

IMAGE BY ZEESHUTTERZZ

FINANCING DISABILITY-INCLUSIVE EDUCATION

USAID ROADMAP

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BACKGROUND & PURPOSE

Ensuring that learners with disabilities benefit from quality, equitable, and inclusive education in accessible environments, alongside their peers and within their communities is a growing global priority. However, a range of barriers compound to exclude learners with disabilities from education systems, contributing to learners with disabilities being more likely to be out of school and less likely to achieve minimum reading proficiency than their peers without disabilities (UNICEF 2022; UNESCO 2020).

A number of seminal publications in the last decade highlight finance as a critical entry point for advancing disability-inclusive education. This includes, but is not limited to, *The Learning Generation: Investing in Education for a Changing World* (The Education Commission 2016); the *Global Education Monitoring Report (GEMR) Inclusion and Education: All Means All* (UNESCO 2020); and *#CostingEquity: The Case for Disability-Responsive Education Financing* (IDDC [International Disability Development Consortium], Light for the World, and Open Society Foundations 2016). However, the role of financing and financial contributions for sustaining and scaling disability-inclusive education are seldom a focus, and few of the efforts focused on disability-inclusive education have been sustained beyond the original insights and data they offer or translated into collective action.

Financing disability-inclusive education is at the intersection of two thematic priorities for USAID: equity and inclusion and sustainability. In 2022, at the Global Disability Summit, USAID [renewed its commitments](#) to disability-inclusive education, which includes advancing the knowledge base on what works in disability-inclusive education, incorporating Universal Design for Learning (UDL) into programming, increasing initiatives in pre-primary education, youth workforce development, higher education, and education finance, and continuing to provide USAID staff and partners with the skills and tools to advance disability-inclusive education at all levels. USAID has robust tools for internal planning, including a [Disability Inclusive Education Toolkit](#), which provides guidance and resources for integrating disability into the USAID Program Cycle. In addition, USAID has internal practice notes on both [disability-inclusive education](#) (Josa and Chassy 2018) and [education finance](#) (Hurley, Chassy, and Lee 2019).

In support of these priorities, USAID commissioned a landscape assessment of financing disability-inclusive education. The purpose of the assessment, and its resultant White Paper, was to provide an overview of the state of finance of disability-inclusive education; propose a framework for describing and analyzing, planning, and coordinating action on financing disability-inclusive education at a country level; and catalyze global action on financing disability-inclusive education.

The purpose of this document is to highlight how USAID can act on the recommendations and opportunities outlined in the White Paper.

ACTIONING THE WHITE PAPER RECOMMENDATIONS & OPPORTUNITIES

While important initiatives are underway to strengthen the financing for disability-inclusive education, there is a need to bring together actors and develop an agenda to facilitate coordinated action. To support this objective, the White Paper included nine recommendations and opportunities for global actors. These recommendations and opportunities are primarily targeted toward donors and national governments. However, meaningful action across these recommendations will require strong

partnerships with Disabled Persons' Organizations (DPOs),¹ other civil society organizations (CSOs), and non-governmental organizations (NGOs) engaged in disability-inclusive education and engagement of persons with disabilities.

1. **Unpack the Twin-Track Approach to Financing Disability-Inclusive Education:** While the twin-track approach to financing disability-inclusive education has been embraced by some global actors, what it means in practice is not always as clear.
2. **Invest in Data:** Comprehensive data to inform disability-inclusive education is a necessary condition to journey toward a “transformative” financing system. This includes data on learners and their academic outcomes and disability-inclusive education finance.
3. **Develop Country-Level Analytical and Planning Tools and Guidance:** Develop tools that can help countries map where they are with respect to disability-inclusive education and identify priority investments and sequencing of those investments.
4. **Support Costing and Cost-Effectiveness Analysis Tools:** A lack of cost and cost-effectiveness data are recurring challenges for disability-responsive budgeting.
5. **Address Both Supply and Demand-side Constraints for Learners with Disabilities:** Supply constraints can address school-level challenges that exclude learners with disabilities, while demand-side financing mechanisms can reduce financial barriers that keep learners with disabilities out of school. Addressing both is required to transform outcomes for learners with disabilities.
6. **Strengthen Expenditure Tracking and Accountability of Disability-Inclusive Education Investments:** This can foster accountability and identify and resolve key areas of inefficient or misappropriated use of funds among governments and other stakeholders.
7. **Strengthen Capacity to Engage on Education Finance Issues:** Across stakeholders (multilaterals, bilaterals, DPOs, others CSOs, among others), there is an appetite for capacity strengthening on education finance. For DPOs specifically, there is a need for resources to engage more meaningfully in budgeting, monitoring, expenditure tracking and analysis, and accountability in the space of disability-inclusive education finance.
8. **Centralize Resources for Financing Disability-Inclusive Education:** There is no central access point for resources or tools, and no plans and priorities for resource development in the area of financing disability-inclusive education.
9. **Establish a Global Working Group or Community of Practice on Financing Disability-Inclusive Education:** This would have joint representation from disability-inclusive education and education finance stakeholders to reduce silos. A core priority would be to develop an agenda of action to advance this workstream.

The recommendations and opportunities include “momentum builders” (opportunities that can catalyze deeper systemic action) or “system changers” (actions that require long-term views and are likely to be the most impactful but require more buy-in and/or resources).

In this section, we highlight entry points that USAID can act on across the nine recommendations and opportunities. Where applicable, we highlight relevant organizations with whom USAID can partner or engage on these issues. Note: For the full list of proposed entry points, please see the “Recommendations & Opportunities” section of the White Paper.

¹ Disabled Persons' Organizations (DPOs), also known as Organizations of Persons with Disabilities (OPDs), are civil society organizations (CSOs) led by persons with disabilities and exist in nearly all countries around the world.

I. Unpack the Twin-Track Approach to Financing Disability-Inclusive Education

Financing disability-inclusive education, at a high-level, means budgeting, allocating, using, and accounting for resources for one inclusive system of education for all students at all levels, with the provision of targeted supports to meet the specific needs of students with disabilities. This is referred to by some as the twin-track approach. The twin-track approach has been embraced by some global actors as a way to ensure broad inclusion of persons with disabilities in mainstream development programs (one track) and to address the specific barriers persons with disabilities may face in a targeted way (another track). However, what this means in practice is not always as clear.

We note that the term twin-track approach is used by various international development fields, including education finance, disability-inclusive development, girls' education, among others. For example, the term twin-track approach is used in [USAID's Education Finance How-To Note](#) to describe activities that are finance-focused (those that have finance specific outputs as the primary goal) and activities that are finance-integrated (those that integrate finance into larger education goals and objectives). Within the White Paper and this roadmap, we use the term to refer to an approach to financing disability-inclusive education, as described above.

Momentum Builders

- Support the development of tools that can guide allocations within the twin-track approach, including suggestions on (1) the percentage of financing that should be mainstreamed versus targeted, and (2) within mainstream financing, guidance on what percentage of financing should be allocated to disability-inclusive education, and (3) the types of investments that will deliver the greatest impact for learners with disabilities. Engage organizations that have expertise in education finance and/or have previously developed tools to support education finance.
- Conduct comparative case studies of what applying the twin-track approach can look like in practice. This can include case studies from the perspective of the government and also from the perspective of donors. This can include learning from the World Bank. The World Bank's criteria require the adoption of a twin-track approach to investments supporting either a general and/or targeted approach.
- Review USAID's internal reporting guidelines (e.g., performance frameworks) to ensure they can accurately capture financing for disability-inclusive education across the twin-track approach.
- Review, and where needed, refresh USAID internal guidance on education finance and disability-inclusive education to reference more directly how the twin-track approach can be implemented in USAID programming.

System Changers

- Generate and disseminate resources on UDL to provide more concrete guidance on how governments can effectively plan and budget for UDL and disability-inclusive education in the area of teacher development and training.
- Systematically measure the real costs of addressing specific barriers faced by persons with disabilities in accessing quality inclusive education and ensuring broad inclusion of persons with disabilities in education development programs.

2. Invest in Data

The availability of comprehensive data to inform disability-inclusive education is a necessary condition to journey toward a transformative financing system. This includes data on prevalence rates, type of disability, enrollment, completion, transition, out of school learners, and learning outcomes, and the capacity to link this data to other national-level disability databases (e.g., social protection). It also includes access to data on disability-inclusive education finance.

Momentum Builders

- Support governments in the integration of the Washington Group questions on disability and specific tools like the Child Functioning Module into country-level data collection efforts (e.g., household surveys).
- Support country governments in enhancing Education Management Information Systems (EMIS) to collect more robust and comprehensive data on learners with disabilities.
- Support other actors who are taking leadership roles in advancing disability data and offering a global perspective on the state of disability-inclusive education, such as the Global Partnership for Education (GPE) or UNICEF's data center for learners with disabilities.

System Changers

- Help build data-sharing capabilities across Ministries. This can begin by piloting the development of such infrastructure in a particular country. Beginning with countries where education, social protection, and health is more centralized will be easier and generate experiences that then can be refined in other contexts.
- Support the development and use of disability-inclusive education finance indicators across global databases (e.g., UNESCO Institute for Statistics) and within country-level information systems. This can be a priority of the Global Working Group. (See recommendation “Establish a Global Working Group or Community of Practice on Financing Disability-Inclusive Education.”)
- Invest in testing the effectiveness and cost-effectiveness of alternative approaches to achieving results and build the capacity of partner governments to use such evidence in decision-making.

3. Develop Country-Level Analytical and Planning Tools and Guidance

For many countries, the financing of education, let alone disability-inclusive education, is difficult to understand and systematically describe. Developing tools that can help countries effectively map where they are with respect to disability-inclusive education will help them identify priority investments and sequencing of those investments and move toward transformative change, which requires long-term views and planning.

Momentum Builders

- USAID can play a leadership role in refining and piloting the building blocks framework (or a similar framework) as a diagnostic tool to help countries understand where they fall with

respect to disability-inclusive education finance. Conduct this in close collaboration with DPOs and other CSOs engaged in disability-inclusive education.

- Provide technical assistance to countries to apply such a framework (and/or develop accompanying guidance notes) and/or build the capacity of staff and governments to apply this framework.

System Changers

- Support periodic analyses of the status of disability-inclusive education to inform new cycles of education sector planning and budgeting and help countries get to the next level of transformation.

4. Support Costing and Cost-Effectiveness Analysis Tools

A lack of cost data is a recurring challenge for disability-responsive budgeting in education. Supporting costing and estimation models to aid in planning and demonstrating how to implement cost-effective disability-inclusive education will go a long way. It is important to note that the purpose of cost-effectiveness studies in this context is not to assess whether to reach learners with disabilities, but how best to reach learners with disabilities given budget constraints. Analyses should be rooted in a rights-based approach. Such analyses are applicable both at the organization level (e.g., costing of USAID interventions) and country level.

Momentum Builders

- Append “costing studies” as part of inclusive education activities (see examples by [Irish Aid and Sightsavers](#)). USAID already has cost analysis guidance as part of its guidance for USAID-Funded Education Activities (Walls, Tulloch, and Harris-Van Keuren 2020), which can facilitate the integration of costing studies as part of inclusive education implementation.
- Commission a comprehensive analysis to inform the “cost” and “effectiveness” sides of cost-effectiveness studies that can help inform more rigorous cost-effectiveness analyses (CEAs). This can include funding stocktakes of costing data across inputs for disability-inclusive education, evaluations on the impact of different inputs for disability-inclusive education, and targeted CEAs for particular questions (e.g., comparative analysis of assistive technologies). Given USAID’s robust experience in costing and cost-effectiveness analyses, it is well-positioned to provide leadership in costing and cost-effectiveness analysis.

System Changers

- Pilot, test, validate, and evaluate different costing tools, and build buy-in and capacity among actors engaged in education sector planning and budgeting, such as governments, GPE, and UNICEF, among others. This should be inclusive of harder-to-reach groups and those with complex learning needs.

5. Address Both Supply and Demand-side Constraints for Learners with Disabilities

Supply constraints can address school-level challenges that exclude learners with disabilities (e.g., infrastructure, assistive devices, learning materials, etc.), while demand-side financing mechanisms can

reduce financial barriers that keep learners with disabilities out of school (e.g., transportation, uniforms, caregiving, etc.). Addressing both is required to transform outcomes for disability-inclusive education and requires better engagement of education, health, and social protection actors.

Momentum Builders

- Conduct a comparative case study of equity-based financing mechanisms to support disability-inclusive education.

System Changers

- Offer technical assistance in the design and implementation of equity-focused education funding formulas (such as the Nepal Equity Index) in a few pilot countries. The goal would be to generate lessons learned in the design, implementation, and scalability of equitable funding formulas.

6. Strengthen Expenditure Tracking and Accountability of Disability-Inclusive Education Investments

A lack of expenditure tracking and analysis is a key weakness in facilitating accountability for disability-inclusive education finance. Strengthening expenditure tracking and analysis to demonstrate fidelity to disability-responsive budgets and identify and resolve key areas of leakage² among both governments and other stakeholders is an opportunity to improve the efficiency and effectiveness of funds for disability-inclusive education.

Momentum Builders

- Host policy dialogue with governments and facilitate government openness and institutionalization of public expenditure reviews (PERs), Public Expenditure Tracking Surveys (PETS), National Education Accounts (NEAs), etc., in partnership with global actors expanding the use of such tools, such as the World Bank.
- Deepen tagging and tracking of both system-wide and targeted investments for disability-inclusive education internally at USAID. Use this data to report against the OECD-DAC disability marker.

7. Strengthen Capacity to Engage on Education Finance Issues

Across stakeholders (multilaterals, bilaterals, DPOs, and other CSOs, among others), there is an appetite for capacity building on education finance that can provide the needed foundations to engage more meaningfully in budgeting, monitoring, expenditure tracking and analysis, and accountability of disability-inclusive education finance.

Momentum Builders

- Support capacity building and awareness-raising on education finance (including budget planning, preparation, execution, and accountability) through courses and toolkits that are digestible for

² Leakage in these contexts refers to the use of allocated funds for purposes unrelated to disability-inclusive education or use for private gain.

those engaged in program design, implementation, and advocacy. This can be done in partnerships with DPOs or networks of DPOs, such as the International Disability Alliance (IDA). This can include opening access to USAID’s education finance resources to broader audiences.

- Note, when building the capacity of DPOs and other CSOs, recognize that at the country level, there are many small organizations, often with very narrow foci. USAID should consider how it can work with umbrella organizations to more effectively reach these small organizations and ensure a bridging of grassroots organizations working on “education issues” versus “disability issues.”

System Changers

- Strengthen the number and capacity of disability-inclusive education units within Ministries of Education.

8. Centralize Resources for Financing Disability-Inclusive Education

A number of valuable tools, training kits, and other resources have been developed, but these can be difficult to find. Given the lack of global leadership on financing disability-inclusive education, there is no central access point for resources or tools, and there are no plans or priorities for resource development.

Momentum Builders

- USAID can commission an activity to lead the centralization of these resources, generate awareness, lead knowledge dissemination, and identify gaps. Embedding this activity as part of a global network or working group (see next recommendation) is a key component of sustaining such an activity.

System Changers

- Establish a multi-year disability-inclusive education HelpDesk for donors and countries (a virtual hub where those engaged in financing disability-inclusive education can request technical assistance and research).

9. Establish a Global Working Group or Community of Practice on Financing Disability-Inclusive Education

A Global Working Group or Community of Practice on Financing Disability Inclusive Education with joint representation from disability-inclusive education and education finance stakeholders can help reduce silos and develop an agenda of action to advance this work.

Momentum Builders

- USAID can lead the development of a Global Working Group or Community of Practice (which can be embedded within Global Campaign for Education, GPE, IIEP, Ed Finance Network, Leading Through Learning Global Platform, GLAD, or other relevant fora). Core offerings of the

network can be to centralize resources (see recommendation above), commission research, and share knowledge.

System Changers

- Establish long-term memberships and commitments (>3 years), with representation across donor and country-level actors.

ROADMAP

The entry points are sequenced across a five-year timeline. Foundational entry points, which can help catalyze action and inform subsequent activities, are proposed for year one. Entry points that are reliant on some of those outputs are scheduled for years two and three. System builder activities, particularly those reliant on learnings from years one through three, are proposed for years four and five. In some cases, it is envisaged that activities will occur over a five-year period.

| ENTRY POINT | 2023 | 2024 | 2025 | 2026 | 2027 |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------|------|------|------|------|
| Tools/Guidance | | | | | |
| Generate guidance for writing solicitations. Host trainings for education officers (and other relevant USAID staff) on writing disability-responsive solicitations. | █ | | | | |
| Review and refresh (where needed), internal policies and guidance on disability-inclusive education. | █ | | | | |
| Support the development of tools that can guide allocations within the twin-track approach to financing disability-inclusive education. | | █ | | | |
| Review USAID's internal reporting guidelines (e.g., performance frameworks) to ensure they capture financing for disability-inclusive education across the twin-track approach to financing disability-inclusive education. | | █ | | | |
| Review, and where needed, refresh USAID internal guidance on education finance and disability-inclusive education to reference more directly what the twin-track approach to financing disability-inclusive education would be like in the case of USAID programming. | | | █ | | |
| Generate and disseminate resources on UDL to provide guidance on how governments can effectively plan and budget for disability-inclusive education. | █ | █ | █ | █ | █ |
| Refine and pilot the building blocks framework (or a similar framework). | █ | | | | |
| Capacity Building/Training | | | | | |
| Provide technical assistance to countries to apply the building blocks (or other) framework (and/or develop accompanying guidance notes). | | █ | █ | | |
| Offer technical assistance in the design and implementation of equity-focused education funding formulas. | | | | █ | █ |
| Support capacity building and awareness-raising on financing disability-inclusive education. | █ | █ | █ | █ | █ |
| Research/Analysis | | | | | |
| Conduct comparative case studies of what applying the twin-track | █ | | | | |

| ENTRY POINT | 2023 | 2024 | 2025 | 2026 | 2027 |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------|------|------|------|------|
| approach to financing disability-inclusive education can look like in practice. | | | | | |
| Append costing studies as part of inclusive education activities. | | | | | |
| Commission costing and cost-effectiveness studies; include measuring the real costs of addressing specific barriers faced by persons with disabilities in accessing quality inclusive education. | | | | | |
| Case studies on equity-based financing mechanisms. | | | | | |
| Country-Level Engagement | | | | | |
| Strengthen EMIS. | | | | | |
| Help build data-sharing capabilities across Ministries. | | | | | |
| Host policy dialogue and advocacy sessions to facilitate government openness and institutionalization of PERs, PETS, NEAs, etc. | | | | | |
| Support periodic analyses of the status of disability-inclusive education to inform new cycles of education sector planning. | | | | | |
| Pilot, test, validate, and evaluate different costing tools, and build buy-in and capacity among actors engaged in education sector planning and budgeting. | | | | | |
| Strengthen the number and capacity of disability-inclusive education units within the Ministries of Education. | | | | | |
| Accountability | | | | | |
| Deepen tagging and reporting against the OECD-DAC disability marker. | | | | | |
| Support the development and use of disability-inclusive education finance indicators across global databases. | | | | | |
| Provide support to UNICEF global data collection and analysis on learners with disabilities. | | | | | |
| Convening | | | | | |
| Release a solicitation to find an organization to lead the centralization of these resources. | | | | | |
| USAID can lead the development of a Global Working Group or Community of Practice. | | | | | |
| Establish long-term memberships and commitments (>3 years), in the Global Working Group with representation across donor and country-level actors. | | | | | |

ANNEX A. SURVEY OF USAID STAFF

In 2022, at the Global Disability Summit, USAID [renewed its commitments](#) to disability-inclusive education, which includes advancing the knowledge base on what works in disability-inclusive education; incorporating UDL into programming; increasing initiatives in pre-primary education, youth workforce development, higher education, and education finance; and continuing providing USAID staff and partners with skills and tools to advance disability-inclusive education at all levels.

USAID is an active player in advancing disability-inclusive education. Example initiatives and tools include:

- Technical leadership in UDL. Example tools include the [UDL Guidelines](#) that can be used to improve and optimize teaching and learning for all people and [a toolkit for international education stakeholders](#) to support reading.
- Strengthening disability-inclusive education. Examples include the [All Children Reading Cambodia](#) initiative, which supported the Ministry of Education, Youth and Sport in developing and piloting a national early-grade reading program which was inclusive of learners with disabilities and the [Gabay Project](#) in the Philippines, which is strengthening inclusive education for blind and deaf children.
- Convening activities, including through the GLAD network.

USAID has robust tools for internal planning, including a [Disability Inclusive Education Toolkit](#), which provides guidance and resources for integrating disability into the USAID Program Cycle. USAID has internal practice notes on both [disability-inclusive education](#) (Josa and Chassy 2018) and [education finance](#) (Hurley, Chassy, and Lee 2019).

To learn more about the needs, interests, and experience of USAID education officers (one of the primary audiences of the White Paper) in financing disability-inclusive education and help inform the recommendations, a semi-structured survey of USAID education officers was issued.

Twenty-eight responses were received (57% from USAID Missions; 25% from the Center for Education; and 18% from Regional Bureaus, Development Dimensions International/DRG, or DDI/EMD with representation across a broad range of experience in disability-inclusive education and education finance (**Figure 1**). Overall, respondents had low levels of confidence in their knowledge at the intersection between disability-inclusive education and education finance and felt they would benefit most from additional capacity building and the provision of relevant resources and best practice examples.

Education officers were more confident on issues of disability-inclusive education and education finance but were least confident at the intersection of these two areas. It is expected that such a pattern exists in other organizations, particularly where engagement in finance and inclusive education design and implementation are siloed organizationally (**Figure 2**).

FIGURE 1. Respondents' Experience Working on Disability-Inclusion and Education Finance

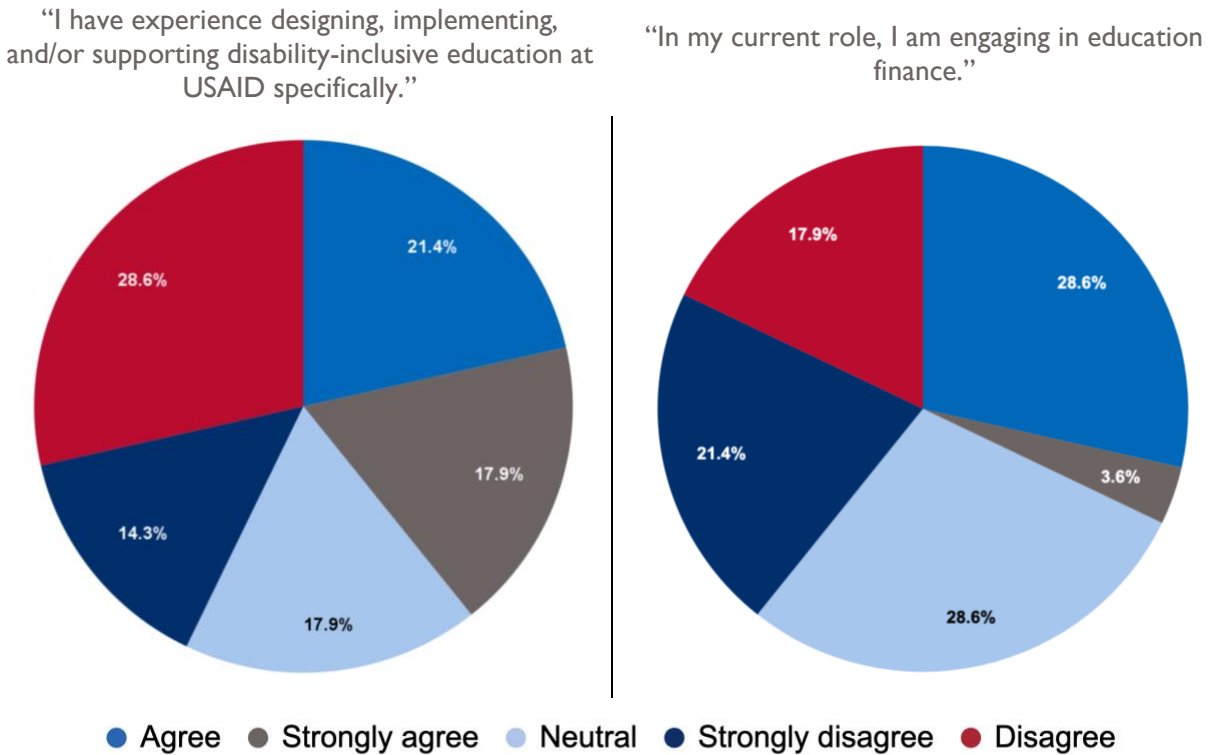
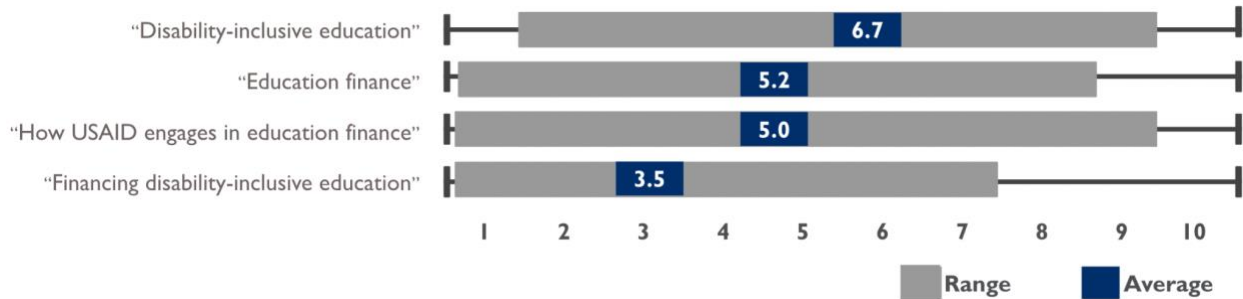


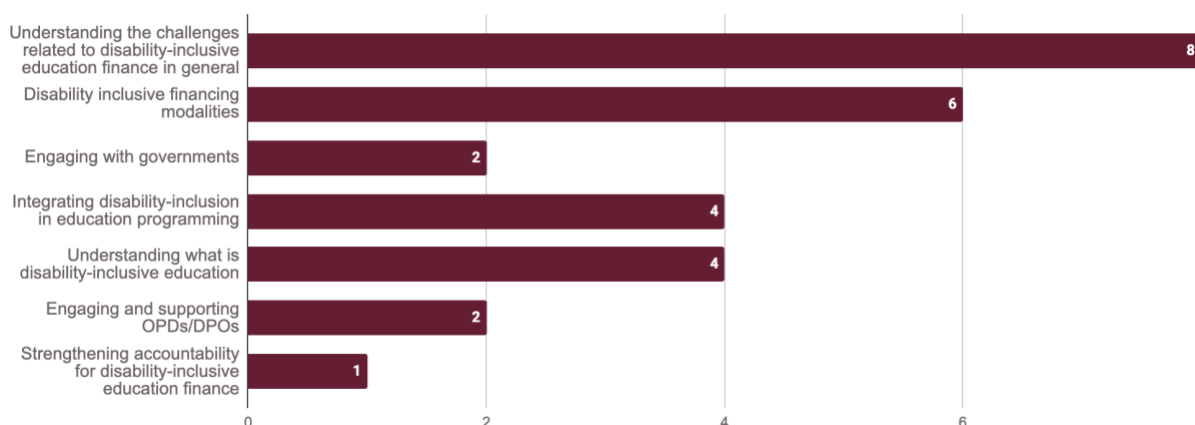
FIGURE 2. Self-Reported Knowledge (1 = Completely Uninformed; 10 = Confident/Expert)



When asked what support USAID education officers would need to strengthen financing disability-inclusive education, the top response was understanding the challenges related to disability-inclusive education finance (selected by 8/27 respondents to this question) (**Figure 3**).

When prompted to provide any other resources of interest, respondents primarily requested resources (including country case examples, best practices, budgeting resources, data, and UDL guidance) and capacity building/experience sharing on the topic. This included requests to participate in temporary duty travel (TDYs) with inclusive education experts.

FIGURE 3. Distribution of Responses to the Question “What Support Would You Need to Strengthen Financing Disability-Inclusive Education?”



USAID’s Comparative Advantage

As part of the consultations, we asked stakeholders³ what they perceive as USAID’s comparative advantage in advancing disability-inclusive education. Common responses included:

- Supporting research and data, particularly on UDL (where many identified USAID as a technical leader).
- Evidence gathering on what works in disability-inclusive education, data, and financing modalities.
- Building capacity among government actors, DPOs, and other CSOs, so that they may have the skills to lead the discourse on these topics.
- Convening actors on issues of disability-inclusive education. Many stakeholders noted USAID’s active participation across global working groups and networks.

To actualize these workstreams, the stakeholders had a few suggestions for how USAID can engage more effectively, including ensuring disability inclusion is mainstreamed across programming and ensuring there is a common understanding of USAID’s approach to disability-inclusive education programming throughout the organization, including Missions. Stakeholders also noted that while USAID has an advantage in convening, USAID should leverage and build upon existing platforms and networks, rather than duplicate existing efforts.

“[USAID should] clarify their own position on inclusive education and what they mean, when they say, you know, funding, what kind of things they will be really funding.”
 - Key Informant Interview, Disability Network (July 2022)

³ This included DPOs, governments, USAID Missions, networks of DPOs and other actors, disability NGOs, international NGOs engaged in inclusive education, and multilaterals.