Measurement and Evaluation Needs Inventory

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).

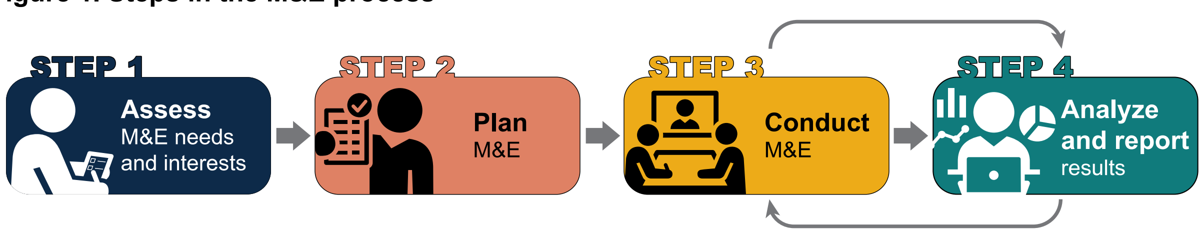
To expand the reach of this work and promote the adoption of evidence-based solutions more broadly, Mathematica has adapted the suite of M&E tools for a broader set of users—organizations implementing solutions, funders, research partners, and other stakeholders. The tools are designed to help users 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**.

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 Measurement and Evaluation Needs Inventory?

This tool was created for organizations planning to evaluate the implementation or effects of a solution (program, product, or practice) they implement. Intended users include program leads or research and evaluation staff working within the implementing organization, and their external research partners.

What is the Measurement and Evaluation Needs Inventory?

This resource is intended to guide an organization's self-assessment of existing measurement and evaluation (M&E) capacity, with the goal of identifying priority areas for support from an external research partner. M&E activities include many tasks, but for the purpose of this document, they refer to study setup, project monitoring, compliance with research requirements, solution implementation support, instrument development, data collection, data analysis, and data interpretation and reporting. This resource will likely be most useful in the early stage of the research cycle when an organization and its research partner are assessing M&E needs and interests.

This resource was prepared for the Bill & Melinda Gates Foundation. Views expressed here do not necessarily reflect positions or policies of the foundation.

Measurement and Evaluation Needs Inventory

This self-assessment tool is designed to help you—and any partners—assess what supports you may need from a research partner to strengthen your organization's measurement and evaluation (M&E) activities. When you complete this self-assessment, you may share it with an external research partner to inform their support or use it internally as a planning tool.

1. Do you currently administer any surveys or assessments to track the outcomes of the solution participants? If yes, please briefly describe them below.

2. Do you currently collect any data to track the implementation of the solution (for example, daily attendance, observations, participant satisfaction surveys)? If yes, please briefly describe them below.

3. Do you currently use a specific software to collect data (for example, SurveyMonkey, Alchemer, Qualtrics)? Please describe.

4. Do you currently have any processes in place to collect data? Please describe.

5. For each of the following M&E activities, place an "X" in the low, medium, or high column to indicate your organization's preferred level of support from a research partner. If desired, summarize the specific type of support you need.

M&E activity	Desired level of support			Summary of specific support needed (optional)
	Low	Medium	High	
Planning for equitable evaluation. Examples include identifying priority community stakeholders to contribute to learning goals; designing tools or meeting plans to solicit input; and embedding feedback loops in the evaluation plan to ensure communication with stakeholders before, during, and after the evaluation.	☐	☐	☐	
Evaluation setup. Examples include identifying study samples; onboarding districts/schools (such as recruitment or logistics/orientation); and collaboratively working with priority community members via design workshops, interviews, or community meetings.	☐	☐	☐	
Project monitoring. Examples include ensuring the project is implemented as intended and setting up systems for managing evaluation-related workflow.	☐	☐	☐	
Compliance with research requirements. Examples include preparing institutional review board (IRB) applications or district or individual school applications, establishing data use agreements or memoranda of understanding with districts or schools, and conducting background checks.	☐	☐	☐	
Solution implementation. Examples include training staff (such as teachers) on how to implement the solution with fidelity and coaching, monitoring, and supporting implementers of solution to address challenges.	☐	☐	☐	

M&E activity	Desired level of support			Summary of specific support needed (optional)
	Low	Medium	High	
Instrument development. Examples include developing or adapting and pilot testing data collection instruments and processes, such as surveys or interview/focus group protocols to track student or teacher outcomes. This may include pretesting measures for linguistic and cultural accessibility.	☐	☐	☐	
Data collection. Examples include developing data collection plans and data quality monitoring systems, collecting administrative data from programs and schools, administering surveys, collecting qualitative data through interviews or focus groups, and securely transferring data.	☐	☐	☐	
Data analysis. Examples include linking and cleaning data for analysis, using statistical software for analyses, conducting descriptive analyses, estimating pre/post changes and correlations, conducting impact analyses, and preparing and filling table shells.	☐	☐	☐	
Data interpretation and reporting. Examples include interpreting findings, including co-interpretation with priority community stakeholders; drawing appropriate inferences based on research design; identifying key conclusions and next steps; and preparing findings reports.	☐	☐	☐	

6. Please provide any additional details on the research support your organization will need to conduct the proposed M&E activities.