the development of workshop materials and were both participants and trainers (for deaf education). According to REFAM's 2021 annual report, OPDs also co-led trainings on EGRA adaptation. As noted in the process section above, REFAM actively engaged with OPDs, including for trainings, but they were not hired as consultants. The strongest connections were with the Malawi National Association of the Deaf (MANAD) and the Malawi Union of the Blind (MUB) in relation to EGRA adaptation workshops and teacher trainings. During KIIs, all OPD partners positively commented on their ability to act as facilitators during the teacher trainings, with one respondent citing it to be the most beneficial part of the training because it allowed them to connect directly with teachers and build relationships that would last.
- **Initial trainings were conducted virtually with mixed success, followed by an in-person ToT model.** Due to limitations caused by the COVID-19 pandemic, REFAM conducted its first training virtually. In post-training interviews, respondents reported high levels of engagement and learning. Such learning was also indicated by an average one-point gain of mean scores on pre-post quizzes distributed by REFAM. Training observations, however, revealed that, at times, over half of the participants were disengaged and not participating in chats and discussions or on camera. Follow-up focus

⁵ At the time of this report, REFAM had not conducted training for specifically for itinerant teachers. Itinerant teacher training occurred in May 2022 and data was not available for analysis for the interim report. Data on training for itinerant teachers will be analyzed for the endline report.

groups conducted by MCSIE research partner IKI found that the main reason for inconsistent attendance and participation was bandwidth problems across Malawi, which REFAM tried to address. Virtual trainings appear to have promise because they can provide real-time accommodations (e.g., captioning) and can efficiently reach large audiences (multiple districts could participate at once). At the same time, bandwidth and internet capacity is an important consideration for virtual trainings, and Malawian participants experienced difficulties in this area. To alleviate some of these difficulties, REFAM conducted subsequent trainings using an in-person ToT model, wherein REFAM trained facilitators who then trained participants. REFAM also established WhatsApp groups on specific topics for ongoing communication during and after workshops.

- **Males outnumbered females in every training.** Training reports demonstrated that male participation in trainings was higher than female. The UDL training, for example, was 60% male. In the training demographic data available to MCSIE, males were always more present than females in training sessions. In these trainings, females outnumbered males in teaching roles, but males outnumbered females approximately 2:1 as head teachers. Further, nearly all desk officers were male. Therefore, gender inequalities in participation can be likely explained by the participants' professional profiles and inequalities that may exist in education leadership roles.
- **There was no sustainability plan or support follow-up in place for participants who received training, and no impact data was found in reports about training leading to outcomes in schools.** As noted above, training delivery was significantly impacted by shutdowns during the COVID-19 pandemic. As a result, trainings occurred far later in the project cycle than originally intended and follow up was not possible after these trainings. REFAM successfully met duration goals established in its original solicitation (e.g., most trainings were required to be two days in length), but little is known about implementation beyond the pre-post training survey results (which measured knowledge gained) and participant-perception interviews. According to KIIs and FGDs with participants, trainings were well-received, but no data that was available to MCSIE evaluators exists on how RC teachers and desk officers carried UDL, IEP, screening, coaching, or parent engagement work forward. Such data may be available for endline reporting. At present, post-training interviews revealed that teachers often engage in continuous professional development discussions with other teachers, which could be a point of impact for REFAM, but without follow-up visits, surveys, or supplemental support, there is no way to know if any of the learning that occurred in trainings was utilized in schools.

Short-Term Actionable Recommendations

REFAM and other implementing partners working in the field of inclusive education should consider the following short-term recommendations regarding training.

- 1. Maintain a focus on inclusive education, not on limitations of students with disabilities.** REFAM's approach to training inclusive practices was novel within the scope of the MCSIE three-country evaluation and holds great promise for current and future programming. REFAM utilized a ToT model with global experts on topics such as UDL and took a strong position in trainings that focused on accessible environments, not children's deficits. Each training (UDL, IEPs, coaching, and parent engagement) provided explicit information on how the strategies taught could be used to support inclusion. Such a standpoint can be replicated in other similar projects elsewhere.
- 2. Consider hybrid training or virtual training with layers of support.** The initial virtual training provided by REFAM allowed for a way to efficiently reach stakeholders in all of Malawi's districts. Innovations such as WhatsApp groups were used, and can be used in future projects, to support participants who may have missed content due to connectivity problems. However, WhatsApp also has limitations if stakeholders do not have smartphones. Despite limitations, project findings indicate that virtual training demonstrates such training can be done in low- resource areas but requires additional supports.⁶ One such support could be a "flipped classroom"⁷ model in which some of the activities are presented online—either live or recorded—and follow-up activities occur in small groups or are facilitated in a face-to-face fashion.
- 3. Follow up with participants after training sessions to ensure implementation.** REFAM provided materials, including templates, participant guides, and toolkits, to all participants in trainings. Such resources could be useful for desk officers and RC teachers to implement strategies they learned in training. However, the everyday work of these stakeholders is often busy and fraught with competing priorities. To ensure implementation, follow-up, on-site coaching, and implementation data collection are recommended. This project provided required training on coaching as an instructional practice for inclusive education, but the project itself did not have any coaching or mentoring beyond the trainings and the materials provided in them. Future projects would need to move beyond simply telling participants what coaching is, and support coaching in schools in sustained ways, with feedback and support for coaches.

Future Programming Recommendations

The following long-term recommendations could provide opportunities to learn from and strengthen future inclusive education programs. These recommendations may be beneficial to donors, implementing partners, and OPDs working to advocate for inclusive education nationally

⁶ An example of hybrid inclusive education training in Malawi is the GIZ-funded BLINC project. BLINC was never mentioned by stakeholder interviews for the interim report but was mentioned in interviews for the forthcoming Areas of Intervention Mapping report. It may provide a case example for replicating hybrid educational training. See <https://www.giz.de/en/worldwide/20110.html>

⁷ See <https://bokcenter.harvard.edu/flipped-classrooms> for an explanation of flipped classrooms.

and internationally.

- 1. Develop an “inclusion first” agenda.** Following REFAM’s example, USAID solicitations and guidance can follow an “inclusion first” agenda, meaning that there should be requirements that all trainings for teachers, administrators, and district officials focus on strategies and environmental alterations that make inclusion possible. The strength of REFAM’s training agenda was that it did not engage in questions about if inclusion was possible, but instead provided strategies with an assumption that inclusion was going to occur, and that training content would support such actions. REFAM focused on UDL, IEPs, coaching, and parent engagement, but additional topics could include differentiated instruction, destigmatization training, individualized learning, heterogenous lesson planning, and a variety of other approaches.
- 2. Require post-training follow-up.** REFAM training was well-received. Due to delays because of the COVID-19 pandemic and a lack of sustainable follow-up planning by the project in original work plans, there is no data from schools to inform whether any of the information presented was ever implemented. Training is often a default activity in terms of reference (TORs) and solicitations, and post-training satisfaction and learning data are typically all that is expected in terms of monitoring and evaluating projects. Training, however, should be considered the first step of a long journey toward capacity-building and inclusion. Future solicitations and TORs should require ongoing follow-up (which could potentially be conducted virtually) to ensure the time and resources devoted to training have impact. USAID recommends follow-up interviews and other support activities after all training sessions in order to understand the impact of the training, troubleshoot problems that arise with implementation, and support new implementers on the knowledge, skills, and abilities they are developing (USAID, 2012).

Instruction

This section provides initial answers with supporting findings to the evaluation question on instructional approaches as well as short-term actionable and long-term strategic recommendations.

Evaluation Answer and Supporting Findings

EQ4: What instructional models worked best to improve classroom instruction and reading outcomes among learners with disabilities?

Answer: There was little available data at the time of this report to provide preliminary findings in relation to this EQ, because REFAM’s overall timeline was disrupted by the COVID-19 pandemic and MCSIE classroom-level data analysis is ongoing. Because there was no follow-up data in REFAM’s quarterly or annual reports, the timeframe for when information will trickle into classrooms and how it will be used is unclear. MCSIE-collected data and analysis of REFAM’s

EGRA will be available in the endline report to questions related to what models work best to support learners with disabilities. With these limitations, the MCSIE team focused its attention on REFAM's efforts to prepare for learning assessments via the EGRA. REFAM adapted the EGRA to be accessible for children who are blind or have low vision, who are deaf or hard of hearing, and who have learning difficulties. Interviews with REFAM staff, however, revealed that the adaptation process was very resource-intensive and that it is unclear whether using the tools will be sustained in schools.

- **REFAM developed a rigorous and inclusive process for the development of adapted EGRAs for children who are blind or have low vision.** REFAM's adaptation for children who are blind or have low vision started with a review of other instruments that were recently adapted for these populations and listening sessions with relevant stakeholders for feedback. The version of the EGRA selected for adaptation was the assessment that was used by the YESA project in Malawi, which was aligned to Malawi's grade-level standards. REFAM also pre-piloted adapted items in schools. The sample size for the pre-pilot was relatively small (eight students for the blind/low vision [BLV] assessment). The final baseline assessment included 238 learners who are blind or have low vision.
- **Standardized assessment for children with learning difficulties reduced subtests; thus, they do not provide comparative data to other populations.** The task order for REFAM required developing an EGRA for students with learning disabilities. REFAM developed an assessment for children with learning difficulties, the term used by the Government of Malawi. Final baseline data included 719 learners with learning difficulties and could be useful for pre-post intervention data to measure reading progress, but do not provide a picture of how these students are performing according to national standards.

Although samples were numerically robust, there are inclusion issues related to the design of the assessment itself. The EGRA is designed to provide standardized information on the ways students are meeting grade-level standards. If standards are changed or subtasks reduced, it is impossible to compare students labeled as having learning difficulties to those without labels. The adapted EGRA could have uses for formative purposes but is not appropriate for a national sampling of achievement because it tests different constructs than the standard EGRA. Adaptations to the EGRA were mainly designed to reduce barriers for students with learning disabilities (according to REFAM reports).

- **The exact population appropriate for the assessment for children identified as having with learning difficulties was unclear from the outset.** The REFAM solicitation referred to the Malawian term *learning difficulties* as “[including] most learning disabilities including autism and intellectual disabilities” (USAID/Malawi RFTOP, 2018) and provided a rationale for developing an adapted assessment for this population. The task order

contract, however, has a deliverable of producing an “EGRA for children with learning disabilities.” There was never a clear rationale or eligibility rationale from the start of this project, which may have led to complications for the purpose of this approach. REFAM made inclusion decisions based on IEPs and teacher nomination, and subtasks decisions were based on general accessibility guidelines related to extending time for response and clear instructions for test takers (according to the REFAM Adaptation Guide).

- **EGRA assessments revealed information both about literacy and other educational factors.** The BLV EGRA assessment and corresponding survey for students and teachers revealed that the majority of students who took the BLV assessment could not use braille correctly and often faced bullying in schools. According to REFAM EGRA reports, the BLV assessment also revealed that students are reading at levels below grade level and that achievement is predicted by socioeconomic status (i.e., higher status predicts higher achievement, according to analysis reported in the REFAM Briefers on EGRA results for students with BLV and LD). Comparable data for children without disabilities was not collected for this project.
- **Additional inputs beyond test development were needed for learners who are deaf or hard of hearing.** REFAM encountered delays in designing and administering the deaf/hard of hearing (DHH) EGRA because additional preparation time was needed to understand the subtleties of MSL. After visiting schools for the deaf in Malawi, REFAM discovered there were regional variations to signs being used in schools, so creating a standardized assessment was impossible without further investigation. Given the regional variations, REFAM developed a consensus approach to signs through consulting with MANAD, six teachers (including two teachers who are deaf) from schools for the deaf or RCs serving children who are deaf or hard of hearing, a representative from the Federation of Disability Organizations in Malawi (FEDOMA), and a Malawian Sign Language interpreter, as well as government officials. REFAM then reviewed assessment literature for students who are deaf or hard of hearing from Morocco, Kenya, the Netherlands, the United States, and the United Kingdom. Finally, REFAM developed subtests in standard MSL and delivered a two-week training, with the final day set aside to try out items in schools.
- **Adapted EGRAs for learners who are deaf or hard of hearing require highly skilled assessors and more instructional time in Malawian Sign Language.** REFAM reports indicated that even a two-week training and adaption workshop was not sufficient to eliminate assessor error on the DHH assessment. According to REFAM’s EGRA Workshop Report, common errors in early administration included coaching of learners during intended independent tasks, not turning stimuli to face learners, and repeating directions in the middle of tasks. The report suggested that intensive training of enumerators is needed to avoid validity concerns. According to the FY20 Q2 Report, REFAM provided assessors with more robust training on field data collection protocols

and videos to be used during baseline DHH EGRA administration, that included directions and subtasks in MSL to reduce assessor error. Additionally, REFAM utilized assessor teams which included person who are deaf, and MSL interpreters, ensuring assessor teams were highly skilled; REFAM sites this as positively contributing to the delivery of the adapted DHH EGRA during baseline. REFAM noted that the trainings overall presented opportunities for the capacity development of the assessors.

Despite these opportunities, REFAM suggested that sustainability of this particular EGRA may be challenging in Malawi. Three reasons named in the 2020 Quarterly Reports were: 1) Lack of sign language proficiency among teachers or other enumerators who would administer the EGRA; 2) lack of access to higher education for MSL experts (primarily deaf adults in Malawi); and technological challenges associated with the increased bandwidth needed for videos in this particular assessment.

- **Results from the DHH assessment baseline reflected overall trends from EGRA assessments.** Children who took the DHH adapted EGRA assessment scored below grade level in the reading competencies tested in the EGRA. Surveys also found that RCs for children who are deaf or hard of hearing had poor resourcing compared to schools for the deaf and general education schools. Finally, surveys that accompanied the EGRA in RCs revealed that children who are deaf prefer to communicate in MSL, but their teachers prefer to teach using total communication. According to a REFAM briefer that reported on survey data associated with the adapted EGRA, 70% of students who are Deaf want their teachers to communicate in MSL, but only 14% of teachers in RCs use MSL predominately in the classroom (most use Total Communication).

Short-Term Actionable Recommendations

REFAM and other implementing partners working in the field of inclusive education should consider the following short-term recommendations regarding instructional approaches.

1. **Allow ample time for the process of EGRA adaptation.** To adapt an assessment that is valid and contextually meaningful, ample processes need to be in place. Implementing partners must have the time and resources to research how adaptation is conducted in other contexts, must evaluate EGRA items against national standards, must identify when constructs or items have requirements that introduce disability bias, must have at least one week of training (or two for DHH assessments)⁸, and must analyze statistical properties of the assessment. The EGRA adaptation process is a high-resource endeavor. TORs and solicitations should reflect this, and implementers should plan accordingly.

⁸ In countries such as Malawi where sign language is still being standardized, additional time may be required for training DHH assessors to ensure the nuances and regional variations of sign language can be considered.

- 2. Conduct a sign language and braille assessment in country before developing an adapted EGRA.** REFAM faced a situation in which regional variations of MSL threatened the validity and standardization of the assessment. Because no specific rules existed for this scenario, an appropriate response was to build consensus among experts, including OPDs from the deaf community. Consensus-building to develop rules for engagement allowed for assessments to reflect the national context while maintaining broadly standardized procedures. EGRA survey data also revealed that many students who took the braille assessment did not know how to use braille. Although this information is useful from a policy perspective, assessing students in formats or languages for which they are unfamiliar will invalidate results.
- 3. Develop rules and policies for assessment participation.** Because assessments were constructed for students with particular disabilities or perceived disabilities (i.e., the assessment for children with learning difficulties), there is a danger of over- or under-assigning students to these assessments unless there are policies and procedures in place to identify who should, and should not, participate. For example, an assessment designed for students with learning difficulties could produce more meaningful data for struggling readers than the standard EGRA, but also inadvertently communicate that students with learning difficulties should have different (or reduced) standard reading expectations. The development of any new version of an assessment should be accompanied by guidelines for participation that do not rely on disability categorizations but on student needs to access the assessment.

Future Programming Recommendations

The following long-term recommendations could provide opportunities to learn from and strengthen future inclusive education programs. These recommendations may be beneficial to donors, implementing partners, and OPDs working to advocate for inclusive education nationally and internationally.

- 1. Rather than creating alternate EGRAs, consider accessible formats, Universal Design for Assessment (UDA) principles, and accommodations.** Universally designed assessments are designed to allow equitable participation of the widest possible range of learners, including learners with disabilities. Based on UDL principles, universally designed assessments allow for flexibility in how assessments engage and motivate learners, how information is presented to learners, and how learners respond or express their knowledge during assessments. In order to produce comparative data on reading achievement between students with and without disabilities, standards and activities must remain the same. In this case, students should be assessed at grade level, but the presentation and response to items can be adapted. For example, a print item can be presented in braille, a spoken response can be provided in sign language, etc. Adapting the level of difficulty on assessments does not allow for comparability; therefore, investing resources in an assessment for children with learning difficulties

(LD) may not be useful for a standardized comparison but could be useful for student-level growth data.

In addition, some of the adaptations that REFAM used could inform development of universally designed EGRAs. For example, REFAM reduced timing barriers and complexity of instructions for students with learning difficulties. These strategies could improve assessment practice for the EGRA overall. In all cases, standardized assessments should be complemented by formative assessments to provide instructional decision-making for teachers. Therefore, design decisions for a standardized assessment should be focused on accessible formats, UDA, and accommodations.

- 2. Consider return on investment for adapting and utilizing EGRAs for small projects.** When EGRAs are used to assess student achievement, they must be accessible to all children, including children with disabilities. At the same time, the process to adapt assessments can require significant resources. If future inclusive education projects are small in budget and short in duration, resources may be better used in capacity-development activities for teachers and communities focused on inclusive education and perhaps in the development of formative assessments. In turn, the development of adapted EGRAs may be better undertaken in large, well-funded projects that will develop or use EGRAs in a particular country. The design of accessible assessments should not be a stand-alone, post-hoc, or retrofitting activity but part of a broader development of EGRAs in countries.
- 3. Focus on EGRA format-based versions, not population-based versions, in solicitations and task orders.** The task order for this contract referred to three population-based versions of the EGRA that were to be developed: (1) an EGRA for learners who read braille, (2) an EGRA for the deaf, and (3) an EGRA for children with learning disabilities.⁹ These were later shorthanded into BLV, DHH, and LD assessments. Terminology, instead, should focus on the formatted versions of the EGRA being developed, not the population. For example, REFAM developed a braille, sign language, and alternate standards version of the EGRA. Inclusive, accurate terminology for assessment versions may help stakeholders to more validly assign students based on student accessibility needs by version rather than disability categories, especially when disability labels differ across contexts.

Unintended Consequences

This section provides initial answers with supporting findings to the evaluation question on unintended consequences as well as short-term actionable and long-term strategic

⁹ *Learning disabilities* is a term used in the U.S. policy context. *Learning difficulties* is a term used in the Malawian policy context.

recommendations.

Evaluation Answer and Supporting Findings

EQ5: Were there any unintended consequences of the activity? What were they?

Answer: As the project is ongoing, assessing the unintended consequences—both positive and negative—is difficult at this time. However, based on the initial findings, potential unintended consequences may exist and will be explored in more detail at later stages of the MCSIE evaluation. The potential unintended consequences include:

- 1. As a result of COVID-19, a new model for online engagement was piloted to enable REFAM to communicate with government officials and training participants.** Although REFAM never originally planned for online engagement for their trainings, the COVID-19 pandemic necessitated that training goals and delivery platforms be adjusted. Utilizing WhatsApp groups, REFAM was able to quickly communicate with MoE officials to adapt training interventions as necessary to account for restrictions in place due to COVID-19. Additionally, an online model allowed REFAM to reach an increased number of stakeholders across a wider geographic area. REFAM documented difficulties encountered with this process, but REFAM's approach of providing materials in advance, providing internet access to those who did not have it (in the case of the initial virtual trainings), and having a WhatsApp support group were models that could be explored and further developed for future projects. The use of WhatsApp and creation of messaging groups has provided an opportunity for ongoing follow up and support, that was originally not planned for, which may contribute to sustainability. REFAM never intended to innovate in this way, but their innovations are valuable lessons learned for ways to reach across geographical boundaries for training sessions.
- 2. A focus on district-level stakeholders will make measuring impact at the classroom level difficult.** REFAM's policy-level and network-focused approach allowed for an evaluation of the USAID and Government of Malawi commitments to inclusive education. Through the facilitation of working teams and national-level conversations, REFAM was able to successfully advocate for and support the development of an inclusive education agenda at the national level. REFAM's training focus on district governmental officials and RC teachers was also intended to create a ripple effect in schools. These strategies were strongpoints of the project but may also make it impossible to understand impact in general education schools, including how the lives children with disabilities may have been impacted because of the high-level focus. RC teachers' impact was unknown because of a lack of follow-up in schools after various training activities. The REFAM model does not fit the mold of a typical USAID activity and is an example of how developing new indicators of success may be helpful for projects that focus on networking and advocacy rather than relying on indicators with a heavy focus on student outcomes. Social network analyses

(SNAs) may be helpful for such evaluations.

- 3. While the high-level networking focus of the project was valuable, the project may have missed opportunities to learn from innovations occurring at the school-level: in classrooms and from teacher perspectives.** REFAM prioritized connections between powerful actors in Malawi, namely government, international development organizations, OPDs, and large rehabilitation-focused organizations (e.g., Sandi Thandiza). By doing so, however, the project may have missed out on gathering perspectives, innovations, and inputs from implementers in schools (teachers at RCs and teachers in general education schools).

Interviews with OPDs and district-level inclusive education stakeholders also indicated that general education teachers were not a core stakeholder group in project activities but are critically important for inclusive education. One RC teacher said, “If all teachers have knowledge of inclusive education, it means that they will be able to support each learner according to their individual difference.”

- 4. EGRA development activities exposed larger systemic issues that needed to be explored within the deaf education system in Malawi, such as a lack of a standardized sign language.** As noted above, REFAM expended high levels of time and resources to meet the task order requirement of developing an adapted EGRA for children who are deaf or hard of hearing. Assessment data revealed that children who are deaf lag in grade-level reading competencies (or at least those constructs found in the EGRA). The EGRA cannot identify why this is happening, but survey data provided insights.
- 5. Through assessment development, REFAM discovered that there were students who had little access to MSL, that those who received access to MSL encountered variations of the language, and that teachers had few resources to develop their MSL capacity (and sometimes did not know any MSL).** An unintended consequence of the EGRA development is that REFAM, in cooperation with MANAD, was able to develop MSL materials that could be used for both instruction and assessment in Malawi. This was not an intended activity area but one that was developed in response to information learned during the required adapted EGRA development process and may benefit children in ways not considered in the original task order.

Next Steps

Each of the unintended consequences has emerged from the data collected to date and will be explored more in future reports. To address certain areas of inquiry, the MCSIE team will continue to collect project-level data and also focus efforts on the three areas of inquiry below to support further analysis of the unintended consequences.

Process

- What were REFAM's efforts to track how skills learned in training were implemented in schools?
- What knowledge did trainees retain from training efforts after the conclusion of the activities?
- In what ways did REFAM's position toward a social model of disability and barrier reduction influence the dispositions of policymakers and school leaders (if at all)?
- Would USAID investment in a high-level, policy- and networking-focused approach like REFAM's be politically feasible in other settings? If so, what type of organization would implement the work?

School-Level Impact

- What efforts from this project can be seen in changes related to inclusive education in schools?
- How have children with disabilities benefitted from policy dialogue and training?
- How did information from the training of district-level ministerial desk officers and RCs make its way into classrooms?
- Is anything different now than it was three years ago? If yes, for whom, and how?

Deaf Education

- How has the development of MSL training videos and dictionaries influenced deaf education?
- What gaps still exist in relation to deaf education, and specifically sign language instruction, that could be addressed by implementing partners? What gaps are outside of the scope of the project?
- Would USAID investment in deaf education focused on early grade reading specifically align with its broader focus on gender equity and social inclusion? What type of engagement would best align with USAID's mission?

Recommendations

Exhibit 1 below provides a summary of both the short-term actionable recommendations as well as the long-term strategic recommendations for the evaluation questions related to process, screening and identification, training, and instructional approaches. As unintended consequences are still being explored, recommendations are not provided at this stage but will be included within the final report.

Exhibit 1. Summary of Recommendations

Evaluation Theme	Short-term Actionable Recommendations	Future Programming Recommendations
Process	<ol style="list-style-type: none"> 1. Prioritize networking building and collaboration with relevant stakeholders. 2. Inclusive education and national context experience must be required for staff in similar projects. 3. Ensure OPDs are paid for their knowledge, time, and expertise. 	<ol style="list-style-type: none"> 1. Develop evaluation strategies to identify the importance of social networks. 2. Look to multiple stakeholders for sustainability but valorize adaptability and evolution. 3. Consider the local context when designing solicitations.
Screening and Identification	<ol style="list-style-type: none"> 1. Examine how teachers use (or don't use) screening materials. 2. Investigate and follow governmental procedures for confidentiality and consent. 3. Follow-up support is needed. 	<ol style="list-style-type: none"> 1. Plan for follow-through on all trainings. 2. Evaluate instruments. 3. Consider developing universal screening instruments. 4. Monitor and embed actions to increase gender parity.
Training	<ol style="list-style-type: none"> 1. Maintain a focus on inclusive education, not limitations of students with disabilities. 2. Consider hybrid training or virtual training with layers of support. 3. Follow up with participants after training sessions to ensure implementation. 	<ol style="list-style-type: none"> 1. Develop an "inclusion first" training agenda. 2. Require post-training follow-up.
Instructional Approaches	<ol style="list-style-type: none"> 1. Allow ample time for the process of EGRA adaptation. 2. Conduct a sign language and braille assessment in country before developing an adapted EGRA. 3. Develop rules and policies for assessment participation. 	<ol style="list-style-type: none"> 1. Rather than creating alternate EGRAs, consider accessible formats, UDA principles, and accommodations. 2. Consider return on investment for adapting and utilizing EGRAs for small projects. 3. Focus on EGRA format-based versions, not population-based versions, in solicitations and task orders.

Conclusion and Next Steps

This interim evaluation attempted to answer five evaluation questions broadly focused on process, screening and identification, training, instruction/EGRA, and consequences. The sections above detailed the interim evaluation findings related to each of the evaluation questions. Inclusive education is a new area for many donors and implementing partners, and findings from this report help build the evidence base by highlighting lessons learned and programmatic aspects that should be replicated in the future.

Many REFAM activities were significantly curtailed by the COVID-19 pandemic, work stoppages, and school closures which impacted the data available for this report. Additional data collection methods will be employed in the next steps of this evaluation and will include:

- Teacher and Head Teacher Interviews
- Classroom observation data¹⁰
- Teacher Survey data
- Endline key informant interviews with implementing partners, OPD partners, and government
- Areas of Intervention Mapping

Additionally, USAID requested that REFAM be provided an opportunity to review interim findings before the project closes in July 2022. As a result, some of the data collected in late 2021 and early 2022 will be saved for an endline report. This includes the above- mentioned classroom observations of 60 RCs. During this time, teachers and head teachers were interviewed at the 60 schools where classroom observations took place, and 12 FGDs were conducted with parents of children who attend RCs in Malawi.

Endline reporting will include observation data from an intake exercise REFAM conducted to ascertain which types of disabilities RCs in Malawi currently support as well as endline EGRA data collection.

The MCSIE June 2022 data collection will particularly focus on the overall impact of REFAM and the sustainability plans for the project. At the time this report is being written, materials from the project are being handed over to MoE, and final project closure activities are underway. The endline report will provide additional information that will discuss findings from the project's final days and the perceived present and future impact on inclusive education in Malawi.

¹⁰ Teacher and head teacher interviews and classroom observation data was collected in late 2021 and Spring of 2022. Data has not been fully analyzed at the time of this report and the interim report timeline was accelerated so that REFAM could have sufficient time to review the interim findings prior to the activity ending in July 2022. This data will be analyzed and triangulated to teacher survey data collected and analyzed in Winter of 2022/2023 and be included in endline reporting.

Glossary

access The ability of all students to have equal opportunity in education, regardless of their disability.

accessibility Ensuring that persons with disabilities have access, on an equal basis with others, to the physical environment, transportation, information and communications, and other facilities and services open or provided to the public, such as the education system. These measures shall include the identification and elimination of obstacles and barriers to accessibility. Additionally, accessibility is defined as the notion that all students should have an unobstructed opportunity to demonstrate their understanding on constructs being measured.

accommodations Necessary and appropriate modification and adaptations where needed in a particular case to ensure people with disabilities access education on an equal basis with others. Accommodation means that some aspect of a system—for example a document or facility—has been adapted or modified to meet the needs of a specific individual or group. Accommodations are patches or fixes applied retroactively to overcome barriers in the environment or system. Accommodation is not the same as accessibility. Whereas accessible systems are designed to be usable by as many people as possible, regardless of disability or assistive technology, accommodations are reactive and may not effectively address everyone's access requirements. While it is important to understand that there will always be a need for accommodation and remediation in inaccessible systems, concepts of accessibility and inclusive design reflect the social model of disability, in which systemic barriers are minimized for the good of all.

availability The available resources and materials in alternative formats that may be beneficial for students with disabilities, such as braille, large print, and digital textbooks.

awareness raising The process of informing and educating stakeholders on the areas related to the project scope including, but not limited to, general disability awareness; screening and identification; support and services for persons with disabilities; inclusive education; and early grade literacy with the intent to influence knowledge, attitudes, and practices.

capacity-building Any processes or activities implemented by the project to aid stakeholders in obtaining or improving their skills, knowledge, and resources related to supporting inclusive education principles and practices.

community of practice A group of stakeholders who engage in ongoing interactions related to a shared interest.

context The program's contextual factors (e.g., policies; institutional, linguistic, and socio-economic factors; stakeholder technical and operational capacity) that affect users or deliverers

of the program. Context is traditionally understood as factors that are external to and operate outside of a program's control but may influence the implementation of the program. Considering the impact of context also increases understanding of how unforeseen and unplanned contingencies can affect program mechanisms, resources, and expected outcomes.

comprehensive evaluation Often referred to as “assessment,” a comprehensive evaluation is a process conducted by a multidisciplinary team using multiple tools that can provide information about a student's academic strengths, challenges, and what accommodations might mitigate those challenges.

contextual suitability The extent to which contextual factors are considered in program design and planning, especially those related to local system and stakeholder technical and operational capacity.

data quality assessment A distinct phase within the data quality life cycle that is used to verify the source, quantity, and impact of any data items that breach pre-defined data quality rules. There are five aspects of data quality—validity, reliability, timeliness, precision, and integrity; IDP has added fairness and psychological testing to ensure issues related to inclusive practices are adequately represented in a data quality review.

deaf education A system that allows students who are deaf to access information and communicate freely with peers, teachers, and administrators in local sign language while learning the written language of the country.

disability IDP recognizes disability as a social construct that can best be defined through the social model of disability. This model aligns with the CRPD definition of disability, stating “persons with disabilities include those who have long-term physical, mental, intellectual or sensory impairments, which in interaction with various barriers, may hinder their full and effective participation in society on an equal basis with others” (United Nations, 2006, Art. 2). The two key elements of this definition are impairments and the identification of barriers that may hinder full participation.

The social model of disability lacks specificity about the types of psycho-social, intellectual, or sensory impairments that are most often present with children in schools. To better identify these, IDP draws upon definitions in the United States Individuals with Disabilities Education Act (IDEA). This definition states “a child with a disability means a child evaluated in accordance with §§300.304 through 300.311 as having an intellectual disability, a hearing impairment (including deafness), a speech or language impairment, a visual impairment (including blindness), a serious emotional disturbance (referred to in this part as “emotional disturbance”), an orthopedic impairment, autism, traumatic brain injury, another health impairment, a specific learning disability, deaf-blindness, or multiple disabilities, and who, by reason thereof, needs special education and related service.” Together, these definitions recognize the social model of disability as well as the full spectrum of individuals who may benefit from special education services.

early grade reading assessment (EGRA) A diagnostic instrument designed to quickly assess

foundational skills for literacy acquisition of students in the early grades of primary school. An adapted EGRA, in this report, refers to the modifications of diagnostic instruments to accommodate students with vision and hearing disabilities.

effectiveness The ability of the implementing partner to achieve stated goals or objectives, judged in terms of both output and initial impact. Put simply, effectiveness answers this question: Is the program achieving the goals and objectives it had intended to accomplish?

identification Applying a phased process using both screening and evaluation techniques to determine if a student would benefit from additional learning support or special education services. This process should be conducted by trained individuals within the classroom setting.

inclusive education A term that describes a learning environment wherein students with disabilities are educated in age-appropriate, local school classrooms with their peers without disabilities to the fullest extent possible. Inclusive education is not only about “placing” children with disabilities in general education schools; it also concerns education systems themselves. It requires an adaptation of the general education system to ensure education can be accessed by everyone. Specifically, inclusive education means general education systems respond to and support the needs of all children, rather than the creation of separate systems to serve some children. The road towards this kind of change is long, and thus, the suggested approach involves defining the goal of inclusion and finding a strategic pathway that leads toward meeting this goal. Processes and aims may shift as student demographics and teacher capabilities vary, but what is most important is a shared commitment toward the goal.

Note: The definition of inclusive education for learners who are deaf or hard of hearing differs from that of other learners. The World Federation of the Deaf (WFD) specifies that for education to be inclusive for learners who are deaf or hard of hearing, education must also take into consideration the cultural and linguistic identity of the deaf community. Students who are deaf or hard of hearing need to be educated in a sign language-rich environment where they can communicate with educators and peers in a shared language, such as Malawian Sign Language.

inclusive education system The policies, programs, and resources dedicated to ensuring children with disabilities are fully included in the general education system as defined by the CRPD. While Article 24 of the CRPD proclaims the right to inclusive education for persons with disabilities as a human rights standard, states may choose how they will achieve this goal, considering local variations and institutional arrangements. The United Nations handbook on executing the CRPD states, “Each State must take measures to realize economic, social, and cultural rights progressively, using the greatest amount of available resources to do so. This obligation, commonly referred to as progressive realization, acknowledges that it often takes time to realize many of these rights fully, for example, when social-security or health-care systems must be created or improved” (United Nations, 2007, p. 19).

in-service training Training or professional development activities that teachers participate in to enhance their knowledge, skills, and competence in their current teaching profession.

integrated education Placing children with disabilities in existing general education without changing the system of education delivery. Integration involves placing a student with a disability in a regular class but without any individualized supports and with a teacher who is unwilling or unable to meet the learning, social, or disability support needs of the child. Many people mistakenly call this “inclusion” but unless the student receives the support needed, it is not.

least dangerous assumption An inclusive approach to educational policy and pedagogy. It holds that in the absence of conclusive data, educational decisions should be based on assumptions that, if incorrect, will have the least dangerous effect on the student.

monitoring, evaluation, learning (MEL) plan Describes how the project intends to monitor implementation and measure progress.

organizations of persons with disabilities (OPDs) Organizations in which persons with disabilities constitute a majority (over 51%) of the staff, board, and volunteers and where persons with disabilities are represented throughout the leadership of the organization.

partnership Formal or informal communities of practice, professional relationships, and working groups which project staff joined or established related to the project scope of work to aid in the implementation of project activities and capacity-building.

performance indicator tracking table (PITT) Lists indicators at the sub-IR level with clear dates and targets for baseline data collection as well as data targets for subsequent years and how the data will be disaggregated.

pre-service training Training or professional development activities student-teachers participate in to enhance their knowledge, skills, and competence in the teaching profession prior to undertaking any teaching position.

presume competence Belief that students with disabilities have the capacity to think, learn, and understand and that they should be exposed to all core subjects. This approach takes the assumption that students are inherently capable and need the right supports and systems to help them succeed.

segregated education When students with disabilities are educated in separate environments (classes or schools) designed for students with disabilities. Segregation is clearest when students with disabilities attend a school only for students with disabilities, but it also happens when students are educated in separate classes in a regular school. These are sometimes called resource (or integrated) classes.

strengths-based approach Focuses on what students do well by helping students discover their strengths and intentionally creating opportunities for students to use those strengths in their learning and assessments. This is in contrast to a deficit approach which seeks to mitigate students’ learning challenges.

struggling learner A student who struggles to make academic progress due to a variety of factors which may include disability, hunger, absenteeism, poverty, trauma, and more. The term can be used to describe students who are unable to make academic progress using the current instructional approach. Ongoing vision and hearing screening, classroom-based assessment, and responsive teaching pedagogies (such as response to intervention or UDL) are measures used to support struggling learners.

sustainability The ability to maintain program activities and benefits over time. The continuance of activities is planned beyond the termination of the initial support (project funding) used to deliver the program. Specifically, this means having the human, financial, technological, and organizational resources to provide services to meet needs and attain results toward a stated goal on an ongoing basis and requiring the organizational and programmatic infrastructure to carry out core functions independent of individuals or one-time opportunities. Donor related: The act of decreasing dependence on one source of funding and shifting financial support for program implementation to an ongoing funding stream.

teaching and learning materials (TLMs) Refers to any collection of materials and resources that a teacher may use in teaching and learning situations to help achieve desired learning objectives.

unintended consequences Consequences, both positive and negative, that were not foreseen or accounted for and may impact project objectives, implementation, and outcomes.

Universal Design for Learning (UDL) An educational framework that guides the development of flexible learning environments and learning spaces that can accommodate individual learning differences. UDL is characterized by three core tenets: multiple means of engagement, multiple means of representation, and multiple means of action and expression.

vision and hearing screenings A screening that assesses if a person has challenges with their vision or hearing. In a school-based setting, it is often used to identify students who would benefit from a more comprehensive vision or hearing exam given by a medical professional.

Annex A. REFAM Program Description and Interim Report Methodology

Program Description

REFAM was initially a two and a half-year activity with an anticipated funding ceiling of \$3 million. Project dates were initially February 2019–July 2021; however, due to the COVID-19 pandemic, REFAM was approved for a no-cost extension through August 2022. Implementation of project activities will cease in June 2022.

The REFAM project objective is to provide the MoE with a scalable intervention model that will help learners with disabilities acquire reading skills through screening, identification, placement, instruction, and assessment. REFAM tasks build upon the extensive work done by USAID and other stakeholders in the disability and inclusive education sectors. REFAM activities target all 34 educational districts, including the 146 RCs across the country, and are supported by the MoE's Department of Special Needs Education, Montfort Special Needs Education College, and FEDOMA. FEDOMA is an umbrella body of all OPDs in Malawi, including MANAD, MUB, and PODCAM, all of whom have engaged with REFAM on project implementation.

REFAM has three objectives under the original scope of work:

1. Strengthen the MoE's capacity to implement appropriate policies and ultimately ensure the provision of effective instruction to learners with disabilities for improved reading in English and Chichewa.
2. Improve reading instruction of learners with disabilities in Malawian schools.
3. Improve family and community support toward the learning of children with disabilities.

The activity's theory of change that undergirds the REFAM design assumes that building the capacity of the MoE (Objective 1), improving instruction and assessments (Objective 2), and improving family and community support (Objective 3) will result in learners with disabilities acquiring reading skills.

Methodology

This methodology section provides a general overview of the methods used to obtain data for the report, including information on data collection and analysis methods, the role of evaluative rubrics and checklists, and the limitations of this study.

General Overview

This chapter describes the general evaluation methods used to answer the five target questions about process, identification, training, instruction, and unintended consequences. For this interim report, IDP and its local partner, IKI, developed and implemented a general REFAM staff survey; collected and reviewed 102 secondary sources, including reports and training materials that were developed by the REFAM project; and conducted KIIs or FGDs with 158 individuals. These stakeholders included REFAM staff, OPDs, central- and district-level government officials, family members, and training participants.

To provide a consistent set of evaluation criteria to help IDP staff draw conclusions, staff used a series of rubrics to identify strengths and potential gaps in activities related to overall project processes as well as screening, training, and EGRA activities. A detailed review was also conducted of the monitoring, evaluation, and learning (MEL) plan using USAID standards guidance. In addition, IDPs local partner, IKI, observed trainings implemented by REFAM and conducted KIIs and FGDs with participants. IDP used rubrics to make preliminary assessments of activities based on available data and followed up with questions in KIIs and FGDs to clarify issues or questions that emerged from data analysis. The subsections below provide additional information on the interview and rubric methodologies. Primary data was collected and analyzed from June 2021 through April 2022. Findings from this data should be considered formative in nature as the project activities are currently ongoing.

Key Informant Interviews and Focus Group Discussions

In line with MCSIE's data-analysis plan, IDP conducted KIIs and FGDs with project staff, OPDs, central- and district-level government officials, family members, and a selection of teacher training participants to inform the interim report.

Sampling

Sampling was purposive in nature and limited to only people with deep familiarity with the project (aside from OPDs) or with recent experience as project beneficiaries via attending training workshops. When collecting data with qualitative instruments, the research team selected participants who could describe, in detail, the program's benefits and challenges. REFAM also provided recommendations at the project and government level.

Enumerator Training

To support local data collection, IDP's international research team conducted remote enumerator training with IDP's local staff member and senior members of the IKI team on October 13–15, 2021, and January 4–7, 2022, to prepare for stakeholders' KIIs and FGDs. These trainings introduced MCSIE, familiarized local enumerators with the data collection tools and procedures, provided a how-to for collecting school-level data including classroom observations in RCs in Malawi and for conducting KIIs and FGDs, reviewed ethical considerations, and provided time for interview skills practice. The training also provided background on the REFAM program and its related activities. Additionally, IDP trainers reviewed the data collection protocol specifically for KIIs with members of government, OPDs, and families. Following these trainings, IKI's staff and field supervisors trained local data collectors. Training took place in Zomba in southern Malawi, where IKI's offices are located.

Data Collection

KIIs and FGDs were conducted from June 2021–April 2022. While some interviews were shorter or longer, most interviews were approximately one hour in length. Interviews with the implementing partner and central-level government officials were conducted remotely via Zoom; OPD, district-level government officials, and family and training participant interviews were

conducted in-person by IKI. All KIIs and FGDs were recorded, and verbal consent was obtained for each. KIIs and FGDs were then analyzed through transcription and thematic coding or rapid analysis. IDP shifted from transcription and thematic coding to rapid analysis of interviews and discussions to help improve efficiency and streamline analysis.

The U.S.-based members of the IDP team conducted interviews in English with REFAM staff who indicated they were comfortable communicating in English. IKI staff transcribed and translated interviews and focus groups conducted in Chichewa to English for analysis.

Using Otter transcription software, IDP researchers transcribed interviews and discussions conducted in English that were analyzed via thematic coding. A second IDP researcher performed a quality check for all transcriptions. Researchers used an IDP-developed Microsoft Excel template with thematic groupings for interviews and discussions analyzed via rapid analysis. To conduct the rapid analysis, IDP researchers listened to audio recordings of interviews conducted in English and reviewed transcripts of interviews and discussions translated from Chichewa. A separate IDP researcher, who conducted the interviews or discussions, performed a quality check for all rapid analysis data and was de-identified for this report.

Data Analysis

IDP conducted qualitative analysis using a combination of approaches. First, IDP researchers developed a series of thematic deductive codes into a codebook related directly to the EQs for this project. Qualitative analysts developed additional deductive codes when interviewees presented outliers or anomalies in the data. The principal investigator oversaw the development of the qualitative research initial codebook as well as the inductive codes identified during preliminary analyses. Additionally, IDP developed a Microsoft Excel template with thematic groupings, using the deductive and inductive codes, to complete rapid analysis. The principal investigator also oversaw the development of the rapid analysis template. The IDP team coded or conducted rapid analysis on all KII and FGD data for analysis and synthesis in this report. Researchers collected data on a rolling basis along with secondary source data analysis throughout this evaluation and used data to triangulate and clarify any substantial inaccuracies in the secondary source data analysis. **Exhibit 2** lists the tools used to collect qualitative data and describes the analysis that the IDP team conducted.

Exhibit 2. Qualitative Data Analysis

Tools	Utilization of Analyses	Descriptive Analyses	Content Analyses
Government KIIs	Understand perceptions and roles of local and national government officials in MCSIE projects.	Government evaluation of programming and linkage to policy and existing initiatives. Focus on gender as mediating influence.	Particular focus on deductive codes “identification”, “training”, “instruction”, “EGRA”, and “consequences” as well as sensitizing concept analysis of implementing partner/government relationships and process analysis of policy development.
OPD KIIs	Understand perceptions, roles, and contributions of OPDs to MCSIE projects.	OPD perceptions of involvement, human rights perspectives, and project consequences. Focus on gender as mediating consideration.	Particular focus on “identification”, “training”, “instruction”, and “consequences” as well as sensitizing concept analysis of OPD/implementing partner relationships.
REFAM KIIs	Understand perceptions and roles of REFAM staff in relation to project implementation.	REFAM perceptions of program activities, strengths, and areas for improvement.	Particular focus on “process”, “partnerships”, “identification”, “training”, “EGRA” as well as the relationships between REFAM and government and the impact of the COVID-19 pandemic.
Family FGDs	Understand family members of learners with disabilities experience with the education system.	Family member perceptions of learners with disabilities experience in schools, supporting their child, and conceptualization of inclusive education.	Particular focus on “process”, “partnership”, “instruction”, and “screening.”
Trained teacher FGDs	Understand teachers’ perceptions following training workshops in relation to the quality and usefulness of the training.	Trainee perceptions of screening, inclusive instruction, and the format and quality of the training received.	Particular focus on “identification”, “training”, and “instruction” as well as the impact of resource availability and the COVID-19 pandemic.

Objective of Evaluative Rubrics and Checklists

Based on the results framework, IDP developed evaluative rubrics (King et al., 2013) and checklists to guide the review of inclusive education and related project materials developed or used in the USAID-funded early grade reading (EGR) programs (Cambodia, Nepal, and Malawi). Rubrics offer a process for making the explicit judgments in an evaluation (Davidson,

2005) and are used to measure the quality, value, and/or importance of the materials used in conjunction with specific EGR activities. Rubrics are made up of evaluative criteria, the aspects of performance on which the evaluation focuses, merit determinations, and the definitions of what performance looks like at different ranking levels.

Rubrics have the potential to be used either holistically or analytically.¹¹ For this report and in support of the ethos of progressive realization,¹² IDP researchers used an analytical approach for this evaluation. Using this analytical approach, researchers mapped data against evaluative standards from both international and local inclusive education and literacy evidence bases. This process allowed the research team to identify where projects aligned with promising practices related to literacy and inclusive education and where there were gaps. It also allowed the team to take the country and project context into perspective and note specific areas of progress. This approach allows for individualization within the rubrics while ensuring consistency of measurement across each MCSIE country for comparability. The rubric and checklist approach led to scores and narrative summaries that provided an overview of practice, describing areas of strength as well as areas for recommended improvement within the project and possible causes.

Methods for Evaluative Rubrics and Checklists

The rubric and checklist design process began by identifying core domains related to the area of interest and outlining the evaluative criteria. For example, the rubric for screening training was informed by a review of literature on training and professional development for inclusive education (Hayes & Bulat, 2017; Hayes et al., 2018; McCollow et al., 2015; Tristani & Bassett- Gunter, 2020; this rubric also examined the following domains: training participants, modalities, content, degree of accessibility, and potential for sustainability after the life of the project, as it pertained to screening training specifically. For each domain, IDP developed standards that provided a more nuanced understanding of the respective domain. These standards were then placed on a rating scale for assessment. In addition, for each standard, IDP developed rich descriptions for all ratings to aid reviewers using the rubric.

Rating scales varied slightly depending on the rubric, but most used a five-level rating scale, such as the one displayed below in **Exhibit 3**.

¹¹ King, McKegg, Oakden, and Wehipeihana (2013) discuss two possible ways to use rubrics: holistically or analytically. Where rubrics are used holistically, an analyst makes a single, quick-to-administer judgment, considering all evaluative standards. Where rubrics are used analytically, an analyst makes separate judgments of each evaluative standard in a step-by-step process. These judgments are sometimes then synthesized into one overall evaluation claim.

¹² This term references the concept of “progressive realization” toward the expectations of the CRPD by signatory countries. The CRPD recognizes that countries have disability rights and unique inclusive education contexts but that they should all be making policy changes and economic investments to progressively realize the aims of the treaty.

Exhibit 3. Rating Scale

N/A	Not applicable
0	No evidence
1	Limited evidence
2	Some evidence
3	Strong, high-quality evidence

IDP piloted each rubric with a multidisciplinary team based on researchers’ areas of expertise. For the Malawi Interim Report, one member scored the rubrics and provided a narrative summary of the findings. This information was reviewed and validated by at least one other team member for each rubric. A description of each rubric/checklist can be found below in **Exhibit 4**.

Exhibit 4. Rubric/Checklist Descriptions

Evaluation Question	Rubric/ Checklist	Purpose
Process	Process Rubric	To review the implementing partner’s technical implementation of their project and any impact it has on meeting the contractual obligations under the statement of work, particularly as it relates to inclusive education. Evaluators will review organizational, planning, and reporting documents to identify elements that showcase beneficial implementation practices as well as note any missing information or programming delays and changes.
Screening and Identification	Screening Rubric	To evaluate each activity’s screening tools and protocols as aligned with current standards related to target population, ethical considerations, validity, reliability, fairness, referrals, and data use/sharing.
Training	Training Rubric	To evaluate each training activity in terms of target audience, content, delivery, accessibility, and sustainability.
Instruction	EGRA Rubric	To evaluate each activity’s adapted EGRA process for children with identified disabilities, from design and instrument development through assessor training, pilot testing, and data collection to analysis and reporting. Evaluation criteria are derived from the <i>USAID EGRA Toolkit</i> (RTI International, 2015). Information related to accommodations or modifications for children with disabilities is captured using the rubric and examined against available, relevant literature but not evaluated against standards specific to the EGRA, as these are not yet established for children with disabilities.

In total, the evaluation team reviewed 102 official project documents, including training materials, screening materials, datasets, and project reports. Some documents were brief, such as event participant lists or job descriptions, while others were much longer, such as various reports.

Annex B. Key Informant Interviews

#	Type	Stakeholder	Date
1.	GOM	Department of Special Needs Education	March 2022
2.	GOM	Directorate of Quality Assurance and Services	March 2022
3.	GOM	Directorate of Teacher Education and Development	March 2022
4.	GOM	Directorate of Basic Education	March 2022
5.	GOM	Ministry of Gender, Children, Disability, and Social Welfare	March 2022
6.	GOM	Department of Special Needs Education, South West Education Division	April 2022
7.	GOM	Central East Education Division	April 2022
8.	GOM	Lilongwe Rural West Education Office	April 2022
9.	GOM	Mangochi District Education Office	April 2022
10.	GOM	Ntcheu District Education Office	April 2022
11.	GOM	Phalombe District Shire Highlands Education Division	April 2022
12.	GOM	Salima District Education Office	April 2022
13.	GOM	Thyolo District Education Office	April 2022
14.	GOM	Zomba District Education Office	April 2022
15.	GOM	Mzuzu District Education Office	April 2022
16.	GOM	Nsanje District Education Office	April 2022
17.	GOM	Rumphi District Education Office	April 2022
18.	OPD	Malawi National Association of the Deaf	April 2022

#	Type	Stakeholder	Date
19.	OPD	Malawi Union of the Blind	April 2022
20.	OPD	Parents of Disabled Children Association of Malawi	April 2022
21.	IP	Juarez & Associates	June 2021
22.	IP	Juarez & Associates	July 2021 Oct 2021
23.	IP	Juarez & Associates	July 2021
24.	IP	Juarez & Associates	July 2021 Sept 2021
25.	IP	Juarez & Associates	July 2021 Nov 2021

Annex C. Focus Group Discussions

FGD #	Number of participants	Stakeholders	Date
1.	6	Family Focus Group in Chikupila, Chikupila Primary School, Zomba District	Oct 2021
2.	7	Family Focus Group in Salima, Salima LEA School, Salima District	Oct 2021
3.	6	Family Focus Group in Mbang'ombe, Mbang'ombe Primary School, Lilongwe District	Oct 2021
4.	8	Family Focus Group in Chiradzulu, Chiradzulu Primary School, Chiradzulu District	Nov 2021
5.	8	Family Focus Group in Kankao, Kankao Primary School, Balaka District	Oct 2021
6.	6	Family Focus Group in Karonga School for the Deaf, Karonga District	Oct 2021
7.	5	Family Focus Group in Thyolo, Naciphere Primary School, Thyolo District	Nov 2021
8.	9	Family Focus Group in Katete, Katete Girls Primary School, Mzimba District	Oct 2021
9.	6	Family Focus Group in Lizulu, School DZ22, Ntcheu District	Oct 2021
10.	3	Family Focus Group in Mpherere, School NCM01, Ntchisi District	Oct 2021
11.	6	Family Focus Group in Mphete, Mphete Primary, Mwanza District	Nov 2021
12.	7	Family Focus Group in Chikwawa, St. Matthew's Primary School, Chikwawa District	Oct 2021

Annex D. Teacher Training KII/FGD

KII/FGD #	Number of participants	Participation in REFAM Training Topics*	Date
1.	8	Inclusive Deaf Education and Malawian Sign Language – Blantyre	Aug 2021
2.	8	Inclusive Deaf Education and Malawian Sign Language – Blantyre	Aug 2021
3.	6	Inclusive Deaf Education and Malawian Sign Language – Mzuzu	Aug 2021
4.	8	Inclusive Deaf Education and Malawian Sign Language – Mzuzu	Aug 2021
5.	8	Screening and Identification, Special Needs Teachers as Coaches, and Parental Engagement – Zomba	Sept 2021
6.	1	Screening and Identification, Special Needs Teachers as Coaches, and Parental Engagement – Lilongwe	Oct 2021
7.	1	Screening and Identification, Special Needs Teachers as Coaches, and Parental Engagement – Lilongwe	Oct 2021
8.	1	Screening and Identification, Special Needs Teachers as Coaches, and Parental Engagement – Lilongwe	Oct 2021
9.	1	Screening and Identification, Special Needs Teachers as Coaches, and Parental Engagement – Lilongwe	Oct 2021
10.	1	Screening and Identification, Special Needs Teachers as Coaches, and Parental Engagement – Lilongwe	Oct 2021
11.	1	Screening and Identification, Special Needs Teachers as Coaches, and Parental Engagement – Lilongwe	Oct 2021
12.	1	Screening and Identification, Special Needs Teachers as Coaches, and Parental Engagement – Lilongwe	Oct 2021
13.	1	Screening and Identification, Special Needs Teachers as Coaches, and Parental Engagement – Lilongwe	Oct 2021
14.	1	Screening and Identification, Special Needs Teachers as Coaches, and Parental Engagement – Mzimba	Oct 2021
15.	1	Screening and Identification, Special Needs Teachers as Coaches, and Parental Engagement – Mzimba	Oct 2021
16.	1	Screening and Identification, Special Needs Teachers as Coaches, and Parental Engagement – Mzimba	Oct 2021
17.	1	Screening and Identification, Special Needs Teachers as Coaches, and Parental Engagement – Mzimba	Oct 2021
18.	1	Screening and Identification, Special Needs Teachers as Coaches, and Parental Engagement – Mzimba	Oct 2021

KII/ FGD #	Number of participants	Participation in REFAM Training Topics	Date
19.	1	Screening and Identification, Special Needs Teachers as Coaches, and Parental Engagement – Mzimba	Oct 2021
20.	1	Screening and Identification, Special Needs Teachers as Coaches, and Parental Engagement – Mzimba	Oct 2021
21.	1	Screening and Identification, Special Needs Teachers as Coaches, and Parental Engagement – Mzimba	Oct 2021

*Note: focus group discussions and key interviews typically took place at the training site or using telephone/video conferencing and were conducted after the conclusion of training sessions.

Annex E. Surveys

Implementing Partner Survey Findings

In August 2020, IDP conducted an online survey of Juarez & Associates (J&A) staff for the REFAM activity. The survey link was shared across all project staff, and there was a 100% response rate (4 total responses). Notable findings are presented in **Exhibit 5** for the 4 personnel who completed the survey. These figures show that no REFAM staff identify as having a disability, but the majority are close to someone (friend or family member) with a disability. Experience or familiarity with disability among so many staff is a strength, as it may increase the likelihood that staff are motivated and invested in the goals of the project and understand the need for inclusive education.

Exhibit 5. REFAM Staff with Lived Experience with Disability

Characteristic	J&A Staff, N=4
Female	75% (N=3)
Male	0% (N=0)
Gender not identified	25% (N=1)**
Identify as having a disability	0% (N=0)
Have a disability diagnosis	0% (N=0)
Close to someone with a disability	75% (N=3)

**Among the four J&A staff who completed the survey, three identified as female and one did not answer the gender demographic question on the survey.

As for the educational experience of REFAM staff, the highest level of education reported among participants was 25% (N=1) completing a postgraduate degree and the remaining 75% (N=3) completing a graduate degree. REFAM staff reported the following topics of their degree(s): international studies, business administration, finance, education, and disability- inclusive education. Regarding training on disability-inclusive education, 75% (N=3) of respondents indicated that they had received training on the topic prior to the project, with 25% (N=1) respondents indicating they had received no training on the topic prior to the project. Of the total combined training of the respondents who received training prior to the project (75%, N=3), 33.3% (N=1) reported having 2–3 days of training, followed by 33.3% (N=1) who reported having 4–5 days, and the remaining 33.3% (N=1) reported having more than 10 days of training. Topics covered in the trainings included advocacy, blind and deaf education, disability awareness, disability laws or policies, effective instructional approaches for students with disabilities, and understanding the CRPD. Respondents indicated that trainings were conducted by either an NGO, employer, or U.S. government-funded program or through their formal education.

The largest proportion (50% or N=2) of the REFAM staff reported having between 1–3 years of

work experience with J&A and one staff member (25%) reported having worked for the company for 4–10 years. Staff experience working on disability-inclusive education activities prior to REFAM varied; 25% (N=1) had no experience, 25% (N=1) had less than 1 year of experience, 25% (N=1) had 3–4 years of experience, and 25% (N=1) had more than 5 years of experience. When asked to describe the nature of the experience, respondents stated: “working in inclusive education more broadly”; “classroom experience”; and “working on awareness campaigns with the community.”

Exhibit 6. REFAM Staff Experience

Experience	J&A Staff, N=4
Worked for current org. over 10 years	0% (N=0)
Worked for current org. 4–10 years	25% (N=1)
Worked for current org. 1–3 years	50% (N=2)
Worked for current org. less than 1 year	25% (N=1)
Disability-Inclusive Education Experience Prior to REFAM: No previous experience	25% (N=1)
Disability-Inclusive Education Experience Prior to REFAM: Less than 1 year	25% (N=1)
Disability-Inclusive Education Experience Prior to REFAM: 1–2 years	0% (N=0)
Disability-Inclusive Education Experience Prior to REFAM: 3–4 years	25% (N=1)
Disability-Inclusive Education Experience Prior to REFAM: More than 5 years	25% (N=1)

Implementing Partner Staff Background Survey

Sample: All implementing partner staff and sub-contractor staff who have a greater than 15% level of effort dedicated to implementation of the disability-inclusive education program

Purpose: To assess the background roles, responsibilities, and knowledge (education and training) of implementing partners as related to disability-inclusive education and the program

Administration: Online survey (Google Forms) distributed via weblink

Questions:

1. Today's Date: _____
2. Country:
 - Cambodia

- Nepal
- Malawi

3. Name of organization that you currently work for:

- Abt Associates
- Juarez & Associates
- KAPE
- Humanity and Inclusion
- Open Institute
- RTI International
- Room to Read
- Save the Children
- SIL Lead
- World Education
- World Vision
- Other, please state: _____

4. Gender (select one) (optional)

- Male
- Female
- Do not know / Do not wish to respond

5. Current age (optional)

- 18-24
- 25-39
- 40-60
- Over 60

6. Do you identify as having a disability? (optional)

- Yes
- No

7. If yes, what type of disability do you have: (optional)

- physical
- intellectual
- vision
- hearing
- learning
- other, please state: _____

8. Do you have a relationship with someone who has a disability? (optional)

- Yes
- No

9. If yes, what is your relationship? (select all that apply) (optional)

- Parent
- Spouse
- Caregiver
- Sibling
- Other family relationship
- Friend

Other, specify: _____

10. Number of years working with organization (select one):

- Less than 1 year
- 1-3 years
- 4-6 years
- 7-10 years
- More than 10 years

11. Job title: _____

12. Main job responsibilities (select one that best matches your work)

- Technical
- Administrative
- Project management
- Monitoring and evaluation
- Finance and accounting
- Management
- Research
- Other: _____

13. Please list your highest equivalent level of education (select one):

- Primary
- Some secondary (not complete)
- Secondary
- Post-secondary
- Graduate degree

- Post graduate degree
- Other, please explain: _____

14. If you have received a university degree in what topic is your degree (Select as many as apply)

- Education
- Disability studies
- Disability-inclusive education/Special education
- Finance, policy and/or administration
- International Studies
- Others, please explain: _____

15. Before your participation in this current project, have you received training on disability-inclusive education?

- Yes
- No (Skip to Q19)

16. If yes, how many trainings on disability-inclusive education have you received?

- 1 training
- 2 trainings
- 3-5 trainings
- More than 5 trainings

17. If yes, across all the trainings you have received what topics did the training(s) cover (select all that apply):

- Advocacy
- Blind education
- Deaf education
- Disability awareness
- Disability laws or policies
- OPD engagement
- Effective instructional approaches for students with and without disabilities
- Identification of students with disabilities
- Understanding the Convention on the Rights of Persons with Disabilities
- Others, please explain: _____

18. If yes, who provided the training on disability-inclusive education (select all that apply)

- Formal education (college)
- Employer
- NGO
- OPD

- Government entity
- Other, please explain: _____

19. Have you received training on disability-inclusive education while working on this project?

- Yes
- No

20. If yes, how long was the training?

- 1-2 hours
- 3-5 hours
- 1 day
- 2-3 days
- 4-5 days
- More than 5 days

21. Prior to this project, how many years of experience do you have working on disability issues (disability issues can include disability-inclusive education or other topics related to the rights of persons with disabilities such as accessible health services, employment, etc.) (select one)?

- No previous experience
- Less than one year
- 1-2 years
- 3-4 years
- 5-6 years
- More than 6 years

22. Prior to this project, if you have work-related experience on disability issues, please describe the nature of your experience: _____

23. Prior to this project, how many years of experience do you have working on issues related to disability-inclusive education (select one)?

- No previous experience
- Less than one year
- 1-2 years
- 3-4 years
- 5-6 years
- More than 6 years

24. If you have work experience related to disability-inclusive education, prior to this project, please describe the nature of your experience: _____

Annex F. Training Observation Forms

Inclusive Education and UDL Training Observation Form

Description of the Instrument

Instrument Administration: Training observation protocol to be administered by local partners

Purpose: To evaluate the implementation of instructional training

Sample: Instructional training for teachers: Nepal, Cambodia, Malawi (1 TOT, 2 district level)

Evaluation Questions: Training

Implementation Timeline: Initial (ToT) and/or midline (district level)

Instructions for Observers: How to Use the Instrument

Step 1: Before observing, review the enumerator guide. Discuss with program personnel to verify you understand each item and how to record information about it.

Step 2: Obtain and review a copy of all training materials provided to participants, including training agenda, handouts, manuals, etc.

Step 3: Closely watch what is taking place during the training and record information about the items in the checklist. Mark “yes” if the behavior is observed at least once in the observation; mark “no” if the behavior is not observed. Mark “N/A” if the behavior is not relevant (for example, if trainers do not use a slideshow presentation, mark N/A for “Trainers provide printed copies of slideshow to participants”). After the observation, review items with the trainer to ensure activities were not missed, particularly practice opportunities.

Part 1: General Information

1. Date of observation: _____
2. Name of person observing training: _____
3. Length of time of training observed: _____
4. Name of the region/district:
5. People present (check all that apply):
 - Teachers
 - Head teachers
 - Resource/special education teachers
 - Trainers (Train the Trainer)
 - District officers/managers
 - OPD members
 - Other, specify: _____
6. Focus of training (check all that apply):
 - Inclusive instruction
 - Early grade reading/literacy
 - Other, specify: _____

7. Total number of trainees: __ (number only)

a. Male: ____ (number only)

b. Female: __ (number only)

Part 2: Training Observation

Observable Behaviors	YES	NO	N/A
Training approach, modalities, and materials			
1. Trainers use multiple modalities to deliver training. If yes, select all that apply: <ul style="list-style-type: none"> <input type="checkbox"/> Lecture <input type="checkbox"/> A slideshow presentation to deliver content <input type="checkbox"/> Providing printed copies of the slideshow <input type="checkbox"/> Use of manuals, handouts, or other worksheets <input type="checkbox"/> Trainer demonstrates the training content to provide a clear model <input type="checkbox"/> Trainers use videos to show examples of training content being applied in a classroom setting Other, describe: _____			
2. Trainers model “I do/we do/you do” approaches in the instruction delivered.			
3. Trainers provide opportunities for participants to engage in discussion and verbal feedback about training content			
4. Trainers provide accommodations for participants with disabilities (such as materials in braille, sign language interpretation, accessible venue for training). If yes, select all that apply: <ul style="list-style-type: none"> <input type="checkbox"/> Materials given in braille <input type="checkbox"/> Closed captioning <input type="checkbox"/> Sign language interpretation <input type="checkbox"/> All materials given to participants in advance <input type="checkbox"/> Accessible venue for training Other, describe: _____			
5. Trainers write down questions and feedback from participants			
6. Trainers generally follow content and time as outlined in training agenda			
7. Participants practice applying instructional approaches through role-play exercises (with a partner or in a group)			

Observable Behaviors	YES	NO	N/A
8. Participants practice applying instructional approaches with children during a visit to a local school.			
Training content			
9. Training content provides participants with strategies or practical opportunities to develop inclusive practice. If yes, select all of the strategies or opportunities that were presented: <ul style="list-style-type: none"> <input type="checkbox"/> Small group work, work in pairs, or other peer engagement <input type="checkbox"/> Use of images, manipulatives, flash cards, etc. <input type="checkbox"/> Use of braille, sign language, or assistive technologies <input type="checkbox"/> Use of games, songs, or movement activities <input type="checkbox"/> Providing additional lessons or attention for struggling learners <input type="checkbox"/> Allowing struggling learners to take extra time when needed <input type="checkbox"/> Presenting and receiving information in different ways: orally, in writing, verbally, etc. <input type="checkbox"/> Seating struggling learners close to the front of the room or where they learn best <input type="checkbox"/> Providing detailed instructions or breaking complex tasks into smaller steps 			
10. Training content describes a variety of disabilities and learning difficulties If yes, select all that apply: <ul style="list-style-type: none"> <input type="checkbox"/> physical <input type="checkbox"/> intellectual <input type="checkbox"/> vision <input type="checkbox"/> hearing <input type="checkbox"/> learning <input type="checkbox"/> other, specify: _____ 			
11. Training content highlights diversity in student ability using positive and respectful language and terms.			
12. Training content includes strategies for including and supporting students who are blind or have low vision (e.g., seating near front of class, providing magnifiers).			
13. . Training content includes strategies for including and supporting students who are deaf or hard of hearing (e.g., seating near front of class, providing hearing aids, using local sign language).			

Observable Behaviors	YES	NO	N/A
14. Training content includes strategies for including and supporting students who have difficulty concentrating or sitting still (e.g., seating near front of class, providing breaks, giving extra time to complete tasks).			
15. Training content covers inclusive instructional strategies that are <u>specific to teaching literacy</u> .			
16. Training content includes how to intervene when a student with a disability is verbally, emotionally, or physically abused by another student or teacher.			
17. Training content includes importance of seating students with disabilities with their peers without disabilities.			
18. Training content includes importance of ensuring classroom is physically safe for ALL students (e.g., no visible risks that could cause physical harm).			
19. Training content includes strategies for students to receive and express information in different ways (e.g., orally, visually, physically).			
<p>20. Training content includes <u>discussion</u> of assistive devices that schools/teachers can provide.</p> <p>If yes, select all that apply:</p> <ul style="list-style-type: none"> <input type="checkbox"/> eyeglasses <input type="checkbox"/> magnifier <input type="checkbox"/> book stand <input type="checkbox"/> hearing aids <input type="checkbox"/> pencil with grip <input type="checkbox"/> crutches <input type="checkbox"/> wheelchair <input type="checkbox"/> other, specify: _____ 			
<p>21. Training specifically discusses strategies for participants to impart what they have learned with others in their school/schools they serve.</p> <p>If yes, what strategies are mentioned? (select all that apply)</p> <ul style="list-style-type: none"> <input type="checkbox"/> Trainees lead a small workshop or meeting to share new information with their colleagues when they return to school. <input type="checkbox"/> Trainees hold a meeting with their head teacher/school administrator/school principal. <input type="checkbox"/> Trainees follow up with colleagues through classroom observation. <input type="checkbox"/> Trainees share the content learned in a community of practice meeting/village/community meeting. <input type="checkbox"/> Other, describe: _____ 			

Part 3: Observer Reflection (after training ends)

<p>22. Do you feel the trainers effectively explained and demonstrated inclusive education strategies? Please explain:</p>	<p>YES</p>	<p>NO</p>	
<p>23. In general, what aspects of the training were most effective?</p>			
<p>24. In general, what aspects of the training were least effective?</p>			
<p>25. Do you feel those trained need any additional content or guidance?</p>			

Inclusive Education and IEP Training Observation Form

Description of the Instrument

Instrument Administration: Training observation protocol to be administered by local partners

Purpose: To evaluate the implementation of instructional training

Sample: Instructional training for teachers: Nepal, Cambodia, Malawi (1 TOT, 2 district level)

Evaluation Questions: Training

Implementation Timeline: Initial (ToT) and/or midline (district level)

Instructions for Observers: How to Use the Instrument

Step 1: Before observing, review the enumerator guide. Discuss with program personnel to verify you understand each item and how to record information about it.

Step 2: Obtain and review a copy of all training materials provided to participants, including training agenda, handouts, manuals, etc.

Step 3: Closely watch what is taking place during the training and record information about the items in the checklist. Mark “yes” if the behavior is observed at least once in the observation; mark “no” if the behavior is not observed. Mark “N/A” if the behavior is not relevant (for example, if trainers do not use a slideshow presentation, mark N/A for “Trainers provide printed copies of slideshow to participants”). After the observation, review items with the trainer to ensure activities were not missed, particularly practice opportunities.

Part 1: General Information

1. Date of observation: _____
2. Name of person observing training: _____
3. Length of time of training observed: _____
4. Name of the region/district:
5. People present (check all that apply):
 - Teachers
 - Head teachers
 - Resource/special education teachers
 - Trainers (Train the Trainer)
 - District officers/managers
 - OPD members
 - Other, specify: _____
6. Focus of training (check all that apply):
 - Inclusive instruction
 - Early grade reading/literacy
 - Other, specify: _____
7. Total number of trainees: __ (number only)
 - a. Male: ____ (number only)
 - b. Female: ____ (number only)

Part 2: Training Observation

Observable Behaviors	YES	NO	N/A
Training approach, modalities, and materials			
1. Trainers use multiple modalities to deliver training. If yes, select all that apply: <ul style="list-style-type: none"> <input type="checkbox"/> Lecture <input type="checkbox"/> A slideshow presentation to deliver content <input type="checkbox"/> Providing printed copies of the slideshow <input type="checkbox"/> Use of manuals, handouts, or other worksheets <input type="checkbox"/> Trainer demonstrates the training content to provide a clear model <input type="checkbox"/> Trainers use videos to show examples of training content being applied in a classroom setting Other, describe: _____			
2. Trainers model “I do/we do/you do” approaches in the instruction delivered.			
3. Trainers provide opportunities for participants to engage in discussion and verbal feedback about training content.			
4. Trainers provide accommodations for participants with disabilities (such as materials in braille, sign language interpretation, accessible venue for training). If yes, select all that apply: <ul style="list-style-type: none"> <input type="checkbox"/> Materials given in braille <input type="checkbox"/> Closed captioning <input type="checkbox"/> Sign language interpretation <input type="checkbox"/> All materials given to participants in advance <input type="checkbox"/> Accessible venue for training Other, describe: _____			
5. Trainers write down questions and feedback from participants.			
6. Trainers generally follow content and time as outlined in training agenda.			
7. Participants practice applying instructional approaches through role-play exercises (with a partner or in a group).			

Observable Behaviors	YES	NO	N/A
8. Participants practice applying instructional approaches with children during a visit to a local school.			
Training content			
9. Training content provides participants with strategies or practical opportunities to develop inclusive practice. If yes, select all of the strategies or opportunities that were presented: <ul style="list-style-type: none"> <input type="checkbox"/> Small group work, work in pairs, or other peer engagement <input type="checkbox"/> Use of images, manipulatives, flash cards, etc. <input type="checkbox"/> Use of braille, sign language, or assistive technologies <input type="checkbox"/> Use of games, songs, or movement activities <input type="checkbox"/> Providing additional lessons or attention for struggling learners <input type="checkbox"/> Allowing struggling learners to take extra time when needed <input type="checkbox"/> Presenting and receiving information in different ways: orally, in writing, verbally, etc. <input type="checkbox"/> Seating struggling learners close to the front of the room or where they learn best <input type="checkbox"/> Providing detailed instructions or breaking complex tasks into smaller steps 			
10. Training content describes a variety of disabilities and learning difficulties If yes, select all that apply: <ul style="list-style-type: none"> <input type="checkbox"/> physical <input type="checkbox"/> intellectual <input type="checkbox"/> vision <input type="checkbox"/> hearing <input type="checkbox"/> learning <input type="checkbox"/> other, specify: _____ 			
11. Training content highlights diversity in student ability using positive and respectful language and terms.			
12. Training content includes strategies for including and supporting students who are blind or have low vision (e.g., seating near front of class, providing magnifiers).			
13. Training content includes strategies for including and supporting students who are deaf or hard of hearing (e.g., seating near front of class, providing hearing aids, using local sign language).			

Observable Behaviors	YES	NO	N/A
14. Training content includes strategies for including and supporting students who have difficulty concentrating or sitting still (e.g., seating near front of class, providing breaks, giving extra time to complete tasks).			
15. Training content covers inclusive instructional strategies that are <u>specific to teaching literacy</u> .			
16. Training content includes how to intervene when a student with a disability is verbally, emotionally, or physically abused by another student or teacher.			
17. Training content includes importance of seating students with disabilities with their peers without disabilities.			
18. Training content includes importance of ensuring classroom is physically safe for ALL students (e.g., no visible risks that could cause physical harm).			
19. Training content includes strategies for students to receive and express information in different ways (e.g., orally, visually, physically).			
<p>20. Training content includes <u>discussion</u> of assistive devices that schools/teachers can provide.</p> <p>If yes, select all that apply:</p> <ul style="list-style-type: none"> <input type="checkbox"/> eyeglasses <input type="checkbox"/> magnifier <input type="checkbox"/> book stand <input type="checkbox"/> hearing aids <input type="checkbox"/> pencil with grip <input type="checkbox"/> crutches <input type="checkbox"/> wheelchair <input type="checkbox"/> other, specify: _____ 			
<p>21. Training specifically discusses strategies for participants to impart what they have learned with others in their school/schools they serve.</p> <p>If yes, what strategies are mentioned? (select all that apply)</p> <ul style="list-style-type: none"> <input type="checkbox"/> Trainees lead a small workshop or meeting to share new information with their colleagues when they return to school <input type="checkbox"/> Trainees hold a meeting with their head teacher/school administrator/school principal <input type="checkbox"/> Trainees follow up with colleagues through classroom observation <input type="checkbox"/> Trainees share the content learned in a community of practice meeting/village/community meeting <input type="checkbox"/> Other, describe: _____ 			

Part 3: Observer Reflection (after training ends)

<p>22. Do you feel the trainers effectively explained and demonstrated inclusive education strategies?</p> <p>Please explain:</p>	<p>YES</p>	<p>NO</p>	
<p>23. In general, what aspects of the training were most effective?</p>			
<p>24. In general, what aspects of the training were least effective?</p>			
<p>25. Do you feel those trained need any additional content or guidance?</p>			

IEP-Specific Observable Behaviors

	<p>YES</p>	<p>NO</p>	<p>N/A</p>
<p>26. Do you feel the trainers effectively explained how to decide which learners should be given an IEP?</p> <p>Please explain:</p>			
<p>27. Do you feel the trainers effectively explained and demonstrated the benefits of an IEP and what they help identify?</p> <p>Please explain:</p>			
<p>28. Do you feel the trainers effectively explained and demonstrated the process of creating an IEP?</p> <p>Please explain:</p>			
<p>29. Do you feel the trainers effectively explained and demonstrated the process of choosing IEP goals and objectives?</p> <p>Please explain:</p>			
<p>30. Do you feel the trainers effectively explained and demonstrated the process of using an IEP to design lesson plans?</p> <p>Please explain:</p>			
<p>31. Do you feel the trainers effectively explained and demonstrated the process of reporting progress for IEPs?</p> <p>Please explain:</p>			

Inclusive Deaf Education and Malawian Sign Language Training Observation Form

Description of the Instrument

Instrument Administration: Training observation protocol to be administered by local partners

Purpose: To evaluate the implementation of instructional training

Sample: Instructional training for teachers: Nepal, Cambodia, Malawi (1 TOT, 2 district level)

Evaluation Questions: Training

Implementation Timeline: Initial (ToT) and/or midline (district level)

Instructions for Observers: How to Use the Instrument

Step 1: Before observing, review the enumerator guide. Discuss with program personnel to verify you understand each item and how to record information about it.

Step 2: Obtain and review a copy of all training materials provided to participants, including training agenda, handouts, manuals, etc.

Step 3: Closely watch what is taking place during the training and record information about the items in the checklist. Mark “yes” if the behavior is observed at least once in the observation; mark “no” if the behavior is not observed. Mark “N/A” if the behavior is not relevant (for example, if trainers do not use a slideshow presentation, mark N/A for “Trainers provide printed copies of slideshow to participants”). After the observation, review items with the trainer to ensure activities were not missed, particularly practice opportunities.

Part 1: General Information

1. Date of observation: _____
2. Name of person observing training: _____
3. Length of time of training observed: _____
4. Name of the region/district: _____
5. People present (check all that apply):
 - Teachers
 - Head teachers
 - Resource / special education teachers
 - Trainers (Train the Trainer)
 - District officers/managers
 - OPD members
 - Other, specify: _____
6. Focus of training (check all that apply):
 - Inclusive instruction
 - Early grade reading/literacy
 - Other, specify: _____
7. Total number of trainees: __ (number only)
 - a. Male: ____ (number only)
 - b. Female: ____ (number only)

Part 2: Training Observation

Observable Behaviors	YES	NO	N/A
Training approach, modalities, and materials			
1. Trainers use multiple modalities to deliver training. If yes, select all that apply: <ul style="list-style-type: none"> <input type="checkbox"/> Lecture <input type="checkbox"/> A slideshow presentation to deliver content <input type="checkbox"/> Providing printed copies of the slideshow <input type="checkbox"/> Use of manuals, handouts, or other worksheets <input type="checkbox"/> Trainer demonstrates the training content to provide a clear model <input type="checkbox"/> Trainers use videos to show examples of training content being applied in a classroom setting Other, describe: _____			
2. Trainers model “I do/we do/you do” approaches in the instruction delivered.			
3. Trainers provide opportunities for participants to engage in discussion and verbal feedback about training content.			
4. Trainers provide accommodations for participants with disabilities (such as materials in Braille, sign language interpretation, accessible venue for training). If yes, select all that apply: <ul style="list-style-type: none"> <input type="checkbox"/> Materials given in braille <input type="checkbox"/> Closed captioning <input type="checkbox"/> Sign language interpretation <input type="checkbox"/> All materials given to participants in advance <input type="checkbox"/> Accessible venue for training Other, describe: _____			
5. Trainers write down questions and feedback from participants.			
6. Trainers generally follow content and time as outlined in training agenda.			
7. Participants practice applying instructional approaches through role-play exercises (with a partner or in a group).			
8. Participants practice applying instructional approaches with children during a visit to a local school.			

Observable Behaviors	YES	NO	N/A
Training content			
9. Training content provides participants with strategies or practical opportunities to develop inclusive practice. If yes, select all of the strategies or opportunities that were presented: <ul style="list-style-type: none"> <input type="checkbox"/> Small group work, work in pairs or other peer engagement <input type="checkbox"/> Use of images, manipulatives, flash cards, etc. <input type="checkbox"/> Use of braille, sign language, or assistive technologies <input type="checkbox"/> Use of games, songs, or movement activities <input type="checkbox"/> Providing additional lessons or attention for struggling learners <input type="checkbox"/> Allowing struggling learners to take extra time when needed <input type="checkbox"/> Presenting and receiving information in different ways: orally, in writing, verbally, etc. <input type="checkbox"/> Seating struggling learners close to the front of the room or where they learn best <input type="checkbox"/> Providing detailed instructions or breaking complex tasks into smaller steps 			
10. Training content describes a variety of disabilities and learning difficulties. If yes, select all that apply: <ul style="list-style-type: none"> <input type="checkbox"/> physical <input type="checkbox"/> intellectual <input type="checkbox"/> vision <input type="checkbox"/> hearing <input type="checkbox"/> learning <input type="checkbox"/> other, specify: _____ 			
11. Training content highlights diversity in student ability using positive and respectful language and terms.			
12. Training content includes strategies for including and supporting students who are blind or have low vision (e.g., seating near front of class, providing magnifiers).			
13. Training content includes strategies for including and supporting students who are deaf or hard of hearing (e.g., seating near front of class, providing hearing aids, using local sign language).			
14. Training content includes strategies for including and supporting students who have difficulty concentrating or sitting still (e.g., seating near front of class, providing breaks, giving extra time to complete tasks).			
15. Training content covers inclusive instructional strategies that are <u>specific to teaching literacy</u> .			

Observable Behaviors	YES	NO	N/A
16. Training content includes how to intervene when a student with a disability is verbally, emotionally, or physically abused by another student or teacher.			
17. Training content includes importance of seating students with disabilities with their peers without disabilities.			
18. Training content includes importance of ensuring classroom is physically safe for ALL students (e.g., no visible risks that could cause physical harm).			
19. Training content includes strategies for students to receive and express information in different ways (e.g., orally, visually, physically).			
20. Training content includes <u>discussion</u> of assistive devices that schools/teachers can provide. If yes, select all that apply: <input type="checkbox"/> eyeglasses <input type="checkbox"/> magnifier <input type="checkbox"/> book stand <input type="checkbox"/> hearing aids <input type="checkbox"/> pencil with grip <input type="checkbox"/> crutches <input type="checkbox"/> wheelchair <input type="checkbox"/> other, specify: _____			
21. The training specifically discusses strategies for participants to impart what they have learned with others in their school/schools they serve. If yes, what strategies are mentioned? (select all that apply) <input type="checkbox"/> Trainees lead a small workshop or meeting to share new information with their colleagues when they return to school <input type="checkbox"/> Trainees hold a meeting with their head teacher/school administrator/school principal <input type="checkbox"/> Trainees follow up with colleagues through classroom observation <input type="checkbox"/> Trainees share the content learned in a community of practice meeting/village/community meeting <input type="checkbox"/> Other, describe: _____			

Part 3: Observer Reflection (after training ends)

<p>22. Do you feel the trainers effectively explained and demonstrated inclusive education strategies? Please explain:</p>	Yes	NO	
<p>23. In general, what aspects of the training were most effective?</p>			
<p>24. In general, what aspects of the training were least effective?</p>			
<p>25. Do you feel those trained need any additional content or guidance?</p>			

Deaf Education Specific Observable Behaviors	YES	NO	N/A
<p>26. Do you feel the trainers effectively explained how to engage parents in supporting the education of their children who are deaf? Please explain:</p>			
<p>27. Do you feel the trainers effectively explained and demonstrated how to communicate with learners who are deaf? Please explain:</p>			
<p>28. Do you feel the trainers effectively explained and demonstrated the grammatical rules, structure, and variations of Malawian Sign Language? Please explain:</p>			
<p>29. Do you feel the trainers effectively explained the educational barriers that exist for learners who are deaf? Please explain:</p>			
<p>30. Do you feel the trainers effectively explained and demonstrated effective strategies for teaching and assessing reading and literacy for learners who are deaf? Please explain:</p>			
<p>31. Do you feel the trainers effectively explained and demonstrated how to use MSL when teaching deaf learners? Please explain:</p>			

Screening, Special Needs Teachers as Coaches, and Family Engagement Observation Form

Description of the Instrument

Instrument Administration: Training observation protocol to be administered by local partners

Purpose: To evaluate the implementation of screening, identification and family engagement training

Sample: Instructional training for teachers: Nepal, Cambodia, Malawi (1 TOT, 2 district level)

Evaluation Questions: Training

Implementation Timeline: Initial (ToT) and/or midline (district level)

Instructions for Observers: How to Use the Instrument

Step 1: Before observing, review the enumerator guide. Discuss with program personnel to verify you understand each item and how to record information about it.

Step 2: Obtain and review a copy of all training materials provided to participants, including training agenda, handouts, manuals, etc.

Step 3: Closely watch what is taking place during the training and record information about the items in the checklist. Mark “yes” if the behavior is observed at least once in the observation; mark “no” if the behavior is not observed. Mark “N/A” if the behavior is not relevant (for example, if trainers do not use a slideshow presentation, mark N/A for “Trainers provide printed copies of slideshow to participants”). After the observation, review items with the trainer to ensure activities were not missed, particularly practice opportunities.

Part 1: General Information

1. Date of observation: _____
2. Name of person observing training: _____
3. Length of time of training observed: _____
4. Name of the region/district: _____
5. People present (check all that apply):
 - Teachers
 - Head teachers
 - Resource/special education teachers
 - Trainers (Train the Trainer)
 - District officers/managers
 - OPD members
 - Other, specify: _____
6. Focus of training (check all that apply):
 - Inclusive instruction
 - Early grade reading/literacy
 - Other, specify: _____
7. Total number of trainees: __ (number only)
 - a. Male: ____ (number only)
 - b. Female: ____ (number only)

Part 2: Training Observation

Observable Behaviors	YES	NO	N/A
Training approach, modalities, and materials			
1. Trainers use multiple modalities to deliver training. If yes, select all that apply: <input type="checkbox"/> Lecture <input type="checkbox"/> A slideshow presentation to deliver content <input type="checkbox"/> Providing printed copies of the slideshow <input type="checkbox"/> Use of manuals, handouts, or other worksheets <input type="checkbox"/> Trainer demonstrates the training content to provide a clear model <input type="checkbox"/> Trainers use videos to show examples of training content being applied in a classroom setting Other, describe: _____			
2. Trainers model “I do/we do/you do” approaches in the instruction delivered.			
3. Trainers provide opportunities for participants to engage in discussion and verbal feedback about training content.			
4. Trainers provide accommodations for participants with disabilities (such as materials in braille, sign language interpretation, accessible venue for training). If yes, select all that apply: <input type="checkbox"/> Materials given in braille <input type="checkbox"/> Closed captioning <input type="checkbox"/> Sign language interpretation <input type="checkbox"/> All materials given to participants in advance <input type="checkbox"/> Accessible venue for training Other, describe: _____			
5. Trainers write down questions and feedback from participants.			
6. Trainers generally follow content and time as outlined in training agenda.			
7. Participants practice applying training content through role-play exercises (with a partner or in a group).			
8. Trainers distribute pre-training and post-training evaluations or assessments.			

Observable Behaviors	YES	NO	N/A
Training content			
9. Training content describes a variety of disabilities and learning difficulties. If yes, select all that apply: <input type="checkbox"/> physical <input type="checkbox"/> intellectual <input type="checkbox"/> vision <input type="checkbox"/> hearing <input type="checkbox"/> learning <input type="checkbox"/> other, specify: _____			
10. Training content highlights diversity in student ability using positive and respectful language and terms.			
11. Training clearly describes the purpose(s) for screening and identification. If yes, select all that apply: <input type="checkbox"/> To determine placement into special school or resource classroom <input type="checkbox"/> To refer to services outside of classroom or school (e.g., testing, assistive devices) <input type="checkbox"/> To inform teacher instructional practices within general education schools <input type="checkbox"/> To collect data for the government <input type="checkbox"/> To collect data for the USAID project (e.g., M&E) Other, describe: _____			
12. Training describes the conditions or environment necessary for conducting identification/screening. If yes, please describe _____			
13. Training includes instruction to avoid discussing identification/screening results with children during or directly after evaluation.			
14. Training includes instruction on how to secure identification/screening results data.			
15. Training includes instruction on how and with whom to share results data. If yes, please describe _____			

Observable Behaviors	YES	NO	N/A
16. Training content includes discussion of referral options and resources available to parents based on identification/screening results. If yes, please describe _____			
17. The training specifically discusses strategies for participants to impart what they have learned with others in their school/schools they serve. If yes, what strategies are mentioned? (select all that apply) <ul style="list-style-type: none"> <input type="checkbox"/> Trainees lead a small workshop or meeting to share new information with their colleagues when they return to school <input type="checkbox"/> Trainees hold a meeting with their head teacher/school administrator/school principal <input type="checkbox"/> Trainees follow up with colleagues through classroom observation <input type="checkbox"/> Trainees share the content learned in a community of practice meeting/village/community meeting <input type="checkbox"/> Other, describe: _____ 			

Part 3: Observer Reflection (after training ends)

18. Do you feel the trainers effectively explained and demonstrated identification, screening, coaching and family engagement? Please explain:	YES	NO	
19. In general, what aspects of the training were most effective?			
20. In general, what aspects of the training were least effective?			
21. Do you feel those trained need any additional content or guidance?			
22. Did you feel the time allotted to the training was adequate for the level and complexity of content covered?			
23. Were there examples in the training about students, teachers, or families that reinforced negative stereotypes about any of these populations?			

Screening Specific Observable Behaviors

Screening Training
24. What screening tools were discussed during the training for hearing, vision and learning difficulties? Please explain:
25. Do you feel the trainers effectively explained how to screen for hearing and vision? Please explain:
26. Do you feel the trainers effectively explained how to screen for hearing difficulties or deafness? Please explain:
27. Do you feel the trainers effectively explained how to screen for learning difficulties? Please explain:
28. Do you feel that participants adequately understood the process of who screens children and why? Please explain:
29. Do you feel the specific screening tools were introduced in enough detail to facilitate participant comprehension? Please explain:
30. Do you feel the pre/post-test activity will provide useful data for internal and external evaluators? Please explain:
Coaching Training
31. Do you feel the trainers effectively explained and demonstrated effective strategies for incorporating Universal Design for Learning into coaching? Please explain:
32. Do you feel the advice given on coaching relationships is relevant to current conditions in Malawi's schools? Please explain:
33. Do you feel the trainers effectively explained and demonstrated effective strategies for engaging with families to improve literacy at home? Please explain:
34. Do you feel the trainers effectively explained and demonstrated effective strategies on how to support families to best access the tools and resources provided to them? Please explain.

Annex G. Project Documentation Reviewed

Planning Documents

Government of Malawi (2019) *Authorisation to carry out assessment on readying by learners with special needs*

Government of Malawi (2020) *Authorisation to carry out assessment on readying by learners with special needs*

Juarez & Associates (n.d.) *REFAM Malawi Section C*

Juarez & Associates (n.d.) *USAID Reading for All Malawi Organizational Chart*

Juarez & Associates (2019) *REFAM IRB Letter to the Ministry of Education, Science, and Technology*

REFAM (n.d.) *Universal Design for Learning for Individualized Education Plans Training Overview*

REFAM (2019) *Reading for All Malawi Activity Monitoring, Evaluation, and Learning Plan 2019*

REFAM (2019) *Reading for All Malawi Program Description*

REFAM (2019) *Reading for All Malawi: REFAM Learning and Tool Adaption Workshop Schedule (MSL)*

REFAM (2019) *Reading for All Malawi Year 1 Workplan*

REFAM (2020) *Reading for All Malawi COVID-19 April Changes to Work Plan*

REFAM (2020) *Reading for All Malawi: Program Outline for EMIS Workshop*

REFAM (2020) *Reading for All Malawi: Review of EMIS to capture data for learners with disabilities in Malawi Activity Plan*

REFAM (2020) *Reading for All Malawi Year 2 Workplan*

REFAM (2021) *Reading for All Malawi Workplan for Facilitators IEP Training*

REFAM (2021) *Reading for All Malawi Year 3 Workplan*

USAID/Malawi (2018) *Request for Task Order Proposals No. 72061219F00001 Reading for All Malawi Activity*

USAID/Malawi (2019) *Task Order 72061219F00001 Reading for All Malawi Award*

Progress Reporting

REFAM (2019) *Reading for All Malawi Annual Report, FY19*

REFAM (2019) *Reading for All Malawi Quarterly Report, FY19 3rd Quarter*

REFAM (2019) *Reading for All Malawi Quarterly Report, FY20 1st Quarter*

REFAM (2020) *Reading for All Malawi Annual Report, FY20*

REFAM (2020) *Reading for All Malawi Quarterly Report, FY20 2nd Quarter*

REFAM (2020) *Reading for All Malawi Quarterly Report, FY20 3rd Quarter*

REFAM (2020) *Reading for All Malawi Quarterly Report, FY21 1st Quarter*

REFAM (2021) *Reading for All Malawi Annual Report, FY21*

REFAM (2021) *Reading for All Malawi Quarterly Report, FY21 2nd Quarter*

REFAM (2021) *Reading for All Malawi Quarterly Report, FY21 3rd Quarter*

Technical Documents

Juarez & Associates (2019): *Reading for All Malawi – REFAM Testing Accommodations*

REFAM (n.d.) *Covid-19: Notes on REFAM's Approach to Post-Scoring and Reporting*

REFAM (n.d.) *DHH Baseline 2020 Manual for Interacting with Children who are Deaf and Hard of Hearing*

REFAM (n.d.) *Project and Assessment Purpose and Suggested MSL-EGRA Subtasks*

REFAM (2019) *Early Grade Reading Assessment of Standard 2 and 4 Blind and Low Vision Learners in Malawi Primary Schools Draft Report*

REFAM (2019) *Example MSL-EGRA Subtasks*

REFAM (2019) *Reading for All Malawi Development of Literacy Toolkit for learners with disabilities in*

Malawi Concept Note

REFAM (2019) *Reading for All Malawi Gender and Social Inclusion Plan*

REFAM (2019) *Reading for All Malawi Inventory of Materials for Children with Disabilities in Malawi*
REFAM (2019) *Reading for All Malawi Report on EGRA Adaptation Workshop*

REFAM (2019) *Reading for All Malawi Report on Mapping of Disabled Persons Organizations and Other Organizations Supporting Learners with Disabilities in Malawi*
 REFAM (2020) *Reading for All Malawi Malawian Sign Language and Hard of Hearing Early Grade Reading Assessment Adaptation Workshop Report*
 REFAM (2020) *Reading for All Malawi Report on EMIS Review Workshop*
 REFAM (2021) *Measuring Early Grade Reading Skills among Learners who are Blind and Low Vision in Malawian Primary School: Findings Summary*
 REFAM (2021) *Measuring Early Grade Reading Skills among Learners who are Deaf and Hard of Hearing in Malawian Primary School: Findings Summary*
 REFAM (2021) *Measuring Early Grade Reading Skills among Learners with Learning Disabilities in Malawian Primary School: Findings Summary*
 REFAM (2021) *Reading for All Malawi Early Grade Reading Assessment (EGRA) Adaptation Guide for Learners with Disabilities*
 REFAM (2021) *Reading for All Malawi Module 2 of the Universal Design for Learning Toolkit Training of Educators: Training Evaluation Report*

Training Materials

Reading for All Malawi (n.d.) *REFAM Overview for Universal Design for Learning Training*
 Reading for All Malawi (n.d.) *REFAM Post Test for the Training in Individualized Education Plans*
 Reading for All Malawi (n.d.) *REFAM Pre-Test for the Training in Individualized Education Plans*
 Reading for All Malawi (2021) *Engaging Families of Children with Disabilities Facilitator Guide*
 Reading for All Malawi (2021) *Engaging Families of Children with Disabilities Participant Guide*
 Reading for All Malawi (2021) *Incorporating UDL into the IEP Facilitators Guide*
 Reading for All Malawi (2021) *Incorporating UDL into the IEP Participant Guide*
 Reading for All Malawi (2021) *Special Needs Educators as Coaches within the NRP Facilitator Guide*
 Reading for All Malawi (2021) *Special Needs Educators as Coaches within the NRP Participant Guide*
 Reading for All Malawi (2021) *The Role of the Facilitator Presentation*
 Reading for All Malawi (2021) *Understanding and Applying the Process of Screening and Identification Facilitator Guide*
 Reading for All Malawi (2021) *Understanding and Applying the Process of Screening and Identification Participant Guide*
 Reading for All Malawi (2021) *Using Universal Design for Learning to Enhance the IEP Process Presentation*

Tools

REFAM (n.d.) *Baseline 2020 Student Sampling Register*
 REFAM (n.d.) *Baseline 2020 Teacher Sampling Register*
 REFAM (n.d.) *DHH Baseline 2020 Assessor Daily Summary Sheet – Learners*
 REFAM (n.d.) *DHH Baseline 2020 Assessor Daily Summary Sheet – Teacher and Head Teacher*
Questionnaires, Classroom Observations and School Climate Survey
 REFAM (n.d.) *DHH Baseline 2020 Checklist Adherence to Administration Guidelines for DHH Children*
 REFAM (n.d.) *DHH Baseline 2020 Children Protection Agreement*
 REFAM (n.d.) *DHH Baseline 2020 Classroom Observation Notes Document*
 REFAM (n.d.) *DHH Baseline 2020 Classroom Observation Protocols*
 REFAM (n.d.) *DHH Baseline 2020 Daily Summary Sheet – Learner Intake Criteria, Assessor Checklist, and Learner Frustration*
 REFAM (n.d.) *DHH Baseline 2020 Data Confidentiality Agreement*
 REFAM (n.d.) *DHH Baseline 2020 Learner Intake: Criteria Questions*
 REFAM (n.d.) *DHH Baseline 2020 Pupil Frustration Observation Checklist*
 REFAM (n.d.) *DHH Baseline 2020 School Climate Survey Final*
 REFAM (n.d.) *DHH Baseline 2020 Tablet User Agreement Form*
 REFAM (n.d.) *DHH Baseline Survey Field Protocol*

REFAM (n.d.) *Reading for All Malawi Variable Names Codebook – Climate Observation – DHH*
 REFAM (n.d.) *Reading for All Malawi Variable Names Codebook – Climate Observation – VI and LD*
 REFAM (n.d.) *Reading for All Malawi Variable Names Codebook – Head Teachers – DHH*
 REFAM (n.d.) *Reading for All Malawi Variable Names Codebook – Head Teachers – VI and LD*
 REFAM (n.d.) *Reading for All Malawi Variable Names Codebook – Learner Questionnaire – DHH*
 REFAM (n.d.) *Reading for All Malawi Variable Names Codebook – Learner Questionnaire – VI and LD*
 REFAM (n.d.) *Reading for All Malawi Variable Names Codebook – Teachers – DHH*
 REFAM (n.d.) *Reading for All Malawi Variable Names Codebook – Teachers – VI and LD*
 REFAM (2019) *2019 Malawi Early Grade Reading Assessment National Reading Program Baseline – LD*
 REFAM (2019) *2019 Malawi Early Grade Reading Assessment National Reading Program Baseline – VI*
 REFAM (2019) *Reading for All Malawi Classroom Observation Protocols*
 REFAM (2019) *Reading for All Malawi EGRA Variable Names & Codebook – Learning Difficulties – English*
 REFAM (2019) *Reading for All Malawi EGRA Variable Names & Codebook – Visual Impairments – English*
 REFAM (2019) *Reading for All Malawi Head Teacher Questionnaire Final*
 REFAM (2019) *Reading for All Malawi Learner Questionnaire Final Print*
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 REFAM (2019) *Reading for All Malawi RC Teacher Questionnaire*
 REFAM (2019) *Reading for All Malawi School Climate Protocol*
 REFAM (2019) *Reading for All Malawi Teacher Questionnaire*
 REFAM (2020) *Malawi Early Grade Reading Assessment: 2020 Baseline Study for Deaf and Hard of Hearing Learners MSL & Hard of Hearing – Student Stimuli 1 – English EGRA, Letters, Words, and Stories*
 REFAM (2020) *Malawi Early Grade Reading Assessment: 2020 Baseline Study for Deaf and Hard of Hearing Learners MSL & Hard of Hearing – Student Stimuli 2 – Pictures*
 REFAM (2020) *Malawi Early Grade Reading Assessment: Protocol Baseline 2020 – Hard of Hearing English EGRA*
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Datasets

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 REFAM (2020) *Reading for All Malawi Baseline HoH English – Chichewa EGRA data modified*
 REFAM (2020) *Reading for All Malawi Baseline MSL English – Chichewa EGRA data modified*

Miscellaneous

REFAM (n.d.) *Malawi Resource Center List*
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 REFAM (2020) *Invitation to Attend Review of the EMIS Workshop*

Annex H. References

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