



A Strategic Toolkit

for EdTech Policy and Decision-Making

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Table of Contents

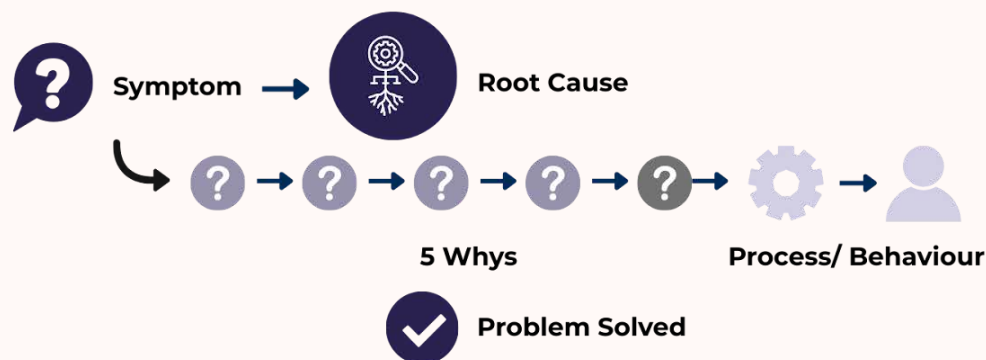
1	Policy Landscape Diagnosis	02
2	Evidence Calibration: Truth vs. Utility	04
3	MELA: Data as a Strategic Asset	06
4	Resilience & Stewardship: Building to Last	08
5	Collaborative Intelligence (CQ): Relational Governance	10
6	Capsule References and Further Reading	13

Why does “Diagnosing Effectively” matter?

Clear diagnosis of the problem to be solved ensures policies target root causes by replacing assumptions with evidence and early stakeholder alignment. This promotes sustainable efforts, prevents resource waste and uncovers risks, ensuring the level of effort matches the problem's complexity—keeping minor fixes agile while giving transformational shifts the depth needed to navigate uncertainty.

The Symptom vs. Root Cause Trap

Most "problems" are actually just symptoms or “surface-level” effects of a deeper underlying cause. If you solve the symptom, the problem returns. **Symptom-based solutions often lead to a cycle of constant fixes.**



Ask "Why?" until you find the human behavior or process failure causing the pain. A good diagnosis creates a problem statement that almost solves itself. Knowing the “whys” leads to deeper understanding of what the policy needs to address.

The Mindset for Impacting Scale

Stop treating every policy like a "Heavy Weight" crisis. **Identify the complexity** early so you can save your resources for the big fights. Misjudging the complexity may lead to the wrong response required by the policy context.



Simple policies addressing routine issues may require straightforward diagnosis and alignment (**Transactional**), while complex ones involving multiple stakeholders, uncertainties, or high risks demand deeper exploration, diverse evidence, and adaptive planning to ensure feasibility and impact (**Transformative to Reform**). Not all policies are equal.



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Pause and reflect:

At the start of your last policy or programme initiative, did you clearly define what kind of problem you were dealing with or did the work begin before that conversation happened?

Case Study

Start Right Guide (New Zealand)

Washington (2022) points out that a massive pitfall in policy work is "poor commissioning"—meaning teams jump straight into the work before defining what *kind* of work it actually is. They either reinvent the wheel for a simple transactional issue or apply rigid, routine project management to a complex transformational reform.

To navigate this effectively, the Start Right guide emphasises 'commissioning conversations' at the outset of any project. These are initial, structured explorations to diagnose the complexity early by asking the Start Right framework forces **"commissioning conversations"** at the very beginning of a project. These are initial, structured explorations to diagnose the complexity early by asking:

- What is the actual scale and scope of the change required?
- What specific analytical lenses do we need to apply?
- Who actually needs to be involved?
- What level of governance and management is strictly necessary?

When leaders understand the complexity from the start, they can move quickly on routine issues and save their time, expertise, and political capital for the bigger changes that really matter.

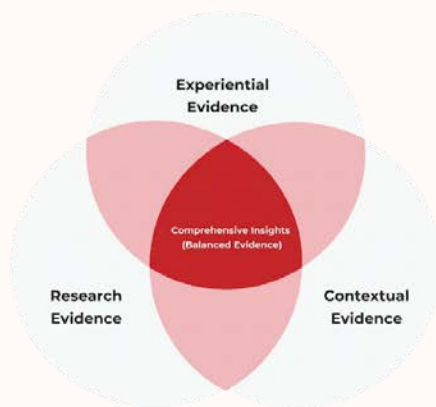
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Why does effectively “Evaluating Evidence” matter?

Evidence evaluation replaces guesswork with risk management, prioritising practical viability over "perfect" data. It matters because it breaks decision paralysis and prevents the failure of misapplied foreign models, ensuring policies are grounded in local reality rather than just theory.

"Fit-for-Purpose" Evidence

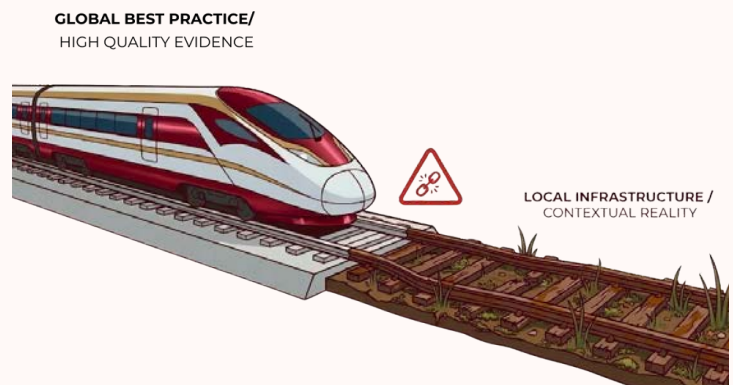
The art of evidence-based policymaking isn't about choosing between rigor and speed; it is about calibration.



Balance Research, Contextual, Experiential evidence for comprehensive insights, using imperfect sources iteratively when complete ones are unavailable. Success lies in prioritising deep research when the stakes are high and time allows, but having the confidence to leverage experiential insights when a political window demands immediate action.

The Gold Standard Illusion

A "Gold Standard" pilot from a high-resource environment is "Low Quality" evidence in your setting if your local infrastructure or cultural norms cannot support it. Don't just grade the source. Grade the fit. **Evidence is only as good as its alignment** with your specific budget, institutional capacity, and timeline.



Quick Proxy Signals



In a fast-moving policymaking environment, waiting six months for a study is a failure.

Incomplete evidence is better than no evidence. Use "Proxy Signals." A quick "Highlighter Test" with 5 users today is more valuable than a perfect survey next year. It reduces risk immediately.



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Pause and reflect:

How can your local systems and mechanisms successfully adapt evidence from other contexts?

Case Study

Universal Basic Education (Nigeria)

This education reform was inspired by the No Child Left Behind (NCLB) policy from the United States, which was a policy aimed to increase school accountability and improve overall learning outcomes in the primary and secondary levels. The reform strategy was heavily designed around standardised assessments, highly qualified teachers, and school efforts on funding, incentives, and standardisation. The assumption was: if learner performance was accurately measured, schools would develop strategies for improving teaching quality.

Nigeria's Universal Basic Education (UBE) reform in 1999 was founded on a similar framework with the goal of ensuring that each child can access their right to education. While the NCLB reform appeared logical to be the "Gold Standard" for improving student performance, Nigeria initially encountered challenges in its local implementation at that time such as:

- Lack of professional development and hiring of new, more qualified teachers to implement reforms needed
- Weak systems for standardised testing, data collection, analysis and testing
- Shortage of funds for learning resources, infrastructure/classroom improvements, and professional development
- Insufficient incentive structures for the improvement of teaching quality
- Underdeveloped inclusivity efforts to capture all children

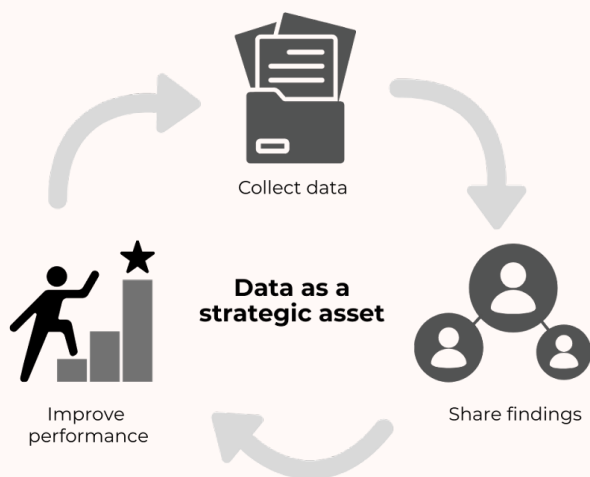
Much has changed through the years for UBE, as they continue to learn lessons in contextual implementation. Without contextualising the evidence, a cookie-cutter implementation of a policy may not be sustainable and may not lead to the desired outcomes. A thorough assessment of existing mechanisms and systems in the local education system are necessary for adaptation models to succeed.

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Why does “Monitoring, Evaluation, Learning & Adaptation” (MELA) in the early planning stages matter?

Monitoring tracks whether a policy is being carried out as planned and helps spot problems early. Evaluation helps explain what worked, what did not, and why. Together, they turn data and experience into evidence that policymakers can use to improve decisions, strengthen implementation, and make policies work better for the public. Integrating M&E development in the planning stages of policymaking ensures that the policy design is measurable, feasible, and adaptable from the start. Intentionally strategising at the onset how teams can learn and adapt based on M&E data will encourage stronger and more realistic policy design as it establishes feedback loops early, ensures that systems are in place from the start, and allows evidence to be the driving force for continuous reflection and improvement.

Learning and Adaptation through Feedback Loops



Leverage on the strategic use of data to inform different phases of policymaking. When **seamlessly included in the workflow**, a well-planned data strategy looks like:

- regularly collecting information from monitoring and evaluation,
- sharing it with the right people,
- discussing what it means, and
- using lessons as feedback to improve planning, decisions, and performance.

Learning and adaptation based on data happens by building learning into normal work processes, encouraging continuous reporting, and making sure results are actually used, not just stored, to guide future actions and actively strengthen institutional learning.

Data is not used as an afterthought, but as a tool to inform an evolving process.

Transparency and feedback mechanisms are far more than technical requirements; they are the foundational framework **for building institutional accountability and public trust**. When information flows are bidirectional and transparent, a policy retains its legitimacy and resilience—even when faced with intense public scrutiny or political pressure. Providing channels for such data learning loops must be accompanied by measurable responsiveness.

Psychological Safety for Learning Windows

Honest data is more important than perfect data. Valuing what is actually happening over performative compliance encourages **accurate insights and timely responses to real needs**, thereby strengthening and improving learning systems in the policy process. When the policymaking team or a data source from the field feels safe to report poor performance, bottlenecks, and unpleasant realities, learning windows open and opportunities to course-correct are accessible. **Psychological safety turns reporting into learning and improvement.**



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Pause and reflect:

How often does the data collected in your institution lead to concrete changes in how policies are implemented?

Tusome national literacy programme (Kenya)

The programme shows how learning and adaptation can be built into the normal work of the education system. Data from classroom observations and reading assessments were collected during routine school visits and shared through a digital system, allowing information to move quickly between schools and national policymakers

Key highlights include:

- **Data collected during normal work:** school visits included short reading checks and lesson observations.
- **Continuous reporting:** information was uploaded to a national dashboard showing progress by county.
- **Immediate feedback:** teachers received feedback on their instructional practice.
- **System learning:** aggregated data informed teacher training and policy decisions.
- **Transparency and accountability:** visible data helped leaders monitor progress and respond to challenges.

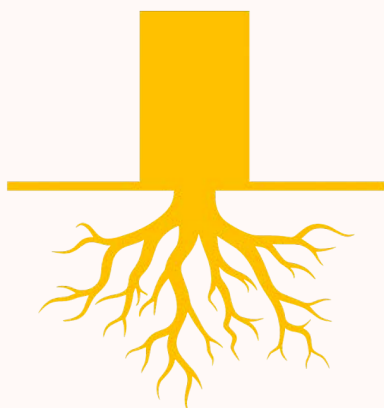
Together, these practices turn data into a tool for continuous learning, helping strengthen accountability and trust in the system.

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Why does “Resilience and Stewardship” matter?

Resilience is the "armor" that protects a policy from collapsing during transitions. It ensures that when a leader rotates or a budget shift occurs, the policy's core logic and technical data remain intact. Stewardship in policy refers to the proactive long-term caretaking of systems, resources, and trust to ensure that the public good benefits from the policy over time. Keeping a policy alive, relevant, and effective leads to the lasting change it was intended to create.

Anchor to the Permanent



*Policies survive when
foundations are strong*

Link policy outcomes to permanent national mandates to ensure **long-term relevance across administrations**. Most policies do not fail because they are poorly written. They fail because they are politically unanchored, administratively unrealistic, or dependent on individual champions.

Policies with strong foundations in national mandates remain **embedded in the system and encourage consistency in implementation, funding, and accountability**. While political champions are undeniably essential in creating and sustaining a demand in policy development, anchoring it heavily on personalities alone does not create the stability that is necessary for long-term success.

Preserve Institutional Memory

One of the highest risks in policy implementation is the "Loss of Memory" due to staff turnover or shifting priorities. Intentionally build a plan to store expert knowledge and decision-making logic in organised systems or **“knowledge reservoirs”**. Through accessible knowledge repositories, document the "why" behind decisions to prevent "Policy Amnesia" during staff turnover. More than embedding memory in administrative orders and issuances, institutional memory is best preserved when **policy knowledge is continuously refreshed and reflected** in frameworks, templates and forms, monitoring, responding, and reporting requirements, and official workflows.

Guardrails in Implementation

Practicing **adaptive implementation** with clear and consistent feedback loops, checkpoints, and pathways for corrections while protecting policy intent strengthens a policy and improves its resiliency. As policies are implemented, clear identification of non-negotiables and flexible elements help ensure that goals are not undermined and progress is on track. Explicit policy guardrails also **boost the capacity and understanding of policy implementers**, which further embeds stewardship across the system during implementation.



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Pause and reflect:

How can you ensure that there is a consistent demand for your policy to be maintained in the system while surviving political changes and implementation challenges?

National Basic Education Assessment System (Brazil)

For thirty years, Brazil's Sistema de Avaliação da Educação Básica (SAEB) has been the country's main source of data for monitoring schools and learning progress on a school level. This system has allowed Brazil to collect and compile historical data that has helped them accurately diagnose school concerns and develop appropriate measures that address issues in school performance. Together with the development of the Índice de Desenvolvimento da Educação Básica (IDEB), an index of national school performance indicators, student learning outcomes are monitored every two years in the public and private school system.

This specific system demonstrates a resilience rarely found in education systems, as it has survived various changes in political leadership through the years. It has remained consistently present and relevant, and even continues to expand due to the following reasons:

- Institutionally embedded: Instituto Nacional de Estudos e Pesquisas Educacionais Ansion Teixeira (INEP) is the federal agency under the Ministry of Education that manages the conducting of assessments. It is not tied to a specific political figure, which ensures policy resilience.
- Adaptive implementation: The system is reviewed and continues to evolve to be able to adapt to changing contexts and growing needs on the field.
- Usability for decision-making: The relevance of data generated from the assessment remains to be significant as the ministry continues to use it in setting education targets, funding decisions, and developing other national interventions.

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Why does “Collaborative Intelligence” matter?

Collaborative intelligence shifts governance from transactional to relational, solving complex problems that policies address. A trust-based approach in policymaking, wherein collective experiences and perspectives are valued in developing, implementing, and improving policy, allows policies to survive bureaucratic shifts in the long run. Successful collaboration depends on understanding people and the history or “baggage” they bring. Partners need a collaborative mindset built on honesty and trust. This means creating a safe space where people can share ideas, challenge each other, and discuss differences without fear of conflict.

The Power-Interest Grid

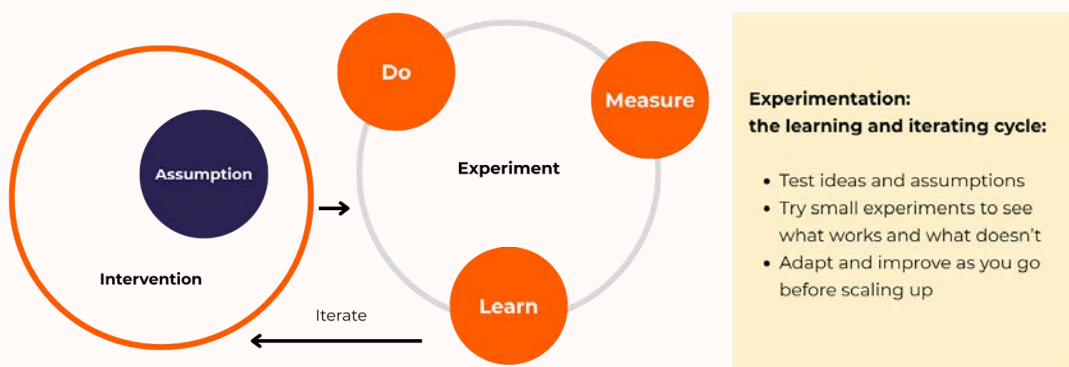


Stakeholder collaboration is about **getting the right people involved at the right time**. When you understand who can influence a policy and who cares about it, you can work together more smoothly. To manage these relationships, you need to look at two things: power and interest.

- **Power** is a stakeholder’s ability to change, drive, or stop your project
- **Interest** is the level of concern or active involvement the stakeholder has in the outcome.

Understanding who the stakeholders are and how they could potentially contribute to policy success is an important element in strategically deciding which relationships to focus on and who to ultimately engage with.

Collaborations in Sandboxes



Regulatory sandboxes represent a clever policy tool for testing groundbreaking ideas in a safe, controlled space before unleashing them on the wider world.

Think of them as a **"try before you buy"** approach for regulations— an “innovation zone” that allows governments to pilot innovations like new technologies or services under temporary exemptions from strict rules.

Drawing from global evidence, sandboxes can be used to bridge the gap between bold experiments and full-scale rollout, often with a mix of successes, hurdles, and valuable lessons. A collaborative approach in sandboxes alongside the normal bureaucratic grind establishes shared responsibility and trust in **spotting risks, gathering data, and refining ideas without stifling creativity.**

[Read here](#) for more information on the sandbox method

Adaptive Team Thinking

Behind every policy is the **complex interplay of people and their diverse personalities, perspectives and priorities.** Whether it's within a unit or across units in a ministry, the work in policy development can be pushed forward or held back by human dynamics that permeate every stage. **Policy teams that show adaptive thinking work in a culture founded on shared responsibility and open communication.** This collaborative problem-solving mindset looks like:



- **Active curiosity** - Shifting the question from “who did this” to “*why did this happen*” allows teams to re-focus on a root cause analysis (that can lead to in-depth brainstorming of solutions) instead of personality-based causes (that slow down the process of making adjustments and improvements).
- **Proactive ownership** - Rather than deflecting blame to ongoing, accepted cultural and behavioral norms, understanding how one’s responsibilities are connected to the broader policy context provides teams more opportunities to commit to improvement and learn more from the system.
- **Empathetic lens-taking** - Viewing the problem in multiple perspectives, through the lens of different stakeholders, encourages units to sort out competing priorities and avoid one-sided solutions to an issue.



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Pause and reflect:

In your policy or programme work, who are the key partners you should be teaming up with? How could their feedback help you adapt to challenges?

The Mango Tree Project (Uganda)

When schools closed during the pandemic, the Mango Tree, EdTech Hub's sandbox project with the Literacy Lab, worked with radio stations, government officials, and communities to continue early literacy learning through radio lessons supported by community "co-teachers" (members of the community, often older siblings).

- **Active curiosity:** Feedback from families helped the team understand what children found difficult and improve lessons week by week.
- **Proactive ownership:** Existing relationships with district officials and schools helped quickly set up community infrastructure aligned with the national curriculum.
- **Empathetic lens-taking:** Parents, older siblings, and community members supported children as "co-teachers," recognising different home learning contexts.

The result was more than a literacy program during a crisis. It showed collaborative intelligence in action whereby different people contributed insights, taking shared responsibility, and improving the solution together.

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CAPSULE 6: Capsule References and Further Reading

Technical Mechanics

Focus: Internal processes, accountability, and standardizing quality.

Resource	Overview	Primary Use Case
<u>Deming's Plan-Do-Check-Act</u>	A four-stage iterative loop: Plan, Do, Check, Act.	Standardising organisational learning and ensuring policy iterations are based on data, not just episodes.
<u>RACI Matrix</u>	A framework to map tasks to: Responsible, Accountable, Consulted, and Informed.	Defining decision rights and preventing "accountability diffusion" in complex stakeholder networks.
<u>Performance-Based Monitoring & Evaluation (PBME) Architecture (OECD)</u>	A results-oriented governance mechanism derived from the "Ten Steps" model.	Guiding the design and construction of a results-based M&E system in the public sector.
<u>The OECD DAC Evaluation Criteria</u>	International standards for evaluating policy: Relevance, Coherence, Effectiveness, Efficiency, Impact, and Sustainability.	Cross-institutional evaluation to ensure policy delivers lasting value rather than just completing tasks.

Peer Toolkits & Frameworks

Focus: Complementary resources for evidence and quality standards.

Source	Overview	Primary Use Case
<u>INASP Organization's Policymaking Toolkit</u>	Four modules focused on evidence types, assessment, and communication.	Building evidence-based content and training teams on data strategy.
<u>New Zealand's Start Right Guide</u>	A foundational resource for the initial stages of policy development.	Setting the foundation for a new policy to ensure quality from Day 1.

<u>New Zealand's Policy Quality Framework</u>	A 16-element standard covering Context, Analysis, Advice, and Action.	Auditing policy advice against a professionalized, high-standard rubric.
<u>Policy Toolkit: A Guide for Policy Development</u>	Tools, worksheets, and case studies to help local networks deepen strategic policy work alongside their communities.	Developing policy plans, advocating for equitable outcomes for the most disadvantaged, and implementing strategies with core stakeholders.

Other Hub Resources

Focus: Direct evidence, methodologies, and lessons learned from EdTech Hub's global portfolio.

Resource	Overview	Primary Use Case
<u>The Sandbox Method</u>	A comprehensive guide on the Hub's rapid experimentation methodology.	Setting up a "safe space" for iterative testing before a policy is fully committed.
<u>Applying Sandbox Methodologies to Address Education Policy and Implementation Challenges in Southeast Asia</u>	An overview of the different sandbox projects across the region. Specifically, it covers Sprint 0, which focuses on sandbox kick-off and set-up.	Implementing the sandbox methodology across various contexts.
<u>Rethinking Toolkit Design for The Messy Reality of Policy Making</u>	Reflections on the "messy reality" of policymaking and the genesis of this toolkit.	Understanding the "why" behind the non-linear approach and the 3Ps framework.

<u>The Signal Library</u>	A curated database of emerging trends and "signals of change" in AI and EdTech.	Horizon scanning to future-proof policies against rapidly evolving technologies.
<u>Country Learning Briefs</u>	Concise reports from Hub sandboxes (e.g., Pakistan, Kenya, Sierra Leone).	Benchmarking success by seeing how other ministries solved similar implementation gaps.



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About EdTech Hub

[EdTech Hub](#) is a global research partnership. Our goal is to empower people by giving them the evidence they need to make decisions about technology in education. Our evidence library is a repository of our latest research, findings, and wider literature on EdTech. As a global partnership, we seek to make our evidence available and accessible to those who are looking for EdTech solutions worldwide. EdTech Hub is supported by UKAid, World Bank, and UNICEF. The views in this document do not necessarily reflect the views of these organisations. To find out more about us, go to edtechhub.org/.

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