



USAID
FROM THE AMERICAN PEOPLE



IMAGE BY ZEESHUTTERZZ

FINANCING DISABILITY-INCLUSIVE EDUCATION

WHITE PAPER EXECUTIVE SUMMARY

January 2023

This white paper was produced with support from USAID's Center of Education to support the implementation of USAID's Education Policy. The authors' views expressed in this publication do not necessarily reflect the views of USAID or the United States Government.

OVERVIEW

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).

The vision for disability-inclusive education is one where education is delivered in one inclusive system, for all levels (early childhood, primary, secondary, and post-secondary), and where school systems are equipped with the necessary skills, knowledge, and resources to teach all learners in accessible environments. This involves a process of system transformation. While there has been progress in low- and middle-income countries (LMICs) to orient education systems toward this vision of disability-inclusive education following the ratification of the United Nations' Convention on the Rights of Persons with Disabilities (CRPD), there is still a long way to go.

In advance of the 2022 Transforming Education Summit (TES), the International Disability and Development Consortium (IDDC), International Disability Alliance (IDA), Global Action on Disability (GLAD) Network, and Global Campaign for Education (GCE) issued a call to ensure global action toward more inclusive education systems for learners with disabilities. In particular, this call urged inclusion and equity to be cross-cutting principles across the five TES thematic tracks that require greater attention, one of which was the financing of education.

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, Light for the World, and Open Society Foundations 2016). However, the role and contribution of financing for sustaining and scaling disability-inclusive education is 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 have been translated into collective action.

Many practitioners and organizations in the education sector focus either on inclusive education design and implementation or on education finance. Very few currently work at the intersection of these issues. On the education finance side, this potentially misses opportunities to orient funds toward achieving equity for all learners, including those with disabilities. On the design and implementation side, it potentially misses opportunities to identify efficiencies or consider scale and sustainability. With many governments globally still below the recommended thresholds for education expenditure, and learners with disabilities falling behind due to COVID-19, there is a need for a dedicated focus on the intersection of education finance and inclusion of learners with disabilities.

OBJECTIVES AND SCOPE OF THIS WHITE PAPER

This white paper has three core objectives:

1. **Provide an overview of the state of finance for disability-inclusive¹ education**, with a primary focus on basic education in LMICs. This overview includes a snapshot of financing sources, the scope of

¹ See “A Note on Terminology” for a description of disability-inclusive education.

challenges that exist related to financing disability-inclusive education, a summary of seminal global initiatives in the space of financing disability-inclusive education, and case examples of three countries (Nepal, Rwanda, and the Philippines) making strong advances in disability-inclusive education. This overview is intended to provide essential context for those interested in advancing this workstream.

2. **Propose a framework for describing and analyzing, planning, and coordinating action on financing disability-inclusive education at a country level.**
3. **Catalyze global action on financing disability-inclusive education** by presenting nine recommendations and opportunities for global actors including multilateral and bilateral aid agencies, national governments, disabled persons' organizations (DPOs)² and other civil society organizations (CSOs), and non-governmental organizations (NGOs),

The white paper primarily focuses on public sources of finance, as this is the largest source of education finance and therefore is a key lever of influence. However, some attention is given to private sources of finance. This paper's overview, framework, and recommendations primarily focus on basic education and the context of LMICs. Where relevant, lessons are shared from high-income countries (HICs).

WHO IS THIS WHITE PAPER FOR?

The core audience of this paper is multilateral and bilateral aid agencies and national governments to help guide their policies and investments in disability-inclusive education, track progress, and hold each other to account. It is also intended for DPOs, other CSOs, and NGOs, who have done so much to advance progress in disability-inclusive education, by shining a light on opportunities to use financing as a lever or catalyst in advancing disability-inclusive education and to hold public actors to account. More broadly, this white paper is for inclusive education and education finance practitioners interested in better understanding the intersection of finance and inclusion and identifying potential strategies for strengthening disability-inclusive education.

METHODOLOGY

A desk review, key informant interviews (KIIs), focus group discussions (FGDs), and a survey of USAID staff informed this white paper. Documents reviewed included program reports, evaluations, budget briefs, expenditure reviews, academic research papers, and policy documents and briefs. KIIs were held with seven stakeholder groups working to enhance the inclusion of persons with disabilities in international development and humanitarian action: DPOs, governments, USAID Missions, networks of DPOs and other actors, disability NGOs, international NGOs engaged in inclusive education, and multilaterals. FGDs were held with the GLAD Secretariat and eight representatives across Philippines-based DPOs, other CSOs, and NGOs. "Pause and Reflect" sessions were held throughout to provide opportunities for reflection, refinement, and sensemaking.



>100 Documents
Reviewed



17 KIIs with 21
Individuals



2 FGDs with 16
Participants



Survey of 28 USAID
Staff

² Disabled persons' organizations, also known as organizations of persons with disabilities (OPDs), are CSOs led by persons with disabilities and exist in nearly all countries around the world.

KEY TAKEAWAYS

This paper reviewed financing for disability-inclusive education, as well as the challenges across the enabling environment of financing (financing sources and priorities and objectives) and the funding cycle itself: planning, budgeting, execution, and monitoring and accountability. Across both areas of analysis, the key takeaways are:

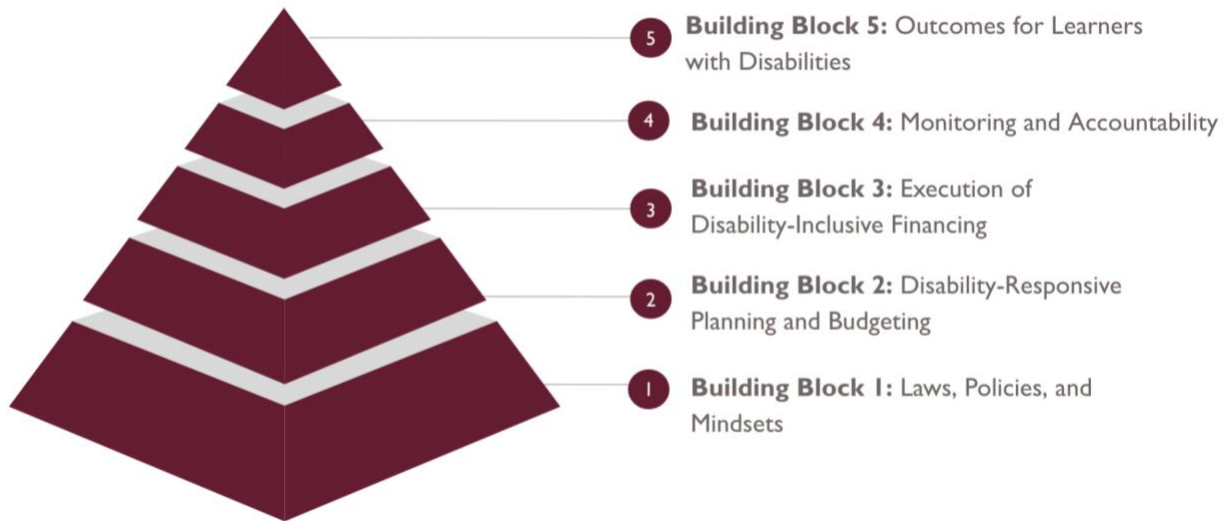
- Globally, the major sources of finance for education for learners with disabilities across all education settings (segregated, integrated and inclusive) are governments and households, consistent with patterns in general education finance.
- The twin-track approach has been embraced by some global 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). Currently, there are no global mechanisms to track twin-track investments, making it challenging to ascertain the volume of funds flowing to disability-inclusive education at the country or donor level.
- Disability inclusion is often under-prioritized when it gets lost under broader inclusive education envelopes (e.g., girls' education, refugees, etc.) or because organizations have not yet articulated a roadmap or policy in the spirit of Article 24 of the UN CRPD. This can result in disability-inclusive education being ignored, or funds continuing to flow to models that do not align with the UN CRPD and IDA's [Vision for Inclusive Education](#).
- A lack of data is a significant barrier to planning and budgeting for disability-inclusive education and education more broadly. Moreover, a lack of disaggregated information regarding budget allocations and expenditure for disability-inclusive education makes it very challenging to assess whether spending is sufficient and hold governments accountable.
- While engagement with DPOs has been increasing, this has not necessarily translated into meaningful engagement across budgeting, monitoring, and accountability due to DPO capacity and resource constraints. Without stable funding to support core operations, DPOs may not be able to play a consistent role and develop the capacity needed to meaningfully participate in these processes.
- A lack of costing and cost-effectiveness data is often cited as a core barrier to disability-responsive budgeting.
- There is no global mechanism to facilitate coordinated action on disability-inclusive education finance and bring together those working in inclusive education and education finance.

A FRAMEWORK FOR ASSESSING DISABILITY-INCLUSIVE EDUCATION FINANCE

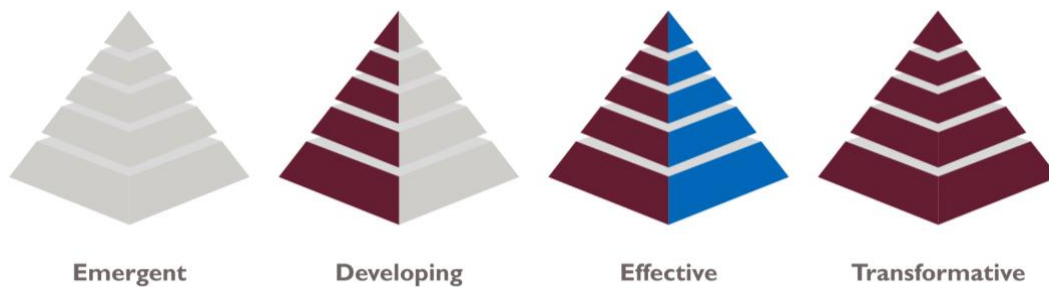
While finance is an important gap in strengthening disability-inclusive education, there is no widely accepted framework for considering financing issues. The “Building Blocks Framework for Financing Disability-Inclusive Education” developed as part of this white paper is proposed as a starting point for countries and partners. The framework provides a systemic view of the building blocks that should be in place at a country level to ensure adequate financing and utilization of funds to advance disability-inclusive education and how these components build on, and reinforce, each other. This framework can be used to

- Understand a country's disability-inclusive education financing landscape.
- Identify potential entry points for advancing disability-inclusive education in a systematic and sustainable way.
- Plan and coordinate action to strengthen disability-inclusive education finance.

These building blocks comprise five levels that build on each other.



The financing of disability-inclusive education is a process and is only one of several key elements in a broader evolution of countries toward disability-inclusive education. Countries may be at different stages in their journey and may be advancing different components of the framework in non-linear or sequential ways. Country progress across the building block levels can be categorized as emergent, developing, effective, or transformative.



The framework was informed by the Global Education Monitoring Report (GEMR) on Inclusion and Education, which identifies finance and governance as one of seven key elements of inclusive education, and IIEP-UNESCO’s Methodological Guidelines Volume 3, which identifies finance as one of four key areas of an enabling environment for disability-inclusive education, as well as country case studies, interviews, and FGDs completed for this paper. For an application of the framework to three countries (Rwanda, Nepal, and the Philippines) see Annex 6 of the full document.

RECOMMENDATIONS, OPPORTUNITIES, AND A CALL TO ACTION

While important initiatives are underway to strengthen 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, we include nine recommendations and opportunities for global actors. These 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 high-impact but require more buy-in and/or resources) that are further described in the paper. The breadth of entry points provides opportunities for action, recognizing that local

contexts can be different and countries can be at different stages of their journey in supporting disability-inclusive education.

1. **Unpack the Twin-Track Approach to Financing Disability-Inclusive Education:** While the twin-track approach to financing has been embraced by some global actors, what it means in practice is not always as clear.
2. **Invest in Data:** Comprehensive data on 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 is a recurring challenge 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 leakage of funds among governments and other stakeholders.
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 strengthening on education finance, and 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.