



**NYU**

Global TIES  
for Children



Universidad de  
**los Andes**  
Colombia

Facultad de  
**Educación**

Strengthening holistic  
learning outcome  
measurement systems in  
emergencies and protracted  
crises: Colombia and Peru

**Diagnostic Report for Peru**  
March 2024

# Acknowledgements, disclaimer, and citation

## Acknowledgments

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## Disclaimer

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# Acronyms

**DRELM** — Regional Department of Education of Metropolitan Lima

**EBR** - Basic Regular Education

**ECW** — Education Cannot Wait

**EiEPC** — Education in Emergencies and Protracted Crisis

**HOLAS** — Holistic Learning Assessment Systems

**INEE** — Inter-agency Network for Education in Emergencies

**(I)NGO** — (International) Non-governmental organization

**M&E** — Monitoring and evaluation

**MINEDU** - Ministry of Education

**NYU-TIES** — NYU Global TIES for Children

**RISE** — Research on Improving Systems of Education

**SABER\*** — Systems Approach for Better Education Results

**SEL** — Social and emotional learning

**TIES** — NYU Global TIES for Children

**OSEE** —(Strategic Monitoring and Evaluation Office)

**UGEL** — Local Educational Management Units

**UMC** — Quality of Learning Measurement Office

**Uniandes** — Universidad de los Andes

# A note of introduction and reflection

In the aftermath of the COVID-19 pandemic and as human-induced climate events increase in severity and frequency, education leaders from school to global settings are advocating for more resilient education systems.<sup>2 3</sup> These systems need to be able to rapidly adapt to the complexities of cascading conflicts, displacement, and migration, which disproportionately affect children from contexts of marginalization and further entrench existing inequities. And in the context of such nested crises, the systems are also called upon to foster holistic learning - both academic knowledge and social and emotional skills and well-being - that can support children to navigate uncertain futures.<sup>4 5</sup>

More, and better, data and evidence on holistic learning outcomes are central to many notions of resilient education systems.<sup>6</sup> As researchers at New York University's Global TIES for Children (NYU-TIES) and the Universidad de los Andes (Uniandes), we do believe in the power of data and evidence to illuminate the educational landscape. Like a painting or a photograph, data and evidence are a reflection and interpretation of our world, with the potential to provide insight and catalyze curiosity and learning. They implicitly and explicitly convey our needs, our biases, and our values, and provide a powerful jumping off point for interrogating those worldviews and taking informed action. However, the ability to generate, disseminate, and utilize data and evidence within an education system often depends on privilege structures and power dynamics deeply entrenched in social, cultural, linguistic, and historical contexts. While data and evidence can promote individual, community, and national freedoms to pursue valued "beings and doings,"<sup>7</sup> monitoring and evaluation (M&E) systems too often stand as a barrier to active and equitable participation in learning and decision-making. Without understanding and acknowledging how data and evidence flows through and are used within the system, by whom, and for what, data will not in and of itself promote resilience - or at least not equitably so. It will serve to maintain a status quo in which certain narratives and experiences are heard, privileged, and funded over others.

As we have worked to acknowledge our complicity in and contributions to this status quo from a variety of intersecting positions (see section below, [Background, organization, and scope](#)), we attempted in this project in Colombia and Peru to reconsider our ways of working, including through:

**Spotlighting the complex systems in which data and evidence are generated, shared, and used.** Effective, timely, and equitable decision-making in education requires more than just quality (reliable, valid and fair) data. It also requires robust communications and collaboration mechanisms across all levels of the sector that promote alignment of and feedback on assessments, data and evidence (information), curricula and standards (goals), and resources (supports). Our Holistic Learning Assessment Systems (HOLAS) framework (see section below, [The HOLAS framework](#)) offers a structure and a set of mixed-method diagnostic tools that can be flexibly applied to identify strengths and gaps in such M&E processes, starting in contexts with strong government education systems supporting diverse populations. These tools can be used to enhance the understanding of and communicate about how M&E systems can support more equitable holistic learning, including among children from contexts of marginalization. Importantly, the framework allows analyses to be tailored to critical audiences within different contexts. While our Peru report emphasizes findings by theme (i.e., contexts of marginalization, social and emotional learning, and equitable data

use), our Colombia report shares findings by framework element (i.e., information, goals, and support). This organization of results was selected to best reach priority audiences in each context.

**Highlighting existing strengths and the contexts in which they have been carried out.**

Efforts to map education data and evidence - and particularly in contexts marked by conflict and protracted crisis - tend to emphasize as a starting point that existing data is weak and fragmented. In our own experience, this message up front can signal disregard for the many efforts that have been made to generate and use data and evidence. This lack of acknowledgement can sharpen divides between stakeholders, reify power dynamics, and ultimately reduce engagement in data and evidence by minimizing and duplicating efforts. To address this, we foreground in our introduction the many strengths in the Peruvian and Colombian M&E systems we identified through our analysis (see section below, [Background, organization, and scope](#)). We have also compiled these many efforts into the interactive HOLAS Assessment Bank, which will be released in April 2024.

**Nuancing considerations of what data is needed for what purpose, for whose benefit, and at what and whose cost.**

In the push for more and better data little mention is given to unintended consequences - which often impact those with the least power and visibility. The teacher who must buy at her own cost the paper to print the required assessment; the shame communities face from media outlets naming “good” schools and “bad” schools based on categorizing publicly available test score data. One of the benefits of systems analysis is that it allows you to better anticipate these “butterfly effects” among stakeholders at different levels. Given the scope of our framework (see section below, [The HOLAS framework](#)), we undoubtedly were not able to identify all such potential ripples. However, we did try to take into account such consequences in developing our integrated findings and recommendations (see section below, [Integrated results and recommendations from the systems’ diagnostic report](#)).

Our efforts to do so are a starting point, and they are an imperfect work in progress. Throughout the report we acknowledge places for future revision, and we hope others can continue this work in the same spirit of equitable systemic resilience.

The NYU-TIES and Uniandes teams



# Executive summary

## Who are we?



NYU

Global TIES  
for Children

NYU Global TIES for Children (NYU-TIES) is an international research center embedded within New York University. Our mission since 2015 is to contribute to a robust and culturally-grounded science for program and policy action that promotes children's holistic learning and development in low- and middle-income countries and crisis-affected contexts.



Universidad de  
los Andes  
Colombia

Facultad de  
Educación

Universidad de los Andes (Uniandes) is an autonomous, independent, and innovative Colombian institution. The School of Education aims to contribute to the development of educational systems within the university and across Colombia by fostering research, training, evaluation, policy development and communication across diverse local and international stakeholders.

## What did we aim to do?

Supported by Education Cannot Wait (ECW), between September 2022 and December 2023 **NYU-TIES and the Uniandes sought to identify strengths, challenges, and gaps within Peruvian monitoring and evaluation (M&E) systems for holistic educational outcomes.**

These holistic educational outcomes encompass common structural outputs - such as attendance and enrollment - and academic skills, including literacy and numeracy. They also include the social and emotional skills that strengthen children's capacities to pursue valued academic, cultural, employment (and many other!) goals. We also include in our definition the factors in school, community, and home settings that can risk or promote children's holistic learning and development.

**The emphasis on M&E stems from the recognition that robust M&E systems capable of generating valid, reliable, and fair data are essential for decision-making.** These systems play a crucial role in identifying where, how, and with whom to focus education programming, in tailoring instruction, and in evaluating if these efforts were successful. By providing such vital information, M&E sheds light on the diverse needs within a complex education system and serves as a starting point for effective intervention. Transforming data into actionable evidence has the power to drive positive changes at both the national level - guiding policies and programs - and within schools and classrooms, influencing daily practices that directly impact children's educational experiences. And ensuring that evidence is aligned with various goals, resources, and stakeholder needs enables the system to function like a well-gearred machine towards supporting children's holistic learning.

In order to deepen our understanding of the Peruvian M&E system, we embarked on an iterative three-step process in collaboration with key stakeholders and a national Steering Committee. To start, we adapted two well-known frameworks for education systems analysis



- the Research on Improving Systems of Education (RISE) diagnostic framework<sup>8</sup> and the Systems Approach for Better Education Results (SABER) tool<sup>9</sup> – with three main goals. First, we aimed to extend the scope of existing frameworks from a focus on academic learning outcomes only to include holistic educational outcomes. Second, we aimed to explicitly emphasize the need for fairness and equity in educational M&E systems among children from contexts of marginalization, including refugee children and students with disabilities. Third, we aimed to improve the reproducibility and utility of systems frameworks and the corresponding analyses and results. **This effort resulted in the development of the Holistic Learning Assessments Systems (HOLAS) framework.**

The HOLAS framework focuses on assessing the alignment within and between diverse stakeholders in national education systems around three main areas:

- **Information:** How does the system promote clarity and alignment in the purpose and content of assessments, ensure data quality, and facilitate equitable access to and use of evidence?
- **Goals:** How does the system define holistic learning objectives – and with what degree of clarity and for whom? To what extent are such decisions being made based on evidence, and what norms are present in the system around the agency of frontline providers and sub-national staff for effective M&E processes?
- **Support:** What support mechanisms are in place to ensure comprehensive, evidence-informed holistic learning at different levels of the education system, including the availability and quality of resources, professional development opportunities, and organizational structures?

**Based on this framework, we conducted a mixed-method systems analysis to assess the extent to which assessments, data, and evidence (information) are aligned with foundational curricular and standards (goals) and key resources (supports) within and across stakeholders at different levels of the education system.** To do so we designed quantitative survey and qualitative interview protocols for use with a diversity of stakeholders within the Peruvian ( $n_{\text{survey}} = 41$ ,  $n_{\text{interview}} = 27$ ) education system, including: current and former staff from the data-producing and data-using offices of the Ministerio de Educación (Ministry of Education or MINEDU), data-producing and data-using staff within the Dirección Regional de Educación de Lima Metropolitana (Department of Education in Lima Metropolitana or DRELM), staff from non-governmental organizations (NGO) and multilateral institutions, and frontline service providers (teachers and principals).

## What were our key findings?

By examining these different levels and stakeholders, we gained comprehensive insights into the challenges and opportunities in the Peruvian M&E system. **We found that significant efforts have been made to design and implement measurement tools that provide valid and reliable information on students' holistic learning outcomes and on the school and teacher factors that support these.** Survey respondents reported accessing or using in the past five years over 50 unique education assessments, evaluations, and/or M&E systems at various levels of the education system. The majority of tools discussed in detail in subsequent interviews and reported on in our findings were intended to be used as national monitoring tools that assess at the primary and secondary level: student academic skills; student social

and emotional skills; quality of teaching and management practices; structural quality indicators; and teacher pedagogical skills and well-being.

**In addition, all interviewed stakeholder groups perceived that the national assessments led by the Secretaría de Planificación Estratégica (Secretary of Strategic Planning or SPE) - and particularly the Oficina de Medición de la Calidad de los Aprendizajes (Office of Learning Quality Measurement or UMC) - meet high quality standards in terms of reliability and validity.** They reported on a range of mechanisms in place to ensure quality at different stages of the assessment process, from the design of the assessment to enumerator training to data verification, analysis, and processing. Respondents also reported on classroom, sub-national, and international assessments designed for a variety of purposes, such as formative feedback, program monitoring or evaluation, and planning of learning sessions.

Given the breadth, depth, and quality of assessments available, we recommend as a starting point that stakeholders seeking to collect information on holistic educational outcomes review what is available before introducing new assessments into the system. To support stakeholders' ability to do so, we have developed the HOLAS Assessment Bank that provides an overview of many of the assessments and data collection tools identified through our systems mapping, as well as information and links on how to access them. We anticipate releasing the Assessment Bank in April 2024.

**However, we also found that considerable work remains to “power on” the M&E system and ensure its ability to illuminate the educational landscape.**

## What are our main recommendations?

Based on the results of the systems analysis, valuable inputs from our Steering Committee and interviewees, and our own knowledge of the systems, we formulated recommendations to strengthen the coherence of Peruvian educational M&E systems for holistic learning outcomes. The recommendations fall under four, overarching areas:

1. Highlighting the strengths of the Peruvian educational M&E system: Promoting the dissemination, use, and uptake of robust educational M&E efforts to strengthen alignment and avoid duplication of efforts;
2. Promoting greater inclusivity in the prioritization, design, implementation, and use of data from education assessments among students with disabilities and Venezuelan refugee children;
3. Connecting the dots to support children's and frontline service providers' social and emotional skills: from frameworks to data to actionable strategies; and
4. Strengthening the utility and sustainability of educational data and evidence in a way that promotes agency and equitable access.

# Background, organization, and scope

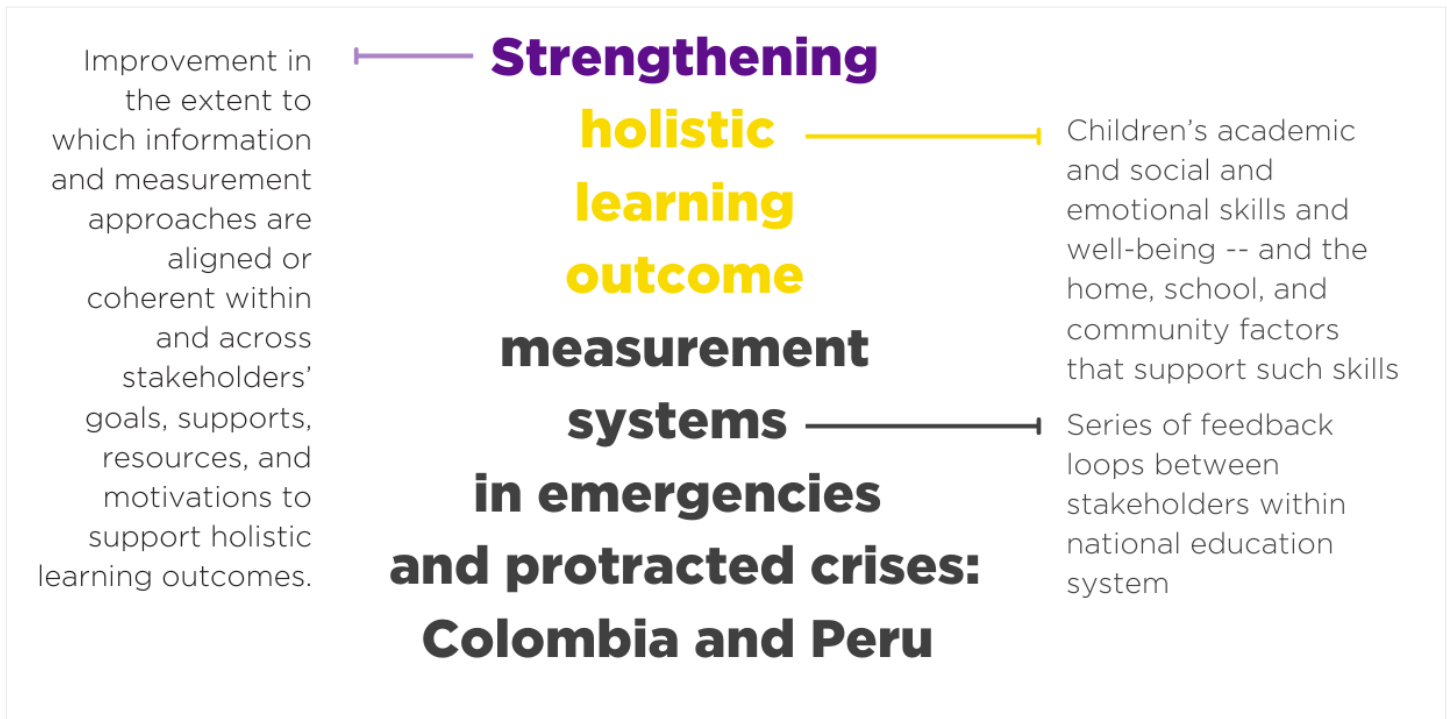


Figure 1 — How are we defining “strengthen,” “holistic learning,” and “systems”?

Supported by Education Cannot Wait (ECW), between September 2022 and March 2024 NYU Global TIES for Children (NYU-TIES) and the Universidad de los Andes (Uniandes) partnered to strengthen holistic learning outcome measurement systems in two countries - Colombia and Peru - hosting the majority of Venezuelan refugee and migrant families.<sup>10</sup> The overarching objective of the initiative was to co-design and implement with key educational stakeholders in each country strategies to strengthen alignment in and mutual capacities for monitoring and evaluating holistic learning outcomes among children from contexts of marginalization (for more details on the goals of and timeline for the initiative, see [here](#)).

## Our focus on childhoods from contexts of marginalization

We define childhoods from contexts of marginalization as groups of children and their caregivers that face or are at the risk of facing discrimination, exclusion, and/or barriers in their access to resources, opportunities, and power. This is due to persistent disadvantages rooted in adverse structural conditions, unequal power dynamics, and systemic inequities.<sup>11 12 13</sup> We recognize individuals' ability to act and produce their desired results even when faced with challenging structural conditions that can limit their field of action.

In this report, we use the term childhoods in contexts of marginalization or vulnerability primarily to refer to three groups that are of special interest to this initiative in Peru and Colombia: refugee and migrant children from Venezuela, children with disabilities, and children from indigenous or native groups.

The ongoing political and economic crisis in Venezuela<sup>14</sup> has resulted in the exodus of over 7.7 million Venezuelans globally, including 6.5 million refugees and migrants residing in Latin America and the Caribbean as of November 2023<sup>15</sup>. Since 2015, Venezuelan refugees and migrants have mainly settled in Colombia and Peru.<sup>16</sup> This situation, often referred to as an “unprecedented migration crisis,<sup>17</sup>” has generated significant barriers to the equitable provision of education for all children<sup>18</sup>. This was further heightened during the COVID-19 pandemic, which also disproportionately impacted children with disabilities and indigenous and native children<sup>19</sup>. While the Colombian and Peruvian governments have made progress toward guaranteeing the right to education for all children, obstacles remain to guaranteeing their access to equitable, quality, and holistic education, which are recognized under both countries’ Constitutions and General Education Laws, published in the 1990s and 2000s<sup>20</sup>.

The term childhoods from contexts of marginalization can also be used to refer to other groups of children in contexts of vulnerability, such as out-of-school children and children in rural or hard-to-reach areas. In referring to childhoods in contexts of marginalization, we also include the various actors that actively partake in the education process of children in contexts of marginalization, such as their teachers and principals.

We recognized from the outset that we could not meaningfully meet our objective without a comprehensive understanding of existing efforts to improve holistic learning outcome measurement systems in both countries, as well as of barriers and enablers to the success of such efforts. Education systems in both countries have made significant strides to prioritize the achievement and assessment of holistic learning outcomes, including both academic and social and emotional skills.<sup>21 22</sup> Such efforts have been made and are currently underway across children’s developmental stages - including early childhood, primary-, and secondary-school levels - as well as with particular attention to children from contexts of marginalization. However, these efforts are at times uncoordinated between different stakeholders and different levels of the education system. And due to a complexity of factors - including limited resources and institutional mandates - such efforts do not sufficiently emphasize equity in assessment practices and information use.

We thus embarked on an iterative process in collaboration with two national Steering Committees to systematically map Colombian and Peruvian educational monitoring and evaluation (M&E) systems, with a specific focus on holistic learning and equity. This report details the multi-step mixed-methods process we undertook to do so, as well as the results of this mapping, and it is organized as follows.

[The HOLAS Framework:](#) First, we review the process for developing the Holistic Learning Assessment Systems (HOLAS) framework that undergirded our systems mapping efforts. Between September 2022 and May 2023, we adapted two well-known frameworks for education systems analysis - the Research on Improving Systems of Education (RISE) diagnostic framework<sup>23</sup> and the Systems Approach for Better Education Results (SABER) tool<sup>24</sup> - with three main goals. First, we aimed to extend the scope of existing frameworks from a focus on academic learning outcomes only to include holistic learning outcomes. Second, we aimed to explicitly emphasize the need for fairness and equity in educational

M&E systems among children from contexts of marginalization, including refugee children and students with disabilities. Third, we aimed to improve the reproducibility and utility of systems frameworks and the corresponding analyses and results. This iterative effort resulted in the development of the HOLAS framework, which focuses on assessing the alignment within and between diverse stakeholders within the education systems around three main elements:

- **Information:** How does the system promote clarity and alignment in the purpose and content of assessments, ensure data quality, and facilitate equitable access to and use of evidence?
- **Goals:** How does the system define holistic learning objectives – and with what degree of clarity and for whom? To what extent are such decisions being made based on evidence, and what norms are present in the system around the agency of frontline providers and sub-national staff for effective M&E processes?
- **Support:** What support mechanisms are in place to ensure comprehensive, evidence-informed holistic learning at different levels of the education system, including the availability and quality of resources, professional development opportunities, and organizational structures?



Figure 2 – The HOLAS framework

The three rows correspond to the three elements of the framework - information, goals, and support - each of which is defined by four sub-elements.

Each of these three elements contains four sub-elements, or dimensions, for a total of 12 sub-elements within the HOLAS framework. Each of the 12 sub-elements is then measured by a set of qualitative indicators that provides an imperative as to what M&E systems aligned for equitable holistic learning might look like. We detail our process for framework adaptation, integration, and extension (see section below, [The HOLAS Framework](#)). We specifically highlight and provide the rationale for decisions made throughout the process that impacted

the scope of the framework and the utility for cross-context systems analysis.

[Mixed-methods systems analysis methodology](#): Next, we describe the methodology used to map the Colombian and Peruvian educational M&E systems based on the HOLAS framework. Between December 2022 and December 2023 we conducted a mixed-methods study to assess the extent to which assessments, data, and evidence (information) are aligned with foundational curricular and standards (goals) and key resources (supports) within and across stakeholders at different levels of the Colombian and Peruvian education systems. To do so we designed quantitative survey and qualitative interview protocols for use with a diversity of stakeholders within Colombian ( $n_{\text{survey}} = 37$ ,  $n_{\text{interview}} = 36$ ) and Peruvian ( $n_{\text{survey}} = 41$ ,  $n_{\text{interview}} = 27$ ) education systems, such as:

- At the national level, current and former staff from data-producing and data-using offices within Ministries of Education (Colombia: MEN; Peru: MINEDU)
- At the sub-national level, data-producing and data-using staff within regions serving a significant number of Venezuelan refugee and migrant students (Colombia: Secretarias in Cucuta and Bogota; Peru: the Dirección Regional de Educación de Lima Metropolitana (Regional Education Directorate of Metropolitan Lima or DRELM))
- At the school level, frontline providers from schools with a high enrollment of Venezuelan refugee and migrant students (Colombia: teachers; Peru: principals and teachers)
- Staff from educational organizations such as non-governmental organizations (NGOs) and multilateral organizations that offer services to Venezuelan refugee children
- Researchers at universities and think tanks who study and collaborate with educational systems (Colombia only)

We also undertook a targeted desk review of foundational documents within the Colombian and Peruvian education systems. Through sequential quantitative and qualitative analysis and integration within and across various types and levels of stakeholders and framework elements, we gained comprehensive insights into the challenges and opportunities present in Colombian and Peruvian M&E systems for holistic learning outcomes.

[Overview of the education system](#): In this section, we provide critical background on holistic M&E processes and structures within Colombia or Peru (depending on the report version), including among childhoods in contexts of marginalization. The overview is intended to support interpretation of the results, and particularly among readers less familiar with the Colombian and Peruvian education systems. It was developed based on the desk review, and it also includes a brief description of the assessments most frequently mentioned in the reports to facilitate recognition when reading the results.\*

[Q and A: How can you approach our results and recommendations?](#) In this section, we share different ways in which the reader can approach, access, and interpret the results of our systems mapping: The results of our analyses are available at different levels, and can be used flexibly depending on the reader's purpose and context. First, results in each country for

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\* For readers of the Colombian report, more information on the assessments, tools, and M&E systems common in the Colombian educational M&E system can be found in Appendix B. For readers of the Peruvian report, we will release additional information on the assessments, tools, and M&E systems that we have gathered through the desk review in a future version of this report



each of the 12 sub-elements within the HOLAS framework are available online. For example, if you as a reader are particularly interested in barriers and enablers to information quality in Colombian or Peruvian educational M&E systems, you can scan the QR code or the link provided in the [Results by sub-element from the systems' diagnostic report](#) section to read a summary of findings particularly related to the sub-element “Ensure information quality.”

Second, the Integrated results and recommendations from the systems' diagnostic report section of this report includes integrated results that highlight key themes, patterns, and (mis)alignments across the various HOLAS sub-elements. These results are particularly relevant to the objectives and target audiences of this initiative.

**We emphasize that these results are not exhaustive. Indeed, by looking across the sub-element reports, additional areas of alignment and misalignment across sub-elements can likely be identified and additional recommendations developed - and we encourage readers to do so!**

[Results by sub-element](#): In this section, we provide the links and QR code for readers to navigate to the results by key sub-element or dimension of the HOLAS framework: information, goals, and support. We also include findings from emerging aspects not originally contemplated in the HOLAS framework. Furthermore, original reports organized by data source (quantitative descriptive, quantitative social network, and qualitative) are available upon request. Contact information details are available in this section.

[Integrated results and recommendations](#): Finally, we report the integrated results of our educational M&E systems mapping efforts in Colombia or Peru (depending on the report) as well as recommendations to address misalignments identified through the systems mapping process. Between May 2023 and March 2024 we used the results of the systems analysis, valuable inputs from our Steering Committee and interviewees, and our own knowledge of the systems to: (a) identify (mis)alignments across the sub-elements in the HOLAS framework; and (b) develop recommendations on how to improve alignments within and across stakeholders and elements to support equitable holistic learning M&E systems. Our lenses in doing so were shaped by both the goals and constraints of our particular initiative as well as the primary audiences for this report (in Colombia: research-practice-policy partnerships across the development-humanitarian nexus and interested local and national level public servants and researchers; in Peru: national and sub-national staff within the MINEDU as well as humanitarian actors such as the country multi-year resilience programs (MYRP) supported by ECW). Given different foci, audiences, and findings, the integrated results and recommendations are presented differently for each country, and we do not attempt to make cross-context recommendations - with one important exception.

### **Across Colombia and Peru we overarching found that ...**

Significant efforts have been made in both Colombia and Peru to design and implement measurement tools that provide valid and reliable information on students' holistic learning outcomes and on the school and teacher factors that support the attainment of those outcomes. Survey respondents in Colombia (n = 37) and Peru (n = 41) reported on 42 (in Colombia) and 50 (in Peru) unique education assessments, evaluations, and/or M&E systems at various levels of the education system.



**Recommendation.** Given the breadth, depth, and quality of educational assessments available within Colombia's and Peru's education system, we recommend as a starting point that diverse stakeholders seeking to collect information on educational outcomes review what is currently available before introducing new assessments into the system. To support stakeholders' ability to do so, we have developed a corresponding HOLAS Assessment Bank that provides an overview of many of the assessments and data collection tools identified through our systems mapping, as well as information and links on how to access them. We anticipate releasing the HOLAS Assessment Bank in April 2024.

## Scope and key considerations

Before delving into the contents of the report, we offer three reflections that must be considered in reading about and using the tools and evidence included in this report. First, the HOLAS framework and associated mixed-methods diagnostic tools were developed specifically for use in Colombia and Peru. Both countries have strong national educational M&E systems, and both countries have provided access to those national systems for refugee children; these considerations influenced how we formulated the framework and tools. Adaptations are needed before use in other social, political, and economic contexts. However, we hope that the HOLAS tools and process provide a useful starting point for doing so.

Second, as in any research process, it is important to reflect on how our own experiences and positions as a team can impact our interpretations of the data. The two principal investigators of the initiative are based in New York, United States, and Bogotá, Colombia, and hold Doctor of Philosophy degrees (PhDs) in Applied Psychology and Psychology and Education, respectively. Both have extensive experience working in collaboration with governments and NGOs on issues related to the measurement of holistic learning outcomes: one on the socioemotional skills of primary school-aged children in Peru, Lebanon, and elsewhere and the other on early childhood development and early education in Colombia, Jordan, and elsewhere. The U.S.-based researcher identifies herself as white and is a native English speaker, and does not speak Spanish. The team that developed the framework, conducted the mixed-methods study, analyzed and summarized evidences, and implemented the strategies is composed of early to mid-career researchers based in:

- Colombia (3): All the researchers in Colombia are Colombian by birth. Two of them hold PhDs in Psychology. A third researcher has a Master's degree in Sociology and works with the Colombian agency responsible for educational evaluation. All of them have extensive experience in the design, data collection, and analysis of data in the context of program evaluation in the Colombian education sector throughout the country. They have interacted with national, regional, and local authorities, as well as with NGOs, teachers, students, and families in different contexts.
- United States (3): All of the researchers in the United States are South American by birth and have Masters degrees. Two of the researchers are Colombian by birth and are pursuing their PhDs. One of these has an Master's degree in Applied Psychology, and previously worked in the Colombian government agency responsible for educational evaluation, as well as collaborating with the Peruvian government in the evaluation of social and emotional skills. The other has a Master's degree in Psychology. A third researcher is Argentinean and has a Master's degree in Global

Affairs. She has previously worked with the MINEDU.

- Peru (2): All of the researchers in Peru are Peruvian by birth and previously worked in various offices of the MINEDU on the measurement of early childhood development and socioemotional skills, among other topics. One researcher has a Master's degree in Applied Psychology. The other has a Bachelor's degree in Social Psychology.

For the duration of the project, team members met at least once a week to ensure that the initiative was guided by their collective knowledge and experience in multiple fields.

Lastly, it is relevant to note that many of the terms used throughout the project and in drafting this report—such as social and emotional learning (SEL), holistic learning, and childhoods in contexts of marginalization—are subject to debate and not the product of universally accepted definitions. While the bulk of our work has not focused on communications, language is crucial to the effort of increasing coherence across education systems. We outline how we have understood some contentious and technical language (see section below, [Appendix 1: Glossary of terms](#)), recognizing that these terms have diverse and contradicting definitions in the global sphere and each country's national standards. Oftentimes, the terms outlined were also understood differently by those who participated in our research. Furthermore, changes in the political climate of Colombia and Peru throughout the last two years has also created dynamism that has impacted our work, including the language we have used herein.

# The HOLAS framework

In this section, we introduce the framework that guided our systems analysis: the Holistic Learning Assessment Systems (HOLAS) framework. Specifically, we:

- Identify the purposes that motivated the development of the HOLAS framework
- Review two well-known frameworks for education systems analysis that deeply informed the development of the HOLAS framework: Research on Improving Systems of Education (RISE) and Systems Approach for Better Education Results (SABER)
- Describe our process for integration, adaptation, and extension of existing frameworks
- Provide an [overview of the elements](#) of the HOLAS framework

In doing so, we acknowledge decisions we made based on project objectives, context, and resource constraints that informed the scope and design of the HOLAS framework. As it currently stands, the HOLAS framework is best suited for use in contexts with strong national educational monitoring and evaluation (M&E) systems that provide access to formal education opportunities among children from contexts of marginalization. We describe in depth the methodology used to create the framework here in the hopes that it can be further extended and adapted for use in different social, economic, and political contexts.

## HOLAS purposes

In order to strengthen coherence and equity in the Colombian and Peruvian holistic learning outcome measurement systems, we first needed a framework that would allow us to bound, map, and communicate about such systems. The HOLAS framework was developed for three interconnected purposes:

1. To facilitate a clear and inclusive communication about the elements of holistic learning M&E systems: We sought to clearly identify and describe elements of holistic learning M&E systems using user-friendly language and incorporating multiple stakeholder voices.
2. To build consensus on areas of (mis)alignment within holistic learning M&E systems: We piloted a methodology for education systems analysis which facilitates replication and transparency through the use of open-source quantitative and qualitative tools.
3. To prioritize strategies for strengthening alignment to support equitable holistic learning: We designed the framework to provide detailed information that enables the development and prioritization of concrete strategies for strengthening alignment in holistic M&E systems.

We then piloted the framework in the current initiative in Colombia and Peru. In doing so, we aimed to provide a proof of concept of the utility of such an approach for strengthening holistic M&E systems in contexts of emergency and protracted crisis, beginning in two countries with strong governmental educational M&E systems.

As a starting point, we identified two existing approaches to education systems analysis that include a focus on assessments, data, and information: the RISE diagnostic framework<sup>25</sup> and the SABER tool<sup>26</sup>. However, we recognized that each framework had complementary strengths and shortcomings for our specified purposes, leading to our decision to adapt, integrate, and extend them to create the HOLAS framework.

**Table 1.** Overview of RISE, SABER Student Assessment, and the HOLAS framework

	<b>RISE</b>	<b>SABER Student Assessment</b>	<b>HOLAS Framework</b>
Main purpose(s)	<p>Within-country:</p> <ul style="list-style-type: none"> <li>• Diagnosis of (mis)alignments in education systems for academic learning</li> <li>• Prioritization and consensus building around strategies that facilitate systems' alignment for academic learning</li> </ul>	<p>The overarching SABER approach is intended for:</p> <ul style="list-style-type: none"> <li>• Cross-country comparative policy analysis</li> <li>• Within-country systems strengthening of high-leverage education policy areas that support academic learning</li> </ul>	<p>Within-country:</p> <ul style="list-style-type: none"> <li>• Diagnosis of (mis)alignments in education M&amp;E systems for holistic learning</li> <li>• Prioritization and consensus building around strategies that facilitate M&amp;E systems' alignment for equitable holistic learning</li> </ul>
Scope	Identifies core elements and relationships that define education systems across specific policy domains.	The overarching SABER approach identifies 13 key policy domains, each of which have their own guiding framework. SABER Student Assessment is one such domain.	Builds on the RISE framework to specify how core elements and relationships specifically interact within education M&E systems.
Framework design	A 5x4 matrix, in which the five core elements of education systems - goals, information, finance, support, and motivation - define four key stakeholder relationships.	A 3x3 matrix, in which three drivers of assessment quality - enabling context, systems alignment, and assessment quality - define the effectiveness of three types of assessments. Notably, some elements of RISE's goals, finance, support and motivation are included within the SABER enabling context.	Currently three core elements (goals, information, and support), each with four corresponding sub-elements, define horizontal, vertical, and diagonal feedback loops between five stakeholder groups.
Stakeholders considered	<p>The state</p> <p>Education authorities and organizations</p> <p>Frontline service providers</p> <p>Caregivers</p> <p>Students</p>	Not explicitly stated.	<p>Education authorities at national and sub-national levels,</p> <p>Education organizations, including non-governmental organizations (NGOs),</p> <p>Frontline service providers,</p> <p>Researcher</p>
Types of assessment considered	Primarily examinations.	Classroom assessments, Examinations, Large-scale national and international monitoring assessments	Formative, summative, and monitoring assessments at classroom, sub-national, national, and international levels.
Role of holistic learning	Not explicit.	Not explicit.	Explicit.
Role of equity	Not explicit.	Considered in a separate policy domain.	Explicit.

## **The RISE framework: In brief**

Published in 2015, RISE provides an analytical framework to help education stakeholders identify the extent to which education systems are aligned towards supporting academic learning - or other purposes, such as access to education - and undertake systemic reform to increase alignment.<sup>27</sup> The ability to assess the alignment of educational systems is critical given emerging research that the effectiveness and sustainability of any given intervention aimed at improving academic learning outcomes are uncertain if implemented within a system that is not aligned towards improving academic learning outcomes. To assess alignment, the RISE framework specifies key elements within education systems that can be (mis) aligned within, between, and across key stakeholder groups.

### **RISE elements**

RISE identifies five main elements of an education system: delegation (or goals, such as those enshrined in curricula, frameworks, and standards); information (such as data and measures); supports (such as in-service and pre-service teacher training); motivation; and financing. Each of these elements contains a number of sub-elements. For example, within the information element, RISE specifically considers “information use” and “assessment purpose.”

### **RISE relationships**

RISE identifies four key stakeholder groups: the state (including executive, legislative, and fiduciary authorities); education authorities and organizations (including Ministries of Education); frontline providers (including school leaders and teachers); and citizens (including parents and students). Various relationships can exist among these stakeholder groups, which are defined by exchange and feedback around the five RISE elements.<sup>28</sup> For example, in what RISE terms the management relationship, an educational authority such as the Ministry of Education holds frontline service providers accountable for completing a goal, such as improving academic learning outcomes. The Ministry of Education provides support - including in-service professional development opportunities - and financing - such as teacher compensation packages - to frontline service providers to achieve this goal, while the frontline service providers have intrinsic and extrinsic motivators - like career advancement opportunities - to support progress to the goal. Progress against the goal is assessed by information, such as data collected through national monitoring assessments.

### **RISE analysis**

A 5x4 matrix results from combining the above-specified elements and the relationships, forming the basis for the RISE framework and analysis.<sup>29</sup> RISE analysis can be undertaken in several ways at different levels, of which we highlight two here. First, one can assess the extent to which goals, information, support, motivation, and financing are aligned (or not) towards the purpose of improving academic learning within, between, and across stakeholder relationships. Second, one can evaluate whether the elements and relationships within the system interact to support goals beyond or in addition to improving academic learning outcomes, such as enhancing access to education or meeting bureaucratic requirements.

## **RISE process and materials**

RISE has teams from different organizations, sectors, and regions, including teams generating original scholarship on education system in Ethiopia, India, Indonesia, Nigeria, Pakistan, Tanzania, and Vietnam.<sup>30</sup> The application of the RISE framework is facilitated by RISE's Diagnostic Toolkit, which provides guidance on the methodology for implementing the RISE through six phases: the inception, desk review, workshops, stakeholder workshop and interviews, analysis prioritization workshop, and final report.<sup>31</sup>

## **The SABER framework: In brief**

Published in 2011 by the World Bank, SABER was launched with the objective of producing comparative data on educational policies and institutions to help countries systematically strengthen their educational systems and promote academic learning.<sup>32</sup> Like RISE, the SABER tool recognizes the importance of aligning education systems' policies and institutions of governance, information, accountability, financial rules, and school management with learning for all<sup>33</sup>. But while the RISE framework identifies common elements and relationships across an education system, the SABER approach is organized according to 13 specific education policymaking topics or domains areas, each of which has its own guiding framework.<sup>34</sup> - Of particular relevance to this initiative is the Student Assessment domain which identifies a set of assessment types as well as drivers of assessment systems' quality.<sup>35</sup>

## **SABER Student Assessment types**

The SABER Student Assessment domain identifies three assessment types or purposes: (1) classroom assessments (that provide information to support teaching and learning within classrooms); (2) examinations (that provide information to make decisions about individual students' certification and grade progression); and (3) large-scale systems assessments - including national and international learning assessments - that monitor quality and performance of the system.<sup>35</sup>

## **SABER Student Assessment drivers of quality**

The SABER Student Assessment domain identifies three main quantifiable and actionable drivers of quality and sustainability within educational M&E systems. First, M&E systems have an enabling context, including policies for assessment activities, leadership and institutional structures, availability of sufficient funding, and presence of trained staff<sup>36</sup>. Second, assessment systems must be aligned with systems' goals, standards, and pre-service and in-service training opportunities. Third, assessment activities must be sound and lead to high-quality - defined here as reliable and valid - data at all stages of the assessment process.

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\* These domains are: Early Childhood Development, Education Management Information Systems, Education Resilience, Engaging the Private Sector, Equity and Inclusion, Information and Communication Technologies, School Autonomy and Accountability, School Finance, School Health and School Feeding, Student Assessment, Teachers, Tertiary Education, and Workforce Development.

\*\* We also reviewed relevant materials from the SABER Education Management Information System framework. However, given the ultimate focus of this initiative on holistic learning outcomes, we ultimately focused on the SABER Student Assessment domain. Integrating relevant aspects of the SABER EMIS framework into the HOLAS framework is a potential area for future development.



## **SABER Student Assessment analysis**

A 3x3 matrix results from crossing the assessment types and drivers of quality. Users can then identify areas for improvement within a specific assessment type - for example, strengthening classroom assessments by focusing on the enabling context and quality - or within the various drivers of quality across assessment types - for instance, leadership and institutional structures that support different types of assessment. Importantly, the SABER questionnaires and rubrics are designed to evaluate the “level of development” of existing classroom, examination, and large-scale assessment activities against “best or recommended practices.”<sup>37</sup> Thus within the matrix, four benchmark levels and corresponding indicators have been established: latent (no assessment activities) through emerging and established to advanced (stable and sustainable high-quality assessment for learning).

## **SABER Student Assessment process and materials**

The SABER Student Assessment process is guided by a set of instruments - a framework paper, and rubrics and questionnaires for each assessment type - to obtain a high-level snapshot of student assessment systems.<sup>38 & 39</sup> The process is designed to be relatively quick and cost-effective, as it assesses policy and institutional conditions as opposed to school-level factors. SABER data broadly has been collected in-country by experts for 10 of the 13 policy domains and validated through engagement with policymakers<sup>40</sup>. SABER tools have been applied in over 100 countries.<sup>41</sup>

## **RISE and SABER: The need for integration and extension**

The RISE and SABER frameworks have complementary strengths and challenges in the context of the objectives of the current initiative. The RISE framework focuses on assessing feedback loops within and across different stakeholder relationships - including at the community and school level - which SABER does not. Meanwhile, the SABER instruments identify specific, quantifiable drivers of assessment systems’ quality throughout the processes of collecting, analyzing, interpreting, and sharing information about academic learning outcomes. By integrating both frameworks, we sought to combine the focus on dynamic, multi-level feedback loops while increasing the specificity around assessment and information systems. In doing so, we aimed to create a roadmap for identifying and acting on the drivers of quality of assessments, while understanding how diverse stakeholders interact with and shape them.

The need went beyond that of integration, however: We noted three, interrelated limitations that required the extension of the RISE and SABER frameworks

## **The need for a systemic focus on the development-humanitarian nexus**

First, neither RISE nor SABER specifically focus on education systems within contexts of emergency and protracted crisis. Yet, as climate change, conflict, and human rights violations have displaced over 100 million people - one out of every 74 people on earth<sup>42</sup> - there is a need for greater coordination and collaboration between actors working towards national and sub-national education development goals (such as Ministries of Education and school staff in formal school settings) and actors working to support education as part of humanitarian response to crisis (such as NGOs and school staff in non-formal education, who are not



explicitly included within the RISE and SABER frameworks)<sup>43</sup>. Coherent education data across what is termed the “development-humanitarian nexus” is conceptualized as critical to such response efforts, allowing for joint planning, risk mitigation and resource mobilization to prevent, respond to, and promote recovery from crisis<sup>44</sup>. Yet, as it currently stands, a diversity of national, sub-national, and humanitarian actors often operate parallel education M&E systems with limited linkages and interoperability.<sup>45 & 46</sup> This creates more opportunities for misalignment than anticipated by the RISE and SABER frameworks<sup>47</sup>.

## **The need for a systemic focus on holistic learning outcomes**

Second, both RISE and SABER focus only on the assessment of academic learning outcomes. However, in the context of the COVID-19 pandemic and climate crises, education systems globally are being called upon to foster holistic learning - both academic knowledge and social and emotional skills and well-being - that can support children to navigate uncertain futures<sup>48 & 49</sup>. As such, there is an increasing focus at the school, sub-national, national, and global levels on assessing social, emotional, and related skills, like citizenship skills<sup>50,51,52</sup>. However, variations in how social and emotional skills are defined, prioritized, and named within and across contexts, by whom, and with what agency<sup>53,54,55</sup> - as well as limited agreement on SEL measurement approaches and purposes - increases the potential for misalignments within educational assessment systems.

## **The need for a systemic focus on equity**

Third, and also relatedly, neither RISE nor SABER explicitly attend to power dynamics and equity among childhoods in contexts of marginalization, including migrants and refugees; children with disabilities; Black, indigenous, and ethnic minority populations; and gender groups. For example, while the RISE framework considers that some education systems might be geared towards the priorities of a “favored group,” it does not acknowledge the histories and systems of racism and colonialism that have enabled such power structures and domination - nor how such dynamics will shape systems alignment efforts.<sup>56</sup> The SABER Student Assessment framework, meanwhile, defines assessment quality in terms of reliability and validity without explicit reference to fairness, a key part of the Standards for Educational and Psychological Testing<sup>57</sup>. Systems frameworks can provide a powerful tool for interrogating power and relational dynamics. But as currently framed, these tools allow users to elide how systems - in both the Minority and Majority world - maintain unequal power structures that favor those from Western, Educated, Industrial, Rich, and Democratic (WEIRD) contexts<sup>58</sup>. Attempts to address (mis)alignments without such acknowledgements will only serve to reify existing inequities.

## **The process of bounding, integration, extension, and application: The HOLAS framework**

We began the process of developing the HOLAS framework by first reviewing in depth the RISE and SABER Student Assessment frameworks. We recognized at this point that the resources and timeline available for this project did not permit us to fully adapt and extend the frameworks for all elements and relationships within the RISE framework, nor for all assessment types in the SABER Student Assessment. In making the decision on how to focus our time and efforts, we considered the purpose for which we were adapting the framework:

To guide the design of strategies to support M&E systems' coherence for equitable holistic learning assessments. Given our team's expertise, assets, and relationships - and considering the project timeline and resources - we felt we could best support:

- Educational authorities, organizations, and frontline service providers around
- Aligning information, support, and goals; and particularly for
- National and sub-national M&E assessments and classroom assessments

Thus, our framework integration, adaptation, and extension centers specifically on the relationship between educational authorities and organizations and frontline service providers, and on the information, support, and goals elements that define interactions within this relationship.

With this bounding, we mapped indicators from the SABER Student Assessment national large-scale and classroom assessment instruments to the different elements and sub-elements within RISE, creating the first version of the HOLAS framework. In doing so, we added new

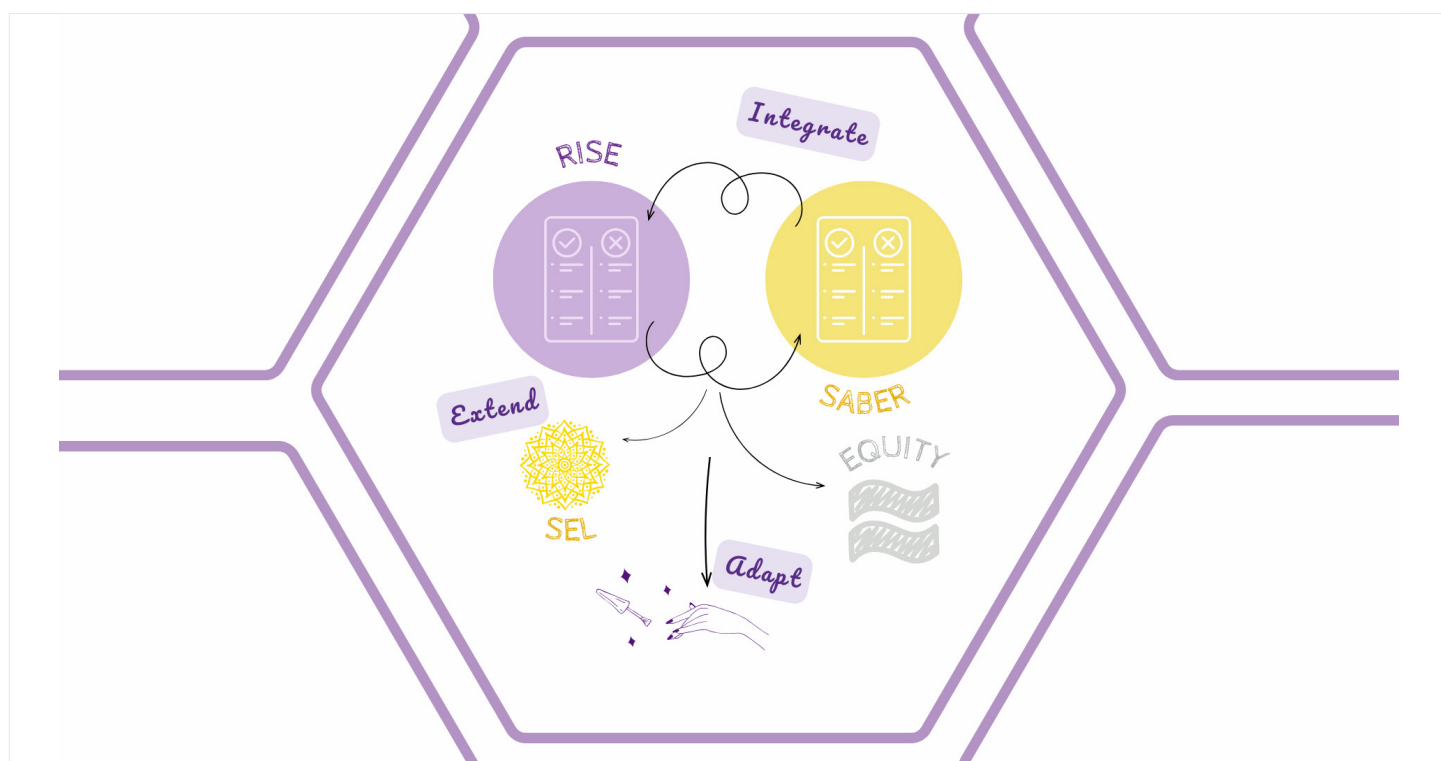


Figure 3 — The design of the HOLAS framework

The graphic above visualizes some of the key processes and considerations that went into the integration, extension, and adaptation of the HOLAS framework.

sub-elements or dimensions to the RISE framework to highlight key M&E processes - such as information quality and assessment organizational structures - included in the SABER Student Assessment but less explicit in RISE. We also revised the RISE elements to more systematically consider the role of different types of assessments, including formative assessments, national monitoring assessments, national evaluation assessments, and exams. Thus, our framework integration, adaptation and extension centers specifically on the

relationship between educational authorities and organizations and frontline service providers, and on the information, support, and goals elements that define interactions within this relationship.

With this bounding, we mapped indicators from the SABER Student Assessment national large-scale and classroom assessment instruments to the different elements and sub-elements within RISE, creating the first version of the HOLAS framework. In doing so, we added new sub-elements or dimensions to the RISE framework to highlight key M&E processes - such as information quality and assessment organizational structures - included in the SABER Student Assessment but less explicit in RISE. We also revised the RISE elements to more systematically consider the role of different types of assessments, including formative assessments, national monitoring assessments, national evaluation assessments, and exams.

Then, we revised version 1.0 of the HOLAS framework with an eye towards three criteria: extension, usability, and replicability. First, we considered extension. We developed initial criteria for what a system that is “coherent for holistic learning” would look like based on both a targeted literature review as well as our own extensive experiences working at various levels of education systems on holistic and SEL. We also reviewed all elements and sub-elements with an eye towards emphasizing diversity, equity, and inclusion. Second, we adjusted the HOLAS framework to maximize usability at two stages of the initiative: (1) when collecting data to map Colombian and Peruvian education M&E systems against the HOLAS framework (see section below, [systems analysis methodology](#)); and (2) when co-designing strategies to strengthen alignments within the Colombian and Peruvian M&E systems. Specifically, we noticed that some of the definitions included in the RISE and SABER framework cells created confusion among team members and did not permit the development of a structured coding system for the systems mapping data collected through qualitative interviews. As such, we reviewed and revised each cell within the HOLAS framework to have a common format, which includes a brief definition as well as an explanation of the criteria along which we are assessing each dimension. Third, we considered replicability. As we began applying the coding system, we noticed that there was significant overlap between dimensions in the HOLAS framework which created difficulties establishing inter-rater reliability. Thus, we tried to better distinguish HOLAS elements and sub-elements or dimensions from each other and create definitions that were more orthogonal to each other. This resulted in version 2.0 of the HOLAS framework.

We then conducted a mixed-methods study - including surveys, interviews, and desk review processes - with a wide range of stakeholders in Colombia and Peru to triangulate information about the elements and sub-elements within the HOLAS framework, with the ultimate aim of identifying (mis)alignments within and across elements and stakeholders (see section below, [systems analysis methodology](#)). After collecting a first tranche of data with policymakers and researchers, we held a workshop with our Steering Committees to review preliminary results and provide evidence on the validity of the HOLAS framework 2.0. At the workshop, Steering Committee members were asked to map definitions of the sub-elements of the HOLAS framework to their “parent” element, and to map quotes from the qualitative interviews to their respective sub-element (which served as “child” nodes in the qualitative coding system). Based on the results of these validation activities, it was clear that participants generally understood the information and support elements of the HOLAS framework. However, additional revisions were needed to clarify the goals element and sub-elements. In addition, across all elements there needed to be an even greater focus on inclusion and equity of childhoods from contexts of marginalization. To address this

feedback, we then revised the HOLAS framework again with a focus on:

### 1. Improving the naming conventions of the sub-elements within the HOLAS framework:

**Particularly within the goals element, the original names of some of the sub-elements were at best not intuitive to users and at worst misleading. To address this feedback, we revised all sub-element names to form an imperative of what an M&E system aligned for equitable holistic learning would look like. For example, we changed the original RISE goals sub-element, “Spider vs. starfish: local discretion granted to schools/ teachers” to “Promote agency among frontline providers and authorities in monitoring and evaluation activities.”**

### 2. Clearly identifying the actors and levels of the education system analyzed within each sub-element:

**To make the framework more actionable, Steering Committee members suggested that sub-element definitions should explicitly identify which stakeholders, at which levels of the education system, should be involved in the specified activities. As we did so, we recognized that this revision helped surface the critical role of sub-national educational authorities in M&E processes.**

### 3. Strengthen the focus within sub-elements on inclusion:

Steering Committee members provided recommendations throughout the elements on how to strengthen our focus on childhoods from contexts of marginalizations. For example, in the “Goals: Establish clear goals for holistic learning” sub-element, we added a specific indicator about the clarity of objectives to support holistic learning for marginalized groups and refugees.

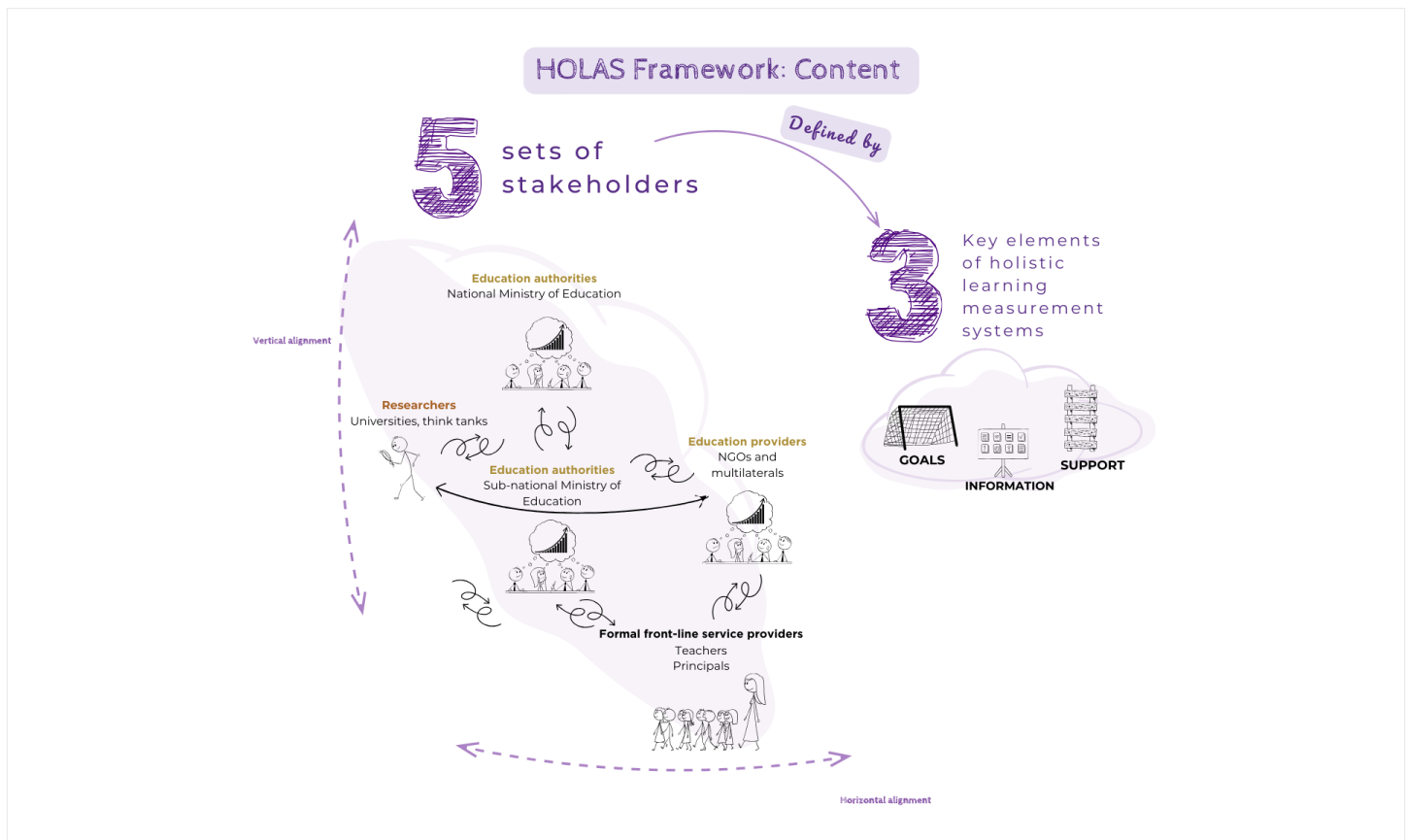


Figure 4 — Overview of the HOLAS framework

HOLAS considers how the interactions and alignment between five sets of stakeholders are defined by three elements of holistic learning measurement education systems.



Figure 5 – Overview of the HOLAS framework

HOLAS considers how the interactions and alignment between five sets of stakeholders are defined by three elements of holistic learning measurement education systems.

## The outcome: The HOLAS framework

The HOLAS framework identifies key elements of holistic learning outcome measurement systems - goals, information, and support - that define the interactions between five sets of stakeholders: education authorities at the national and sub-national level, non-governmental education providers, frontline service providers in formal education settings, and researchers.

### HOLAS elements and sub-elements

The HOLAS framework currently identifies three main elements of education M&E systems:

- **Information:** The information element focuses on how and with what quality information produced by education M&E systems (see section below, [Appendix 1: Glossary of terms](#)) is generated, accessed, used, and shared by education authorities, organizations, frontline providers, and researchers for a variety of purposes.
- **Goals:** The goals element focuses on the definition and clarity of holistic learning objectives within the system, the alignment of information from education M&E systems with these objectives and other crucial education system components, and the established norms governing the use of this information in decision-making, including the level of autonomy stakeholders have in doing so.
- **Support:** The support element includes the mechanisms that are in place to ensure

comprehensive, evidence-informed holistic learning at different levels of the education system, including the availability and quality of resources, professional development opportunities, and organizational structures.

Each of these three elements contains four sub-elements, or dimensions, for a total of 12 sub-elements within the HOLAS framework.

**Table 2.** Exemplar HOLAS sub-element

<b>HOLAS element: Sub-element</b>	<b>Information: Using information to support equitable holistic learning</b>
Sub-element definition	This dimension relates to the extent to which information from a variety of types of assessments - as well as from M&E systems - is used responsibly by stakeholders to make holistic learning-oriented decisions. We specifically consider three criteria within this dimension.
Criteria 1	<b>Type of decisions.</b> The extent to which information is used (or not) for decision making that supports holistic learning outcomes.
Criteria 2	<b>Eco-system information flows for decision-making.</b> The extent to which information informs decision-making by authorities and is also shared back with and used by schools, teachers, or community stakeholders.
Criteria 3	<b>Fair use.</b> The extent to which information is used in a way that is fair and equitable. This includes the extent to which information does not explicitly or implicitly stigmatize marginalized groups, and actively supports equity in the allocation of resources and opportunities.

As shown in Table 2, each of the 12 sub-elements contains a definition and a set of qualitative criteria that provides an imperative as to what education M&E systems aligned for equitable holistic learning might look like. The HOLAS sub-elements and their definitions are available in this report (see section below, [Appendix 2: The definitions by HOLAS sub-element](#)).

## HOLAS relationship and interactions

The HOLAS framework focuses on one relationship from the RISE framework: the management relationship between education authorities, organizations, and frontline providers. It currently envisions this relationship for contexts with strong government education systems that provide access to refugee children in formal education settings. Within this relationship and context, HOLAS recognizes that interactions can occur among at least five stakeholder groups at various levels. The HOLAS framework considers three sets of government stakeholders at various levels:

- **Frontline providers - such as teachers and principals - in formal school settings** critically shape the educational experiences that most proximally support students' development of academic and social and emotional skills. In the context of national and sub-national policies, teachers and principals also play a critical role



in supporting the inclusion of students from contexts of marginalization, including refugee children, on a day-to-day basis. Frontline providers are nested within schools, which are nested within geographic governmental administrative levels. In Colombia, schools are nested within the municipal or departmental Secretarías de Educación (Secretariats of Education). In Peru, schools are nested within Unidades de Gestión Educativa Local (Local Educational Management Units or UGELs), which are nested within Direcciones Regionales de Educación (Regional Department of Education or DREs) (Peru).

- **Staff at various sub-national government administrative levels** are instrumental in the management of formal education services. Beyond administrative duties, they play crucial roles in monitoring and evaluating educational policies at regional or local levels. Their efforts are key to ensuring national educational strategies align with the specific needs and contexts of their respective regions.
- **Staff at the national government level** develop overarching policies and mandates to organize and manage educational services. They set standards, define goals, and allocate resources and support, significantly influencing instructional and inclusion practices at sub-national and school levels. Furthermore, they create and manage M&E systems to oversee, gather, and disseminate educational practice information nationwide. Their strategic decisions directly influence education delivery and assessment focus, shaping the environment for students' holistic development.

Given the nested structure of government systems, we can examine the extent to which interactions among these three stakeholder groups around information, goals, and support are vertically aligned.<sup>59</sup> See Figure 7. The HOLAS framework also identifies external or non-state organizations, institutions, and networks working to support educational outcomes:

1. **Staff at NGOs and multilateral institutions** work to support development programs and initiatives - such as efforts to achieve the United Nations (U.N.) Sustainable Development Goals - or humanitarian activities, in cases in which resources or will constrains the capacity of government actors at various levels to lead education responses during or in the aftermath of a crisis<sup>60</sup>. While coordination mechanisms exist within development and humanitarian spheres, more needs to be done to ensure alignment across the development and humanitarian nexus, including with respect to M&E systems.<sup>61</sup>
2. **Researchers at universities or other institutions** working in partnership with government actors at various levels as well as with NGOs and multilateral institutions play a critical role in strengthening capacities and relationships to produce, interpret, and use evidence for decision-making in support of equitable holistic learning.  
<sup>62</sup>Although the RISE and SABER Student Assessment frameworks do not extensively consider researchers, we have incorporated them into the HOLAS framework due to their potential to sustainably enhance holistic learning M&E systems.

Given that these stakeholders partner with each other and with government entities writ large, we can examine the extent to which interactions among these three broad stakeholder groups around information, goals, and support are horizontally aligned<sup>63</sup>. We can also consider diagonal alignments between government actors at specific geographic levels and these external actors.



## Building out HOLAS elements, relationships, and interactions: What is needed?

As discussed above, given the time and resource constraints and the goals of this specific initiative, we needed to make difficult decisions about how to bound this version of the HOLAS framework. In doing so, we recognize that key elements of and stakeholder interactions critical to equitable and holistic M&E systems are not currently included in the framework. As shown in Figure 6 below, we strongly recommend building out a financing element of the framework, given that the availability and stability of financing is critical to sustainable M&E systems. We also recommend building out additional stakeholder interactions and, most pressing, among host-country and refugee children and caregivers. We also recommend interactions among frontline providers in non-formal education settings; the state; and bilateral and multilateral donors<sup>64</sup>.

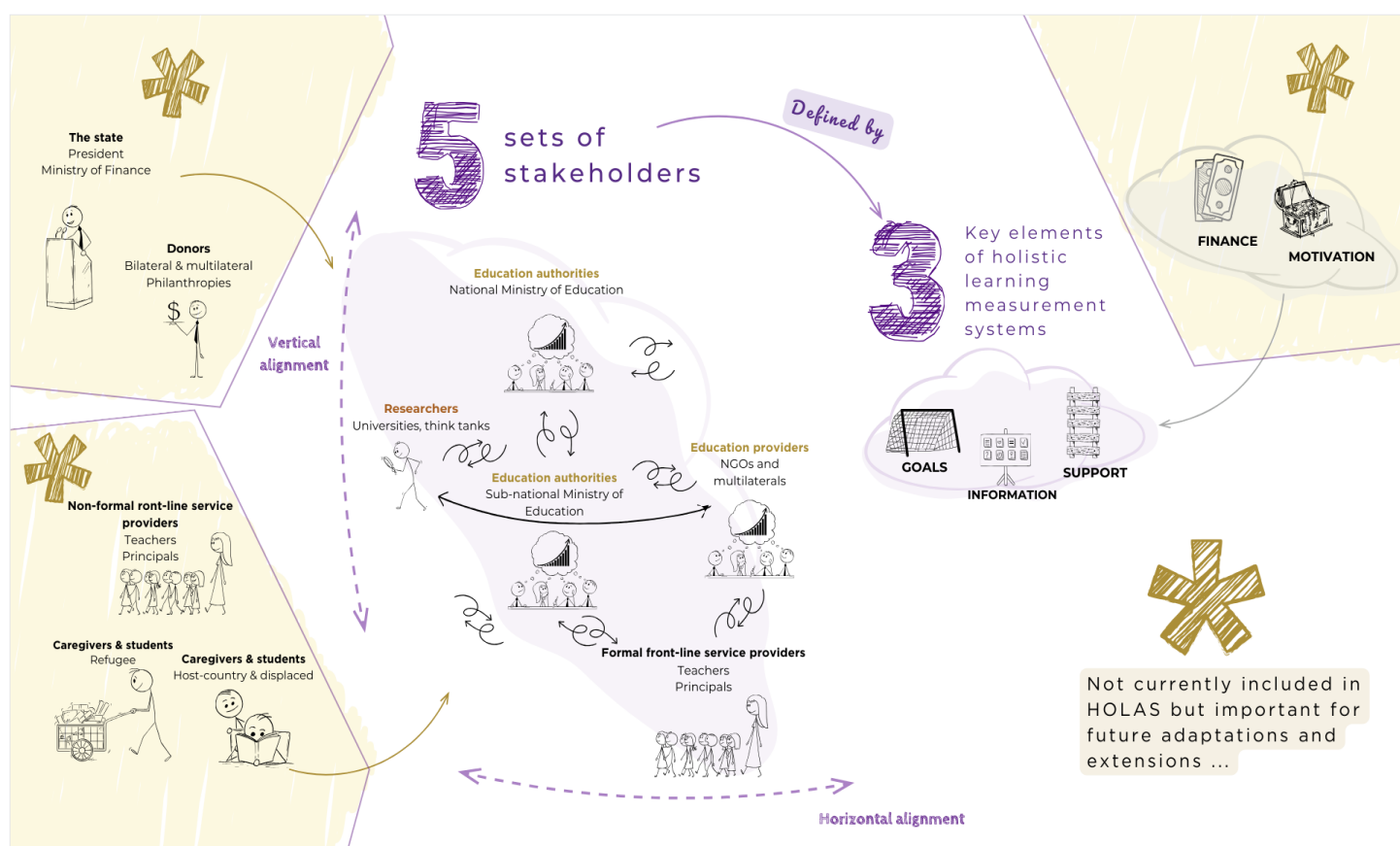


Figure 6 — Adaptations and extensions to the HOLAS framework

## HOLAS analysis

As opposed to RISE or SABER Student Assessment, the HOLAS framework does not have a traditional matrix structure. Rather, the three core elements and corresponding sub-elements define a number of horizontal, vertical, and diagonal feedback loops between the five stakeholder groups. Analysis can be flexibly undertaken in several ways depending on the user's goals:

**Table 3.** The levels of analysis of the HOLAS framework

	Level of analysis	Goal	We recommend...	Example
A	By specific stakeholder groups	To understand the barriers and enablers to specific elements of quality holistic learning M&E systems within a stakeholder group	Reviewing results for the target stakeholder group by element and sub-element. This can also shed light on important interactions and dynamics within heterogeneous stakeholder groups.	Available upon request (see section below, <a href="#">Results by sub-element from the systems' diagnostic report</a> for contact information details).
		To assess the extent to which assessments, data, and evidence (information) are aligned with foundational curricular and standards (goals) and key resources (supports) within a stakeholder group.	Reviewing results for the target stakeholder group across elements and sub-elements to identify the areas of (mis)alignment	Available upon request (see section below, <a href="#">Results by sub-element from the systems' diagnostic report</a> for contact information details).
B	By each of the 12 sub-elements or dimensions of the HOLAS framework	To assess how different stakeholder groups perceive barriers and enablers to specific elements of quality holistic learning M&E systems.	Reviewing the results by element and sub-element across stakeholders. Depending on how this analysis is conducted, this can shed light on areas of vertical, horizontal, and diagonal stakeholder alignments within specific elements and sub-elements.	See section below, <a href="#">Results by sub-element from the systems' diagnostic report</a> .
C	By the three elements of the HOLAS framework, across dimensions and stakeholder groups	To assess the extent to which there is alignment across dimensions of information, goals, and support across stakeholder groups.	Reviewing results across elements and sub-elements and across stakeholder groups to identify the areas of (mis)alignment. Depending on how this analysis is conducted, this can shed light on areas of vertical, horizontal, and diagonal stakeholder alignments.	See section, Integrated results and recommendations of the Colombia report.
D	By thematic area, within and across information, goal, and support elements and across stakeholder groups	To assess the extent to which information is aligned with foundational goals and supports across stakeholder groups around a specific theme.	Reviewing results across elements and sub-elements and across stakeholder groups to identify areas of (mis)alignment for a specific theme, such as social and emotional learning or childhoods in contexts of marginalization.	See section below, <a href="#">Integrated results and recommendations</a> of the Peru report.

Table 3 shows how the HOLAS framework can be used to understand how information is coherent with foundational goals and supports within and across vertical, horizontal, and diagonal alignments of stakeholder groups (see column, level of analysis C).

## HOLAS materials

As noted above, the HOLAS framework is currently designed for use in contexts with strong government education systems that provide access to refugee children in formal education settings. To support the types of analysis described in Table 3 above in such contexts, we currently or will soon have available open-source resources in English and Spanish including: the HOLAS framework (see section below, [Appendix 2: The definitions by HOLAS sub-element](#)), the method used to conduct the systems mapping using the HOLAS framework (see section below, [systems analysis methodology](#)), survey and interview data collection tools, quantitative and qualitative analysis codes, and the pilot results (see section, [Results by sub-element from the systems' diagnostic report](#)). Given that the current initiative served as a pilot for the HOLAS framework, we emphasize that these tools require review and adaptation before their use in a new context.

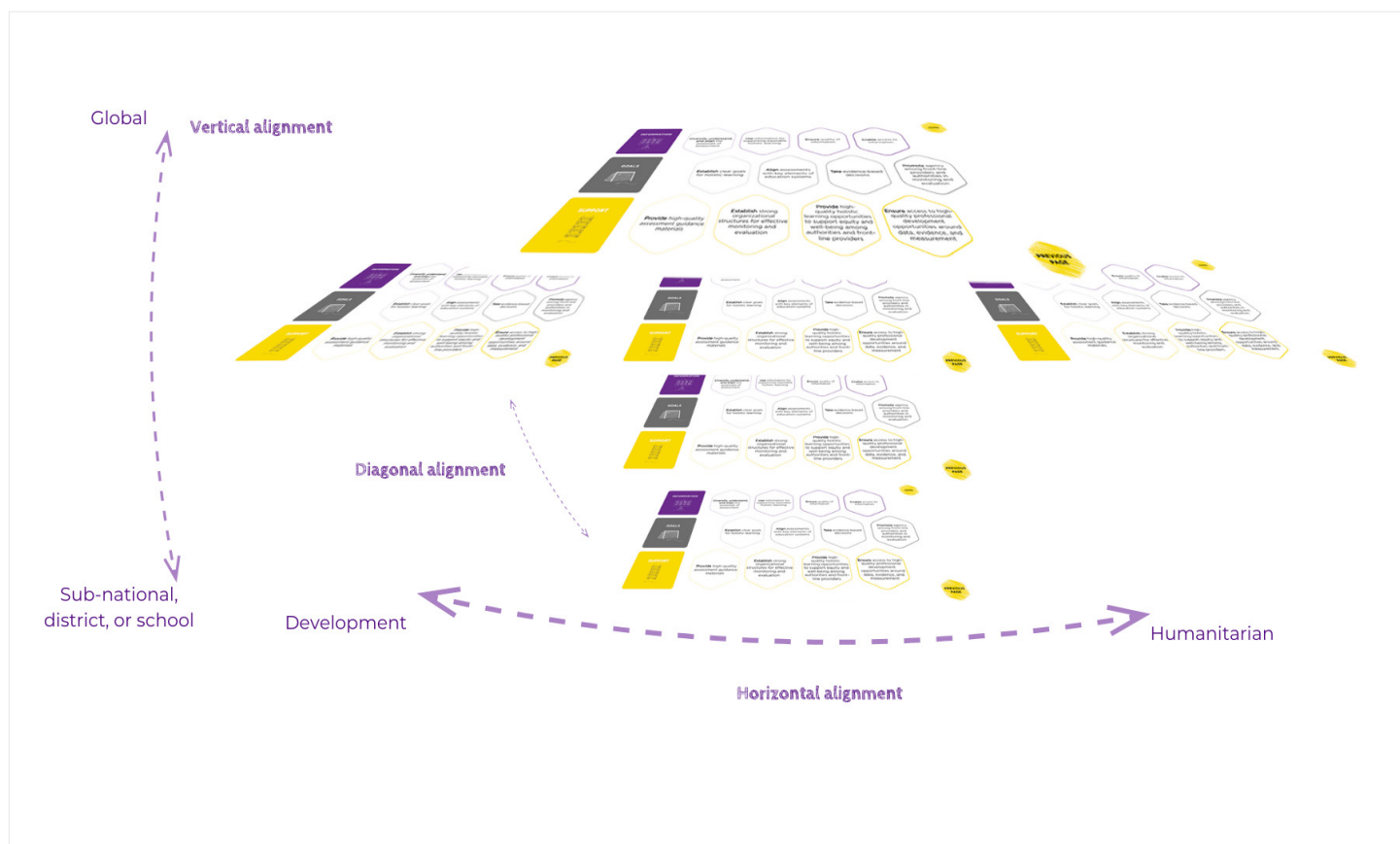


Figure 7 — Adaptations and extensions to the HOLAS framework

The HOLAS framework can be used to conduct analysis within and across information, goal, and support elements and across stakeholder groups.

# Systems analysis methodology

In this section, we describe the methodology used to conduct the educational monitoring and evaluation (M&E) systems mapping aligned to the Holistic Learning Assessment Systems (HOLAS) framework, including:

- Providing an overview of [the broad objectives and questions](#) that guided the mapping effort
- Describing the characteristics of the [Peruvian sample](#) and the [study design](#)
- Detailing the process for the design and implementation of the [quantitative and qualitative data collection instruments](#)
- Reporting on the [procedure](#) and [analytic strategies](#)

In doing so, we detail methodological decision points made at each stage that influenced the scope, generalizability, and format of the results.

## Systems mapping objectives and questions

Given the complexity of the systems in which we are working - which include a diversity of actors at multiple ecological levels - and the integrated analytical framework that grounded this inquiry, New York University's Global TIES for Children (NYU-TIES) and the Universidad de los Andes (Uniandes) opted to undertake a mixed-methods approach to our systems mapping effort. Specifically, we aimed to address following objectives and research questions through diverse quantitative and qualitative methods in both Peru and Colombia:

**Table 4.** Type of information collected and methodological component used to address the objectives and research questions.

Objectives	Research question	Type of information	Methodological component
1. To understand the types of information on holistic learning outcomes that education authorities, organizations, frontline service providers, and researchers generate, access, share, and use, how they do it, and with whom.	What types of information on holistic learning outcomes - including measures, data, and guidance materials - are diverse education authorities, organizations, frontline service providers, and researchers generating, accessing, using, and sharing?	Quantitative	Survey
	How is information on holistic learning outcomes accessed and shared within networks of educational authorities, organizations, frontline service providers, and researchers?	Quantitative	Network Analysis

	How are Peru and Colombia's various education authorities, organizations, researchers, and frontline service providers generating, accessing, using, and understanding information on holistic learning outcomes?	Qualitative	Interview
	What types of national assessments and educational information and management systems (EMIS) are used in the Peruvian and Colombian education systems, with what quality, and through which mechanisms?	Qualitative	Desk Review
2. To understand the barriers and enablers perceived by education authorities, organizations, frontline service providers, and researchers to generate, access, use, and understand information on holistic learning outcomes in Peru and Colombia.	To what extent do education authorities, organizations, frontline service providers, and researchers have access to and can exchange information on holistic learning outcomes?	Quantitative	Survey
	What key barriers and enablers do education authorities, organizations, researchers, and frontline service providers perceive to the generation, access, use, and understanding of information on holistic learning outcomes in Peru and Colombia?	Qualitative	Interview
3. To understand the extent to which education authorities, organizations, frontline service providers, and researchers perceive that information on holistic learning outcomes is aligned with prioritized holistic learning skills and competencies, and with professional development resources and support.	What holistic learning skills and competencies are prioritized in national curricula and standards?	Qualitative	Desk Review
	To what extent do education authorities, organizations, researchers, and frontline service providers perceive information on holistic learning outcomes to be aligned with national curricula and standards in Peru and Colombia?	Qualitative	Interview
	To what extent do education authorities, organizations, researchers, and frontline service providers perceive information on holistic learning outcomes to be aligned with school staff professional development opportunities and resources?	Qualitative	Interview
	What key barriers and enablers do education authorities, organizations, researchers, and frontline service providers perceive for the alignment within and between information, goals, and support?	Qualitative	Interview

## Participants

During our study, we engaged five key stakeholder groups: policymakers (PM) in the education sector (PM) - including interviews with the Ministerio de Educación (MINEDU or Ministry of Education) at the national level and with the Dirección Regional de Educación de Lima Metropolitana (Regional Department of Education of Metropolitan Lima or DRELM) at the sub-national level -, multilateral and non-governmental organization (NGO) members, researchers (R), and frontline providers (FP), including teachers and principals from formal primary schools in Metropolitan Lima (see section above, [The HOLAS framework](#)). Metropolitan Lima was selected as a focal region given that it has the highest enrollment rate of Venezuelan refugee students in the country.<sup>65</sup>

We identified the first four groups through a comprehensive desk review, recommendations from our Steering Committee, and by leveraging our team's networks. Guided by the HOLAS framework's analytical focus, our selection criteria included: (i) expertise in holistic learning systems within Peru's education sector, (ii) experience working with children and adolescents, who live in marginalized contexts such as Venezuelan refugee children, and/or (iii) experience in designing or evaluating social and emotional skill-related studies or interventions at the student or provider level.

In addition to the previously mentioned criteria, PM stakeholders were selected based on whether they held current or past positions in the Peruvian educational system within the last five years. We classified the PM into three groups for analysis and reporting purposes: (1) national-level (within MINEDU offices) data producers, including those from offices leading the M&E of holistic learning outcomes and the factors that enhance them; (2) national-level (within MINEDU) data users, comprising those from offices focused on interventions to support student, teacher, and/or principal social and emotional skills/well-being or responsible for overseeing budget allocations; and (3) sub-national level DRELM PMs. Although we aimed to maintain the data user/producer distinction within DRELM for reporting purposes, sampling limitations required us to merge these groups for analysis, resulting in collective reporting at the sub-national policymaker level in the integrated results section.

For our last group - the frontline providers -, we employed a targeted approach. In collaboration with DRELM authorities, we obtained a list of 30 schools in the Metropolitan Lima region with the highest enrollment of Venezuelan students. With the DRELM's support, we coordinated with the principals of these schools to organize interviews and visits, engaging directly with educators on-site. Recognizing the differences between primary and high school teaching dynamics - primary teachers act as teachers for a single class, whereas secondary teachers manage multiple classes and a wider age range - we concentrated on targeting primary school teachers.

Considering policymakers - at the national and sub-national levels -, researchers, and NGO staff, a total of 66 people were contacted, reaching a total response rate of 53%, with a higher response rate among PMs (58%) and a lower response rate for researchers and NGO personnel (39%). In the case of frontline providers, we contacted 10 schools, with three agreeing to participate. We invited a total of 12 teachers and principals from these schools for interviews and successfully interviewed eight teachers and two principals, all of whom were women. Of all the participants who submitted a survey response, 68% identify as women (N=28). Considering policymakers, researchers, and NGO personnel who submitted a survey, they have an average of 4.6 years (SD=8.8) of experience in the education sector. Meanwhile,

in the survey, 50% of the teachers reported working between three to 10 years in their current schools.

**Table 5.** Interview and survey outreach and analytic samples by stakeholder group

Stakeholder		Outreach	Surveys	Analyed in quantitative results	Interviews**	Analyzed in qualitative report
Policymakers	National data users*	32	23	23	16	5
	National data producers*					7
	DRELM	8			5	4
Members of NGOs		13	5	5	5	5
Researchers		13	5	5	5	0
Frontline providers		12	8	8	9	6
Total		78	41	41	40	27

\*We used these classifications for qualitative analysis and reporting purposes, not for sampling or data collection purposes, as a result of which some disaggregated information is not available in Table 5 above.

\*\*Considering only recorded interviews

## Design

We used a sequential mixed QUAN -> QUAL<sup>66</sup> design. For policymakers, researchers, and NGO personnel, we launched an online, self-reported survey. For frontline providers, we collected quantitative data in-person at schools by reading survey questions to teachers and principals. In both cases, we subsequently expanded on participants' perceptions and experiences through in-depth, semi-structured qualitative interviews. Additionally, we carried out a desk review of relevant documents.

We intended to use the quantitative and qualitative data to complement each other, and to offer a more comprehensive view of the system than that achievable using one or the other method alone. This comprehensive approach allowed for the consideration of structural aspects as well as meaning-making and explanations of participants' actions and views. Figure 8 shows the working model that was used to collect information. In this visual, the types of actors involved, the methodological components of the study, and the main categories of the HOLAS framework are visualized.



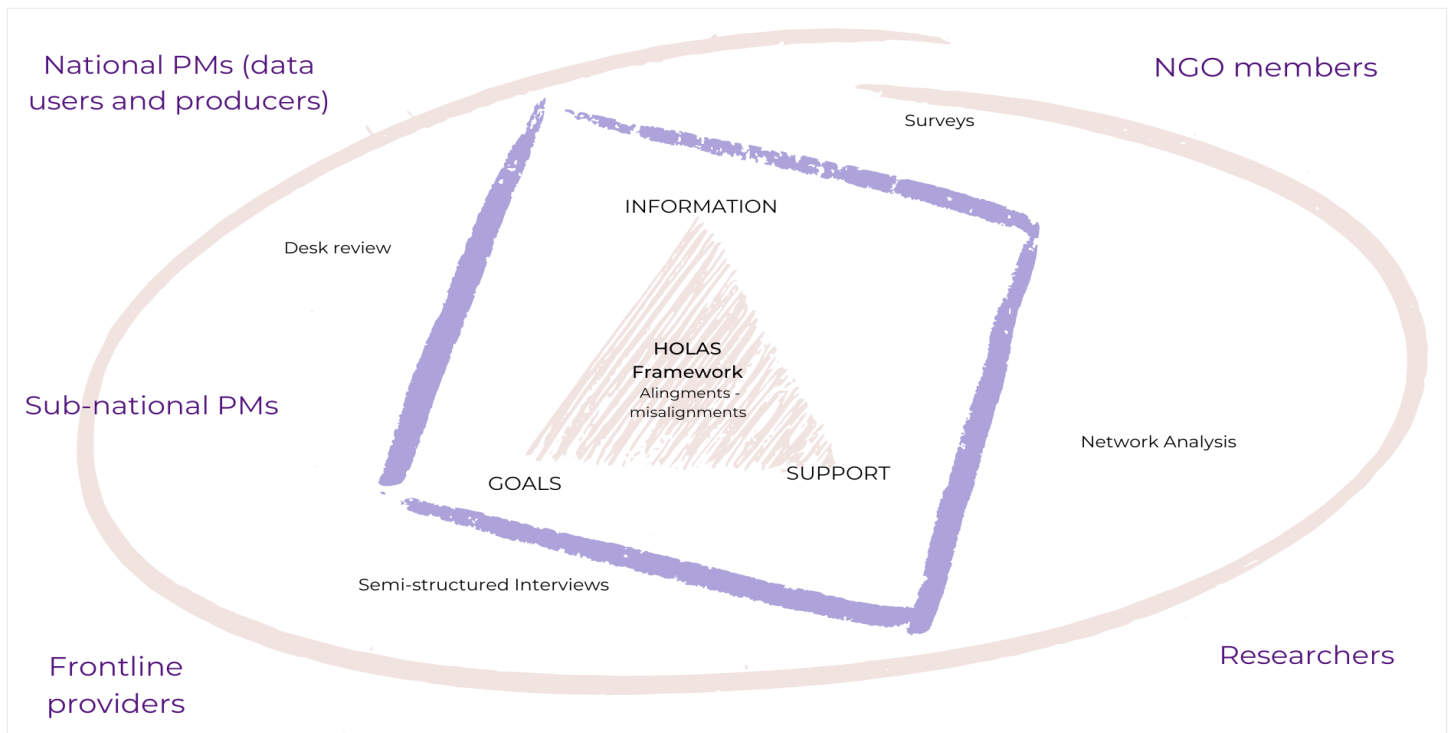


Figure 8 — Schema of the model for the collection of information

The study was guided by the three broad elements of the HOLAS framework: information, goals, and support. We used four methodological components - surveys, interviews, document review, and network analysis - to explore participants' perceptions and experiences of these elements. We collected information from five groups of key informants: Data producers from the MINEDU, data users from the MINEDU, sub-national personnel from the DRELM, NGO members, and frontline providers.

## Instruments

### Survey

For policymakers, NGO members, and researchers, surveys contained demographic questions to capture participants' work experience within educational M&E systems. Additionally, the surveys contained questions related to the information elements and sub-elements within the HOLAS framework, including: (1) their familiarity with national assessments; (2) perceptions of the purposes of data from national assessments; (3) ways to access a variety of types of information about the assessments; (4) how information from the assessments is used; and 5) how information from the assessments is communicated about and shared. Participants were first asked about a set of national assessments led by the public education sector\*, selected for inclusion based on: (i) their recognizability within Peru; (ii) whether they evaluate students' holistic learning outcomes; and/or (iii) factors at the school, teacher, and/or principal level that promote holistic learning outcomes. The assessments included were the following:

- Evaluación Censal de Estudiantes (Census Assessment of Students or ECE): National standardized assessment conducted annually by the Oficina de Medición de la Calidad de los Aprendizajes (Quality of Learning Measurement Office or UMC). It was discontinued in 2019.

- Piloto de Habilidades Socio Emocionales (Socioemotional Skills Pilot or HSE): National pilot assessment conducted virtually by the UMC in 2022.
- Evaluación Muestral de Estudiantes (Sample Assessment or EM): National standardized assessment conducted by the UMC. It was last applied in 2022 and rebranded to Evaluación Nacional de Logros de Aprendizaje (National Evaluation of Learning Achievements or ENLA) in 2023.
- Monitoreo de Prácticas Escolares (Monitoring of School Practices or MPE)\*: National assessment conducted by the Oficina de Seguimiento y Evaluación Estratégica (Strategic Monitoring and Evaluation Office or OSEE), conducted annually since 2015.
- Evaluación Remota de Habilidades Socioemocionales (Remote Assessment of Social-Emotional Skills or EHSE)\*: National study applied remotely by the OSEE, last applied in 2022.
- Encuesta Nacional de Docentes (National Survey to Teachers or ENDO)\*: National survey conducted by the Dirección de Promoción del Bienestar y Reconocimiento Docente (Directorate of Welfare Promotion and Teacher Recognition or DIBRED), last applied remotely in 2021.
- Evaluación Nacional de Desempeño Docente Nivel Primaria (Teacher Performance Assessment Primary Level or EDD)\*\*: National assessment conducted by the Dirección General de Desarrollo Docente (General Directorate of Teacher Development or DIGEDD), last applied in 2020.
- Evaluación de desempeño de los directivos de IIEE (Performance Assessment of IIEE Principals)\*\*: National assessment conducted by the Dirección de Fortalecimiento de la Gestión Escolar (Directorate of School Management Strengthening or DIF) , last applied in 2022.

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\*If an assessment was explicitly discontinued, we note it. These assessments vary in frequency, being annual or biannual, and we provide specific details when available.

\*\*Only included in surveys to policymakers and frontline providers.

\*\*\*Only included in surveys to frontline providers.

We also sought to identify other assessments and data on holistic learning - from classroom assessments to research studies, information systems, or program monitoring tools - that participants had used. Each participant could report up to five other tools that they had used in the past five years for a variety of purposes. We refer to these assessments hereafter as “other assessments.” Similar questions were asked as to the national assessments.

The final section of the survey for this set of stakeholders pertains to the HOLAS support element (see section above, [The HOLAS framework](#)), and it was only asked to those familiar with classroom assessments. We assessed stakeholders’ perception of the quality and utility of various materials to support frontline providers’ use of classroom assessments of academic, social, and emotional competencies.

For the frontline providers’ survey, we included demographic and background questions and tailored the sections on M&E tools and classroom assessments similar to the surveys for the other stakeholders. We evaluated the frontline providers’ familiarity with M&E tools, focusing on their participation at the individual or school level and their access to results, as

well as the support needed for interpretation. We then examined the support materials or opportunities essential for assessing holistic learning outcomes in the classroom. Additionally, we introduced a new section with open-ended questions to identify challenges in teaching, creating holistic classroom assessments, and effectively integrating students with special education needs and Venezuelan refugees, laying the groundwork for more detailed follow-up on these critical issues.

We designed the surveys to be adaptive, so that the total number of questions answered depended, in several cases, on the number of answers provided in the previous sections (conditional format). For example, participants who indicated familiarity with two national assessments (ECE and HSE) were prompted to answer specific questions about each assessment (or not, if the participant was not familiar). Surveys were conducted between February to August 2023, and participants took between 20 and 40 minutes to complete it, depending on the number of assessments with which they reported familiarity.

**Semi-structured interview**

For policymakers, researchers and NGO staff, the team designed three in-depth interviews that included the HOLAS sub-elements and themes presented in Figure 9. Each sub-element included standard questions that could be selected, modified, or supplemented according to the information provided by the participant. Ahead of the interviews with these stakeholder groups, the interviewers reviewed participants’ responses to the online survey and used them to prepare for the subsequent qualitative phase. Specifically, the interviewer selected one of the assessments, tools, measurements, or data sets that the participant said they were most familiar with in the survey to propose as the “core measure” of the interview. In selecting the core measure, interviewers aimed to have a variety of: (i) preloaded and other assessments, (ii) student academic and social and emotional learning (SEL) outcomes assessments, (iii) structural and process quality assessments; and (iv) student, teacher, and/or principal skill assessments.

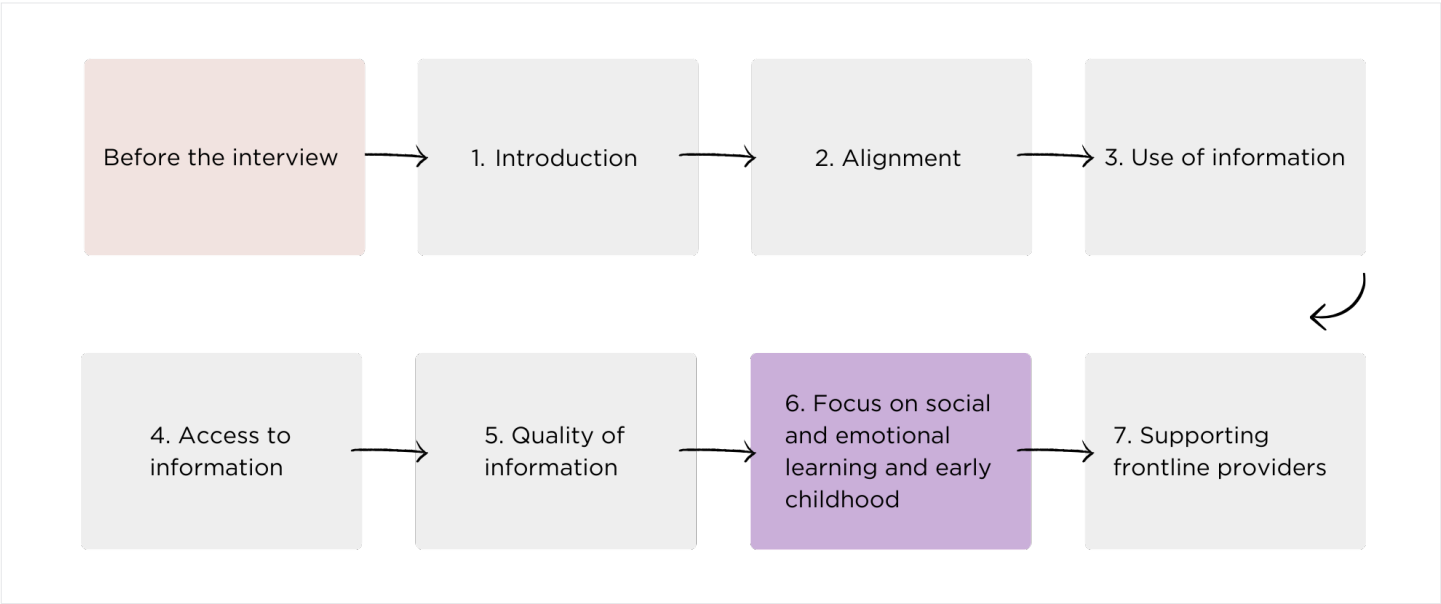


Figure 9 — Semi-structured interview sections for the various stakeholders  
Thematic components discussed with PM, R, and NGOs during the interviews.

The purposes for each one of the sections following the introduction are presented below.

**Alignment:** We sought to identify the perceptions regarding how the core measure relates to the education sector's main objectives - as described in national standards -, frameworks, or curricula. For example, if the assessment is designed to capture information about children's reading and writing skills, to what extent does the respondent believe it captures the skills of the National Curriculum? We also sought to identify whether the respondent identified alignment or misalignment.

**Use of information:** We sought to collect information on how the respondent has used the core measure or data, the ease or difficulty in using it, the reasons for doing so, and what supports could facilitate its use.

**Access to information:** We sought to identify whether the participants searched for educational data produced by others, how they accessed the data, evaluations, or materials for analysis, and the barriers and enablers for sharing such information.

**Quality of Information:** We sought to identify the procedures to strengthen capacities for collecting, analyzing, and disseminating high-quality information. We particularly focused on fair evaluation processes and equitable inclusion of children in contexts of marginalization

**Focus on social and emotional learning and early childhood:** This section was optional and administered to those individuals who indicated familiarity with tools in these areas. We sought to identify the respondent's perception of how information in these areas has been used and how this use could be improved.

**Supporting frontline providers:** We sought to identify the strategies or activities that are used or recommended to strengthen the capacity of frontline providers - for example, teachers and principals - to generate and use assessments and to communicate evidence effectively to frontline providers.

In the interviews with frontline providers, due to their direct interaction with students with diverse needs and the relevance of the HOLAS framework to their daily school experiences, we included a section on the integration of Venezuelan students into school life and the specific support required for this integration. The second section, based on their reported familiarity with preloaded assessments, examined their access to and use of these assessments to inform their classroom practices, as well as the support needed or provided to enhance understanding and application of the results. The third section, specifically designed for teachers, focused on how they integrate classroom assessment results into their teaching, aligning with key educational components like the curriculum, the support that they receive to develop these assessments, and how they share results with caregivers, students, and/or principals.

## Procedure

The survey and semi-structured interview protocols were developed sequentially and adapted to (a) researchers (December to January 2023); (b) policymakers, (January to February 2023); (c) members of NGOs and multilateral organizations (March to April 2023); and (d) frontline providers (April to May 2023). Each instrument was initially designed in English

and then translated into Spanish by one of the team members. Subsequently, two sequential revisions were carried out by two other members to ensure that the translation retained its original meaning and was adjusted to the linguistic particularities. Both surveys and interviews were programmed in Kobo Toolbox. The online Kobo interview protocol served as a guide rather than a tool for data collection.

We contacted potential participants according to the previously detailed criteria (see above, [Participants](#)). For the online data collection process, once the individual expressed their interest in participating in the project, we sent an email with a link to an informed consent form and the online survey. After the participant confirmed their intention to complete the survey and shared some identifying information, we also sent an invitation to participate in the interview. For frontline providers, we facilitated on-site participation by coordinating with the schools' principals and the DRELM.

Five trained team members from Colombia, Argentina, and Peru - all of whose mother tongue is Spanish - conducted the interviews. The leader of the qualitative component of the study provided the team with trainings during February 2023, including role-playing, targeted feedback to ensure adherence to the purposes of each interview component (see above, Figure 9), and instructions on how to manage the recordings to ensure their proper archive and transcription. A semi-structured interview manual was developed to accompany the training, and it became the main reference document. The training was designed based on the interview protocol for researchers, and it was adapted for the other stakeholder groups based on the specific situations that arose and were discussed during the team's weekly meetings.

Once the interview had taken place, the audio and video files were stored and transcribed. Transcription was conducted based on the audio file, and the videos were used only to clarify ambiguous aspects. A first automatic transcript was generated using Sonix.ai software<sup>67</sup> and, in most of the cases, reviewed by the team member who conducted that interview. Then, a denaturalized transcription was carried out. This type of transcription is not an exact reproduction of the speaker's speech - repetitions, stutters, interjections, or irrelevant expressions such as filler words were omitted. Thus, the grammatical structure is adjusted so that it is easier to understand the speaker's meaning.<sup>68</sup> The interviews were transcribed in their entirety, even with sections that - at first glance - seemed irrelevant to the analysis phase. Researchers could annotate the transcript to highlight aspects that they considered to be relevant to understanding the spoken content. A dictionary was generated that included common terms - such as the abbreviations of organizations or tests and tools - which facilitated the translation. To ensure accuracy, the transcripts were audited against the audio recordings, paying particular attention to country-specific language and accents and the use of uncommon acronyms or terms specific to the educational M&E field.

Once the transcripts were reviewed and approved, we classified the PMs based on our framework's ecological model, separating them into the national and sub-national levels. At the national level, we identified participants as either those leading M&E efforts (data producers) or those using this information (data users). In labeling these roles, we considered their extensive sector experience, acknowledging potential role transitions. Due to an overrepresentation of M&E participants at the national level, as shown in Table 2, we reduced the number of interviews that we analyzed from this group to maintain a balanced analysis. For the participants from the DRELM, sampling limitations prevented us from creating as detailed a division, although we identified both data users and producers among them.

Finally, driven by the project's time and staffing constraints and the need to streamline our analyses, we decided to reduce the number of frontline provider interviews to be analyzed and to not include researchers in the qualitative analyses. In the case of researchers, we made this decision based on a preliminary analysis that indicated that we could best support M&E systems' alignment in the current initiative - the overarching goal - by focusing on stakeholders directly involved in policy implementation and M&E practices.

After making these decisions, we began the coding process with MAXQDA 2022 software<sup>69</sup>. Two Peruvian and one Argentinian team members were in charge of coding. These researchers participated in the interviews, transcriptions, coding, and analysis by stakeholder and sub-element. This way of working was considered appropriate to promote the familiarity with the data. To counteract potential interpretation biases, the analyses were carried out iteratively.<sup>70</sup> In addition, the preliminary reports were translated into English and discussed with different team members who also participated in the interviews in both Peru and Colombia, as well as with the project's Principal Investigators (PIs). To the extent that all project members were familiar with the interviews and transcripts, points of view were offered that allowed them to consider alternative interpretations and make personal biases explicit.

In parallel to the surveys and interviews, team members conducted a desk review focused on the structure of M&E in the Peruvian education system. During the project start-up/baseline phase, project team members conducted an initial mapping of organizations, stakeholders, and documents related to holistic learning in Peru, emphasizing equity, diversity, and inclusion. The resulting section "[An overview of the Peruvian education system: The monitoring and evaluation of holistic education outcomes](#)" reviews the Peruvian Constitution, laws, decrees, and resolutions. It also reviews and summarizes national standards. The team discussed this synthesis in a working group to connect the review to the quantitative and qualitative results.

## Analysis strategy

### Quantitative data analysis strategy

#### Descriptive statistical analysis:

Initially, datasets were downloaded from the KoboToolbox platform and exported in Excel format, accompanied by an Extensible Markup Language (XML) survey format that served as a data dictionary and provided labels for survey responses. This process was applied uniformly to each survey according to the stakeholder group. Subsequently, the datasets were imported into the R software<sup>71</sup> for harmonization and merging into a unified set.

During the processing phase, the tidyverse package set was used<sup>72</sup>. The dictionaries were applied individually to each survey before they were added. Given the descriptive nature of the analysis, summary tables of demographic data and responses to the various questions of the survey were made and organized according to the elements and sub-elements of the HOLAS framework. In general, the tables contain relative frequencies of the response by each stakeholder group: policymakers, NGO members, researchers, and frontline providers.

Given the adaptive nature of the survey and differences between questions and response



options for different stakeholder groups, we offer four clarifications to aid the interpretation of the results. These clarifications are further detailed in the quantitative report, available upon request (see section below, [Results by sub-element from the systems' diagnostic report](#), for contact information details). First, the participants' access to some questions was contingent on answers to the previous questions. For example, if a person said, "*I'm not familiar with this assessment*," they did not answer subsequent questions about that assessment. Therefore, the number of people who answered questions about that assessment may be less than the sample reported for each stakeholder and the total number of participants surveyed.

Second, given the variety of tools or assessments listed by the participants, we categorized the content of the assessments using the categories in Table 6.

**Table 6.** The categories used to analyze the content of assessments/tools mentioned by participants

Content	Definition
Holistic learning	Assessments or tools designed to assess the dynamic and interrelated nature of human development across a variety of domains, including academic, social, emotional, cognitive, physical, and others - such as spiritual and cultural.
Children's academic learning	Assessments designed to gauge children's attainment of knowledge, competencies, or skills that educational systems have traditionally explicitly emphasized as essential for children's learning. Examples include assessments of children's literacy or numeracy skills.
Children's social and emotional learning	Assessments designed to gauge children's social and emotional knowledge, attitudes, behaviors, competencies, skills, and/or well-being (see section below, <a href="#">Appendix 1: Glossary of Terms, Social and emotional learning definition</a> ). Examples include assessments of children's emotional awareness or self-regulation.
Quality - Process at the settings (classroom/institution) level	Assessments or tools designed to gauge the social processes (e.g., relationships, norms, participation in activities) within a setting, such as a school or classroom. Examples include assessments of school climate or community violence.
Quality - Structural at the settings (classroom/institution) level	Assessments or tools designed to measure the resources - human, physical, economic, temporal - and/or organization of resources - social, physical, economic, temporal - within a setting, such as a school or classroom setting. Examples include assessments of school infrastructure, student or teacher attendance, and student/teacher ratio.
Teachers' pedagogical skills and practices	Assessments designed to capture the knowledge, techniques, strategies, and approaches that teachers utilize to facilitate children's academic and/or social and emotional learning. Examples include assessments of teachers' knowledge of curricular content or teachers' instructional strategies, such as tailored teaching practices.
Teachers' social and emotional skills and well-being	Assessments or tools designed to capture teachers' social and emotional knowledge, attitudes, behaviors, competencies, skills, and well-being. Examples include assessments of teachers' emotion regulation or burnout.
Other	Assessments, tools, or monitoring and evaluation efforts whose content cannot be described under the previous categories. Examples include monitoring and evaluation systems that cover enrollment, the receipt of State services, or the performance or competencies of principals, amongst others.

Third, some survey questions asked participants to report on the stakeholders with whom they share information and the institutions with whom they work to develop assessments and collect data. These open-ended responses gave rise to a wide variety of answers that were categorized as follows: academia/researchers, NGOs, regional or sub-national public policymakers, national policymakers, national statistical offices, education community - such as teachers, principals, and caregivers -, multilateral organizations - such as the United Nations International Children's Emergency Fund (UNICEF) -, the private sector, donors, and non-identifiable.

Fourth, and finally, in analyzing results across stakeholder groups, we collapsed some response options that had minor wording differences between stakeholder groups. This was done to harmonize the presentation of results. With these decisions and the corresponding data organization, the gtsummary package was used to create summary tables.<sup>73</sup>

#### Network analysis:

To explore the relationships and collaborative efforts between the different types of stakeholders in each country, a network analysis was carried out. The network analysis was based on the social capital framework, which assumes that relationships between different parties are mediated by access to resources - which, in this case, include items, evaluations, evaluation results, and different types of reports, among others.

For this component, the same data and categorizations mentioned above were employed; analyses were performed using the tidygraph<sup>74</sup> and ggraph<sup>75</sup> packages of R<sup>76</sup>. We note that these analyses are purely descriptive - they do not use inferential statistics. To establish the collaborative networks, special consideration was given to the institutional affiliations reported by survey participants, responses to questions regarding access to and dissemination of information on holistic learning assessments, and the collaborative M&E efforts reported by the different actors. Using these questions and analytic strategies, we identified the strength of network connections, possible central stakeholders in the flow of information in the system, and possible gaps or weaker bridges in the connection between actors in the flow of information or joint work.

### **Qualitative data analysis strategy**

In this study, we used qualitative content analytic methods, relevant when verbal, symbolic, or communicative data are available. This analytic method can be used to establish conclusions through the interpretation of and inferences about original expressions.<sup>77</sup> Specifically, we conducted a conventional content analysis, taking the participants' statements as the unit of analysis and making it possible to retain the original meaning of the statements<sup>78</sup>. At the same time, we undertook a variable-oriented analysis using a cross-case approach<sup>79</sup>. In this approach, common variables - in this case, the sub-elements of the HOLAS framework - are used to describe and explain what is happening across all cases. In the first phase of the analysis, each participant constituted a case. In the second phase, the participants were grouped according to the type of stakeholder they represented. Thus, each stakeholder group - national-level data producer PMs, national-level data user PMs, sub-national-level PMs from the DRELM, NGO personnel, and frontline providers - was viewed as a case. Finally, analyses were performed and presented by variables - or sub-elements.

We deductively derived the analysis categories from the HOLAS framework, and we included the category option “Others” to identify emerging elements. We iteratively refined the coding system to more precisely reflect the content of the interviews as data was collected. We also revised the initial coding system after a meeting with the Steering Committee in May 2023 to promote clarity and consistency. The coding of each statement included two components: 1) the type of assessment to which the statement refers, and 2) the theme or content of the statement made, according to the categories shown in Table 7 below.

We present the definitions for each sub-element and the criteria to assign a fragment to the indicated category in Appendix 2 (see section below, [Appendix 2: The definitions by HOLAS sub-element](#)). We used the qualitative analysis software MAXQDA 2022<sup>80</sup> for the entire coding process.

**Table 7.** Categories related to the type of assessment/tool mentioned by the participant

Category	Subcategory	Code	Examples
Type of the assessment/ Tool	Monitoring	M	Censo Educativo (Educational Census)
	Summative Assessment	SE	Kit de evaluación diagnóstica (Diagnostic assessment kit)
	Formative Assessment	FE	Herramienta de recojo de habilidades socioemocionales (Socioemotional skills collection tool)
	Other	Or	Síseve
Level of the assessment/ tool	International	Int	International Civic and Citizenship Education Survey (ICCS)
	National	Nal	Evaluación Censal (Census Assessment or ECE)
	Regional or Local	Reg	
	Classroom Assessment	Class	
Content of the assessment/ tool	Holistic learning	HL	Evaluación Censal (Census Assessment or ECE)
	Child's Academic Learning	To the	Evaluación Nacional de Logros de Aprendizaje (National Assessment of Learning Achievement or ENLA)
	The child's social and emotional learning	SEL	Evaluación Remota de Habilidades Socioemocionales (Remote Assessment of Social-Emotional Skills or EHSE)
	Quality - Process at the classroom/ institution level	PQ	Measuring Early Learning Quality and Outcomes (MELQO)
	Quality - Structure at the classroom/ institution level	SQ	Semáforo Escuela (School Traffic Light)
	Teacher's pedagogical Skills and Practices	TP	Monitoreo de Prácticas Escolares (Monitoring of School Practices or MPE)
	Teacher's Social and Emotional Skills	TSEL	Evaluación remota de habilidades de directores y docentes (Remote assessment of principal and teacher skills)
	Other	O	Alerta Escuela (School Alert)

## Inter-coder reliability:

To establish inter-coder agreement, we established a master code based on coding of an interview by one of the PIs of the project who was integrally involved in the development of the HOLAS framework. Subsequently, the qualitative component's leader transferred the coding to the original version in Spanish, and this served as a reference for all coders. The agreement was established using the percentage of presence of the categories as an indicator. A percentage of more than 70% agreement was considered acceptable. The four coders involved (who also conducted the interviews) reached agreements between 79.17% and 91.30% with the master code. Even though this agreement was sufficient, the team discussed each of the disagreements to develop additional criteria to facilitate coding decisions about challenging fragments. These analyses also enriched the coding manual.

## Integration of quantitative and qualitative data

The organization and integration of the quantitative and qualitative components occurred throughout the study, as is depicted in Figure 10. As can be seen, quantitative and qualitative analyses were developed independently. We generated separate reports for each type of analysis, and then made meta-inferences to integrate the different types of data. We first integrated and presented the results by the HOLAS sub-elements. These results by sub-element are available online (see section below, [Results by sub-element from the systems' diagnostic report](#)). We then reviewed the integrated results across the HOLAS sub-elements in order to identify (mis)alignments across and between sub-elements. This second stage of integration resulted in the integrated findings and recommendations (see section below, [Integrated results and recommendations from the systems' diagnostic report](#)).

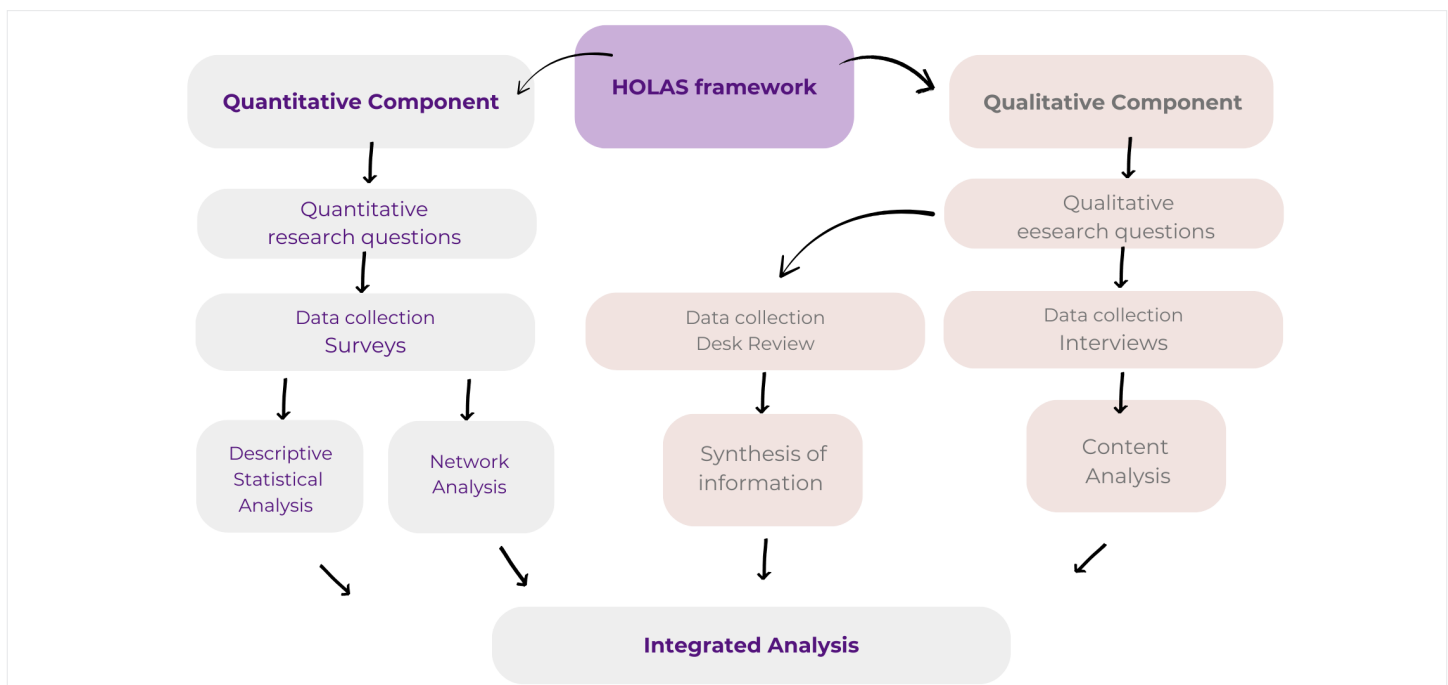


Figure 10 — Integration of the quantitative and qualitative components in this study

The study's quantitative and qualitative components addressed distinct research questions. For each component, we developed different data collection tools: surveys, desk review, and interviews. After conducting independent analyses, we integrated the information at the end of the process.

# An overview of the Peruvian education system:

## The monitoring and evaluation of holistic education outcomes and the focus on childhoods in contexts of marginalization

In this section, we provide a background on the holistic monitoring and evaluation (M&E) processes and structures within the Peruvian education system. It is divided into five parts: (i) The basic principles of Peruvian education; (ii) the structures that support the M&E of education quality; (iii) the prioritization of holistic learning in the basic education system; (iv) the measurement of holistic learning outcomes and the safeguard of equity in assessment efforts; and (v) civil society structures that contribute to the research, monitoring, and evaluation of holistic learning outcomes.

**What do we suggest that you keep in mind while reading and interpreting this overview?** We conducted a desk review of publicly available documents and have cited them throughout the report. Our aim was to present a comprehensive narrative to contextualize our system analysis, supporting the interpretation of our results and recommendations. However, the scope of this project limited the extent of information we could review. If there are additional or updated documents that provide further nuanced context, please contact us at [ecwperu@nyu.edu](mailto:ecwperu@nyu.edu).

### I. What are the basic principles of Peruvian education?

The right to access to quality education. Access to compulsory, free, and comprehensive basic education - which encompasses early childhood, primary, and secondary education for children and adolescents - is a fundamental right recognized by the 1993 Constitución Política (Political Constitution) of Peru.<sup>81</sup> Under the 2003 Ley General de Educación (General Education Law N° 28044) and its 2021 modifications<sup>82 & 83</sup> the right to education is grounded in the principles of ethics, equity, democracy, interculturality, environmental awareness, creativity, and innovation.<sup>84</sup> This includes the right to availability and permanence in the education system.<sup>85</sup>

#### The right to basic education in Peru is operationalized into three modalities:

- **Educación Básica Regular** (Regular Basic Education or EBR), which targets children and adolescents who pass through the educational process according to their **normative physical, affective, and cognitive development.**<sup>86</sup>
- **Educación Básica Alternativa** (Alternative Basic Education or EBA), which targets children, adolescents, and adults **who were not inserted into EBR in a timely manner**, who did not have access to EBR, or who were unable to finalize their EBR studies and their age prevents them from continuing their regular studies.<sup>87</sup>

- **Educación Básica Especial** (Special Basic Education or EBE)<sup>88</sup> is directed towards three groups: **Children with disabilities** or at risk of acquiring them under the age of three; children, adolescents, young people, and adults with severe disabilities that require permanent and specialized support; and children and adolescents with **high abilities** (talent and giftedness).<sup>89</sup>

**The Peruvian education system also has several education service models.** One of these is the Modelo de Servicio de Educación Intercultural Bilingüe (Intercultural Bilingual Education Service or MSEIB) which provides a quality education service that is relevant to the socio-cultural and linguistic characteristics of indigenous or native students.<sup>90</sup>

## **What are the key commitments of the Peruvian education system that hold particular relevance to this system analysis?**

The Peruvian State aims to uphold and actualize the right to basic education - organized into EBR, EBE, and EBA - through a series of guarantees. Three tenets of the Peruvian education system are of particular relevance to this report and are outlined across this overview.

**Improving quality and equity through different levels of the education system.** Firstly, the Peruvian State has committed to improving the quality and equity of education through a permanent process of supervision and assessment,<sup>91</sup> generating evidence to inform action at each level of government and management.<sup>92</sup> This occurs at four levels within the education system that together make up the decentralized management system: Most distantly to the students, there is the Ministerio de Educación (Ministry of Education or MINEDU), followed by the Direcciones Regionales de Educación (Regional Departments of Education or DREs), the Unidades de Gestión Educativa Local (Local Educational Management Units or UGELs), and the schools.<sup>93</sup>

**The holistic understanding of learning outcomes.** Secondly, the Peruvian State has committed to improving both children's academic learning and holistic outcomes more broadly.<sup>94 & 95</sup> We describe below the prioritization of holistic learning in the basic education system, including recent efforts to monitor and assess children's holistic learning and the factors that support it at various levels.

**Supporting equity in education for childhoods in contexts of marginalization.** Thirdly, the Peruvian State has committed to supporting equity in the attainment of quality education, including that of holistic learning outcomes.<sup>96</sup> We outline below norms, rights, and mechanisms for the inclusion of three groups of childhoods in contexts of marginalization - Venezuelan migrant and refugee children, children with disabilities, and children from indigenous and native communities - in education systems, including pertinent M&E efforts. We briefly describe how United Nations (UN) agencies and international non-governmental organizations (INGOs) have supported the right to education of children from these three groups.

## **II. What are the structures that support the M&E of education quality? A focus on national bodies, sub-national offices, and schools and their assessment efforts**



## The MINEDU

The MINEDU is the body of the national government charged with defining, directing, and articulating the policy of education, culture, recreation, and sports, in accordance with the general policies of the State.<sup>97</sup> The State, through the MINEDU, is responsible for preserving the unity of the decentralized national education system.<sup>98</sup> The MINEDU exercises its competencies at the national level.<sup>99</sup> In order to fulfill its purpose and functions, the MINEDU is organized into senior management bodies, a consultative body, and advisory bodies, amongst other entities.\* The senior management bodies include the Despacho Ministerial (Ministerial Office), Despacho Viceministerial de Gestión Pedagógica (Vice-ministerial Office of Pedagogical Management), and the Despacho Viceministerial de Gestión Institucional (Vice-ministerial Office of Institutional Management). The consultative body consists of the Consejo Nacional de Educación (National Education Council or CNE), which is a specialized and autonomous body of the MINEDU.<sup>100</sup> &<sup>101</sup> The advisory bodies include the Secretaría de Planificación Estratégica (Strategic Planning Secretary or SPE), which depends on the Ministerial Office. As visualized in Figures 11, 12 and 13, four of these bodies are particularly relevant to understanding the MINEDU's M&E of holistic outcomes for students, teachers, and principals in basic education, and the corresponding standards to assess performance: The Vice-ministerial Office of Pedagogical Management, the Vice-ministerial Office of Institutional Management, the SPE, and the CNE.

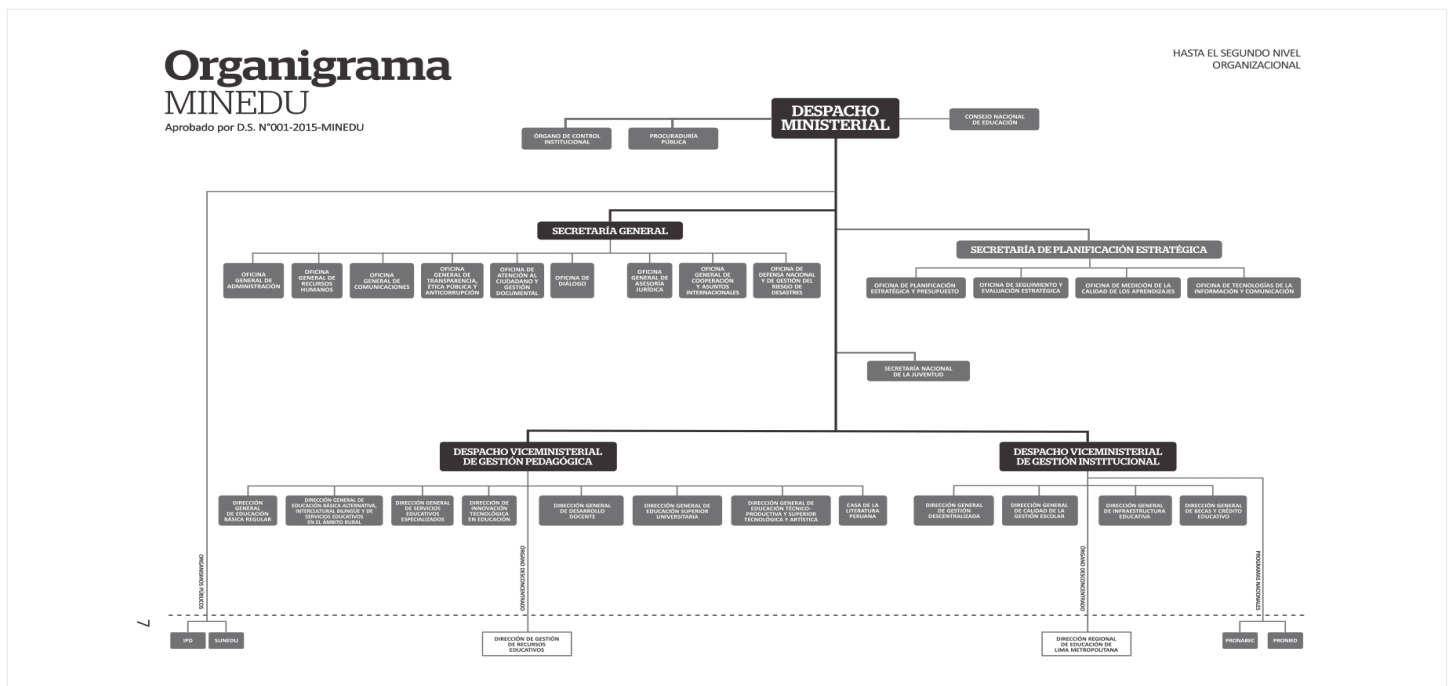


Figure 11 — The MINEDU organization chart

Source: “[Regulation of the Organization and Functions](#),” (Lima, 2015), p. 7

## The Vice-ministerial Office of Pedagogical Management

The Vice-ministerial Office of Pedagogical is held “responsible for formulating, regulating, coordinating, directing, supervising, and assessing the implementation of policies, plans,

\* Other entities include a control body, a legal defense entity, support bodies, line bodies, and decentralized bodies (not to be confused with the decentralized management system).

educational programs and normative documents in the areas of learning, curricular development and adaptation, and teacher development, sports, materials and other educational-pedagogical resources for all levels and modalities of basic education.”<sup>102</sup> Within the Vice-ministerial Office of Pedagogical, two General Directorates are particularly pertinent to the M&E of child and teacher outcomes, respectively: the Dirección General de Educación Básica Regular (General Directorate of Regular Basic Education or DIGEBR) and the Dirección General de Desarrollo Docente (General Directorate of Teacher Development or DIGEDD).

**DIGEBR is divided into four organizational units.** The Dirección de Educación Inicial (Directorate of Early Childhood Education), the Dirección de Educación Primaria (Directorate of Primary Education), the Dirección de Educación Secundaria (Directorate of Secondary Education), and the Dirección de Educación Física y Deporte (Directorate of Physical Education and Sports).<sup>103</sup> Broadly, the DIGEBR’s functions include:

- Leading and supervising the articulated formulation of policies, pedagogical proposals of educational service models, and normative documents for EBR;
- Leading and supervising the formulation, implementation, and assessment of the Currículo Nacional (National Curriculum) - which establishes the learning that students are expected to achieve from their basic education<sup>104</sup>, considering bilingual, inclusive, environmental and community-based approaches;
- Supervising the definition, design, and utilization of educational-pedagogical resources for EBR; and
- Determining the needs of in-service teacher training for EBR, establishing the pertinent contents and modalities, and supervising implementation.<sup>105</sup>

**DIGEBR, through its Unidad Funcional no Orgánica de Tutoría y Orientación Educativa (Functional Unit of Tutoría and Educational Guidance), also leads the actions of Tutoría and educational guidance (TOE) in the different modalities,<sup>\*</sup> &<sup>106</sup> levels, and service models.<sup>107</sup>**

Of importance to holistic learning, TOE is a service inherent to the National Curriculum that provides students with socio-affective and cognitive support across the basic education system - encompassing the EBR, EBA and EBE modalities<sup>108</sup> - and “constitutes an opportunity for the development of socio-emotional skills.”<sup>109</sup>

**DIGEDD is divided into five units:** The Dirección de Evaluación Docente (Directorate of Teacher Assessment or DIED), the Dirección de Promoción del Bienestar y Reconocimiento Docente (Directorate of Welfare Promotion and Teacher Recognition or DIBRED), the Dirección de Formación Inicial Docente (Directorate of Pre-Service Teacher Training), the Dirección de Formación Docente en Servicio (Directorate of In-Service Teacher Training), and the Dirección Técnico Normativa de Docentes (Directorate of Technical Regulations for Teachers).<sup>110</sup> The functions of the DIGEDD include:<sup>111</sup>

- Designing, conducting, supervising, and assessing a teaching system that integrates and articulates assessment, career, well-being, recognition, training and hiring policies, within a perspective of permanent professional development;
- Leading and supervising the formulation of policies, legislative, and regulatory initiatives and normative documents for the implementation and improvement of the

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\* The Functional Unit works within the scope of the DIGEBR; still, the Unit coordinates with delegates from other directorates to establish focal points and work in a coordinated manner.

teacher system; and

- Proposing policies, plans, and regulatory documents in the areas of teacher assessment, career development, well-being, recognition, training, and hiring.

**There are two other Directorates within the Vice-ministerial Office of Pedagogical that are of particular relevance to equity:** The Dirección General de Educación Básica Alternativa, Intercultural Bilingüe y de Servicios Educativos en el Ámbito Rural (General Direction of Alternative Basic Education, Intercultural Bilingual Education and Educational Services in Rural Areas or DIGEIBIRA) and the Dirección General de Servicios Educativos Especializados (General Directorate of Specialized Educational Services). First, the DIGEIBIRA's functions, within the scope of its competence, include: (a) Conducting and supervising the adequacy of the National Curriculum, as well as its actualization, monitoring, and evaluation, and (b) proposing, leading, and supervising the articulated formulation of policies, pedagogical proposals of the educational service models and normative documents.<sup>112</sup> DIGEIBIRA is composed of three bodies: (a) The Dirección de Educación Básica Alternativa (Directorate of Basic Alternative Education), responsible for educational services in each cycle of EBA<sup>113</sup>; (b) the Dirección de Educación Intercultural Bilingüe (Directorate of Intercultural Bilingual Education), in charge of Educación Intercultural Bilingüe (Intercultural Bilingual Education or EIB) policies, plans, proposals, and documents<sup>114</sup>; and (c) the Dirección de Servicios Educativos en el Ámbito Rural (Directorate of Education Services in the Rural Areas), which oversees educational services in Spanish multigrade monolingual schools and services specific to rural areas.<sup>115</sup> Second, the General Directorate of Specialized Educational Services is responsible for proposing policies, plans, and normative documents - as well as directing the implementation of service models - for children and adolescents with special education needs (SEN). The Dirección General de Servicios Educativos Especializados is composed of two bodies: The Dirección de Educación Básica Especial (Directorate of Basic Special Education) and the Dirección de Educación Básica para Estudiantes con Desempeño Sobresaliente y Alto

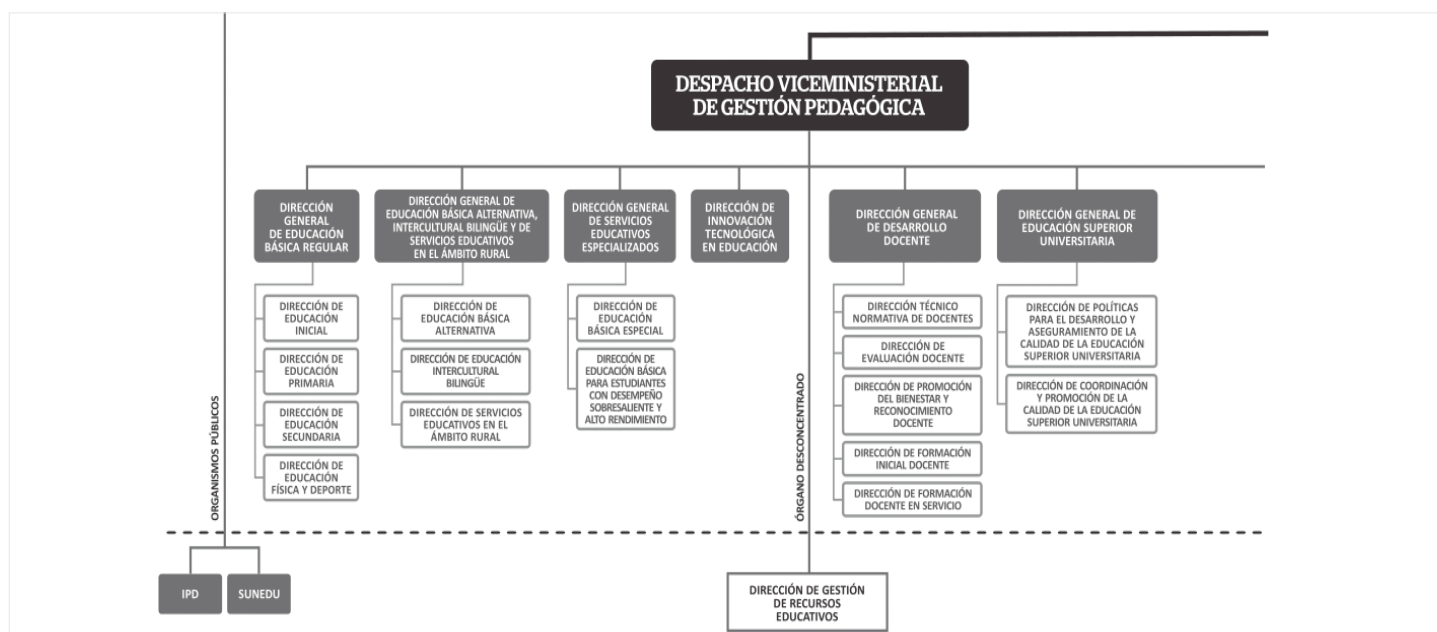


Figure 12 – The Vice-ministerial Office of Pedagogical Management

Source: “[Regulation of the Organization and Functions](#),” (Lima, 2015), p. 8

Rendimiento (Directorate of Basic Education for Students with Outstanding Performance and High Achievement).

## **Vice-ministerial Office of Institutional Management**

The Vice-ministerial Office of Institutional Management is held “responsible for formulating, regulating, articulating, coordinating, directing, supervising, and evaluating the implementation of policies, plans, projects, and normative documents for the improvement of the quality of the management of the educational system, scholarships and educational credits, and educational infrastructure and equipment under a territorial and results-based management approach in coordination with different levels of government and decentralized agencies.”<sup>116</sup>

**Within the Vice-ministerial Office of Institutional Management, the Dirección General de Calidad de la Gestión Escolar (General Directorate of School Management Quality)-** which incorporates the Dirección de Gestión Escolar (Directorate of School Management) and the Dirección de Fortalecimiento de la Gestión Escolar (Directorate for the Strengthening of School Management) - **is particularly relevant to this study.** While the Directorate of School Management is “responsible for designing, proposing, supervising and evaluating educational service models and efficient management standards for educational institutions and programs,”<sup>117</sup> the Directorate for the Strengthening of School Management is “responsible for determining the training needs of the management and administrative personnel of educational institutions, as well as for designing, implementing and evaluating the pertinent strategies, contents and modalities,”<sup>118</sup> amongst others.

Furthermore, this Vice-ministerial also plays an important role in setting the standards for principal outcomes and in the Peruvian’s State commitment to equity. Importantly, the Vice-ministerial Office produced the Marco de Buen Desempeño Directivo (Framework for Good Management Performance or MBDDir), which establishes standards and pedagogical practices for principals.<sup>\*</sup> & <sup>119</sup>

## **Strategic Planning Secretary**

**The SPE is responsible for coordinating, integrating, formulating, monitoring, and evaluating the policy, objectives, and strategies of the education sector.** Within the SPE, two offices are particularly relevant to M&E: The Oficina de Seguimiento y Evaluación Estratégica (Strategic Monitoring and Evaluation Office or OSEE) and the Oficina de Medición de la Calidad de los Aprendizajes (Quality of Learning Measurement Office or UMC).

The OSEE, composed of a Unidad de Estadística (Statistical Unit) and a Unidad de Seguimiento y Evaluación (Monitoring and Evaluation Unit or USE), is “responsible for coordinating the process of production, integration and analysis of statistical information, performance and impact of educational policy.”<sup>120</sup> Within the OSEE, the Statistical Unit is part of the Sistema Estadístico Nacional (National Statistics System) and is charged with “programming, collecting, validating, processing, and disseminating statistical information of the Education sector,”<sup>121</sup> while the USE is responsible for promoting, designing, conducting, and supervising impact and performance evaluations of educational policy interventions and designing, conducting, and implementing the tools promoted by the SPE to monitor the performance of educational policy.<sup>122</sup>

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\* Principal standards were established by the General Directorate for the Development of Educational Institutions, which was under the Vice-ministry of Pedagogical Management. This office no longer exists as such.

The UMC is “responsible for planning, designing, implementing, and executing learning achievement assessments of basic education students, as well as for producing statistics and learning achievement indicators that serve to formulate and retrofit educational policy.”<sup>123</sup> The UMC is also charged with maintaining the validity and statistical reliability of its instruments, as well as the compatibility of the results of their application over time.<sup>124</sup>

## National Education Council

The CNE is a specialized and autonomous body of the MINEDU that participates in the formulation, coordination, follow-up, and assessment of the Proyecto Educativo Nacional (National Education Project or PEN); medium and long term educational plans and policies; and intersectoral policies that contribute to the development of education.<sup>125</sup> The PEN consists of a set of policies developed through a national dialogue that provide a strategic framework to the decisions that lead to the development of education.<sup>126</sup> The current PEN is the 2036 PEN which was published in 2020.<sup>127</sup> The CNE also promotes agreements and

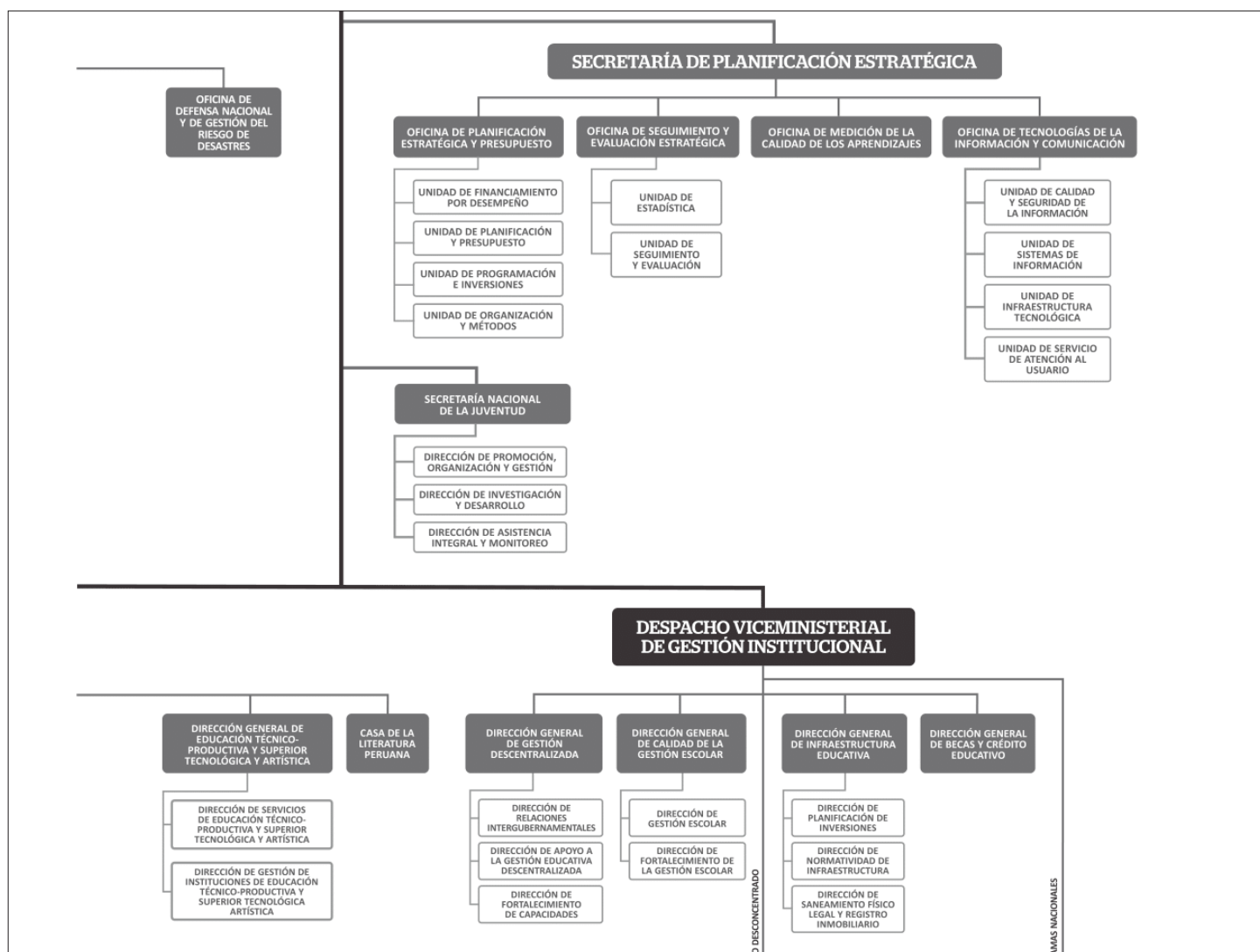


Figure 13 —he Strategic Planning Secretary and the Vice-ministerial Office of Institutional Management

Source: “[Regulation of the Organization and Functions](#),” (Lima, 2015), p. 9

commitments through the participatory exercise of the State and civil society to favor the country's educational development.<sup>128</sup> For instance, standards for teacher performance were established by the Marco de Buen Desempeño Docente (Framework for Good Teaching Performance or MMBDD), developed from dialogue led by the CNE and the Educational Forum through an Inter-Institutional Performance Board.<sup>129</sup>

## The DREs and the DRELM

Under the decentralized educational management system, 25 regional governments\* & 130,131 assume the responsibility of governing and managing education in their constituencies under a territorial and intercultural approach, in coordination with national policies and in collaboration with local governments.<sup>132</sup> In parallel,\*\* & 133 the DREs are specialized bodies of the regional governments held responsible for the educational service in their territories.<sup>134</sup> Each DRE “ensures educational services and comprehensive care programs with quality and equity in its jurisdiction, for which it coordinates with the UGELs and summons the participation of the different social actors.”<sup>135</sup> The functions of the DRE include identifying priorities for investment. DRE Directors also integrate Consejos Participativos Regionales de Educación (Regional Participatory Councils of Education), which are participatory, coordination, and surveillance bodies. Each region has its own binding resolution that establishes the norms that regulate each DRE.

In the Metropolitan Lima area – which is composed of 43 districts<sup>136</sup> – the Dirección Regional de Educación de Lima Metropolitana (Regional Directorate of Education of Metropolitan Lima or DRELM) acts as the decentralized body of the MINEDU through the Vice-Ministerial Office of Institutional Management.<sup>137</sup> The DRELM's functions include applying and executing the national education policy issued by the MINEDU and assessing its implementation in the Metropolitan Lima jurisdiction, as well as designing and proposing intervention plans in Metropolitan Lima to the MINEDU in accordance with national education policy, amongst others.<sup>138</sup> The DRELM also supervises the services provided by the Lima Metropolitan UGELs – number one to seven<sup>139</sup> – related to basic education.<sup>140</sup>

## The UGELs

The UGELs, who work with autonomy from the regional government within the “scope of their competence,” adapt the educational and pedagogical policies established by the MINEDU and the corresponding regional government entities and articulate actions between public and private institutions around the Proyecto Educativo Local (Local Education Project).<sup>141</sup> The UGELs contribute to the M&E of education by promoting the activity of the Consejos Participativos Locales de Educación (Local Participatory Education Councils), which are also participatory, coordination, and educational surveillance bodies.<sup>142</sup>

## The schools

Schools are the main sites managed by the decentralized education system and where the service delivery occurs.<sup>143</sup> The functions of schools include elaborating, approving,

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\* There are 25 regional governments and one overarching Regional Commonwealth of the Andes, an institution that unites the regional governments for the execution of projects, local development, and the improvement of services.

\*\* The General Education Law outlines the functions of the DREs “without prejudice to the functions of the regional governments in the area of education established in Article 47 of the Ley Orgánica de Gobiernos Regionales (Organic Law of Regional Governments), Law N° 27867.”



executing, and assessing the Proyecto Educativo Institucional (Institutional Educational Project); organizing, conducting, and evaluating processes of institutional and pedagogical management; diversifying and complementing the basic curriculum and conducting Tutoría actions.<sup>144</sup> Within schools, teachers are charged with planning, developing, and assessing activities to ensure student learning,<sup>145</sup> which occurs through permanent, formative classroom assessment.<sup>146</sup>

### III. How is holistic learning prioritized in the basic education system?

Within the basic education systems, the organizational structures at the different levels of decentralized management support the prioritization of holistic education, which is justified under Article 13 of the 1993 Political Constitution and Article 9 of the 2003 General Education Law. Officially-recognized documents provide additional information on the holistic aims of education, define social and emotional wellbeing, and outline the routes to achieve social and emotional learning (SEL) and wellbeing amongst students and teachers.

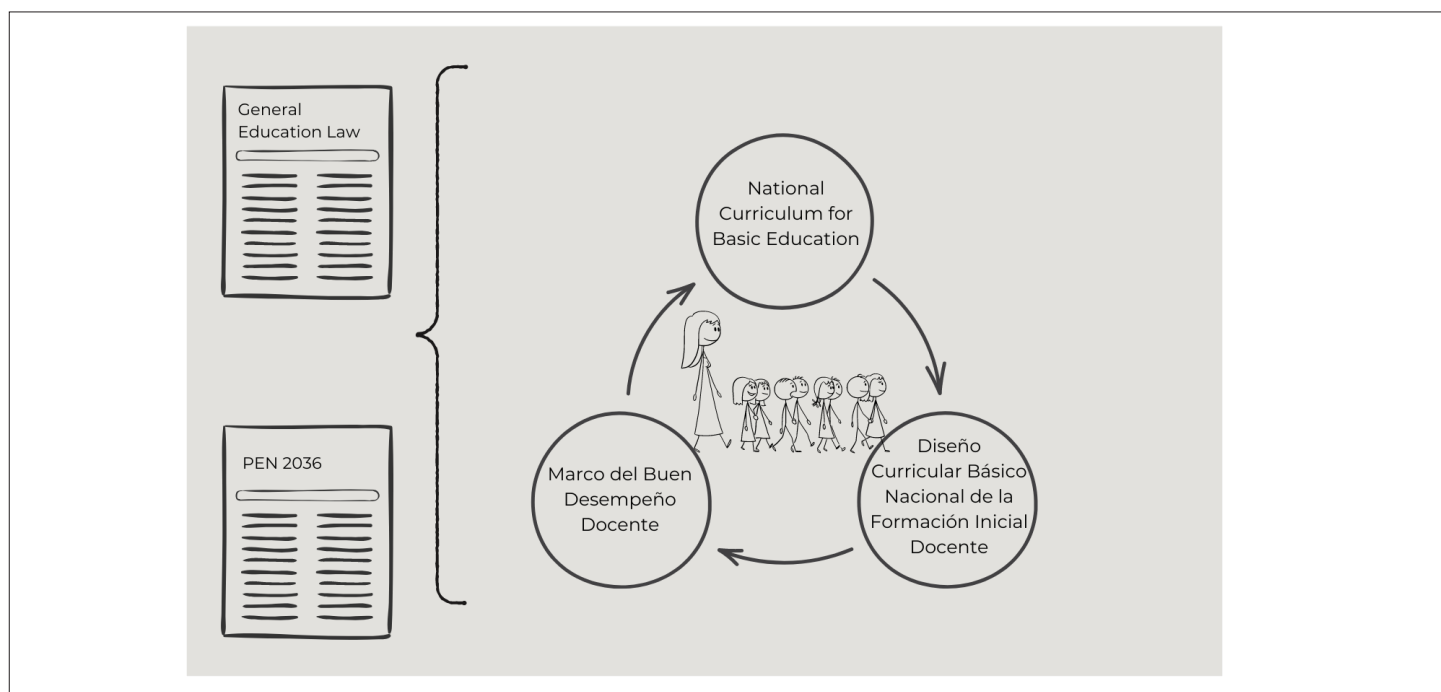


Figure 14 –Key documents in the Peruvian education system for students' and teachers' social and emotional competencies

Some mandates and laws are essential but more distal to teachers, while other documents more directly influence daily school practices.

**The purposes of education are enshrined into key documents of the education system, namely, the General Education Law and the PEN.** According to the General Education Law, Basic Education aims to comprehensively train students in physical, affective, and cognitive aspects; develop capacities, values, and attitudes that allow them to learn throughout their lives; and develop learning in the fields of science, humanities, technique, culture, art, physical education, and sports.<sup>147</sup> Published in 2020, the PEN for 2036 also establishes social emotional well-being and civic life as one of the four key purposes for Peruvian education.\* & <sup>148</sup>

\* This includes the ethical and civic training of students, which is mandatory in any educational process.

In the 2036 PEN, social and emotional well-being and skills is defined as:

“A state of the person that includes the adaptive management of emotions, his/her social life, of the capacity for healthy coexistence and an optimistic view of his or her development and that of society, the spaces in which he or she finds meaning and purpose; therefore, it is deeply connected to the development of our spirituality and spirit of transcendence. In this way, socio-emotional well-being is expressed in emotional balance (personal), the adaptation to coexistence (social), the ability to deal with various challenges (physical, personal, academic, etc.) and the contribution to collective well-being (citizenship).”<sup>149</sup>

Educational Orientation and Tutoría further defines social and emotional skills as “aptitudes or skills of a person related to identifying, expressing and managing emotions, understanding those of others, demonstrating empathy, making responsible decisions, and relating with others in a healthy and satisfactory way.”<sup>150</sup>

**In addition to these definitions, official documents outline the routes to reach the SEL and wellbeing of students and teachers.** Broadly, since 2016, the National Curriculum for Basic Education enshrines prioritized competencies and capacities, detailing the capacities, competencies, abilities, learning standards, and performances that students are expected to achieve related to holistic and SEL. Additionally, the Diseño Curricular Básico Nacional de la Formación Inicial Docente (National Basic Curriculum Design for Pre-service Teacher Education) and MMBBDD outline the standards that teachers are expected to achieve during their pre-service training and throughout their teaching careers. Some of those standards specifically link to the holistic and SEL of students and teachers.

**In line with the PEN’s definition of social and emotional well-being, the Lineamientos para la promoción del bienestar socioemocional de las y los estudiantes de la educación básica (Guidelines for the Socio-Emotional Well-being of Students of Basic Education) outline seven guiding axes for the social and emotional well-being of students in basic education,** such as working with families and the community and attention to diversity and inclusion. These guiding axes are implemented through a series of actions and strategies to support social-emotional well-being and learning, requiring the commitment of the entire educational community including the DREs and UGELs. These actions include: (i) Monitoring students’ social and emotional skills and well-being and the conditions that support it through the application of instruments for information gathering, (ii) planning short, medium, and long-term actions to promote socio-emotional well-being that consider the diversity of students, including the socioemotional skills program, and (iii) periodic M&E of the extent to which the proposed actions result in improvement and sharing of good practices.<sup>151</sup> The Guidelines also specify responsibilities of the MINEDU, DREs, UGELs, school principals and staff in the M&E of actions related to socioemotional well-being.<sup>152</sup>

## **How is the prioritization of equity ensured within the education system? The inclusion of students and teachers in contexts of marginalization**

### **Promote equity, interculturality, and diversity**

In addition to focusing on the prioritization of holistic learning, Peruvian education and the decentralized management system integrate approaches to promote equity, interculturality, and diversity.<sup>153</sup> The Political Constitution states that each student has the right to an education that respects his/her identity.<sup>154</sup> The Constitution promotes a bilingual and

intercultural education, seeking to preserve the diverse cultural and linguistic manifestations of the country,<sup>155</sup> and states that it is a duty of the State to ensure that everyone - including those with “mental or physical limitations” - receive an adequate education.<sup>156</sup> In the same line, the General Education Law outlines measures that education authorities need to take to guarantee equity in education within the scope of their respective competencies<sup>157</sup>, including the function of the MINEDU to specify equity policies.<sup>158</sup> In addition, the 2036 PEN outlines “inclusion and equity” as one of the four guiding principles for State action.<sup>159</sup> Finally, official documents outline norms, rights, and mechanisms for the inclusion of children, teachers, and schools in contexts of marginalization into the education system. This report is particularly interested in the M&E of holistic education services at scale for Venezuelan migrant and refugee children, children with disabilities, and children from indigenous and native groups. Challenges faced by children from these groups as well as efforts made towards their full inclusion in the basic education system - with the support from UN agencies and INGOs - are outlined over the next few paragraphs.

## **Venezuelan refugee and migrant children**

Since 2014, millions of Venezuelans have fled their country following a series of political, economic, human rights, and humanitarian crises, making this the largest population migration in recent Latin American history.<sup>160</sup> Venezuelans have cited unemployment, violence and insecurity, political turmoil, and health issues as some of the main reasons for leaving the country.<sup>161</sup> The exponential increase in the Venezuelan refugee and migrant population in Peru began in mid-2017, and the population size has fluctuated according to the changing requirements for entry established by the Peruvian government.<sup>162</sup> Peru is currently the second largest destination for Venezuelan refugees and migrants worldwide, after Colombia.<sup>163</sup> Still, millions of Venezuelans in Peru lack legal recognition as refugees.<sup>164</sup> According to the Interagency Coordination Platform for Refugees and Migrants from Venezuela (R4V) estimates for 2023, there are currently a projected 1.62 million Venezuelans permanently residing in Peru, as well as 204,000 people in transit.<sup>165</sup> 2022 data from a survey conducted by the Instituto Nacional de Estadística e Informática (National Institute of Statistics and Informatics or INEI) in Lima and Callao, Trujillo, Arequipa, Chiclayo, Chicla, Piura, Ica, and Tumbes shows that migrants have chosen to primarily settle in Lima and Callao, although the proportion of migrants settling in these cities has decreased from around 96.6% in 2018 to 82.5% in 2022. 5.1% of migrants have settled in Trujillo, followed by 3.3% in Arequipa and 2.6% in Ica.\* & <sup>166</sup>

A few years before the outbreak of the “migration crisis,”<sup>167</sup> the permanent Mesa de Trabajo Intersectorial para la Gestión Migratoria (Intersectoral Roundtable for Migration Management or MTIGM) was established with the purpose of coordinating, evaluating, proposing, prioritizing, and supervising policies and actions related to comprehensive migration management.<sup>168</sup> Additional norms, rights, and mechanisms have been created since, in the context of the influx of hundreds of thousands of Venezuelan refugee children. Importantly, Article 8 of the 2017 Decreto Legislativo de Migraciones (Legislative Decree on Migrations N° 1350) assigned the MINEDU the responsibility to dictate the norms and establish the necessary measures to guarantee that foreigners - including persons in an irregular migratory situation - could access public education services including basic education. However, the tightening of migration policies in mid-2018 in response to calls to prioritize security and internal order

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\* According to the Encuesta a la Población Venezolana residente en el Perú (Survey of the Venezuelan Population Residing in the Country or ENPOVE) the total Venezuelan population residing in these eight cities represents 82.9% of the total number of homes with Venezuelan population in the departmental capital cities.

led to a significant increase in the irregular entry of Venezuelan people into Peru; this in turn resulted in an overstretched response capacity from the Peruvian State to guarantee the right to education as enshrined in Law N° 1350.<sup>169 & 170</sup>

Since then, there have been some efforts to increase access to the educational system, including a 2019 norm to regulate the enrollment and transfer of children, adolescents, youth, and adults into schools and national EBR, EBE, and EBA programs.<sup>171 & 172</sup> Still, some claim that despite efforts to ensure the educational inclusion of refugees and migrants, support mechanisms are not put in practice during enrollment processes by the principals of schools due to lack of knowledge, ineffective communication, and/or discriminatory behaviors.<sup>173 & 174</sup>

Net enrollment rates of the Venezuelan refugee and migrant population residing in Peru are estimated around 84.9% for the early childhood level, 98.9% for primary, and 91.1% for secondary,<sup>175</sup> with estimated dropout rates of 19% between 2021 and 2022.<sup>176</sup> There are still an estimated 910,700 Venezuelans with unmet needs in the education sector<sup>177</sup> and migrant Venezuelan children have seen their learning gaps increase in 2022.<sup>178</sup>

## **Children with disabilities**

There have been significant shifts in how the education system approaches children with disabilities over the last decades. In 1971, one of the three modalities of basic education - the EBE - was created with the objective of facilitating the comprehensive development of the population with disabilities.<sup>179</sup> In 1982, the General Education Law N° 23884 defined special education as a modality for people who, due to their “exceptional characteristics” - such as “mental or organic deficiencies,” “social behavioral maladjustments,” and “outstanding conditions” - required differentiated attention.<sup>180</sup> Special education focused on the comprehensive training of people with exceptional characteristics<sup>181</sup> to integrate them into society and working life, and the orientation of families and communities to identify, treat, and recognize the rights of people with exceptional characteristics. One decade later, the approach to disability and students with SEN began to shift in a project with the United Nations Educational, Scientific, and Cultural Organization (UNESCO), in which students with disabilities were integrated into neurotypical classrooms for the first time.<sup>182</sup> In line with this project, the 2003 General Education Law regulated that the EBE has an “inclusive approach and serves people with special educational needs, in order to achieve their integration into community life and their participation in society.”<sup>183</sup> According to this - currently in force - General Education Law, “people with special education needs” now include “people who have a type of disability that makes regular learning difficult” and “gifted or specifically gifted children and adolescents.”<sup>184</sup> This means that education provisions for children with disabilities are included under the umbrella of SEN.

The same year that General Education Law N° 28044 was sanctioned, the Decade for Special Education was established to foster a coordinated action on special education between the State and civil society actors from 2003 to 2012.<sup>185</sup> In 2010, SEN were considered to emerge due to specific learning difficulties, high intellectual abilities, late entry into the educational system, disability, personal, family, and/or school history conditions; including students with temporary and/or permanent needs, which can be caused by physical, sensory, or intellectual conditions, amongst others.<sup>186</sup> Nowadays, this definition has further broadened: Children and adolescents are considered to have SEN as a result of the existence of educational barriers

that prevent or hinder the right to education from a broad understanding of diversity, without referring to a particular condition or characteristic.<sup>187</sup>

The Peruvian State provides attention to students with special needs through its various basic education modalities - EBR, EBE, and EBA -, which have different audiences and purposes that tend to diversity, in line with the 2003 General Education Law, as discussed earlier (see section above, [I. What are the basic principles of Peruvian education?](#)). Students with mild or moderate disabilities can enter schools in EBR with the support of nearby Servicios de Apoyo y Asesoramiento para la Atención de las Necesidades Educativas Especiales (Support and Advisory Services for the Care of Students with Special Education Needs or SAANEE), depending on the choice made by their parents<sup>188</sup>. Within EBR, teachers who have students with SEN make adaptations to the Curriculum and programming designed for their classrooms, with recommendations from SAANEE.<sup>189</sup> These adaptations take the form of individualized plans for each student since the current National Curriculum does not specify how learning expectations are modified for students with disabilities.<sup>190</sup> On the other hand, the EBE promotes and supports the transition of those with disabilities and high abilities into EBR.<sup>191</sup> The EBE has various services to provide attention to students with special needs, including the Centros de Educación Básica Especial (Special Basic Education Centers or CEBE) and its SAANEE centers,<sup>192</sup> which are being restructured.<sup>\*</sup> & <sup>193</sup>

Provisions and efforts towards the inclusion of children and adolescents with SEN have resulted in the attendance of 18.4% of those who reported having a disability in 2017 to an educational center, in comparison to the 35.4% attendance rate amongst the population without a disability.<sup>194</sup> Within EBR, over 53,000 people with disabilities are enrolled in early childhood education, one million in primary education, and 900,000 into secondary education. Over 17,000 are enrolled in EBE.<sup>195</sup> Still, according to the UN's International Children's Emergency Fund (UNICEF), children with disabilities have seen their learning gaps increase in 2022.<sup>196</sup>

## Children from indigenous and native communities

There are 55 indigenous and native groups from the Amazonian and Andean regions of Peru.<sup>197</sup> 25% of the national population identifies as indigenous or native and 48 languages are spoken in the country.<sup>198</sup> Significantly, the 2017 Census estimated that 22.3% of the population is of Quechua origin and 2.4% of Aymara origin.<sup>199</sup> The presence of indigenous populations is largest in the Lima, Puno, and Cusco departments, followed by Ayacucho, Arequipa, Junin, and Ancash.<sup>200</sup>

**There have been historical efforts to provide quality education to children from diverse groups.** Significant milestones towards the integration of children from indigenous and native groups began with a literacy plan in 1953, followed in the next decades by the MINEDU's 1972 Educational Reform Law, the creation of the Dirección General de Educación Bilingüe (General Direction of Bilingual Education) in 1987, and the enactment of the EIB policy in 1989, when the intercultural policy was included in the educational system.<sup>201</sup> In 1993, Article 89 of the Political Constitution of Peru recognized the legal rights of peasant and native communities and highlighted the State's respect for their cultural identity. In its Article 19,

\* The SAANEEs are progressively being absorbed by the Servicios de Apoyo Educativo (Educational Support Services or SAEs) in their jurisdiction.



the 2003 General Education Law recognized and guaranteed the right of children from indigenous groups to education in equal conditions to the national community, establishing special programs to guarantee equal opportunities and gender equity in rural areas and where appropriate. As established by the Education Law's Article 20, this was primarily done through the establishment of the EIB system, which guarantees learning in the mother tongue, establishes the obligation of teachers to be proficient in the native language of the area where they work, ensures the participation of members of indigenous peoples in the formulation and execution of education programs, preserves the languages of indigenous peoples and promotes their development, and promotes cultural diversity, intercultural dialogue, and the awareness of rights of indigenous peoples, amongst others. In line with this, the Peruvian graduate profile includes that students learn to communicate, read, and write their mother tongue, in Spanish as a second language, and in English as a foreign language.<sup>202</sup> In 2016, the MINEDU defined seven prioritized policies including the "respect for culture in learning: Quechua, Aymara, and Amazonian children learn in their own language and Spanish;" with this objective, the MINEDU created the Plan Estratégico y la Propuesta Pedagógica de Educación Intercultural Bilingüe (Strategic Plan and Pedagogical Proposal of EIB).<sup>203</sup> Furthermore, the 2020 PEN outlines that interculturality must not be seen as an attribute to the education of 'the bilinguals'; rather, interculturality must be inherent to the educational experience of all, starting with urban centers, which are the spaces with the greatest diversity and the largest number of cases of discrimination and harassment.<sup>204</sup>

Currently, there are almost 27,000 EIB institutions, where over a million children, adolescents, and youth study in one of the 48 native languages.<sup>205</sup> Still, there have been setbacks towards equal education opportunities for children from indigenous and native groups, including reductions in the budget assigned to the implementation of the EIB Strategic Plan from 2016 to 2022.<sup>206</sup> In 2022, the Asociación Interétnica de Desarrollo de la Selva Peruana (AIDESEP or Interethnic Association for the Development of the Peruvian Jungle) issued a statement warning that schools providing EIB in the Amazons and Andes are endangered, given difficulties in hiring teachers that know the local language or culture.<sup>207</sup> According to UNICEF, remote education programs are still only offered in nine of the native and indigenous languages.<sup>208</sup> These obstacles are reflected in the fact that learning gaps for students from indigenous origin have increased in 2022.<sup>209</sup> The population that self-identifies as belonging to an ethnic group in the Amazonian region has the highest illiteracy rates; the highest rates are found amongst Ashaninka (21.4%), Awajun (14.8%), and native or indigenous of the Amazons (14.2%) groups.<sup>210</sup>

## **The role of UN agencies and INGOs in the inclusion of children from marginalized groups**

In addition or in collaboration to official efforts to guarantee the inclusion, numerous INGOs and UN agencies work to guarantee the inclusion and right to education of children from marginalized groups in Peru. The following are some of the efforts made by INGOs and UN agencies, based on the findings of desk review processes and the mixed-methods research. Importantly, these include UNICEF's activities and programs - such as the +Inclusion project - to promote the inclusion of children with disabilities, children from indigenous communities, and Venezuelan migrant and refugee children.<sup>211</sup> UNICEF also promotes efforts to integrate children from indigenous groups into recovery plans and formative assessment.<sup>212</sup> Since the mass arrival of Venezuelans in 2017, established organizations like UNICEF, UNESCO, the International Organization for Migration (IOM), RET Americas, and Save the Children have



focused on providing emergency assistance and humanitarian aid to Venezuelan migrants, refugees, and asylum seekers. This has included a focus on the integration of Venezuelan children into the Peruvian education system. For instance, UNESCO Peru has focused on integrating Venezuelan migrants and refugees through cultural projects and strengthening SEL for rural, secondary school students through its Venezuela Siembra Cultura (Venezuela Plants Culture)<sup>213</sup> and Horizontes (Horizons) programs.<sup>214</sup> For RET Americas, efforts have included the provision of non-formal education services to Venezuelan children and adolescents, as well as the reinforcement of the MINEDU's capacity to enroll and provide services to refugee and migrant populations through non-formal education.<sup>215</sup> Collaborative efforts under the umbrella of the Education Cannot Wait (ECW)-funded +Diversidad (More Diversity) program, implemented by UNESCO, RET Americas, World Vision, HIAS, Save the Children, and NGO Alternativa, has promoted inclusive education for refugee and migrant boys, girls, and adolescents in Peru.<sup>216</sup> Within this program, UNESCO has focused on retaining migrant and refugee children and adolescents in the education system and on helping decision-makers make data-driven evidence-based decisions.<sup>217</sup> These UN agencies and INGOs often work on various educational endeavors and monitor and evaluate their own programs and results, including information about the attainment of holistic learning goals; however, documents, data, and results from these efforts are not often made publicly available which may amplify the risk of misalignments with other elements of the M&E system of holistic learning outcomes.

#### IV. How are holistic learning outcomes measured and how is equity ensured within assessment efforts?

The Peruvian education system seeks to guarantee its quality, which is defined as “the optimal level of education that people should attain in order to face the challenges of human

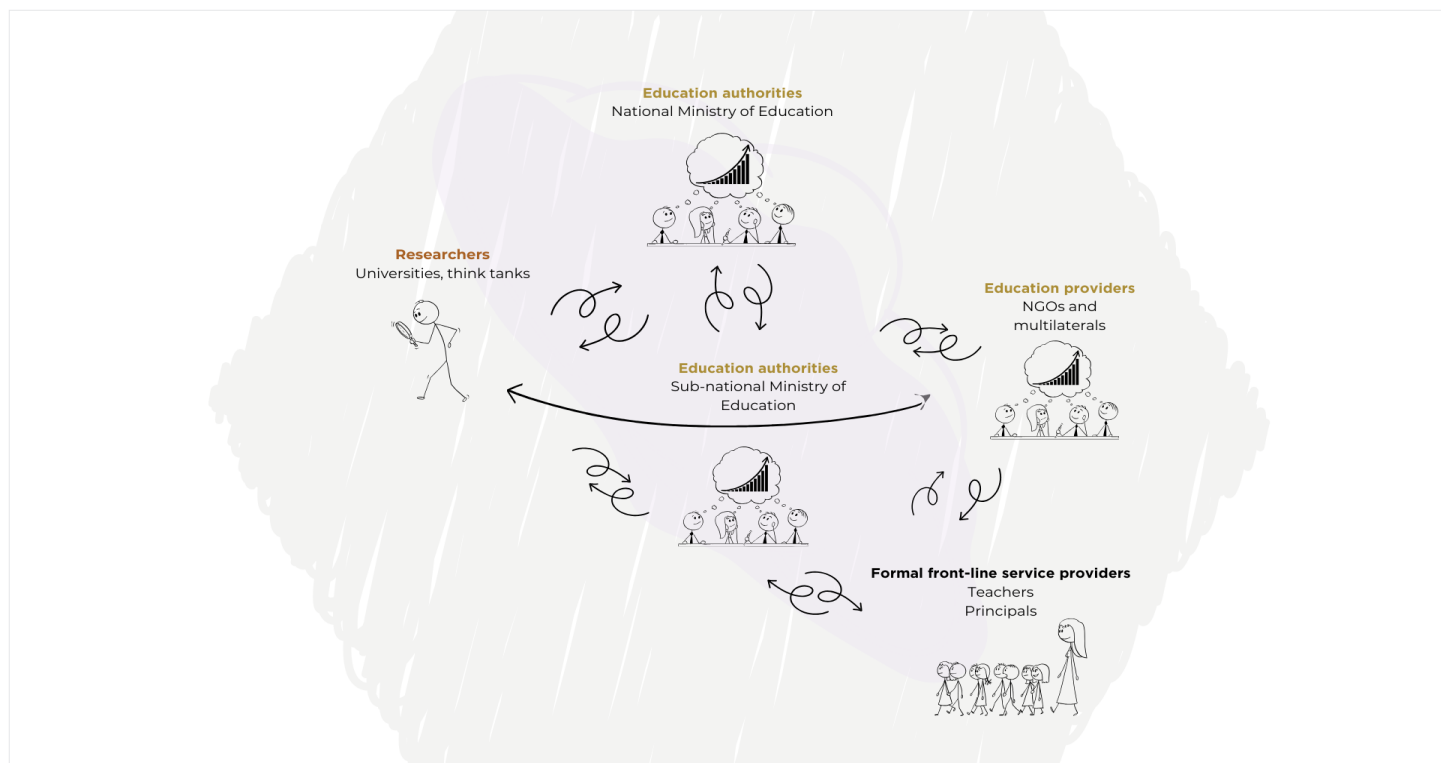


Figure 15 — INGOs and multilaterals in the education system.

Actors from INGOs and multilateral organizations play an important role as education providers in the Peruvian education system, interacting with various stakeholders.

development, exercise their citizenship, and continue learning throughout life.”<sup>218</sup> To monitor and evaluate education quality, numerous assessments and M&E systems are implemented in the Peruvian educational system. In recent years, there have been assessment efforts at four levels - the international, national, sub-national, and classroom levels - focused on measuring school climate and students’ SEL skills. Assessment efforts have often included provisions to guarantee the adaptation for or the use with children and teachers in contexts of marginalization. The next few pages provide a snapshot of the assessment system, focusing on holistic and social and emotional skills assessments that appeared across the desk review processes and mixed methods findings.

## Holistic learning assessment is enhanced at every level within the education system

First, at the national level, MINEDU entities - most often, offices within the SPE - have various systems and assessments to capture student outcomes and teacher and principal skills.

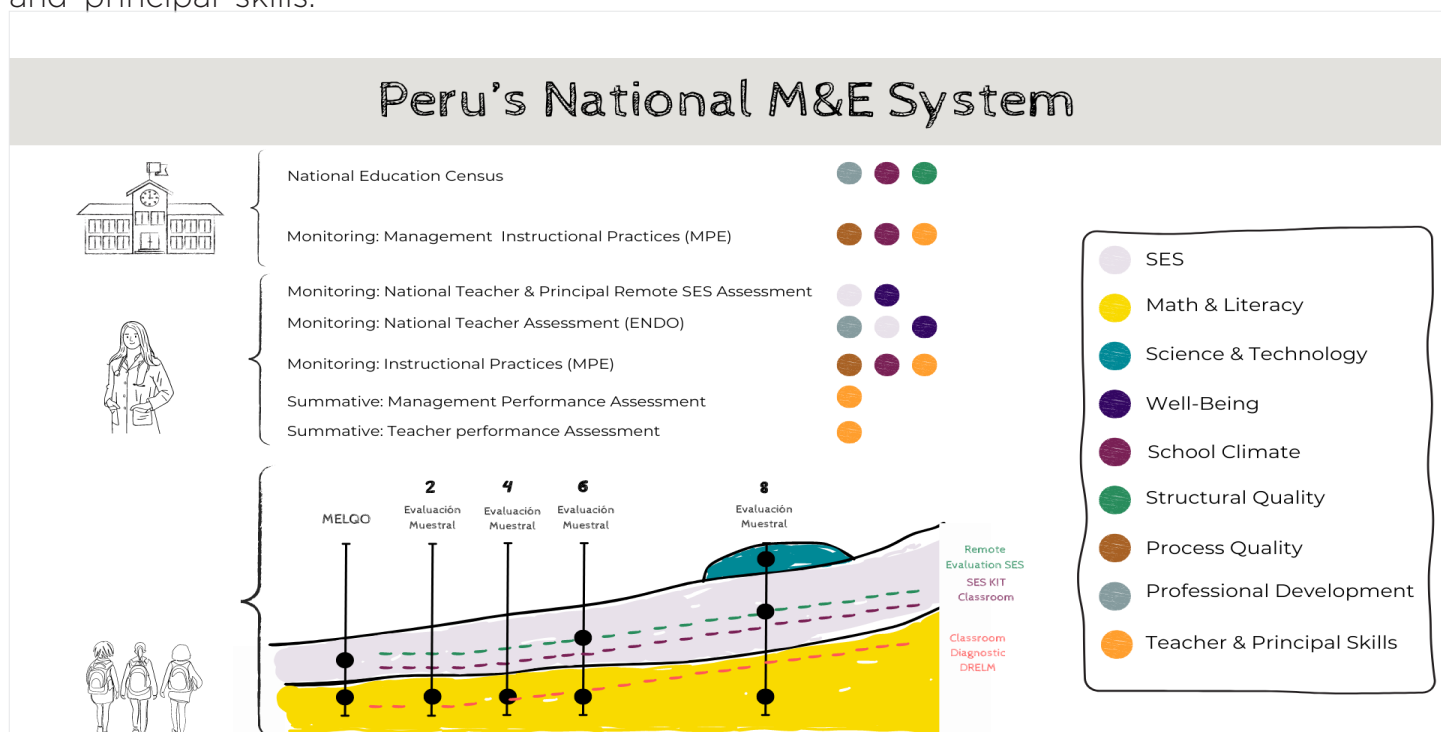


Figure 16 — A snapshot of the monitoring and evaluation system.

The Peruvian M&E system has important assessments that measure social and emotional skills (SES), mathematics and literacy, science and technology, well-being, school climate, structural quality, process quality, professional development, and teacher and principal skills, amongst others.

One of the most ambitious and well-known efforts conducted nationally by the UMC was the Evaluación Censal de Estudiantes (Census Assessment of Students or ECE), which was discontinued in 2020.<sup>219</sup> Since 2019, the UMC has conducted the Evaluación Muestral de Estudiantes (Sample Assessment of Students or EM) instead\* & <sup>220</sup>. Most recently, in 2023, the UMC implemented the Evaluación Nacional de Logros de Aprendizaje de Estudiantes (National Assessment of Student Learning Achievement or ENLA). Importantly, the UMC has sub-teams organized by specialty which include citizenship and social sciences and social and emotional skills teams.<sup>221</sup> The OSEE also has several relevant assessments including the Monitoreo de Prácticas Escolares (Monitoring of School Practices or MPE) and the Evaluación

\* The EM was also applied in 2013, 2018, 2019, and 2022.

Remota de Habilidades Socioemocionales (Remote Assessment of Social-Emotional Skills or EHSE). The DIGEDD and DIBRED also have their own national assessments for teachers, like the Evaluación Nacional de Desempeño Docente (Teacher Performance Assessment or EDD) and the Encuesta Nacional de Docentes (National Survey to Teachers or ENDO), respectively. Second, at the regional and local levels, the DREs and UGELs, amongst other actors, also monitor and evaluate student learning achievements. For instance, the DRELM implemented the Evaluación Regional (Regional Assessment or ER) in 2018. Third, at the school level, within the basic education classrooms, assessments are conducted to certify what students know, to improve their learning outcomes and educational results, and to enhance teacher practice by allowing teachers to adapt their practices and better address the diversity of students' learning.<sup>222</sup> Classroom assessments are a systematic process through which teachers or other school personnel collect and assess information about the level of development and the competencies of each student - as outlined in learning standards in the National Curriculum - through a formative approach.<sup>223</sup> In contrast to national assessments - which focus on monitoring and evaluating the Curriculum's competencies at the population level - classroom assessments allow teachers to track individual progress towards competencies and provide timely feedback to produce changes in student learning and improve teaching.<sup>224</sup> A relevant effort to assess students' social and emotional skills in the classroom was the Kit de bienestar socioemocional (Socio-emotional Well-being Kit), which includes a socio-emotional skills data collection tool, launched by DIGEBR in 2021.

Furthermore, there are also international efforts that measure Peruvian students' holistic or SEL outcomes that are produced by international organisms like the Programme for International Student Assessment (PISA), UNESCO, and the Organisation for Economic Co-operation and Development (OECD), and implemented through the UMC. These include the International Civic and Citizenship Education Survey (ICCS), Programme for International Student Assessment (PISA), and Survey on Social and Emotional Skills (SSES).<sup>\*</sup> & <sup>225</sup>

## Equity across assessment efforts

This study hones in whether assessments and systems in the education system have been adapted and used with children and teachers in contexts of marginalization: Particularly, children with disabilities, children from indigenous and native groups, and Venezuelan refugees and migrants. Publicly available evidence indicates that several national and/or sub-national assessments are used with or have been adapted for children with disabilities and SEN more broadly and children from indigenous and native groups; however, there is limited publicly available evidence indicating the existence of special provisions for Venezuelan migrant and refugee groups in national and sub-national assessments.

First, for children with disabilities, it is relevant to note that, since 2015, the UMC has begun to progressively adapt its assessment instruments and procedures to ensure the participation of students with sensory disability, physical disability, Autism Spectrum Disorder (ASD), and intellectual disabilities.<sup>226</sup> The UMC also has an Attention to Diversity team that orients and contributes to the adaptation of the UMC's instruments for students with disabilities included in EBR.<sup>227</sup> Additionally, in 2023, the UMC implemented the Registro de Estudiantes con Discapacidad (Registry of Students with Disability or R-NEE) to guarantee the participation of students with disabilities in national assessments.<sup>228</sup>

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\* The UMC is charged with conducting and implementing international assessments of student learning achievement in basic education.

Second, in 2005, to effectively monitor and evaluate the learning outcomes of children from indigenous or native groups, the Peruvian government adopted guidelines for a policy of EIB.<sup>229</sup> Within the EIB modality, the UMC assesses reading skills in six indigenous languages. Since 2007, the UMC assesses fourth-grade students who speak Quechua Cusco Collao, Aymara, Awajun, and Shipibo - Konibo; in 2014, and 2016, Quechua Chanka and Ashaninka were also incorporated.<sup>230</sup> Additionally, these students - as well as others who speak other native and indigenous languages - have been assessed in reading in Spanish as a second language since 2007.<sup>231</sup> The UMC's expert team that designs and constructs instruments also includes specialists from EIB.<sup>232</sup> Importantly, the 2023 ENLA assessment has gathered census evidence about students from EIB schools. At the regional level, in 2018, the DRELM, in cooperation with the MINEDU, conducted an assessment of teacher's level of proficiency in native languages.<sup>233</sup>

Thirdly, there is limited publicly available evidence about provisions made for Venezuelan migrants and refugees in national and sub-national assessments. The nationwide Sistema de Información de Apoyo a la Gestión de la Institución Educativa (Management Support Information System of the School or SIAGIE) has collected data on individual's 'country of birth' since 2011 but does not publish the data.<sup>234 & 235</sup> While the Síseve platform initially required students to enter a national identity number to access its reporting form, since 2020 the platform has been updated to promote the access for Venezuelan students, accepting a wider range of documentation types.<sup>236 & 237</sup> Since participation in learning achievement assessments is a right of all students - and given that Venezuelan refugees and migrants have access to public early childhood, primary, and secondary education - refugees and migrants enrolled in public schools are included in applicable M&E efforts. This inclusion is based on their attendance to EBR's public schools. While no M&E efforts honing in on out-of-school Venezuelan refugee and migrant students specifically were found, the MINEDU's Alerta Escuela (School Alert) system seeks to identify public school students at risk of abandoning schools.<sup>238</sup>

We will release further information on assessments and M&E systems across all levels, including their sampling frames, constructs or competencies measured, and their inclusion and adaptation to childhoods in contexts of marginalization, in future publications.

## **V. How do civil society structures contribute to the research, monitoring, and evaluation of holistic learning outcomes?**

**Beyond government, INGO, and UN actors, there are various civil society structures - such as universities and think tanks - that contribute to the M&E of holistic learning outcomes and equity in Peru.** Desk review findings suggest that they do so in at least four ways. First, civil society organizations design and/or implement holistic learning assessments. For example, the Grupo de Análisis para el Desarrollo (Group for the Analysis and Development or GRADE), implemented the Niños del Milenio (Young Lives) longitudinal study to understand the causes of poverty and how policies affect children's well-being.<sup>239</sup> Second, civil society actors collaborate with policy makers, government structures, UN agencies, and INGOs - formally and informally - to support the monitoring, evaluation, and learning stemming from

education processes. For instance, NYU researchers involved in this study partnered with OSEE's USE Unit to conduct the EHSE in 2020 and 2021.<sup>240</sup> Third, universities and think tanks use and analyze findings from holistic learning assessments implemented by government structures in their research. For instance, researchers from GRADE, Universidad del Pacífico (University of the Pacific), Universidad de Lima (University of Lima), and the Universidad Peruana de Ciencias Aplicadas (Peruvian University of Applied Sciences) have used ECE reports to study equity gaps,<sup>241</sup> conduct program impact evaluations,<sup>242</sup> and analyze the uses given to assessment reports at the school level.<sup>243</sup> Researchers from the Pontificia Universidad Católica del Perú (Pontifical Catholic University of Peru or PUCP) have also used information from assessments such as the 2020 and 2021 ENDO, as well as information from strategies like "*Te escucho docente*" ("I listen to you teacher") and registries from the Ministerio de Salud (Health Ministry or MINSA) to report on the state of teachers social emotional wellbeing, contextual and institutional factors, and personal factors.<sup>244</sup> Fourth, students from various Peruvian universities use and analyze the results of assessments for their own projects. Most recently, students at the PUCP used EHSE data<sup>245</sup> and ECE data<sup>246</sup> for their thesis.

# Q&A: How can you approach our results and recommendations?

## How do we present our results?

The flexibility of our Holistic Learning Assessment Systems (HOLAS) framework enables us to present our results in two ways:

- 1. By each one of the 12 dimensions or sub-elements of the HOLAS framework, across stakeholder groups.** These 12 dimensions are organized into three key elements (see section above, [The HOLAS framework](#) for more information):
  - **Information**, highlighting for what purpose and with what quality the information produced by education monitoring and evaluation (M&E) systems is generated, used, accessed, and shared;
  - **Goals**, emphasizing the clarity of holistic learning objectives within the system, the alignment of information from education M&E systems with these objectives and other crucial education system components, along with the norms promoting the use of this information in decision-making; and
  - **Support**, detailing the mechanisms that are in place to ensure comprehensive, evidence-informed holistic learning at different levels of the education system, including the availability and quality of resources, professional development opportunities, and organizational structures.
- 2. By integrated key results, organized by four thematic areas across key HOLAS elements and dimensions and across stakeholder groups.** These results emphasize (mis)alignments within and across dimensions of the HOLAS framework that promote or impede more equitable holistic learning M&E systems in four key areas:
  - **[Highlighting the strengths of the Peruvian educational M&E system:](#)** Promoting the dissemination, use, and uptake of robust educational M&E efforts to strengthen alignment and avoid duplication of efforts.
  - **[Inclusivity among childhoods from contexts of marginalization:](#)** Promoting greater inclusivity in the prioritization, design, implementation, and use of data from education assessments among students with students with mild or moderate special educational needs (SEN) associated with disabilities and Venezuelan refugee children.
  - **[Students' and frontline service providers social and emotional skills:](#)** Supporting children's and frontline service providers' social and emotional skills.
  - **[Agency for M&E processes:](#)** Strengthening the utility and sustainability of educational data and evidence in a way that promotes agency and equitable access.



We have organized our results into two corresponding sections. Given the complexity of addressing systemic barriers, we have only included recommendations in the second section that provides a more comprehensive and thematic analysis of the system.

### What section should I read first?

**Well, this will depend on your context and purpose.**

The **Results by sub-elements (Section 1)** may be useful if you consider yourself an in-depth reader and want a detailed overview of our findings. This section may be for you if:

- You want to delve into the three key elements that define holistic learning M&E systems and each of their four sub-elements or dimensions. You will find here detailed results about each sub-element and barriers and enablers to their attainment.
- You are new to the Peruvian educational M&E system and would benefit from a snapshot of it.
- You aim to understand within different dimensions of holistic learning M&E systems how the roles, interactions, and perceptions of key stakeholder groups differ or converge.
- **You have your own specific focus!** In this initiative, we focused specifically on how education M&E systems include and align for childhoods from contexts of marginalization and holistic learning (or not). You may have other themes you are interested in exploring, and given the richness of our mixed-method study, our results may include additional information of relevance to your interests!

Our **Integrated results and recommendations (Section 2)** may be useful if you consider yourself a thematic reader and want to read about specific topic areas and recommendations for how the Peruvian educational M&E system can be strengthened to best support these areas. This section may be for you if:

- You are familiar with the Peruvian M&E system and have some background understanding of the three main analysis areas.
- Seek to obtain actionable insights on how to strengthen the coherence of the Peruvian M&E system for equitable holistic learning.

### How do I access these sections?

**Section 1** is available online only (see below, [Results by sub-element from the systems' diagnostic report](#) to access it). There you will find links to our results for each of the 12 sub-elements within the HOLAS framework.

**Section 2** is available in its entirety in this report and, as noted above, it includes four main sets of results and recommendations (see section below, [Integrated results and recommendations from the systems' diagnostic report](#) to read it).

## OK, I have accessed these sections. How are the results and recommendations structured?

**Table 8.** The structure of the results and recommendations

Section 1: Results by sub-element	Section 2: Integrated results and recommendations
Each of the 12 online sub-element results is structured to contain...	Each of the four key results areas is structured to contain...
<p><b>A definition.</b> We begin with a brief definition of how the team has described the sub-element as they conducted the interviews, coded the data, and analyzed the results. Each definition is structured to contain a set of criteria that provide imperatives as to what an M&amp;E system that is aligned for equitable holistic learning might look like.</p> <p><b>Main findings.</b> Main findings for each sub-element are organized according to the relevant criteria. They provide insights into the extent to which and how criteria are being met (or not), as well as among what stakeholder group, for what types of assessment, at what level, and more.</p> <p><b>Barriers, enablers, and suggestions for each sub-element.</b> Tables at the end of each sub-element identify barriers and existing enablers to meeting the criteria, as well as suggestions for improvement at different system levels. These barriers, enablers, and suggestions were identified by interviewees. Barriers, enablers, and suggestions are divided into various levels (to understand how these are defined, review the definition for Education systems barrier, enabler, and suggestion levels, <a href="#">Appendix 1: Glossary of Terms</a>).</p>	<p><b>A summary.</b> Each main result area begins by highlighting key findings and recommendations for that section.</p> <p><b>Bite-sized integrated results.</b> Each result represents our integration of findings across dimensions, elements, and stakeholder groups within the HOLAS framework. In order to clarify how we identified these (mis)alignments, we provide links to the results by sub-element.</p> <p><b>Recommendations to address the integrated results.</b> We propose recommendations to address the integrated results based on: enablers brainstormed by our interviewees, inputs from the Steering Committee, and our prior knowledge of the education system. We recognize that these results are informed by our particular analytic lenses, and there are nuances that we likely did not surface. However, we believe these can serve as a starting point for further analysis!</p>

In addition to reading each section separately, you can navigate between the different types of findings. Next to each integrated result in Section 2, you will find a hexagon indicating the sub-element(s) findings upon which the integrated result is based. Clicking on a hexagon provides detailed information about the results from that sub-element. When an integrated result incorporates information from multiple sub-elements, you will see multiple hexagons.

## What do we suggest to keep in mind while reading and interpreting our results?

**Data sources and sampling.** We invite readers to reflect on how our sampling decisions and our integration of various data sources influenced our pattern of results. In the Results by sub-element definitions, we specify what type of data was used to make conclusions about each criteria (see section below, [Results by sub-element](#)).

**What is (not) included in the sub-element criteria.** In designing our HOLAS framework, our goal was to thoroughly examine the educational M&E system, with a specific emphasis on holistic learning outcomes and the underlying system characteristics that facilitate these outcomes. This focus has helped us gather deep insights but also means we've concentrated on a specific scope of analysis.

# Results by sub-element from the systems' diagnostic report

In this section, we provide links to the results organized by key sub-elements or dimensions of the Holistic Learning Assessment Systems (HOLAS) framework, which are central to our analysis. While these results are not included in this report, they can be accessed online through the QR code provided below or by navigating through the links in the hexagons.

These results by sub-element informed our integrated findings and recommendations (see section below, [Integrated results and recommendations from the systems' diagnostic report](#)). In addition, we encourage readers to identify additional areas of alignment and misalignment across sub-elements based on your particular interest areas!

**1. Information:** Focuses on how and with what quality (1.3) the information produced by education monitoring and evaluation (M&E) systems is generated, accessed, used (1.2), and shared (1.4) by education authorities, organizations, frontline providers, and researchers for a variety of purposes (1.1). Access our findings for the four dimensions of this element here:

1. Diversify, understand, and align the purposes of assessments
2. Use information for supporting equitable holistic learning
3. Ensure quality of information
4. Enable access to information based on open-science principles

**2. Goals:** Focuses on the definition and clarity of holistic learning objectives within the system (2.1), the alignment of information from education M&E systems with these objectives and other crucial education system components (2.2), and the established norms governing the use of this information in decision-making (2.3), including the level of autonomy stakeholders have in doing so (2.4). Access our findings for the four dimensions of this element here:

1. Establish clear goals for holistic learning
2. Align assessments with key elements of education systems
3. Take evidence-based decisions
4. Promote agency among frontline providers and authorities in monitoring and evaluation

**3. Support:** Includes the mechanisms that are in place to ensure comprehensive, evidence-informed holistic learning at different levels of the education system, including the availability and quality of resources (3.1), professional development opportunities (3.3 and 3.4), and organizational structures (3.2). Access our findings for the four dimensions of this element

here:

1. Provide high-quality guidance materials
2. Establish strong organizational structures for effective monitoring and evaluation
3. Provide high-quality holistic learning opportunities to support equity and well-being among authorities and frontline providers
4. Ensure access to high-quality professional development opportunities around data, evidence, and measurement

**Others:** You can also access a brief summary of emerging aspects not originally included in the HOLAS framework.

We offer guidance on how to approach and interpret our results and recommendations (see section above, [Q and A: How can you approach our results and recommendations?](#)).

In addition to presenting integrated results and recommendations and these results by sub-element, original reports organized by data source - quantitative descriptive, quantitative social network, and qualitative - are available upon request. If you wish to obtain these, please contact us at [ecwperu@nyu.edu](mailto:ecwperu@nyu.edu)



**SCAN ME**

# Integrated results and recommendations from the systems' diagnostic report

In this section, we present our integrated results, organized by four thematic areas - related to the target populations, themes, and systems central to our analysis - and connect them to a set of recommendations to strengthen the coherence of the Peruvian monitoring and evaluation (M&E) systems for holistic learning outcomes. Based on the results of the systems analysis by the 12 dimensions of the Holistic Learning Assessments Systems (HOLAS) framework (see section above, [Results by sub-element from the systems' diagnostic report](#)), valuable inputs from our Steering Committee and interviewees, and our own knowledge of the systems, we emphasize (mis)alignments within and across HOLAS elements and dimensions and across stakeholder groups.

## The four sets of recommendations relate to:

1. Highlighting the strengths of the Peruvian educational M&E system: Promoting the dissemination, use, and uptake of robust educational M&E efforts to strengthen alignment and avoid duplication of efforts;
2. Promoting greater inclusivity in the prioritization, design, implementation, and use of data from education assessments among students with disabilities and Venezuelan refugee children;
3. Connecting the dots to support children's and frontline service providers' social and emotional skills: From frameworks to data to actionable strategies; and
4. Strengthening the utility and sustainability of educational data and evidence in a way that promotes agency and equitable access.

Our lenses in developing these recommendations were shaped by the goals and constraints of this initiative, as well as the primary audiences for this report, which include national personnel with the Ministerio de Educación (Ministry of Education or MINEDU), sub-national staff with the Direcciones Regionales de Educación (Regional Directorates of Education or DREs), and humanitarian actors such as the country multi-year resilience programs (MYRPs) supported by Education Cannot Wait (ECW).

We provide guidance on how to approach and interpret our results and recommendations (see section above, [Q and A: How can you approach our results and recommendations?](#)).

## I. Highlighting the strengths of the Peruvian educational M&E system: Promoting the dissemination, use, and uptake of robust educational M&E efforts

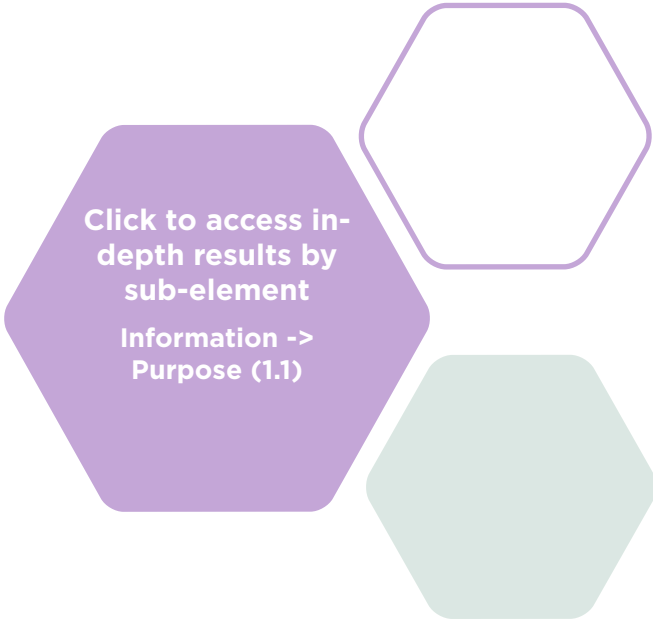
Notable efforts exist within the Peruvian national educational M&E system to measure holistic learning outcomes and related factors (see below, [result 1.1](#)). Stakeholders perceive that national assessments meet high quality standards ([1.2](#)). Given the public availability of these initiatives, we recommend that stakeholders review what is currently available as they undertake new assessment efforts. For this purpose, we created the HOLAS Assessment Bank, which will be released in April 2024.

**1.1: Significant efforts have been made in Peru to design and implement measurement tools that provide valid and reliable information on students' holistic learning outcomes and on the school and teacher factors that support the attainment of those outcomes.** Survey respondents (N=41) report accessing or using in the past five years 50 unique education assessments, evaluations, and/or M&E systems at various levels of the education system. The majority of tools discussed in detail in subsequent interviews and reported on in our findings were intended to be used as national monitoring tools that assess:

- Academic skills of primary and secondary students, such as the Evaluación Censal de Estudiantes (Census Assessment of Students or ECE);
- Social and emotional skills of primary and secondary students, such as the Medición Remota de Habilidades Socioemocionales (Remote Measurement of Socio-Emotional Skills or EHSE);
- Quality of teaching and management practices at the primary and secondary level - such as the Monitoreo de Prácticas Escolares (Monitoring of School Practices or MPE) - and for early childhood

education services, like the Measuring Early Learning Quality and Outcomes (MELQO);

- Structural quality indicators, such as Semáforo Escuela (School Traffic Light); and
- Skills and well-being of teachers, such as the Encuesta Nacional de Docentes (National Teacher Survey or ENDO), including teachers and principals working with students with special education needs.




Click to access in-depth results by sub-element  
Information -> Purpose (1.1)



**1.2: All interviewed stakeholder groups perceive that the national assessments led by the Secretaría de Planificación Estratégica (Secretary of Strategic Planning or SPE) - and particularly the Oficina de Medición de la Calidad de los Aprendizajes (Office of Learning Quality Measurement or UMC) - meet high quality standards in terms of reliability and validity.**

Interviewees report on a range of mechanisms in place to ensure quality at different stages of the assessment process, from the design of the assessment to enumerator training to data verification, analysis, and processing. Respondents also reported on

classroom assessments and sub-national and international assessments designed for a variety of purposes, such as formative feedback, program monitoring, program evaluation, and the planning of learning sessions.



**Information ->  
Quality (1.3)**

**Recommendations to address results 1.1 and 1.2: Given the breadth, depth, and quality of educational assessments available within Peru's education system, we recommend as a starting point that diverse stakeholders seeking to collect information on educational outcomes review what is currently available as they undertake new assessment and M&E activities. To support stakeholders' ability to do so, we have developed a corresponding HOLAS Assessment Bank, as outlined in Box A below.**

#### **Box A. What is the HOLAS Assessment Bank?**

The NYU Global TIES for Children (NYU-TIES) and Universidad de los Andes (Uniandes) HOLAS Assessment Bank is an inventory of educational assessments, tools, and M&E systems designed or implemented in Peru and Colombia. The HOLAS Assessment Bank focuses on measures of students' holistic learning outcomes and related teacher, school, and community factors identified through our mixed-method study (see section above, [Systems analysis methodology](#)).

The HOLAS Assessment Bank can be used to:

- Identify available educational assessments, tools, and M&E systems;
- Understand the purposes for which the tools were designed and other relevant information;
- Determine what supports and instruments are publicly available for the use and implementation of the assessments, tools, and systems by various stakeholders; and
- Acquire contact information for the offices and/or people from whom additional information about the tools can be obtained.

The HOLAS Assessment Bank includes unique filtering options that enable more targeted searching to identify publicly available instruments as well as the supports available for their use. **We anticipate releasing the HOLAS Assessment Bank in April 2024.**

## II. Promoting greater inclusivity in the prioritization, design, implementation, and use of data from education assessments among students with disabilities and Venezuelan refugee children

Diverse efforts have been made to include students with disabilities (see below, [result 2.1](#)) and Venezuelan refugee students ([2.6](#)) in Educación Básica Regular (Basic Regular Education or EBR) schools and in the national monitoring assessments that they are part of ([2.2](#) and [2.7](#)). However, access to education does not guarantee equity. The three main areas for improvement identified in our analysis include:

- Diagnostic access for students with special education needs ([2.2](#) and [2.3](#));
- Professional development opportunities for frontline providers related to the skills needed to support children with special education needs and Venezuelan refugee children ([2.4](#), [2.5](#), and [2.11](#)); and
- Provision of materials, including rubrics ([2.2](#)), detailed, tailored curriculum guides, lesson plans, and curriculum resources ([2.5](#), [2.9](#), and [2.10](#)).

**2.1: The MINEDU has made commendable strides in including students with special educational needs (SEN) within the educational system and in supporting their inclusion in national M&E practices.** By mandating that public and private schools nationwide reserve two classroom spots for students with SEN related to mild or moderate disabilities, significant efforts are being made toward inclusion. Furthermore, the MINEDU is committed to enhancing inclusivity in national monitoring assessment among students with SEN enrolled in EBR. For example, they are providing adapted tests and/or supports for the national academic learning monitoring assessment, the 2023 Evaluación Nacional de Logros de Aprendizaje (National Assessment of Learning Achievement or ENLA). This initiative is specifically targeted at students whose disability has been registered and validated in the Registro de Estudiantes con Discapacidad (Disability Student Registration System or R-NEE), prior to the assessment day.<sup>247</sup>

**“They also have the right to be assessed, don’t they? (...)** The teacher told me ‘I have an autistic child, Miss, here you have [the test] only put his name’. **You don’t know how sorry I was.** I said: ‘Miss, please don’t take the test. Because it’s not going to give you anything because it’s a test that is not made for that child’.”

-Sub-national level policymaker- DRELM



**2.2: While efforts to measure the academic learning outcomes of students with SEN are in progress, there remain challenges to overcome at various organizational levels.** For the school to request the adapted version of the national ENLA for 2023, they needed to present an official student diagnosis. But frontline providers highlighted a critical issue: The presence of children who are suspected to have learning disabilities but lack an official diagnosis.

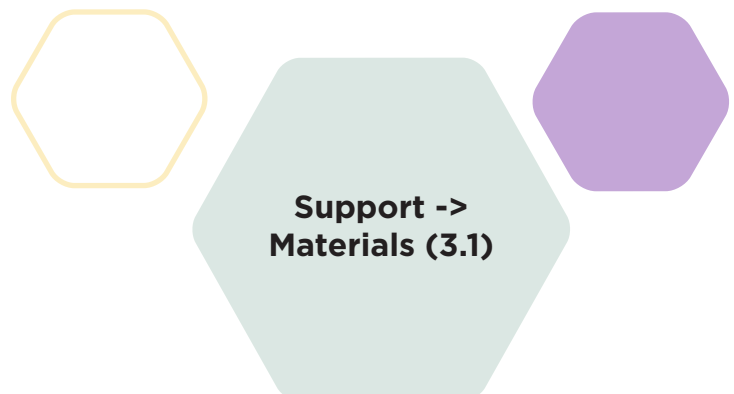
Frontline providers perceive that there are difficulties in obtaining a diagnosis partly due to the limited availability of specialized services: For example, at the Dirección Regional de Educación de Lima Metropolitana (Regional Department of Education in Metropolitan Lima or DRELM) level, there is just one individual for the entire region who is responsible for supporting students with SEN. Frontline providers also perceive some reluctance among parents to acknowledge their child's learning challenges. Then, at the sub-national level, the primary tool used within the DRELM to monitor academic learning has not been adapted for use with students with SEN. At the classroom assessment level, in the absence of rubrics that define performance levels for children with special needs, teachers struggle to determine how to design formative assessments. Finally, there is a perception that Educación Básica Alternativa (Alternative Basic Education or EBA) and Educación Básica Especial (Special Basic Education or EBE) - which cater to students who enter public education late or those with disabilities, respectively (see section above, [An overview of the Peruvian education system](#)) - have been historically overlooked in M&E efforts.

"In each classroom, **it's suspected that there are one or two students with special needs**, based on what the teachers report. **The issue is that (...) the psychologists don't come anymore. Before, we had a SAANEE teacher, but she left, and they haven't sent a replacement.**"

-Frontline provider, Metropolitan Lima



**2.3: The limited availability of official diagnostics further complicates the situation for schools, making it difficult to secure necessary support such as the Servicio de Apoyo y Asesoramiento para la Atención de las Necesidades Educativas Especiales.** (Support and Advisory Service for the Care of Students with Special Educational Needs or SAANEE). While the SAANEE is mandated to provide support for students with SEN, frontline providers perceive that this support is conditional on having an official diagnostic certification before the services can be rendered. Without such a diagnosis, the support is perceived as limited. This service gap compounds the need for frontline providers to have available training and specific support materials.



**2.4: National data users and frontline providers in EBR schools recognize that they lack the specialized knowledge required to support students with SEN effectively.** Specialized training to support students with SEN tends to be available primarily to personnel in special education services, such as the EBE. This is problematic given the mandate to integrate students with SEN into EBR schools. Interviewees (from EBR schools) highlighted a significant gap between the skills taught in pre-service and in-service training and those necessary for fostering an inclusive and safe environment for a diversity of students. Due to this training gap, there is some evidence that teachers perceive students with SEN as an added burden.

**"(...) Normally, the teacher sees it as a problem, a work overload when she has to attend to children with a disability .. And partly out of lack of knowledge, because if they knew what to do they wouldn't be so conflicted."**

- Sub-national level policymaker- DRELM



**2.5: Frontline providers call for detailed, tailored curriculum guides and lesson plans to better support students with SEN in EBR schools.** Broad recommendations on how to adapt the Curriculum to students with SEN, introduced in 2022, underscored the importance of an inclusive approach aligned with educational laws and frameworks. However, a clear gap exists in such documents, as they include only a few lessons and concrete examples on how to implement such adaptations. Alongside tailored learning objective rubrics (see above, [result 2.2](#)), frontline providers urgently require detailed, customized curriculum guides with a wide array of templates and step-by-step instructions for personalizing lesson plans and instructional methods.

**"[What worries me the most about students with SEN] is not being able to give them what they need.** Because it's not enough if I receive the children, my school is inclusive, and in the end, **I don't engage them in meaningful activities; they are just there, maybe just painting. We try, but there aren't the tools or we don't have the materials to develop other skills in them.**

-Frontline provider, Metropolitan Lima



**Recommendations to address results 2.2 and 2.3: Integrate SEN diagnostics in schools to remove barriers and ensure accessible support for all children.** To ensure that students with SEN can access the necessary services, a clear diagnostic process is the initial and crucial step. Recognizing potential roadblocks - such as logistical challenges, financial constraints, and the inability of caregivers to take time off from work, especially in informal economies -, we recommend integrating diagnostic facilities within the school system itself.

This approach would alleviate the need for caregivers to transport children to external locations for diagnosis, offer the service free of charge, and eliminate the requirement for caregivers to allocate time away from their work for these purposes. Integrating diagnostic services within schools not only streamlines the process of identifying and addressing SEN but also significantly reduces the burden on families, ensuring that all children have the opportunity to receive the support that they need without undue hardship. For example, within the government, a partnership with the Ministerio de Salud (Ministry of Health or MINSA) could be pursued. Additionally, this could be a focal point for multilateral or non-governmental organizations (NGOs) working with students with SEN.

**Recommendations to address results 2.4 and 2.5: Equip the educators in EBR schools with knowledge and strategies to support students with SEN, ensuring an inclusive and effective learning among all students.** We recommend incorporating training on how to support the inclusion of and holistic learning among students with SEN into pre-service and in-service professional development for all teachers. We recommend doing so alongside the provision of rubrics and lesson planning examples. Implementing this approach will not only enhance the educational experience for students with SEN but also foster a more inclusive and supportive environment across all classrooms.

## **2.6: MINEDU's SIAGIE update supports inclusivity for Venezuelan refugees.**

The MINEDU updated the Sistema de Información de Apoyo a la Gestión de la Institución Educativa (System to Support the Management of the Educational Institution or SIAGIE), supporting the inclusion of Venezuelan refugees in the national education system. The SIAGIE facilitates the administrative registration of students, tracking their enrollment and educational progress without requiring a national identification (ID) number, which Venezuelan refugee children do not have. While these efforts significantly promote inclusion, interviewees acknowledged that simply providing school spots is not enough. For the successful integration and holistic learning

of Venezuelan refugee students within the Peruvian educational system, comprehensive support mechanisms are essential.



**2.7: While Venezuelan refugee students enrolled in the national education system are included in the national and sub-national education assessments contingent on attendance, there are barriers to disaggregating and sharing monitoring data on holistic learning outcomes by refugee status.** Interviewees in our study did not report discrimination against Venezuelan refugees regarding access to these critical educational assessments once the latter are part of the Peruvian education system. However, there are overall broad systemic challenges to data disaggregation and sharing (for further information, see [result 4.3](#) below),

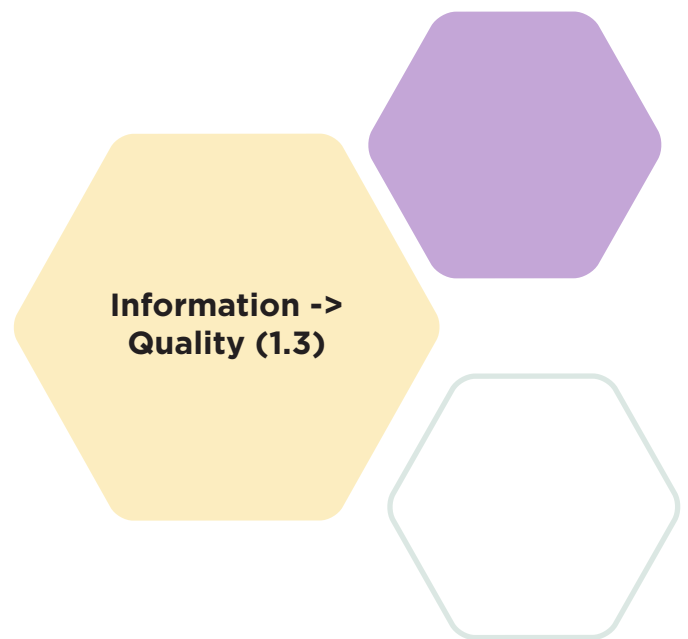
as well as barriers more specific to this population. Sampling methods do not currently permit disaggregated population representative estimates by host country and refugee status, in part because there is a perception that limited public funds should first focus on the needs of the majority and serve host-country children from contexts of marginalization. In addition, concerns did surface about the consequences of sharing information about Venezuelan refugee students' holistic learning outcomes. These include whether comparisons between host-country and refugee students could further biases against refugee students, as well as whether external actors would use this information to highlight the gaps in the Peruvian education system without supporting the government to address the challenges. While we discuss recommendations to address data disaggregation challenges broadly below (see below, results [4.3](#) and [4.4](#) onwards), we note that for Venezuelan refugee children it will be important for stakeholders to consider the purposes for which they want to use the data.

"So there is no discrimination among Venezuelans. 'Only the ECE is for Peruvians', no sir. **If there is one or ten, it applies to everyone.** Now, it seems to me that the results do not give it [do not make reports by nationality]."

-Sub-national level policymaker- DRELM



**2.8: The issue of out-of-school children presents a significant challenge within the education sector, largely due to the perception of a lack of a clear mandate regarding who is responsible for these students.** While principals are tasked with the goal of re-integrating children who have dropped out of their schools and following up with children who are not attending, there exists a gap in responsibility and action once these children are no longer within the school system. This absence of accountability and visibility results in these students becoming virtually invisible, leaving their needs unaddressed and their potential unfulfilled. The ambiguity surrounding the responsibility for out-of-school children underscores the need for a defined strategy and dedicated efforts to ensure that all children, regardless of their current educational status, receive the support and opportunities that they deserve.

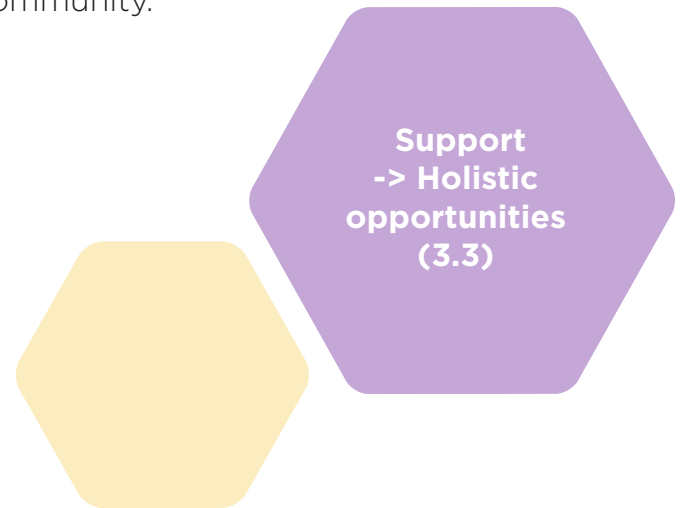




**2.9: While enrollment in schools represents a crucial step toward making education accessible, it falls short of ensuring complete inclusion and equity within the educational system.**

Insights from national data producers and frontline providers reveal stereotypes against Venezuelan refugee students, undermining their inclusion and the quality of care that they receive. These stereotypes include misconceptions about Venezuelan caregivers, who are sometimes portrayed as aggressive, indifferent towards their children's education, unappreciative of the host country's efforts, and overly concerned with their personal appearance. Such beliefs have a detrimental effect on the essential relationship between caregivers and teachers, a partnership that

plays a pivotal role in supporting children's education. This situation underscores the urgent need for interventions aimed at dismantling these stereotypes, fostering a more inclusive and supportive environment that recognizes and values the contributions and needs of all members of the school community.



**2.10: Teachers require integrated resources to engage Venezuelan students effectively and reduce their additional resource burden.** Frontline providers have observed that the absence of Venezuelan cultural references in educational sessions and resources widens the gap between teachers and their students, hindering effective teaching and student engagement. For example, teachers noted that they lack materials that incorporate Venezuelan history and geography, essential for contextualizing lessons and fostering a deeper connection with their students. There is a significant burden placed on teachers due to the lack of available resources that include Venezuelan cultural and educational content. This deficiency means that educators often resort to creating or sourcing their own materials to provide a comprehensive and inclusive curriculum. It was noted that teachers - striving to bridge the cultural and educational gap - sometimes bear the financial burden of printing these materials at their own expense. This situation emphasizes the critical need for a systematic provision of integrated and culturally relevant resources within the educational system to alleviate the extra demands placed on teachers and to enhance the educational experience for all students.

**"If I give a science class and talk about the animals of Peru from the coast, highlands, and jungle, then they feel lost because they are not familiar with them. So, if I had a projector (...) I could show videos so they get to know the animals; there might be similarities or different names they recognize (...) Bringing a large image helps too, but it's also a cost for us as teachers. A small image won't catch their attention. It needs to be a large one (...) and has to be in color to be engaging."**



-Frontline provider, Metropolitan Lima

**2.11: Frontline providers need training to better address the impact of trauma on Venezuelan refugee student holistic development.** Frontline providers identified a gap in their understanding of and preparedness to support the social and emotional skills and well-being of refugee students who have experienced traumatic events, such as witnessing the deportation of family members, living under precarious economic situations, and food insecurity. These experiences significantly affect students' emotional well-being and their ability to engage and succeed in academic settings. This lack of knowledge impedes the provision of necessary support and interventions tailored to the specific needs of refugee students, underscoring the need for enhanced training and resources.

"[To better support the social and emotional skills of Venezuelan students] I would like to have psychologists to support the children in the socio-emotional aspect. And also to work on tutoring in the classroom (...) to improve the socio-emotional aspect. Because **many of them come with a lot of suffering**."

-Frontline provider, Metropolitan Lima



**Recommendations to address result 2.7: Establish ethical data and partnership agreements between sub-national authorities and external actors working to support Venezuelan refugee students.** The DRELM is collecting extensive information about enrolled students - including both host-country and refugee students' - academic learning outcomes and related school and teacher factors (for more details, review [result 4.5](#)). While these data would not provide population representative estimates of enrolled Venezuelan refugee students' holistic learning outcomes, they could be shared with external stakeholders working with refugee populations for formative or planning purposes. Doing so would require the establishment of data-sharing and -using agreements that clearly identify the purposes for which external stakeholders could use and disseminate the results of the data. In addition, as trust is established, external actors could consider funding pilots with national or sub-national authorities that provide enrolled refugee student population representative estimates to: (i) Conduct sensitivity analysis against data collected using current sampling methods to assess the extent of bias; (ii) Estimate costs of such sampling approaches; and (iii) Assess the benefit - and for whom - against the cost.

**Recommendations to address result 2.8: Include in citizen-led household assessments measures of holistic learning outcomes to provide critical information about the educational needs of out-of-school children.** Organizations such as the People's Action for Learning (PAL) Network<sup>248</sup> have created a community-led, scalable model for assessing learning outcomes in a way that is: (i) Aligned to national standards and global development goals; and (b) Inclusive of out-of-school children. Such information can be powerfully used to advocate for a more coordinated systemic response for out-of-school children.

**Recommendations to address results 2.9 and 2.10: To create a more inclusive educational environment, it is critical to systematically embed Venezuelan cultural elements into the curriculum.** This involves developing a digital resource center for teachers, filled with materials that detail Venezuelan words, holidays, and cultural nuances, alongside textbooks that highlight the synergies between the Venezuelan and Peruvian cultures. Such resources

are designed not just for the cultural inclusion of Venezuelan students, but to broaden the cultural awareness of all students, enriching their educational journey by providing a diverse cultural lens. The success of these resources hinges on their integration with professional development programs tailored to empower teachers with the skills to effectively apply these materials and navigate the resultant cultural dynamics. This approach advocates for a curriculum that is not only culturally comprehensive but also adaptable, ensuring that teachers are equipped to foster an educational environment that is empathetic, inclusive, and responsive to the nuanced needs of a diverse student population.

"They have their Arepa, which is always sent in their lunchboxes. So if we teach the letter 'A' using that [Arepa word], they will quickly grasp it. (...) **I think they want to feel that their culture is also accepted and respected. And perhaps in that way, we can also earn their respect because they feel like they face discrimination in everything.** (...) It's not necessarily discrimination, **but sometimes we still need to better relate both cultures.**"

- Frontline provider, Metropolitan Lima

**Recommendations to address results 2.10 and 2.11: To better support Venezuelan refugee students, teacher training should be intensified with a focus on diversity, equity, and inclusion, including of Venezuelan refugee students.** One area of focus could be around **restorative practices, which involve community-building and conflict resolution techniques that foster understanding and empathy.** For example, training could include role-playing scenarios that address common challenges faced by refugees, workshops on cultural sensitivity, and strategies for integrating restorative circles in the classroom to encourage dialogue between refugee and host students. Such practices not only aid Venezuelan refugees in overcoming trauma and adjusting to a new environment, but also enhance cohesion and mutual respect among the entire student population, creating a more inclusive and supportive school environment.

As part of our ECW-funded work, NYU-TIES is collaborating with the DRELM and the Pontificia Universidad Católica del Perú (Pontifical Catholic University of Peru or PUCP) to pilot an assessment of teachers' self-efficacy for restorative discipline practices that support inclusion of diverse students in the classroom. PUCP is developing bite-size tools that can support frontline providers' use of such practices, thereby showcasing the "full cycle" of M&E - from assessments to action.

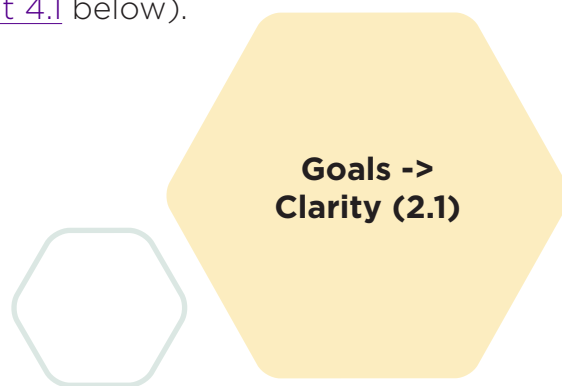
### III. Connecting the dots to support children's and frontline service providers' social and emotional skills: From frameworks to data to actionable strategies

Within the Peruvian M&E system, national and sub-national assessments exist to assess children's social and emotional skills and the school processes that can promote or impede their development (see below, results [3.1](#) to [3.5](#)). There are also emerging national assessments of teachers' social and emotional skills and well-being ([3.6](#) and [3.7](#)). Given the rapid proliferation of such initiatives, there are significant opportunities within and across both areas for enhancing alignment and integration, and ensuring that the data leads to actionable strategies ([3.8](#) to [3.10](#)).

#### **3.1: Within the Peruvian M&E system, there has been a marked interest from various offices at both the national and sub-national levels of the MINEDU to understand, address, and promote social and emotional learning (SEL).**

This burgeoning interest has led to intentional efforts to integrate assessments specifically focused on social and emotional skills into national M&E systems. The urgency and importance of these skills were highlighted during the COVID-19 pandemic, a period that saw an increased emphasis on SEL as a means to navigate the changed educational landscape and unlock students' full potential. However, given the numerous challenges faced

by educational offices during the pandemic, these efforts were often fragmented, characterized by a lack of coherence between various assessments and corresponding SEL frameworks as well as by limited accessibility of reports detailing assessment design and testing methodologies (for further details, see [result 4.1](#) below).



#### **Box B: What is an SEL framework?**

An SEL framework is “a key way of organizing and naming social and emotional competencies and the social-emotional learning process in order to better support efforts to study, understand, communicate, and work together to build these competencies.”<sup>249</sup> SEL frameworks can be used for many different purposes, such as defining key terms, informing assessment, supporting practice, and summarizing evidence. Because of this, SEL frameworks may be formatted and organized differently - such as lists, rubrics, taxonomies, or theories - to best support different purposes; for example, the format that best supports definitions may not be the format that best supports measure development. Because of this, it can be helpful to have many stakeholder groups around the table when developing a framework to try to ensure clarity in the purpose of the framework, and where possible, efficiencies and coordination. In the Peruvian context, there are diverse documents that aim to organize children's SEL, teachers' and principals' performance that foster SEL, and instructional quality standards, among others. However, these critical pieces are not currently organized under a framework suited for the multiple purposes detailed above.<sup>250</sup>

**3.2: Interviewees reported difficulties understanding the transversal vision of social and emotional skills for students within the Currículo Nacional (National Curriculum) published in 2016.** Despite subsequent efforts in 2021 by the Dirección General de Educación Básica Regular (General Directorate of Regular Basic Education or DIGEBR) to generate documentation that describes and prioritizes students' social and emotional skills, the groups interviewed in our study still perceive that they are not given the same priority within the sector as academic competencies such as mathematics and/or communication. Such difficulties are compounded by the different terms used to refer to social and emotional skills in various documents in the Peruvian education system.

**“I think there is a lack of integration. It is as if they had come out at the beginning as isolated efforts,** but the need (...) for a single discourse is leading the offices to become more interconnected to deal with this issue.(...) I would argue that it has to be all articulated, it just doesn't happen that way. I suspect that somewhere along the way it will all come together.”

-National level policy maker - data producer



**3.3: Concurrent efforts to measure student social and emotional skills at various levels before and after 2021 led to varied approaches and terminology across assessments.**

Pre-2021, two parallel efforts were undertaken by different data-producing offices at the national level to develop and test student social and emotional skills assessments. A third effort to provide teachers with student

social and emotional skill assessments for formative classroom assessment purposes was launched in 2022. The timing of these various measurement initiatives, the availability and clarity of various framework documents at the time the initiatives launched, and coordination challenges resulted in inconsistent measurement of skills across measures, with even similar skills having differences in names, definitions, and measurement approaches.



**3.4: Broader access to methodological assessment documents is essential for improving assessment methodologies and understanding the measurement of SEL.**

These documents - detailing the design process, decision-making, and operationalization

of skills - are key to aligning initiatives across various measures. However, with restricted access, the alignment of these initiatives is challenging, as is cultivating a culture of learning and improvement. Unfortunately, at the time of data collection, these reports for national assessment efforts were not widely accessible to stakeholders, hindering stakeholders' ability to gain a comprehensive understanding of the measurement efforts. For the formative classroom social and emotional skills assessment, psychometric analysis has been deprioritized for quick deployment. This underscores the need for improved quality in these efforts.

### **3.5: There are other assessments that collect information on indicators that are foundational building blocks of students' holistic learning outcomes.**

The Peruvian M&E system includes assessments that measure processes that promote or impede the development of children's academic and social and emotional skills. For instance, the MPE and the MELQO include classroom quality indicators - such as fostering critical thinking, feedback loops, providing positive reinforcement to students, and maintaining a respectful environment, among others - that have been shown to predict children's holistic learning. However, these indicators are scattered across

different assessments and lack integration into a cohesive and comprehensive narrative. This dispersion hinders the ability to form a unified understanding of what works, how, and for whom to support children's holistic learning (for more information, see [result 4.2](#) below). This underscores the need for a systematic approach to consolidating these indicators into a coherent summary that could guide effective interventions and policy formulations.



**Recommendations to address results 3.1 to 3.5: Integrate social and emotional skills and the factors that enhance them into a comprehensive framework.** Documentation on essential social and emotional skills within the educational system - such as the National Curriculum and teachers' standards - is abundant but lacks explicit alignment under a single, comprehensive framework that can serve multiple purposes (see above, [Box B: What is an SEL framework?](#)). To address this, we recommend initiating a national and sub-national MINEDU-wide SEL working group (see below, [Box C: Conditions for the success of working groups](#)) to consolidate various framework and measurement resources into a cohesive narrative. This may include:

- Developing an approach to social and emotional skills within the MINEDU under an integrated unit. At present, the separation of “convivencia escolar” (school coexistence) and “tutoría” (tutoring) between two vice ministries - Gestión Institucional (Institutional Management) and Gestión Pedagógica (Pedagogical Management)- diminishes the potential for a comprehensive response. An integrated unit could lead the creation of a normative document that regulates the measurement of social and emotional skills, potentially strengthening the working groups.
- Empirically mapping various frameworks and documents in use at the national, sub-



national, and community levels using the Harvard University EASEL Lab's Taxonomy project<sup>251</sup> to identify convergences and divergences in social and emotional skills definitions and terms. It may be also useful to include in this mapping frameworks in use by other education stakeholders in Peru - such as NGOs and multilateral institutions - to further specify (in)coherences in terms and definitions (see above, [result 3.2](#)).

- Building consensus among national, sub-national, and school-level stakeholders - including teachers, students, and caregivers - around priority social and emotional skills definitions and terms, leading to a draft unified framework (see above, [result 3.2](#)).
- Comprehensively extending the unified framework based on empirical evidence to consider how school, community, and home factors can impede or promote the development of academic and social and emotional skills (see above, results [3.2](#), [3.5](#)).
- Organize existing measurement resources, tools, and data against this comprehensive, unified framework to identify conceptual and measurement gaps (see above, results [3.2](#), [3.3](#), and [3.5](#)).
- As a first step, publish this framework and mapping on the Repositorio MINEDU<sup>252</sup> (MINEDU Repository), thereby improving stakeholder access to coherent documentation, deepening their understanding of such assessment processes, and ultimately facilitating the inclusion of social and emotional skills in education (see above, [result 3.1](#)).

### Box C: Conditions for the success of working groups

Working groups, as suggested in this document, are founded on trustworthy partnerships between officials and external parties who share a common goal and produce concrete and tangible outcomes. These outcomes are clear from the outset of the working group and are tailored to the needs of the leaders, who in this context are policy-making offices or civil servant groups aiming for equitable, sustainable, scalable work.

Successful working groups share five essential characteristics:

- 1. Resource allocation:** Essential funding not only covers structural needs like venues and transportation but also includes resources to hire professionals capable of developing tangible outcomes, providing the working group with the extra hands needed for success.
- 2. Mutual learning:** All participants bring to such spaces areas where they can offer expertise as well as areas where they benefit from others' expertise. When participants feel respected and respect others, it catalyzes engagement and promotes creativity.
- 3. Burden reduction:** Given the number of competing priorities faced by civil servants, we recommend that external facilitators manage the development of deliverables, taking care to elicit and address feedback at all stages of the process.
- 4. Logistical coordination:** Consistent, respectful coordination and follow-up is essential for ensuring participation and engagement among members.

**5. Attention to power dynamics:** Working group spaces can reify problematic power asymmetries without careful attention to how diverse voices are included, heard, and valued.

Thus, well-structured working groups can significantly improve educational environments. In this report, when we refer to working groups, we are considering all these characteristics.

**Recommendations to address result 3.4: Make psychometric reports of measures of students' social and emotional skills publicly available.** We recommend making publicly available to external stakeholders full documentation of student social and emotional skills assessments. This documentation would (i) Not only specify definitions of measured skills, but also provide evidence of various forms of validity, reliability, and fairness; (ii) Explicitly state the recommended purposes of use; and (iii) Provide recommendations for refinement and adaptation. Additionally, it should include any relevant material for enumerator training and outline concrete and feasible steps for use and adaptation with specific regions and/or populations.

As part of our ECW-funded work, NYU-TIES is supporting the development of measurement reports of student social and emotional skills assessments used for national monitoring purposes in Peru, which we aim to submit to the Inter-agency Network for Education in Emergencies (INEE) Measurement Library<sup>253</sup> and the MINEDU Repository by the end of 2024.

**3.6: Different stakeholders groups recognize the need to work on frontline providers' social and emotional competencies - such as awareness, expression, and emotional regulation - in tandem to addressing these aspects with students.** Despite the implementation of various initiatives and specialized programs by the DRELM, NGOs, and national data users to enhance teacher well-being at the sub-national level, many were discontinued after the COVID-19 pandemic. This situation underscores the vital need for ongoing professional development opportunities that focus on frontline providers' well-being. Such initiatives are particularly crucial in schools serving diverse student populations with varied needs, languages, and values - including refugee and migrant children, neurodivergent children, and ethnic minority children - and require the creation of a safe, inclusive, and supportive environment for all children.

**“It is precisely that the teacher knows how to deal with the diversity of students she has and for this, she has to apply her social-emotional skills. (...) She has a minimum of 30 (...) 30 different heads, 30 little people who come with different values and different attitudes. So sometimes it gets on our nerves (...)**

-Frontline provider, Metropolitan Lima



### **3.7: Data on the social and emotional skills and well-being of teachers and principals have been collected through two distinct assessments.**

The first - conducted remotely via phone calls during the pandemic - has become impractical with the reopening of schools. Notably, this assessment includes a version tailored specifically for teachers and principals working with students with SEN. The second assessment, a comprehensive evaluation,

features only a limited set of indicators related to frontline provider well-being and even fewer concerning social and emotional skills.



### **Recommendations to address result 3.6: Prioritize the social and emotional skills and well-being of educators as essential.**

Prioritizing teachers' social and emotional skills and well-being - with a focus on emotion regulation, stress management, interpersonal skills, burnout, and more - is crucial for acknowledging and respecting the difficult work that frontline providers do, while also fostering a nurturing learning environment for children. Traditional methods often overlook direct support for teachers, opting to concentrate on student outcomes or instructional evaluations. A holistic approach that centers on teachers' well-being as fundamental to student success is essential for fostering empathetic, resilient educational communities that support both teachers' and students' mutual growth. Targeted support - including specific training programs, peer support networks, and integration of social and emotional skills into the teacher career path - is vital, especially in high-stress settings, to empower teachers and enhance their ability to develop these skills in students. See the following results and recommendations for more details on necessary considerations.

"One of the main areas, I think we have to work on, is that the **teacher himself should recognize his own emotions, his own social skills.** And I feel that **in the training of Peruvian teachers, it has not been a strength...**"

- Sub-national level policymaker- DRELM

### **Recommendations to address result 3.7: There is a need to adapt and clearly focus on measuring teachers' social and emotional skills and practices within the school environment.**

We recommend several strategies for this, organized from least to most resource-intensive. First, we suggest emphasizing specific teacher social and emotional practices that promote safety and inclusion in national measures of teachers' instructional practices. For instance, within the MPE - which employs a mixed-method methodology with rubric observations and surveys for teachers - there are two possibilities for inclusion. Initially, adapt a key set of items from previous remote assessments related to frontline providers' well-being and social and emotional skills - such as the EHSE - for self-reporting. Enumerators could distribute these to teachers during school visits. Another important refinement could be in the observation rubric to include a special indicator focusing on how teachers resolve conflicts among students, not just on behavior management strategies. Given that the MPE provides regional-level disaggregation, if these refinements are implemented, this could potentially lead to disaggregated results and actionable information at the DRE and Unidad de Gestión Educativa Local (Local Educational Management Unit or UGEL) level.

**3.8: Assessments should be paired with resources to address their results.** Despite a robust system, there are opportunities for improvement, especially in the system's capacity to address the results of student and teacher social and emotional skills assessments. A notable training gap exists in equipping frontline providers and sub-national staff to convert data into actionable evidence. Results are often used for diagnostic purposes, with limited guidance on conceptual and hands-on strategies for improvement. Enhancing understanding and application of assessment results requires a focus not just on conceptual understanding but also on providing practical examples of how to implement within the classroom.

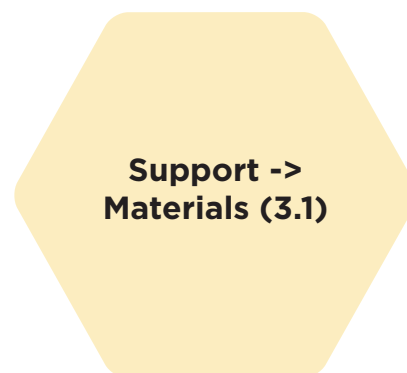


**3.9: Opinions diverge on the need for student social and emotional skills support materials: Frontline providers call for resources to work with children, while national data users emphasize the need for dissemination and coaching on these materials.** On one hand, teachers and principals report a tangible need for detailed strategies to support students' social and emotional skills and for physical materials within schools to aid emotional expression. On the other hand, national data users note that numerous resources - such as the Kit de Bienestar Socioemocional (Well-being Kit) produced by the DIGEBR - have been distributed to students, families, teachers, and specialists. They argue that the priority should now shift towards a comprehensive coaching support program to facilitate the effective use of these materials.

**3.10: Teachers face challenges with current support channels and turn to accessible web platforms and collegial work for resources.** Interviews with personnel from the DRELM and frontline providers reveal that the channels through which support is provided to teachers are often massive and have logistical and interaction constraints - for example, Peru Educa, EduTalentos, and webinars -, including not offering spaces for questions and answers. In response, teachers report obtaining resources from universally accessible web platforms - such as YouTube and Google - and meetings with their colleagues (collegial work) to design their classroom assessments.

**"It would help me a lot to have materials.** For example, if that guide tells me what type of materials, I would have them in the classroom. For instance, **to manage their intolerance or so that they learn to live together. What type of materials can be used there?"**

-Frontline provider, Metropolitan Lima



**Recommendations to address results 3.8 to 3.10:** To fully support and realize the holistic vision of SEL, national and sub-national offices must undertake “the complete monitoring and evaluation cycle” (for further detail, see quote below). This includes translating the results of social and emotional assessments into actionable strategies teachers can use in the classroom, and distributing them in engaging formats such as social media platforms. It is recommended to create a curated platform that consolidates available materials - currently in PDFs or lengthy videos - into engaging formats like social media. Blending practical, face-to-face training with innovative social media use provides comprehensive support aligned with educators’ preferences. This approach - merging traditional and contemporary methods - is essential for catalyzing meaningful educational transformation and making professional development opportunities both accessible and attractive to educators.

**“The complete cycle [of M&E]** In other words, raising awareness, accompanying the application, and then doing orientation work based on the results. I believe that a similar process would have to be done in an evaluation, let's say of Socio-Emotional Skills, but with the need of a previous step: That at least there is a common basis among all the specialists in Metropolitan Lima on what emotional education implies, and how it is measured. Because I dare to say that there must be more than a few who are a little skeptical to think that social-emotional skills can be evaluated, especially in standardized tests.”

-Policymaker sub-national Level - DRELM

## IV. Strengthening the utility and sustainability of educational data and evidence in a way that promotes agency and equitable access: overview and recommendations

"[UGEL officials]...They don't have to drown in more data"

-National level policy maker - data producer

Significant efforts have been made to develop, implement, and use a variety of assessments of children's holistic learning outcomes at different levels of the Peruvian education system. However, considerable work remains to "power on" the M&E system and ensure its ability to illuminate the educational landscape. To ensure that different types of assessments and the resulting data are useful, sustainable, and promote equal opportunities for access and utilization, three main improvement areas surfaced in our analysis:

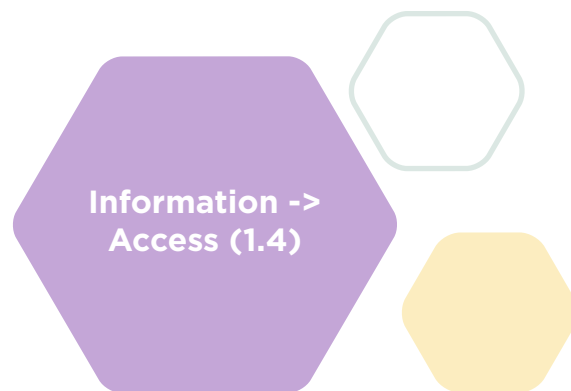
- Improve the accessibility, timeliness, and flow of information across stakeholders (see below, results [4.1](#) to [4.3](#));
- Improve the extent to which data from national and sub-national monitoring efforts can be disaggregated by key demographic and geographic factors ([4.3](#) to [4.5](#)); and
- Improve agency and equity in who has the ability to access and use the data ([4.6](#) to [4.8](#)).

We view these three improvement areas as complementary and necessary to address simultaneously in order to truly harness the power of information for change.

**4.1: Interviewees noted that high-level results of most national monitoring assessments are accessible through online repositories or other means.** The UMC's system for organizing presentations was particularly highlighted as useful for making assessments more accessible. However, several barriers were noted to accessing the results and corresponding data in a manner that is timely and facilitates communication and decision-making.

"(...) Imagine, I have to grade four exams that the students have taken, and I have to do it one by one, letter by letter. Oh my God. Today, they finally gave us access with our code to submit by Monday. I mean, I won't have Saturday, I won't have Sunday because, well, all that information needs to be processed. (...) **I mean, it's as if we don't have a life. That's how I have exams.**"

-Frontline provider, Metropolitan Lima

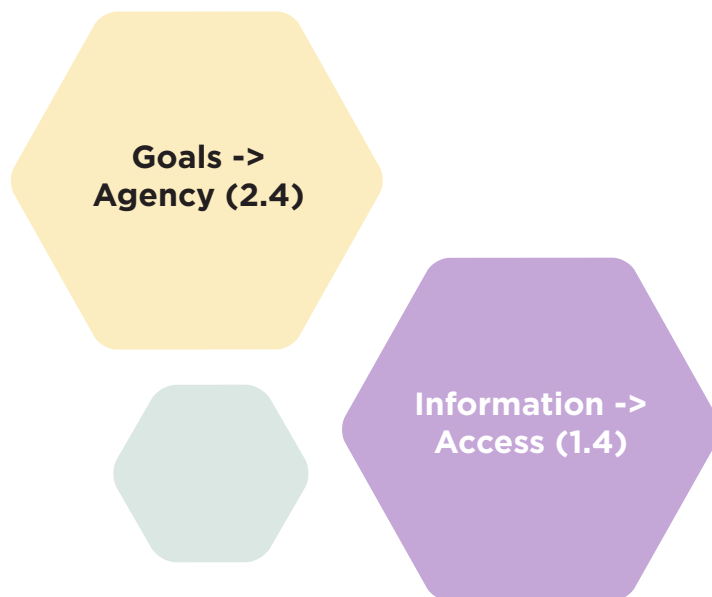




**4.2: The diversity of organizational and data systems across different offices and levels within the MINEDU - and their limited interoperability - is an impediment to timely and efficient access to data and results.**

For example, to try to improve the timeliness of results, Metropolitan Lima launched an online platform for teachers to upload the results of a national academic assessment. However, just two months later, the MINEDU requested the same data through a different platform, leading to duplicated efforts and frustration. This indicates that any effort to simplify the submission and analysis of data should, as much as possible, be interoperable across different levels of the education system.

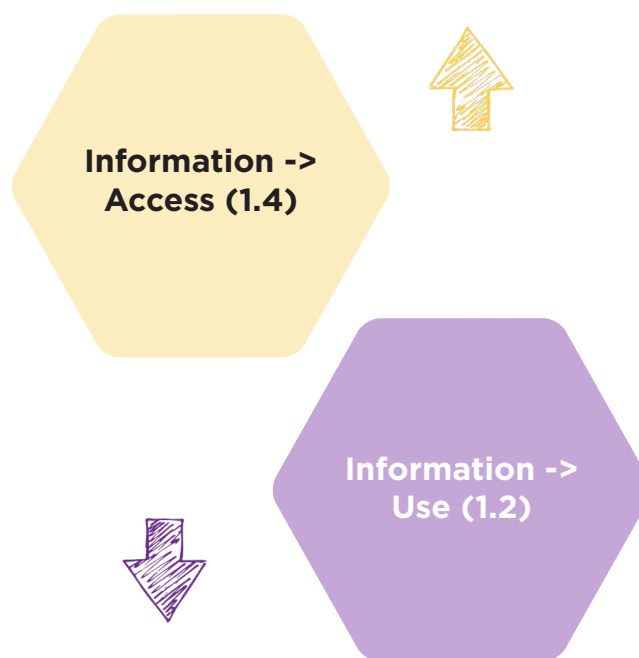
Given the strength and diversity of national monitoring assessment data, ensuring greater interoperability across offices and levels would also promote diverse stakeholders' ability to use the data to learn what works, how, for whom, and in what contexts.



**4.3: While high-level results of national monitoring assessments are available, interviewees noted that there is a reluctance to share disaggregated results, when available (see below, results [4.4](#) and [4.5](#)), and details about assessment design and analysis.**

The former in part stems from concerns about data confidentiality and protection. However, stakeholders perceived that a lack of clear guidelines on when and and at what level stakeholders should have access to various M&E materials - such as data and methodological reports, among others - reduced the likelihood of provision of more detailed information.

There were also some perceptions that the more distant a user is from the national education system, the more complicated it is to access comprehensive materials about the assessments.



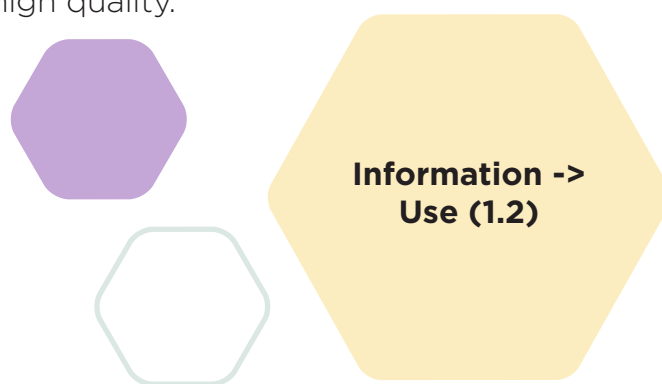
**4.4: However, a majority of stakeholders emphasized the importance of being able to disaggregate data from national monitoring assessments at the individual, school, UGEL, and/or regional level to inform policy decisions.**

The national assessments whose administration and sampling methods did allow for lower levels of disaggregation - such as the ECE or the Semáforo Escuela - have been discontinued. And, even then, NGO personnel explicitly noted that the inability to disaggregate the ECE data by the refugee status of students was a barrier to promoting access and inclusion among Venezuelan refugee children (see above, [result 2.7](#)).

**4.5: To try to fill these gaps, regions like Metropolitan Lima have carried out large-scale sub-national data collection efforts that - given the scale and availability of unique child and school identifiers - could be used to link and disaggregate holistic learning outcome data by key demographic and geographic factors.**

However, in at least one case, the assessment implemented at the sub-national level was originally intended for use as a classroom formative assessment and has not been validated for use as a population monitoring tool.

In addition, sub-national staff and frontline providers reported institutional and school structural barriers to such large-scale sub-national assessments - such as a lack of paper, projectors, and computers - that created strain and limited their ability to carry out data collection processes efficiently and with high quality.



**Recommendations to address results 4.1 to 4.5:** Considering the various political interests and financial will for a national Census, we recommend establishing a national network of regional working groups (see above, [Box C: Conditions for the success of working groups](#)) to map what information is currently being collected through classroom, sub-national, and national assessment processes, with what sampling approach, and using what tools and systems. In particular, we recommend that the national network of working groups be convened, facilitated, and funded by an external stakeholder(s) to:

- Build shared understanding of the purposes of and convergences and divergences in the content of key assessments and M&E systems at various levels of the education system. The HOLAS Assessment Bank may be a useful starting point for this process (see above, [Box A: What is the HOLAS Assessment Bank?](#)), as are the various internal and external repositories at the MINEDU (see above, [result 4.1](#)).
- Conduct secondary psychometric analysis of existing classroom and sub-national data to assess whether and how such instruments can be used or adapted for sub-national monitoring purposes, thereby avoiding additional burden on frontline providers and sub-national staff (see above, [result 4.5](#)).
- “Map the journey” of key assessments whose sampling method could enable lower levels of disaggregation using user-centered and participatory approaches. These approaches should identify pain points at different stages of the assessment process - from data collection in the classroom to data entry to verification, analysis, and reporting to user access - at multiple levels of the system (see above, results [4.2](#), [4.3](#), and [4.5](#)).

- Develop a strategic plan to improve the interoperability of data systems within and across national and sub-national levels (see above, [result 4.2](#)).
- Co-develop and build consensus around data access guidelines, based on the responsibilities and needs of various actors in the system (see above, [result 4.3](#)). For example, it was recommended that at the local level specialists would have direct access to the results of teachers in their respective localities, while higher-level authorities could have access to detailed data visualizations.
- Conduct cross-sectoral consultations to identify additional uses for data and collaboratively develop innovative advocacy, financing, and resource solutions to pain points and challenges that arise through the working group process.

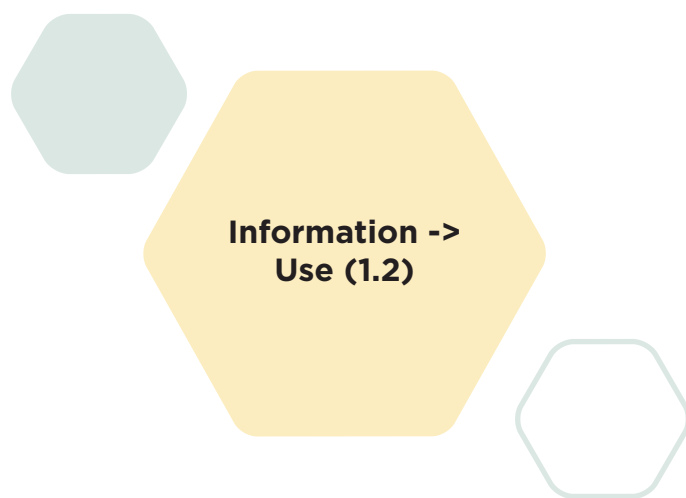
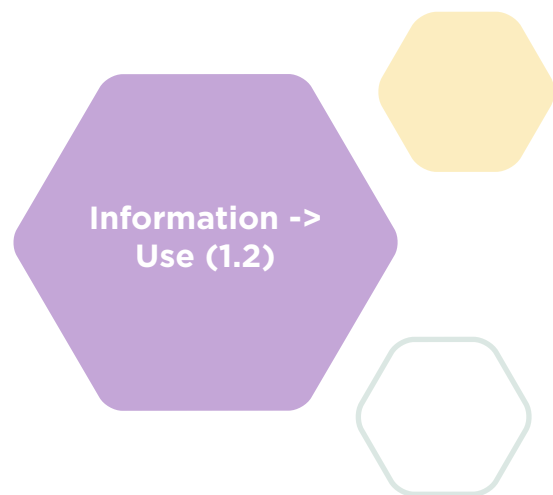
**4.6: While significant amounts of educational data have been collected at the national and sub-national levels**, interviewees strongly emphasized the need for additional technical training and support across various levels - national, sub-national, and school - to enhance the ability of stakeholders to interpret and actually use data for decision-making. Although the recommended supports differed based on stakeholders' role and level, they share the goal of strengthening mutual capacities for communication and learning.

"I have been **irritated to be honest. There are people, even high-ranking authorities, who do not understand that it is a sample, and minimize the fact that it is a small sample (...)** It's like 'Oh no, but there are 500,000 teachers', how are you going to receive a result with only 500 or only 400?' It is much more complex to explain to everyone how sample selection works, random samples, the law of large numbers...."

-National level policy maker - data producer

**4.7: Specifically, interviewees suggested that those who primarily use data at the national and sub-national levels, along with frontline providers, would benefit from additional support on:**

- Understanding descriptive statistics, such as means and standard deviations, and how to read statistical graphs;
- Identifying the implications of various sampling methods for the conclusions that can be drawn from the data; and
- Interpreting results to inform planning and program development.



#### 4.8: Meanwhile, national data-producing offices at national and sub-national levels would benefit from additional support:

- Strengthening technical skills - such as measurement invariance/differential item functioning and weighting - useful for data disaggregation;
- Integrating pedagogical and educational content knowledge with data results;
- Developing policy recommendations based on results; and
- Communicating complex statistics and technical issues in a way that is targeted to user needs, engaging, and appealing.

**‘What would I like them to do?** For example, they gave me the results, ‘Here, but you see, these students are failing in such ability’. How can I help this child to better develop this ability? **‘Look, take these strategies’. You can use this material...** That’s what the UGEL should do. **Not just ‘here, and overwhelm yourself alone.’**

-Frontline provider, Metropolitan Lima



Such complementary supports are expected to foster a common understanding that not only improves the flow and impact of communication from data-producing offices but also enhances the engagement in and ownership of results among those who are not part of specialized M&E teams.

**Recommendations to address result 4.6:** To broadly support mutual learning opportunities, we recommend fostering and subsidizing research-practice-policy partnerships between academic institutions and data-using and data-producing offices. Such partnerships could strengthen technical capacities while also ensuring that maximum benefit and learning is derived from data collected on topics of mutual interest - for example, through secondary analysis, see above, [result 4.2](#)). While successful examples of such partnerships were found in our systems mapping, barriers to the establishment of maintenance of partnerships included the time and effort required to sign contractual agreements as well as the frequency of turnover within national and sub-national departments.

**Recommendations to address result 4.7:** We recommend designing and implementing for data-using offices at national, sub-national (DRE and UGEL), and school levels a hybrid course to scaffold data interpretation and evidence-based planning skills. The course should be informed by principles of adult learning design, and should seek to engage participants’ natural curiosity in the world by providing direct connections to the work they undertake in their roles. Sustainability should be considered in designing and rolling out the course, with effort made to embed it in existing initiatives, such as the Programa de Mentoría para Directivos (Mentoring Program for Principals), the introductory course for civil servants at the MINEDU.

**Recommendations to address result 4.8:** An array of supports are recommended to address the needs identified by national data-producing offices, including:

- Technical training on skills useful for data disaggregation.
- Research communications training focused on how to: (i) Formulate and target key messages; (ii) Simplify and streamline Powerpoint presentations; (iii) Cleanly visualize data and results; and (iv) Leverage social media platforms to share data and evidence.
- Hiring a pedagogical specialist to strengthen evidence-based policy formulation.

NYU-TIES provided training on measurement invariance and differential item functioning as part of our ECW-funded work to data-producing staff at the DRELM, UMC, and the Oficina de Seguimiento y Evaluación Estratégica (OSEE - Office of Strategic Monitoring and Evaluation) in December 2023.

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# Appendix 1. Glossary of terms

## Childhoods in contexts of marginalization or vulnerability

Groups of children and their caregivers - broadly defined - that face or are at the risk of facing discrimination, exclusion, and/or barriers in their access to resources, opportunities, and power as a result of persistent disadvantage rooted in adverse structural conditions, unequal power dynamics, and systemic inequities.<sup>254</sup> We recognize individuals' ability to act and produce their desired results even when faced with challenging structural conditions that can limit their field of action. In this report, we use the term childhoods in contexts of marginalization or vulnerability primarily to refer to three groups that are of special interest to this project: children with disabilities, children from indigenous or native groups, and refugee and migrant children from Venezuela (see below definitions, [migrants](#) and [refugees](#)). The term children in contexts of marginalization can also be used to refer to other groups of children in contexts of vulnerability, such as out-of-school children and children in rural or hard-to-reach areas. In referring to childhoods in contexts of marginalization, we also include the various actors that actively partake in the education process of children in contexts of marginalization, such as their teachers and principals.

## Disabilities

Disabilities result from the interaction between individuals with one or more health conditions with personal and environmental factors, including negative attitudes, inaccessible services and infrastructure, and limited social support.<sup>255</sup> People with disabilities often face barriers to their full and effective participation in society, including their education. Thus, children with disabilities often have different education needs which are addressed through special needs or inclusive education programs (see below definition, [special needs education and inclusive education](#)). Examples of disabilities include physical impairments, sensory impairments, cognitive impairments, intellectual impairments, and mental illness or mental health conditions like depression, anxiety, schizophrenia, and bipolar disorder.<sup>256</sup>

## Early childhood education

Education services and programs provided to young children, generally under the age of six, before they enter primary-level education. In Peru, early childhood education specifically refers to children from zero to five years of age, in line with the children targeted by the Educación Inicial (Initial Education) level of the Educación Básica Regular (Basic Regular Education or EBR) system.<sup>257</sup> In Colombia, children from three to six years of age are included in this definition, capturing children in the Instituto Colombiano de Bienestar Familiar (Colombian Institute of Family Welfare or ICBF) early care programs, early education, and preschool.<sup>258</sup>

## Education in emergency and protracted crises (EiEPC)

EiEPC relates to the availability of quality and continuous holistic learning opportunities for children and adolescents of all ages across all education modalities and levels of schooling in situations of emergency and protracted crisis,<sup>259</sup> also called “crisis contexts” or “humanitarian contexts.” Emergencies and protracted crises include situations in which a community of people experience an event or a series of events that threaten their health, safety, livelihood,

and/or wellbeing.<sup>260</sup> Crises can be differentiated by the rapidity of their onset: They may be sudden onset or emergency (in which they arise rapidly with little or no warning) or slow or delayed onset (in which they emerge gradually over months or years). They may also be differentiated by their duration: Some crises are relatively time-bound, while others are protracted, causing vulnerability over a prolonged period of time.<sup>261</sup> Examples of emergencies and protracted crises include, but are not limited to, interstate and intrastate conflicts, contested governance and civil strife, climate-related disasters, refugee and migration flows, and pandemics and other public health crises. In the Peruvian and Colombian context, we use the term EiEPC to refer to educational opportunities for both host-country children and the exponential increase in the Venezuelan refugee and migrant population in Peru and Colombia, which has been referred to as a “migrant crisis”<sup>262</sup> (see section above, [Overview of the Education System](#)).

## **Education systems barrier, enabler, and suggestion levels**

Drawing on political economy analysis frameworks,<sup>263</sup> the levels of the education systems at which barriers, enablers, and suggestions identified by the interviewees during data collection occur. These include: policy/societal level (barriers and enablers that relate to high-level norms, resources, capacities, information, and incentives within education systems), operational level (barriers and enablers that relate to practical components of education service delivery such as curriculum, teacher training, infrastructure, data systems, and assessments), and school/teachers level (barriers and enablers that relate to in-school dynamics such as the participation of teachers and principals in trainings and assessment processes).

## **Educational assessment**

We use the term educational assessment broadly to refer to the processes, materials, and methods designed to provide information about the attainment of educational goals (e.g., access, quality, continuity) for a variety of purposes. Assessments can take many different forms, including checklists, surveys, performance-based measures such as examinations or tests, qualitative interview protocols, and more. In our definition, educational assessments can be used to measure the attainment of educational goals at the individual level - such as among students, caretakers, teachers, and principals - as well as at school, district, regional, and/or country levels, amongst others.<sup>264</sup> We conceive educational assessments as a component of overarching monitoring and evaluation systems in the education sector (see below definition, [educational monitoring and evaluation systems](#)). In the study conducted by our team and summarized in this report, we discovered that interviewees referred to a wide range of tools, tests, and examinations as “assessments,” without necessarily following the established definition here.

## **Educational assessment content**

We use the term content of educational assessments, tools, or monitoring and evaluation systems to refer to the primary domain the assessment, tool, or monitoring and evaluation system is meant to measure. In this report, we have categorized the content of educational assessments as pertaining to:

- Children’s academic learning: Assessments designed to gauge children’s attainment of knowledge, competencies, or skills that educational systems have traditionally



explicitly emphasized as essential for children's learning. Examples include assessments of children's literacy or numeracy skills.

- Children's social and emotional learning: Assessments designed to gauge children's social and emotional knowledge, attitudes, behaviors, competencies, skills, and/or well-being. Examples include assessments of children's emotion awareness or self-regulation (see below definition, [social and emotional learning](#)).
- Children's holistic learning: Assessments designed to measure both children's academic and social and emotional learning or development (see below definition, [holistic learning](#)).
- Teachers' pedagogical skills and practices: Assessments designed to capture the knowledge, techniques, strategies, and approaches that teachers utilize to facilitate children's academic and/or social and emotional learning. Examples include assessments of teachers' knowledge of curricular content or teachers' instructional strategies (such as tailored teaching practices).
- Teachers' social and emotional skills and well-being: Assessments designed to capture teachers' social and emotional knowledge, attitudes, behaviors, competencies, skills, and well-being. Examples include assessments of teachers' emotion regulation or burnout.
- Settings-level process quality: Assessments designed to gauge the social processes (e.g., relationships, norms, participation in activities) within a setting, such as a school or classroom. Examples include assessments of school climate or community violence.
- Settings-level structural quality: Assessments designed to measure the resources (human, physical, economic, temporal) and/or organization of resources (social, physical, economic, temporal) within a setting, such as a school or classroom. Examples include assessments of school infrastructure, student or teacher attendance, and student/teacher ratio.
- Other: Assessments, tools, or monitoring and evaluation efforts whose content cannot be described under the previous categories. Examples include monitoring and evaluation systems that cover enrollment, the receipt of State services, or the performance or competencies of principals, amongst others.

## Educational assessment level

Educational assessment level refers to the geographic scope the information, the assessment, tool, or monitoring and evaluation system is designed to provide. These include: international (assessments that are designed to evaluate respondents in multiple countries); national (assessments that are designed to evaluate respondents at the national level in Colombia or Peru); sub-national, regional, or local (assessments that are designed to assess respondents at the sub-national, regional or local level within Colombia or Peru); classroom assessment (assessments that are designed to assess respondents within the classroom in Colombia or Peru); and others (whose scope cannot be established in the prior categories). In referring to "regional" tools, we allude to tools used in regions of Colombia or Peru, and not to tools used in the Latin American or South American regions.

## Educational assessment type

Type of educational assessments, tools, or monitoring and evaluation systems relates to the primary purpose for which the assessment, tool, or monitoring and evaluation system was designed. In this study, we initially coded the primary purpose of assessments according to commonly recognized broad categories: monitoring tools (assessments that are used to describe and compare across a population(s) or program(s) to identify areas of need or improvement;); summative assessments (assessments that are used to evaluate learning or achievement at the end of an instructional unit or program, often by comparing it against some standard or benchmark), formative assessments (assessments that are used to identify what skills/competencies children or service providers have and what skills they need in order to provide feedback and scaffolded support); and others (those that cannot be identified in the prior categories, such as epidemiological surveillance systems, data analysis services, or webpages that provide interactive visualizations to facilitate information use by users).

We note one important caveat to and concern about this categorization of assessments. While the use of these labels allows for alignment with common understanding and practice, they obscure the variety of ways that information from the assessments are often used. Summative information on what students have learned may be used for decision-making on individual grade promotion; program effectiveness; school and national level resource allocation, and comparisons with other countries, to name only a few. But to enable such very different decisions, assessments must be designed, implemented, and tested in different ways. Recognizing the need to nuance traditional formative and summative assessment typologies, when we report the results on the purpose of assessments (see section, [Results by sub-element > 1.1](#)), we provide as granular information as possible on how information from the assessments are actually used.

## Educational monitoring and evaluation systems

Educational monitoring and evaluation systems, also called educational measurement systems, are the group of assessments, tools, information systems, and structures that exist across school, program, district, regional, and/or country levels of education systems to generate, analyze, and use information on the attainment of educational goals for a variety of purposes. While educational assessments are specific materials, methods, and processes designed to provide information about the attainment of select educational goals by specific entities, organizations, or actors in the education system (see above definition, [educational assessment](#)), monitoring and evaluation systems encompass the set of data, evidence, information, and/or data visualizations about educational attainment broadly produced, including through assessments.<sup>265</sup>

## Element

Within the HOLAS framework, three key elements, or components, describe the nature of relationships between the education authorities and organizations and frontline service providers (e.g., school leaders and teachers) within holistic learning outcome measurement systems: information, goals, and support. Information focuses on how and with what quality the information produced by education monitoring and evaluation systems is generated, accessed, used, and shared by education authorities, organizations, frontline providers, and researchers for a variety of purposes. Goals hones in on the definition and clarity of holistic learning objectives within the system, the alignment of information from education

monitoring and evaluation systems with these objectives and other crucial education system components, and the established norms governing the use of this information in decision-making, including the level of autonomy stakeholders have in doing so. Support includes the mechanisms that are in place to ensure comprehensive, evidence-informed holistic learning at different levels of the education system, including the availability and quality of resources, professional development opportunities, and organizational structures. Each element consists of several sub-elements (see definition below, [sub-element](#)).

## **Holistic learning**

Holistic learning refers to an educational approach that acknowledges and addresses the dynamic and interrelated nature of human development across a variety of domains, including academic, social, emotional, cognitive, physical, and others (such as spiritual and cultural). Our definition also acknowledges and includes the individual, family, classroom and school processes and contextual factors that support learning and development within and across these domains. In the data collection processes conducted by our team and summarized in this report, we discovered that interviewees had various understandings of holistic learning, without necessarily following the definition established here.

## **Migrants**

People who choose to reside in a country outside of their nationality and who - contrary to refugees - do not face direct threats of persecution, serious harm, or death if they return to their country of origin. Migrants choose to migrate for a myriad of reasons, such as to pursue professional development or education opportunities and to reunite with their families.<sup>266</sup> This includes people without a regular immigration status in their country of arrival. Throughout this report, we use the term “migrants” to refer to Venezuelan migrants; we do not use this term to refer to refugees, internal migrants, or internally displaced persons.

## **Monitoring and evaluation**

Monitoring and evaluation are synergistic processes. While both involve the collection, analysis, interpretation, and sharing of information about educational inputs, processes, outputs, outcomes and goals, they differ in purpose and periodicity. Monitoring tends to refer to the continuous collection of data to track the level and quality of curricular, program, and/or policy implementation against outputs, outcomes, and goals, while evaluation assesses the extent to which curricula, programs, and or policies are effective, equitable, and sustainable at achieving the desired outcomes and goals at discrete periods of time.

## **Refugees**

People who are in a country outside of their nationality and are unable or unwilling to return to their country of origin due to war, armed conflict, violence, and/or a well-founded fear of being persecuted for reasons of race, religion, nationality, membership of a particular social group, or political opinion; in contrast to migrants, refugees face threats to their lives and/or freedom and are protected by specific international legal frameworks.<sup>267</sup> In this report, we use the term “refugees” to refer to Venezuelan refugees.

## Social and emotional learning

While diverse definitions for social and emotional learning exist, for the purpose of this project social and emotional learning has been defined as the process through which all young people and adults acquire and apply a wide array of non-academic knowledge, attitudes, behaviors, and skills that are essential for their success in school, work, home, and their communities.<sup>268</sup>

Within this umbrella definition, we follow the Harvard EASEL Lab's taxonomy and identify six broad domains of social and emotional learning: cognitive (skills required for individuals to direct behavior towards the attainment of a goal), emotion (skills to recognize, express, and control emotions), social (ability to interpret other people's behaviors, navigate social situations, and interact positively with others), values (skills and abilities to support individuals to be prosocial and productive members of society), perspectives (skills related to how individuals view and approach the world), and identity (how people understand and perceive themselves and their abilities).<sup>269</sup> Within and across these domains, how specific social and emotional knowledge, behaviors, attitudes, and skills are defined, named, manifested, categorized and prioritized varies within and across cultures and contexts. In this study, for example, spirituality and religion, environmental consciousness, respect and responsibility towards the environment, and sustainability are also included under the umbrella of social and emotional learning.<sup>270</sup>

## Special needs education and inclusive education

Special needs education refers to educational provisions designed to facilitate the learning of individuals who, for a wide variety of reasons, require additional support to access and meet learning objectives commensurate with their age in an educational program. Reasons may include (but are not limited to) permanent or temporary impairments, difficulties, or challenges (see definition above, [disabilities](#)); late entry into the educational system; high intellectual abilities; or personal, family and/or school historical conditions.<sup>271</sup> Common provisions include adaptive pedagogical methods and materials, additional supports or resources, or specialized equipment or learning spaces,<sup>272</sup> beyond the means and resources usually used by teachers to respond to individual differences amongst their students.<sup>273</sup> Traditionally the term special needs education has been used to refer to provisions that support learning through integration into existing education programs or through separation into programs in the same or alternate educational institutions. It does not traditionally encompass inclusive education, which proactively addresses barriers to participation and learning and ensures that curricula, and teaching and learning materials are adapted, made accessible and appropriate for all learners.

We note that the term special needs education is contested. However, we use it throughout this report given that it is the term used in legal frameworks in Peru and Colombia and that it is often used in practice, as detected throughout the interviews (see section above, [Systemic analysis methodology](#)).

## Sub-element

Within the HOLAS framework, each systemic element (see definition above, [element](#)) consists of four dimensions, also called sub-elements, that provide imperatives as to what a measurement system aligned for holistic learning looks like. The Information element includes (i) Diversify, understand, and align the purposes of assessment, (ii) Use information for supporting equitable holistic learning, (iii) Ensure quality of information, and (iv) Enable access to information. The Goals element encompasses (i) Establish clear goals for holistic learning, (ii) Align assessments with key elements of education systems, (iii) Take evidence-based decisions, and (iv) Promote agency among frontline providers and authorities in monitoring and evaluation. The Support element comprises: (i) Provide high-quality assessment guidance materials, (ii) Establish strong organizational structures for effective monitoring and evaluation, (iii) Provide high-quality holistic learning opportunities to support equity and well-being among authorities and frontline providers, and (iv) Ensure access to high-quality professional development opportunities around data, evidence, and measurement (for more information, see section above, [The HOLAS framework](#)).

# Appendix 2: The definitions by HOLAS sub-element

Element	Sub-element	Definition
1. Information	1.1 Diversify, understand, and align the purposes of assessments	<p>This dimension relates to the variety of and alignment between assessments in the educational system and the extent to which stakeholders understand their “fit for purpose.” We specifically consider three criteria within this dimension.</p> <ol style="list-style-type: none"> <li><b>Variety of assessment purposes and types.</b> The extent to which a <u>variety of types of assessments</u> are available to assess different <u>holistic outcomes and processes</u>.</li> <li><b>Stakeholders’ understanding of assessment purposes.</b> The extent to which different stakeholders can clearly and accurately identify the purposes for which educational assessments were originally designed.</li> <li><b>Alignment between assessments for different purposes.</b> The extent to which assessments of similar skills or outcomes that were designed for different purposes provide information that is aligned or coherent.</li> </ol>
	1.2 Use information for supporting equitable holistic learning	<p>This dimension relates to the extent to which information from a variety of types of assessments - as well as from monitoring and evaluation systems - is used responsibly by stakeholders to make holistic learning-oriented decisions. We specifically consider three criteria within this dimension.</p> <ol style="list-style-type: none"> <li><b>Type of decisions.</b> The extent to which information is used (or not) for decision making that supports holistic learning outcomes.</li> <li><b>Eco-system information flows for decision-making.</b> The extent to which information informs decision-making by authorities and is also shared back with and used by schools, teachers, or community stakeholders.</li> <li><b>Fair use.</b> The extent to which information is used in a way that is fair and equitable. This includes the extent to which information does not explicitly or implicitly stigmatize marginalized groups, and actively supports equity in the allocation of resources and opportunities</li> </ol>
	1.3 Ensure quality of information	<p>This dimension relates to the quality of education measures, assessments, assessment tools, monitoring and evaluation systems and/or the data obtained from them. We specifically consider four criteria within this dimension.</p> <ol style="list-style-type: none"> <li><b>Sufficiency of evidence of information quality.</b> The extent to which there is sufficient evidence <b>that information provided</b> by the assessments or tools is valid, reliable, and/or fair. Sufficiency is determined based on the purpose of the assessment.</li> <li><b>Mechanisms and practices to ethnically ensure information quality.</b> The extent to which practices and <b>mechanisms</b> are in place and utilized to ensure data from assessments or tools meets quality standards commensurate with the intended use of the information.</li> <li><b>Availability of evidence of information quality.</b> The extent to which reports of the psychometric <b>properties</b>/quality of assessments are publicly available.</li> <li><b>Fairness.</b> The extent to which there are mechanisms and practices in place to ensure inclusion and meaningful representation of marginalized groups at all stages of the assessment <b>process</b>, from the design to data collection to analysis and dissemination.</li> </ol>
	1.4 Enable access to information based on open-science principles	<p>This dimension relates to the degree (or not) of physical or digital access to various objects used in or resulting from the monitoring and evaluation (M&amp;E) process, including results, data, measures, materials, and analytic code (hereafter, M&amp;E objects). It also relates to stakeholders’ practices of sharing such M&amp;E objects. We specifically consider two criteria within this dimension.</p> <ol style="list-style-type: none"> <li><b>Principled availability of/access to guidance documents, data, or results.</b> The extent to which M&amp;E objects from various stages of the monitoring and evaluation process can be obtained. This includes whether there are clear pathways for accessing or retrieving objects and whether objects are readily provided upon request.</li> <li><b>Sharing of evaluations, data, results and materials.</b> The extent to which there are mechanisms, processes, and expectations in place for stakeholders to share and disseminate M&amp;E objects to diverse stakeholders.</li> </ol>



2. Goals of the education system	2.1 Establish clear goals for holistic learning	<p>This dimension relates to whether clear learning objectives for both academic and social and emotional learning are outlined in official documents for all children within the education system. We specifically consider two criteria within this dimension.</p> <ol style="list-style-type: none"> <li><b>1. Clarity on the objectives of holistic learning.</b> The extent to which academic and social and emotional learning objectives are outlined in official documents in a coherent, consistent and explicit manner.</li> <li><b>2. Clarity of objectives to support holistic learning for marginalized groups and refugees.</b> The extent to which there are official documents that outline clear and explicit objectives to strengthen, promote, and enhance the holistic learning outcomes of marginalized groups.</li> </ol>
	2.2 Align assessments with key elements of education systems	<p>This dimension relates to the extent to which education measures, assessments, assessment tools, and/or monitoring and evaluation systems are aligned with curricula, standards, and professional development trainings within the education system.</p> <ol style="list-style-type: none"> <li><b>1. Alignment of educational assessments with corresponding standards or regulations.</b> The extent to which there are clear and specified linkages between an educational assessment or tool and corresponding national or sub-national standards or regulations.</li> <li><b>2. Alignment of educational assessments with front-line provider training opportunities.</b> The extent to which the design and results of educational assessments and tools are aligned with professional development opportunities for front-line service providers.</li> <li><b>3. Alignment of assessments with other elements of the system.</b> The extent to which the design and results of educational assessments and tools are aligned with other elements of the education system, such as non-formal education.</li> </ol>
	2.3 Take evidence-based decisions	<p>This dimension relates to the extent to which decisions are made based on a cumulative body of knowledge about the drivers of holistic learning outcomes. We specifically consider one criteria within this dimension.</p> <ol style="list-style-type: none"> <li><b>1. Evidence of factors that enhance student holistic learning.</b> The extent to which educational authorities make decisions based on evidence of drivers of holistic learning outcomes, including access, quality, and continuity of education.</li> </ol>
	2.4 Promote agency among frontline providers and authorities in monitoring and evaluation processes	<p>This dimension refers to the extent to which front-line providers such as teachers and principals and sub-national educational authorities are perceived as capable of undertaking monitoring and assessment activities. We specifically consider two criteria within this dimension.</p> <ol style="list-style-type: none"> <li><b>1. Stakeholder support for sub-national staff design and use of assessments.</b> The extent to which diverse stakeholders perceive that sub-national educational authorities are capable of designing and implementing their own educational assessments or tools, as well as using the resulting data.</li> <li><b>2. Stakeholder support for school staff design and use of assessments.</b> The extent to which diverse stakeholders perceive that front-line providers are capable of designing and implementing their own assessments or tools, as well as using the resulting data.</li> </ol>
3. Supporting education authorities and frontline providers	3.1 Provide high-quality assessment guidance materials	<p>This dimension relates to the existence and quality of guidance materials that allow sub-national authorities and front-line service providers to design, administer, and effectively use assessments. We specifically consider two criteria within this dimension.</p> <ol style="list-style-type: none"> <li><b>1. Materials for classroom assessments design and use.</b> The extent to which materials to support classroom assessment design and use - such as dashboards, rubrics, item banks, and workbooks with assessment examples - are perceived as practical and high quality.</li> <li><b>2. Materials for monitoring and evaluation assessment design, understanding, and data utilization.</b> The quality of guiding materials that foster knowledge and skills related to the design, comprehension, and the effective utilization of education monitoring and evaluation data. Such resources may include manuals, frameworks, item banks, infographics, and more.</li> </ol>

	3.2 Establish strong organizational structures for effective monitoring and evaluation	<p>This dimension relates to the extent to which there are strong national and sub-national organizational structures to support monitoring and evaluation efforts. We specifically consider five criteria within this dimension.</p> <ol style="list-style-type: none"> <li><b>1. Existence and leadership.</b> The extent to which national or sub-national M&amp;E offices exist and have clear and established mandates to lead monitoring and evaluation processes; and the degree to which these offices coordinate with each other when required.</li> <li><b>2. Dedicated and trained staff.</b> The extent to which there are qualified, permanent staff who are part of the offices leading the monitoring and evaluation processes.</li> <li><b>3. Funding.</b> The extent to which adequate funding is secured on an annual basis for national and sub-national monitoring and evaluation offices.</li> <li><b>4. Research, practice, policy, and partnerships.</b> The extent to which national and sub-national M&amp;E offices are capable of establishing external partnerships that facilitate and enhance M&amp;E processes at all stages.</li> <li><b>5. Continuity of M&amp;E efforts in challenging political contexts.</b> The extent to which M&amp;E organizational structures maintain (or not) their long-term vision and operational capacity despite the changes that occur within educational systems, particularly during times of political and economic crisis</li> </ol>
	3.3 Provide high-quality holistic learning opportunities to support equity and well-being among educational authorities and frontline providers	<p>This dimension relates to the extent to which there are system-level mechanisms in place to strengthen educational authorities and front-line service providers' capacities for equitable and inclusive practices. We specifically consider three criteria within this dimension.</p> <ol style="list-style-type: none"> <li><b>1. Opportunities to foster the social and emotional skills of front-line service providers.</b> The extent to which there are evidence-informed pre-service and in-service professional development opportunities that acknowledge and support the well-being and social and emotional skills of front-line service providers.</li> <li><b>2. Training opportunities for education authorities and front-line providers to improve equity and inclusion.</b> The extent to which educational authorities and front-line service providers have access to pre-service or in-service initiatives to strengthen capacities for addressing the needs and ensuring equitable and inclusive participation of marginalized groups in curriculum and assessment.</li> <li><b>3. Availability of peer support for front-line providers to improve equity and inclusion.</b> The extent to which front-line providers have access to regular peer and professional supports to implement specific strategies to promote holistic well-being, equity, and inclusion.</li> </ol>
	3.4 Ensure access to high-quality professional development opportunities around data, evidence, and measurement	<p>This dimension relates to the extent to which there are system-level mechanisms in place to strengthen educational authorities' and front-line service providers' capacities for generating and using assessments, data and evidence. We specifically consider three criteria within this dimension.</p> <ol style="list-style-type: none"> <li><b>1. Content of professional development opportunities around assessments, data, and evidence.</b> The extent to which professional development opportunities for educational authorities and front-line service providers includes content related to assessment, data, and evidence.</li> <li><b>2. Quality of professional development opportunities around data, evidence and assessments.</b> The extent to which professional development opportunities for educational authorities and front-line service providers around assessment, data, and evidence allow for hands-on experience, knowledge application, and certification as opposed to "chalk and talk" methods.</li> <li><b>3. Availability of peer support and supervision in data, testing and assessment for front-line providers.</b> The extent to which a strong peer network is available at the school or program level to provide regular feedback and improve front-line providers' use of assessments, data, and evidence.</li> </ol>

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