Measurement and Evaluation Reporting Template

As the evaluation technical assistance partner for two portfolios of investments in Middle Years Math and Secondary Writing—funded by the Bill & Melinda Gates Foundation—Mathematica developed a set of tools to support grantees through a measurement and evaluation (M&E) process. The goal of these portfolios is to develop, refine, and scale evidence-based solutions (programs, products, or practices) that demonstrate success in improving educational outcomes for students who are Black, Latino, and/or experiencing poverty (the priority communities for the grants).

To expand the reach of this work and promote the adoption of evidence-based solutions more broadly, Mathematica has adapted the suite of M&E tools for a broader set of users—organizations implementing solutions, funders, research partners, and other stakeholders. The tools are designed to help users implement the M&E process in their own work. Organizations or individuals may choose to use one tool or the full set and can adapt the tools to their needs.

What is the M&E process?

The M&E process is designed to promote rapid innovation and scaling of promising solutions through generating timely and actionable evidence about what works for whom, and in what context. It uses an iterative approach to evidence building, in which the focus and design of the research is aligned to the solution’s phase of development. Checkpoints are built in throughout to encourage users to pause and reflect on what has been learned so far and to refine the solution and the M&E plan as needed. More information on this iterative approach to evidence building and the phases of development is available [here](https://vimeo.com/528938353/76f1ece58b).

In each evidence-building phase, the M&E process has four key steps (Figure 1). In Step 1, organizations articulate their M&E goals, interests, and needs. In Step 2, they develop a plan—including research questions—to guide the M&E work. In Step 3, they execute the M&E plan designed in Step 3, including collecting the data needed to address each research question. Finally, in Step 4, organizations analyze the data they collected in Step 3, determine next steps, and report the findings.

Figure 1. Steps in the M&E process



The M&E process centers on equity and community voice as a core principle. Across all steps, organizations are encouraged to meaningfully engage community stakeholders to ensure the solution builds on the strengths and assets and meets the needs of the community it is intended to serve.

Who should use the M&E Reporting Template?

The M&E Reporting Template is designed to be used or adapted by funders or organizations implementing solutions, with support from a research partner. A research partner could be staff within the organization who have expertise in evaluation, or an external organization, technical assistance provider, or consultant.

What is the M&E Reporting Template?

Organizations implementing solutions can use the M&E Reporting Template with support from a research partner during Step 4, Analyze and Report Results, to summarize and share findings from the study. The M&E Reporting Template is a guide to create a short report that will include a brief overview of the solution and study approach but will focus mostly on three to five key findings and next steps. The template also includes recommendations for appendices, including detailed descriptions of the solution and implementation context, findings relative to targets set, and the study methods used for data collection and analyses. The report format is designed to be easy to read and accessible and useful for a variety of audiences.

For funders working with multiple organizations, the M&E Reporting Template also promotes continuity across reports, allowing for streamlined review, improved understanding, and cross-solution comparisons.

Measurement and Evaluation Reporting Template

Report Title [Interim/Final Report #]

|  |
| --- |
| Summary of Solution2-3 sentences that provide an overview of the solution being studied. *See Appendix A for additional details.*Context of Implementation2-3 sentences that describe implementation of the solution and any notable variations. *See Appendix B for additional details.*Methods2-3 sentences that summarize the approach to answering the research questions. *See Appendices C and D for additional details.* |

Summary of Findings

Summarize the findings in one paragraph, providing the reader with a high-level description of the results.

Key Findings

Choose three to five key findings to highlight. Findings can cut across multiple research questions. Consider which findings relate to key outcomes of interest, which findings were surprising, which findings have the biggest implications or impact on next steps, and/or which findings are informative for the field. If possible, at least one of the key findings should be related to equity and community voice.

Replace the bold text below with a one-sentence summary of the key finding that reads like an introductory headline. Summarize each key finding in one or two paragraphs or in bullets. Discuss implications and next steps. Include a table or figure to illustrate each key finding, if appropriate.

Headline for key finding 1.

Headline for key finding 2.

Headline for key finding 3.

Headline for key finding 4.

Headline for key finding 5.

Overarching Conclusion and Next Steps

Briefly describe in one or two paragraphs, or three or four bullet points, why the findings are useful or important for the implementing organization, the stakeholders, or the broader field. For example, you could describe how the organization implementing the solution will use the findings to refine the solution, engage the priority communities, or change the way the solution will be implemented. You could also highlight additional research questions that emerge from the findings. This section should not repeat the findings.

Appendix A. Detailed description of solution

This is a concise one-page description of the solution. Include details on what the intervention is, who provides the intervention and who receives it, how many students and schools are included, and the intended dosage (frequency and duration) of the intervention. This description should be a briefer version of the solution description found in the measurement and evaluation plan.

* **Describe key components of the solution**
* Purpose/goal of the solution
* One sentence on what the solution is
* Provider of the solution
* Intended outcomes (short, medium, and long term)
* Key components
* Key activities
* Who receives the solution (including how many students and schools)
* Dosage of the solution (in initial draft, note the intended dosage; update it with the actual dosage as the solution is implemented)
* How the solution is expected to work to achieve intended outcomes

Appendix B. Detailed description of implementation context

This is a one-page description of the actual implementation of the solution as well as the context within which it is implemented. In one paragraph, describe the actual implementation of the solution, highlighting anything that might help explain the results (for example, variations in how the solution is implemented across sites).

In Table B.1, provide details on the context in which the solution is implemented. If necessary, include a brief narrative of a few sentences that explains and expands on the contextual information in Table B.1.

Table B.1. Context for implementation

| Category | Characteristic | Contextual detail |
| --- | --- | --- |
| School/district | Grades served | If multiple grade spans are served, specify the number of schools or sites for each. For example:9–12 (2 schools)6–12 (1 school) |
| School type(s)[if applicable] | Traditional public / charter / magnet / private. If multiple types, specify the number of schools for each type. For example:Traditional public (2 schools)Charter (2 schools) |
| District size | Student enrollment for district |
| School or program size (if applicable) | Specify  |
| Setting | Urban / rural / suburban |
| Location | Level of specificity can vary, depending on what the organization is allowed to report |
| Student population | Percentage Black |  |
| Percentage Latino |  |
| Percentage students experiencing poverty |  |
| Percentage male/female |  |
| Percentage English learners |  |
| Prior achievement [specify] | This may be percentage proficient in math and English language arts, or average achievement in one or more subjects; change category title(s) and add rows as needed |
| Policy context or other features that might affect implementation | Curriculum  | Curriculum or curricula used in the school or program  |
|  | Other [specify] | Briefly summarize any other relevant contextual features |

Note: Type text here. [delete if this is not applicable]

aType text here. [delete if this is not applicable]

bType text here. [delete if this is not applicable]

Appendix C. Key findings and performance relative to target

In Table C.1, summarize the findings and performance relative to the targets set in the measurement and evaluation plan for this study.

Table C.1. Key findings and performance relative to target

| Research question | Design and comparison | Measure and construct | Key findings | Target set | Target achieved |
| --- | --- | --- | --- | --- | --- |
| Include each research question listed in the measurement and evaluation plan. | Include the study design and what is being compared [e.g., No comparison, Pre-solution versus solution, Students receiving solution versus students not receiving solution, etc.]. | Include the measure (instrument) and the outcome of interest. | Present the summary findings in 2 or 3 sentences. Make sure the wording of the finding is aligned to the target. | Include OK, Good, and Great targets that were set during the measurement and evaluation planning process (prior to implementation). | Indicate whether the target was “Not met,” “OK,” “Good,” or “Great.” |
| EXAMPLE |  |  |  |  |  |
| What is the average rate of students’ participation in the [solution]? | DescriptiveNo comparison | Program attendance recordsStudent participation rate | Across all program sites, student attendance in the summer program was 89%, on average. The average student attendance for individual sites ranged from 80% to 95%. | **OK:** At least 70% average student attendance during the program**Good:** At least 80% average student attendance during the program**Great:** At least 90% average student attendance during the program | **Good** |
| EXAMPLE |  |  |  |  |  |
| Do students who participate in the [solution] perform better in math than similar students who do not participate? | Matched comparison designStudents in [solution] versus similar students who do not participate in [solution] | State standardized testsStudent math knowledge | On average, students who participated in the [solution] performed 0.16 standard deviations higher on the state standardized math test than similar students who did not participate in the [solution]. | **OK:** [Solution] students perform at least 0.10 standard deviation higher on state standardized test, on average.**Good:** [Solution] students perform at least 0.20 standard deviation higher on state standardized test, on average.**Great:** [Solution] students perform at least 0.30 standard deviation higher on state standardized test, on average. | **OK** |

Appendix D. Methods

This is a one-page description of the methods for or approach to answering the research questions. The description should be succinct and nontechnical. Include the evaluation design(s), how the data collection and analyses were conducted, and the sample sizes and response rates. Note if there were any important deviations in how the measurement and evaluation work was implemented that the reader should keep in mind when interpreting findings.