Measurement and Evaluation Checklist Glossary

Activities and strategies – A solution's core components that are necessary to produce outputs and outcomes.

Actual implementation – How the solution was actually carried out, rather than how it was planned. Before proceeding to Phase 3, organizations are expected to implement their solutions successfully, meaning actual implementation should align with planned implementation.

Adherence to program model – The extent to which each component of the solution is carried out (implemented) as intended (**Click here for source**).

Affordable – Whether costs of implementing a solution are reasonable given the resources available to the implementers. This might require organizations to review pricing of similar products or programs and to determine what sources of funding are available for the solution.

Ambitious targets – Goals that represent a meaningful change in the trajectory of students in the priority community (or communities). When feasible, targets should be based on existing data or research on similar solutions and outcomes, with input from stakeholders in the priority community (**Click here for source**).

Broader context – The socio-political, historical, and structural context outside the priority community that might have an impact on stakeholders (**Click here for source**).

Business-as-usual or counterfactual – Refers to programs, practices, or products participants would have access to in the absence of the solution. Organizations might also compare different approaches to implementing the same solution, rather than business-as-usual (**Click here for source**).

Community assets – Resources, including people, physical structures or places, community services, and businesses, that could improve the quality of life within a community. (**Click to find more information about identifying community assets and resources here.**)

Core components – A solution's essential activities and strategies that are necessary to produce desired outputs and outcomes (**Click here for source**).

Engage (the priority community) – Using a variety of quantitative and qualitative methods to gather feedback from the priority community, such as (but not limited to) conducting focus groups, interviews, short surveys, and classroom observations or human-centered design activities, depending on the cultural context of the priority community. Organizations are encouraged to seek culturally appropriate methods specific to their priority community (**Click here for source**).

Evidence – Facts, information, or indicators that can be used to inform decisions or determine the impact of implemented activities and strategies, and might include insights from the priority community. The type of evidence organizations aim to generate might vary depending on the phase of the solution and evaluation goals (**Click here for source**).

Expand, replicate, or adapt – Actions organizations can take to scale solutions to serve more people and increase the intervention's reach. To expand a solution is to provide a solution to a greater number of people in the priority community in the current location, which requires increasing the capacity of the current resources. To replicate is to build off expansion by providing the solution to the same priority community, but in a new location. To adapt a solution means to modify and effectively implement it outside the priority community or in new settings (**Click here for source**).

Equity and community voice – Valuing and including the diverse experiences, knowledge and expertise of stakeholders and solution users in a priority community, particularly people of color and other historically marginalized groups, throughout the evaluation planning and execution process. Providing frequent opportunities to authentically engage communities to share their perspectives and expertise.

Expansion – Expansion refers to providing a solution to a greater number of people in the priority community in the current location, which necessitates increasing the capacity of the current resources.

Facilitators and barriers to implementation – Factors that help (facilitators) or impede (barriers) a solution's ability to be carried out according to the program model. Facilitators and barriers to implementation may be unique to the implementation context, although similar facilitators and barriers can appear in multiple contexts. Identifying the anticipated facilitators and barriers before implementation can help organizations refine the implementation strategy specific to the context and increase the chances of successful implementation (**Click here for source**).

"Good" target – The middle performance target organizations set for each of their research questions. These targets are meant to be ambitious, meaning that the "great" target should represent performance above and beyond what previous evidence has shown for similar solutions. "Good" targets represent slightly lower but still ambitious expectations, and "OK" targets represent the lowest expectations that would be acceptable.

Implementation context – The environment or setting where the solution is carried out, including people or human-centered context (culture, buy-in, readiness for change, time, interest) and the technical or structural context (schedule, technology, policy conditions, sustainability, cost) (**Click here for source**).

Implementation supports – Activities and strategies that assist in carrying out the solution, such as developing teams, building capacity, or conducting improvement cycles (**Click here for source**).

Implementation success – Solutions are carried out as intended.

Independent third party – A person or team not affiliated with the organization or the solution who leads the evaluation (which may include study design, data collection, analysis, and reporting). These third parties should have evaluation expertise.

Intervention or solution adaptation – Occurs as solution users (including implementers) make changes to the solution. Changes may be made by choice to better suit solution users' needs, or they may be made by mistake or by force. Understanding the type of change, why the change was made, who benefits from the change, and if it happened to a core component is important for implementation learning. Some adaptations may make the solution more contextually relevant and therefore represent a positive change and opportunity to learn from stakeholders (**Click here for source**).

Iteratively refine – A process of continuously improving the solution—and updating the theory of change—based on feedback. This involves engaging priority community and getting feedback, implementing changes based on the feedback, and then soliciting more feedback until the priority communities consider the solution usable and useful. Organizations should document the rationale for all changes to the solution and theory of change (**Click here for source**).

Matched comparison design – A type of a quasi-experimental design **(QED)** that uses available data from just before the start of the solution to create two groups that are similar to each other on all observable characteristics.

Measurable implementation thresholds – Specific implementation guidelines that can be reasonably documented as the solution is carried out (implemented), such as the number of hours students should attend the program, the number of professional development sessions teachers should receive, or the number of units a curriculum should cover.

Measures – Quantitative or qualitative instruments used to document outcomes or collect feedback. Organizations have the option to select from the menu of measures, which includes measures that Mathematica and a panel of experts have reviewed for quality. Stakeholders should also be involved in identifying measures that are culturally responsive to their community.

Method, implementation, or theory failure – Possible causes for the failure of research and evaluation methods to result in evidence that supports the solution's effectiveness. Method failure occurs when research and evaluation methods or implementation are inadequate. Implementation failure occurs when the solution is not carried out as intended. Theory failure occurs when the solution is not directly connected to the desired outcome (**Click here for source**).

Narrowly define – A specific definition of the characteristics (such as race, grade band, socioeconomic status, and disability) and context (such as history, geography, and immigration status) of the priority community.

Oppression – The deliberate restriction of opportunities or rights placed on people or groups by a person or group that has more power, the result of which is the devaluation and exploitation of the oppressed people or groups. Oppression might also occur through omission as a result of societal practices, norms, and values (**Click here for source**).

Outcomes – Changes in knowledge, attitudes, or behavior in response to the solution, including both in the short term and long term. Solutions often have long-term outcomes that may take several years to achieve and that may be difficult to measure in a short-term study.

Outputs – The most direct results of certain activities and strategies that are completed in the program or solution. They do not address value or performance. For example, the number of students participating in a program is an output.

People or human-centered context – Knowledge, beliefs, conceptions, customs, institutions, and any other capabilities and habits of the priority community and stakeholders (**Click here for source**).

Preliminary indicator – Signals that show early on that the solution implemented (carried out) might achieve the desired short-term or long-term outcomes.

Priority community (or communities) – The students, teachers, families, or other stakeholders the solution is designed to reach.

Process targets – Learning goals that focus on how the information gathered from the research question will be used to refine a solution (**Click here for source**).

Quasi-experimental design (QED) – A type of evaluation design that uses available data, rather than randomly assigning people or groups to a condition, to create treatment and comparison groups to measure the impact of the solution (**Click here for source**).

Randomized controlled trial (RCT) – A type of evaluation design that randomly assigns people or groups to a condition to create equivalent treatment and comparison groups at the start of the solution. Observed differences in outcomes are attributable to the solution and not to other factors (**Click here for source**).

Resources – The means by which organizations are able to implement their solutions. These might include subject matter experts, additional staff and professional development, equipment or supplies, supplementary programs, or funding (**Click here for source**).

Root causes – The fundamental factors behind the presence and occurrence of the problem (**Click here for source**).

Short-term outcomes – Changes in knowledge, attitudes, or behavior that happen soon after the start of a solution's implementation and logically precede a long-term outcome. The time-frame for short-term varies by solution (**Click here for source**).

Long-term outcomes – Changes in knowledge, attitudes, or behavior that happen later or that logically follow a short-term outcome. The time frame for long term varies by solution (**Click here for source**).

Solutions – Programs, products, or practices designed to improve outcomes. Also called interventions.

Solution users – Typically teachers serving as implementers and students as participants, but this may vary depending on the solution. We recommend specifying users of a solution by thinking about the users' characteristics or demographics (for example, race, socioeconomic status, urbanicity, grade band).

Stakeholders – Members of the priority community who are directly or indirectly involved in the solution. Stakeholders may include students, teachers, school leaders, parents, and tutors (**Click here for source**).

Structural context – The social and economic structures within a community that affect the distribution of money, power, and resources (**Click here for source**).

Structural racism –The political, economic, and social systems that reinforce racial and ethnic inequities by limiting people or groups from accessing equal opportunities, resources, and power due to their race or ethnicity (**Click here for source**).

Systematically document – To record information in a precise and methodical way. Systematically documenting the counterfactual condition means documenting what other programs students are accessing, what curriculum they receive in relevant subject areas, what supports are available to them, and any other details that could reasonably influence the outcome of interest for the study.

Usability – how easy or hard it is to use the solution (such as whether an interface is easy to navigate), as well as ease of carrying out the solution.

Usefulness – the solution user's perceptions of the solution's ability to meet a participant's need, provide an advantage over alternative solutions, or meet the objectives stated in the theory of change.

Utilization – The rate at which users take up the solution or the extent to which users use the solution.

Validate – To prove that a solution is successful at producing the intended outcomes for the priority community through a rigorous evaluation design.

Variable – Components of the program model that can be changed throughout the implementation of the solution, without compromising the solution's core components.

Well-defined theory of change – A model that clearly illustrates how a solution is expected to improve outcomes. The theory of change should include the core components of the solution (activities and strategies), with each connected to specific outputs and short- and long-term outcomes. There should be a logical connection between inputs, outputs and outcomes, including evidence that supports these connections, the theory of change should consider key contextual information and reflect community assets.