Maximizing Learning Across Investments: Recommendations for Funders

When investing in a new or evolving program, product, or practice (a solution), it can be challenging to determine the right measurement and evaluation (M&E) activities that will uncover whether a solution works, for whom, and in what context. This challenge is more complex when investing in multiple solutions at the same time.

The following recommendations will help you structure an M&E process that supports cross-grantee learning while balancing your priorities, the developers', and the communities' where research will take place. Along the way, a learning partner can support you and your grantees to design and carry out a learning plan, build the capacity of your grantees to conduct their own M&E activities, and share findings that drive decision making and changes in practice. These recommendations can help you generate evidence in many settings or contexts; here we include specific considerations for education settings.

A road map for generating timely and action-oriented evidence

Mathematica's M&E approach and associated toolkit tailor learning in four phases to fuel evidence-based, equitable innovation.

Community members and developers (potentially with support from a research partner) work together throughout these phases to design and refine the solution, co-develop research questions and the study approach, and co-interpret findings. You can access the full toolkit here.

Before releasing your request for proposals and awarding grants, develop your learning goals, plan your M&E approach, and communicate expectations to prospective grantees. You, ideally with support from your learning partner, should do the following:

- Engage the community (such as district leaders, educators, students, and/or parents) to understand their needs and priorities, and use their input to inform the grant-making and M&E approach.
- Create a theory of action to organize learning across a cohort of similar solutions, develop common research questions aligned with this theory of action, and identify common measures whenever possible.
- Clearly communicate expectations to potential grantees in the request for proposals. Include any common and required research questions, measures, or data collection activities and the estimated level of effort to engage in the M&E process.
- Set a realistic timeline that allows for recruiting districts and schools, engaging community members as research collaborators, developing an M&E plan or design research plan, securing research approvals, gathering administrative and outcome data, and updating solutions based on emerging evidence
- Situate each solution in a phase of evidence building based on their current stage of development, learning goals, and prior research.

After awarding your grants, ask your learning partner to take these steps:

- Serve as a liaison between your organization and the grantee by clarifying requirements, negotiating expectations and thresholds for success, and openly discussing challenges and potential solutions.
- Develop, refine, or customize tools and supports, such as M&E planning and reporting templates, so they align with the shared learning goals across a cohort.
- Co-develop M&E plans with the grantee and the community where research will take place.
- Support grantees in securing research approvals, identifying or developing measures, and collecting data.
- Support analyses (or conduct them, if needed) depending on the capacity of each grantee and help to build each grantee's capacity to independently conduct M&E over time.

When data collection is complete, a learning partner can help you interpret findings about individual solutions and cohorts of similar solutions that support broader learning. Ask them to do the following:

- Support each grantee to co-interpret findings with the community where their research took place.
- Synthesize findings across a cohort of solutions. Several studies on a single solution type can tell you more than any one of those studies on its own, but making direct comparisons between findings is not always straightforward. A learning partner can (1) standardize different measures, (2) provide context around how closely aligned each solution was to the measures used in their study, and (3) help you explore cost effectiveness by considering outcomes alongside the varied cost or dosage of each solution.
- Support you in determining whether and when each solution is ready to move on to the next phase of evidence-building.
- Convene grantees to discuss the cohort's results and support shared learning.
- Produce summaries of results that are accessible and tailored to different audiences and disseminate results with and for the community and the broader field.

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