

Rapid Feedback Monitoring Evaluation Research & Learning (Rapid Feedback MERL)



Rapid Feedback MERL (RF MERL) is a USAID endeavor led by the U.S. Global Development Lab and in partnership with the Bureau for Policy, Planning and Learning and the Bureau for Global Health. Rapid Feedback MERL (RF MERL) brings learning to the early stages of an activity in a rigorous, empowering, and flexible way that works to inform implementation. We use a variety of monitoring, evaluation, and learning methodologies in collaboration with USAID and implementing partners to optimize design and implementation decisions, and continually adapt to get to better activities faster.

The Challenge:

Few activities build experimentation and feedback into implementation in ways that work to inform decision-making and lead to learning and adaptation within the activity cycle. Even those with a strong evidence-based design often implement activities using assumptions about their efficacy that could benefit from rigorous testing. Furthermore, implementers may not use monitoring systems to gather evidence about what is working well in the activity and what is not in order to help improve ongoing implementation. And, while independent impact evaluations may provide important evidence, that evidence often comes too late to improve the activities assessed before the end of the activity cycle.

What is Innovative about RF MERL?

The RF MERL Consortium applies proven evaluation methods to test the effectiveness of specific components of an activity against alternative intervention options. The approach involves rigorously testing the success of two or more alternative intervention options at achieving short-term outcomes. This is done in rapid cycles to allow for timely feedback and course adjustment earlier than is typically done using standard methods. RF MERL evaluations may include use of advanced statistical techniques to improve statistical power and reduce sample size requirements, as well as the use of tools to achieve rapid data collection. These tools might include cell phones and tablets for survey implementation, SMS and interactive voice response technology for remote data collection, and geospatial imagery from satellites.

AT A GLANCE:

Tools: Tools will match the design questions to support timely decision-making, and may include formative research, experimental, quasi-experimental, and non-experimental design, mixed-method approaches, and small-sample analytic methods.

Funding mechanism: Cooperative Agreement (buy-in option for USAID Operating Units)

Partners: Results for Development Institute (prime), Abt Associates Inc., Mathematica Policy Research, Notre Dame Initiative for Global Development

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The RF MERL Approach:

RF MERL first works to understand the problem that the activity aims to address. Through formative research, we identify two or more alternative intervention options to test, and the short-term outcomes that will be used to determine success. The implementers and RF MERL Consortium then conduct “Feedback Experiments.” Feedback Experiments encompass the wide range of testing approaches that are at the heart of RF MERL, with a focus on testing multiple intervention options to identify the optimal choice. They can range from small-scale testing of program components (e.g., using message A vs. message B to increase participation) to testing alternative interventions (e.g., encouraging reading to children via pre-natal education vs. a community activist approach). A variety of methods can be used, and are designed to

be as rigorous as possible to ensure that results can be used to inform decision-making about activity design and implementation.

RF MERL is tailored to our partners’ learning needs, the local context, and the realistic trade-offs between rigor, time, and budget. This mechanism is particularly useful at the early stages of a project when there is uncertainty about the specific intervention options. RF MERL is appropriate when used alongside an activity that is being tailored or adapted to a new setting, moving from a pilot to scale-up phase, or considering alternative strategies to promote greater engagement or participation of potential beneficiaries. RF MERL can also be used when project teams are interested in “unpacking” programs to identify the most effective elements or understanding why a specific activity has not yet achieved its intended results.

Rapid Feedback MERL Engagement Process

PHASE I: SCREENING



Which USAID activities are good fits for Rapid Feedback MERL?

STEPS:

- A. Identify Operating Units (OUs) interested in RF MERL
- B. Understand OU needs and assess RF MERL opportunities
- C. Develop initial engagement note

PHASE II: DEVELOPMENT



What are some high-quality, testable ideas that can inform the activity’s design and implementation?

STEPS:

- D. Understand the problem the activity aims to address, and identify 2 or more alternative intervention options to test via “Feedback Experiment(s)”*
- E. Identify key outcomes to track (RF Outcomes)
- F. Develop implementation and evaluation plan for “Feedback Experiment(s)”

PHASE III: IMPLEMENTATION



What are the results of the “Feedback Experiment(s)” and how do they inform program design and implementation?

STEPS:

- G. Implement “Feedback Experiment(s)”
- H. Analyze data and generate results
- I. Iterate and adapt (adjust implementation design, test additional options, etc.)

*Feedback Experiments encompass the wide range of testing approaches that are at the heart of RF MERL—with a focus on testing multiple intervention options to identify the optimal choice. They can range from small-scale testing of program components (e.g., using message A vs. message B to increase participation) to testing alternative interventions (e.g., encouraging reading to children via pre-natal education vs. a community activist approach). A variety of methods can be used, and will be as rigorous as possible to ensure that results can be used to inform decision-making about activity design and implementation.

Rapid Feedback MERL

QUICK QUIZ: Is RF MERL right for you?

1 Are you and your team motivated to achieve the ultimate outcomes of your activity, and interested in exploring diverse and/or innovative ways to reach those outcomes? Are you willing to modify components of your activity and try out different intervention options to do so? (This will include testing and learning from a variety of design and evaluation approaches in partnership with the RF MERL Consortium.)

2 Do you have the flexibility to make changes to activity implementation based on the results of RF MERL feedback experiments, in terms of both buy-in from stakeholders and feasibility given the activity timelines?

3 Is the implementing partner interested in working collaboratively with our team to implement the RF MERL approach? While this will require investment of staff time and resources, a successful partnership will lead to improved activity design and implementation and, therefore, to better outcomes over time.

4 Is the Mission willing to dedicate financial resources to support the implementation of RF MERL? This would entail both support of the Rapid Feedback MERL Consortium to lead the work, as well as additional resources that may be needed by the implementing partner to allow for testing multiple approaches, building capacity, etc.

5 Can the implementing partner incorporate indicators into its monitoring to track RF MERL Outcomes?

If you answered YES

to most or all of these questions, the RF MERL approach might be right for you!

Reach out to MERLIN at merlin@usaid.gov to learn more.

Illustrative Example: RF MERL in Action

The following example outlines a potential engagement between the RF MERL Consortium, a USAID Operating Unit (OU), and implementing partners. The USAID-funded activity — POPCARE (a fictionalized example) — is based in Uganda and aims to reduce chronic malnutrition and food insecurity and build resilience among vulnerable populations in the most food-insecure and disaster-prone districts. In this example, the OU and implementing partners are interested in testing different approaches to community training and mobilization.



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PHASE I: SCREENING

Understand OU needs and assess RF MERL opportunities



- n The RF MERL Consortium meets with the Mission and implementing partners in Uganda to learn about their current activities with community members and their Theory of Change (TOC).
- n The TOC states that by providing training to community members, the organization will empower and enable them to take actions to increase their resilience to climate and food security shocks.

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- n The RF MERL Consortium works with the implementing partners to better understand what assumptions in the TOC are in need of further validation and testing to strengthen activity design. It becomes clear that the path between trainings for community members and improved indicators at the household level on nutrition and food security are not clearly articulated. Assumptions include:
 - Community members require additional training to be more effective.
 - The trainings that are conducted are effective.
 - The issues identified can be solved through actions taken by community members.

OUTPUT: Initial engagement note



PHASE II: DEVELOPMENT

Understand the problem the activity aims to address

- n The RF MERL Consortium conducts formative research in order to validate the assumptions within the activity's TOC and identify intervention options for testing. This includes focus group discussions (FGDs) with community group members who

will be trained in this activity to understand the potential barriers preventing them from assisting their communities. The Consortium will also observe current trainings being conducted by the organization and conduct a review of the literature.

- n Based on this formative research, the team identifies a main challenge around mobilization of resources — although community group leaders understand the problems contributing to food insecurity in their communities and have ideas about potential solutions, resources to implement potential solutions are a constraint. Though the activity does not plan to provide additional resources, it can train community leaders on how to mobilize resources from their regional and national government authorities.
- n The RF MERL Consortium, with the implementing partners, decide to focus on ensuring that this training is effective and plans to conduct a Feedback Experiment to test three different training packages to determine which to scale up. The RF MERL Consortium reviews both the current training modules and the current capacity of the implementing partners, and conducts a literature review of capacity building efforts for decentralized government structures.

OUTPUT: Finalized resource mobilization training modules

Identify key indicators and outcomes to track

- n To compare the effectiveness of the three different training modules, the RF Consortium recommends assessing the following short-term outcomes: or RF outcomes
 - Whether participants' knowledge of local funding sources increased
 - Whether their proposal development skills improved

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For each Feedback Experiment, a set of indicators will be selected that will enable RF MERL to assess which intervention option is most effective. The results based on these indicators will be used as inputs to make decisions about improving design and implementation. These are called "RF Outcomes" and may include process/monitoring indicators (i.e., to measure implementation effectiveness) as well as short-term outcome indicators (e.g., attendance/participation, adherence, test scores). The term RF Outcomes can include outputs and earlier stage metrics if used in this context. Critically, there must be at least one RF Outcome that is linked through existing evidence to the long-term outcomes the activity aims to achieve, even though those long-term outcomes will not likely be measured during the RF MERL process due to the rapid timeline.

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- n These outcomes can be observed soon after the training takes place through knowledge assessment and questionnaire to community leaders who receive the trainings.

OUTPUT: List of RF indicators and outcomes

Develop implementation and evaluation plan for “Feedback Experiments”

- n Random assignment of the three different training modules is feasible among the 284 local community groups receiving the training in the first year of the activity. A list of villages is assigned to different treatment and control groups, and curriculum and materials for the three training modules are developed in English and the local language.

Output: Implementation and evaluation plan



PHASE III: IMPLEMENTATION

Implement “Feedback Experiment”

- n In order to determine the effectiveness of the training in improving community group leaders’ knowledge of local funding sources and skills in proposal development (and thus their ability to mobilize resources in the long-term), the team administers a quiz to each leader that tests their abilities in both topics before and after the trainings.
- n Data is collected using tablets and software. The RF MERL Consortium programs surveys into the tablet format, trains local enumerators the implementing partners have recruited, and performs daily data quality control.
- n The evaluation follows a simple difference-in-difference design between the various treatment and comparison groups. The treatment group that demonstrates the largest significant improvement in key outcome variables is identified as having the most effective training.
- n The RF MERL team also holds focus group discussions with trainees immediately following the training to find out what worked well for them

and what did not to better understand why the trainings were successful or not.

OUTPUT: Clean dataset and table on key variables

Analyze data and generate results

- n Because data was collected electronically, results are available within 30 days of completion of data collection. The RF MERL Consortium and implementing partner jointly reflect on the results of this experiment (i.e. how well did the training increase knowledge of local funding sources and skills in proposal development?) and determine what changes to implementation should occur to improve/strengthen program design.

OUTPUT: Monitoring data



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Iterate and adapt

- n Because implementing partners have purchased tablets for data collection and gained skills in Feedback Experiment design and data collection, they now have the capacity to repeat the experiment the following years in other areas of implementation.

OUTPUT: Brief report with clear analysis and recommendations, further rapid feedback cycles integrated into activity when necessary

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Frequently Asked Questions (FAQs)

1. What is unique and innovative about RF MERL?

RF MERL brings learning to the early stages of implementation in a rigorous, empowering, and flexible way. RF MERL leverages proven MERL methods to drive better activity design, implementation, and effectiveness. The RF MERL approach:

- n Focuses on evidence and feedback to guide decision-making and adaptation. Activities need a process for systematic testing to enable ongoing refinement and improvement. Even when activities are not yet ready for an impact evaluation, RF MERL methods can be used to drive learning and adaptation through structured experimentation and effective and timely monitoring.
- n Employs MERL methods in a smart way. RF MERL seeks to identify and rapidly test assumptions within the theory of change (TOC) as early as possible, increasing the likelihood of a well-conceived activity from the beginning. RF MERL also works with partners to test different intervention options to identify which is most effective for implementation.
- n Takes a participatory approach to evidence-based learning. The RF MERL Consortium works closely with OUs and partners to:
 - understand their challenges and determine what kinds of experimentation and evidence will be most useful to inform decision-making,
 - collaborate throughout implementation of these feedback experiments,
 - analyze results for partners, and
 - help partners adapt their activities as a result.

2. What is “rapid” about RF MERL?

The “rapid” in RF MERL refers to the speed at which evidence and feedback is available to partners,

accelerating their ability to adapt their activities throughout implementation and increase their impact. Rather than having to wait a full three-to-five years for the results of a typical impact evaluation, RF MERL works to provide results within months or a year (with results incorporated into project adaptations in a cyclical fashion) depending on the outcomes being measured. Whether rapidly testing an individual component of an activity on a small scale, such as a key behavior change message, or simultaneously piloting two different teacher training curricula to test uptake, RF MERL seeks to provide timely evidence to help adapt activities. This does not guarantee that applying RF MERL will result in a shorter implementation timeframe for the overall program or a shorter evaluation timeframe (although in some cases it may).

3. What evaluation methods will be used in RF MERL?

RF MERL strives to strike a balance between rigorous and practical MERL methods. There is no one set of methods that will fit all engagements. Rather, we work closely with partners to ensure that our methods are the most appropriate to answer your programmatic questions. Within each engagement we will design and carry out one or more “Feedback Experiments” — this term encompasses the wide range of testing approaches that are at the heart of RF MERL, with a focus on testing multiple intervention options to identify the optimal choice. A variety of methods can be used, and will be as rigorous as possible to ensure that results can be used to inform decision-making about activity design and implementation. Ideally, intervention options will be tested simultaneously, although this may not always be possible due to capacity constraints or activity timelines.

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Frequently Asked Questions (FAQs)

4. Can RF MERL replace an impact evaluation of an entire activity?

No — RF MERL is not designed to replace an impact evaluation of an entire activity. Impact evaluations are designed to answer the question “did the intervention work?” RF MERL answers the questions “which approaches appear to be leading to the intended short-term outcomes?,” “why?,” and “how do we use that information immediately to make things work better?.” That said, RF MERL can play an important



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role in getting interventions and activities primed for an impact evaluation. For some engagements, the RF MERL process will result in intervention options that are ready to be implemented at a scale beyond the piloting phase. As such, it may make sense to conduct an impact evaluation of the optimal model that was developed as a result of the iterative RF MERL process.

5. Will RF MERL evaluate my whole project or activity?

RF MERL is not designed to evaluate project or activity models in their entirety. Rather, our approach focuses on rapid experimentation of specific compo-

nents of an activity. This can range from small-scale testing of activity components (e.g., gauging community reactions to alternative behavior change messages to increase use of an important health product) to testing alternative delivery modalities (e.g., training health workers to conduct outreach on that message or using radio or other mass media to spread it.) Programs should select multiple intervention options for RF MERL based on the activities that are most critical to achieving desired outcomes in the program’s TOC. The focus on intervention options as opposed to the overall program model helps to generate faster feedback on whether a given intervention option (or options) is working or not and why.

6. What are the time/resource expectations for my team to participate in RF MERL?

Buy-in and interest from key staff of USAID OUs and their implementing partners are critical to the success of RF MERL. Each engagement is designed to ensure that the work leverages the implementing partner’s expertise, is relevant to their needs, and the results drive learning and adaptation. However, the RF MERL Consortium will take the lead in the development and implementation of the RF MERL activities, including providing in-country support for the formative research phase and for the Feedback Experiment phase (see phase diagram). Furthermore, each engagement is customized to each program based on the resources available, the questions of focus, and the research plan. Initial conversations between the RF MERL Consortium and implementing partner will focus on the ability and interest of staff to participate in RF MERL.

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Frequently Asked Questions (FAQs)

7. What stage of program development is well suited for RF MERL?

RF MERL is well suited for programs at many different stages of design and implementation.

It is appropriate for:

- n Early-stage activities, when rapidly testing components of an activity will help inform its design. For example, the activity could be testing an innovative approach, which is informed by literature and experience, but where there is little implementation experience to draw on.
- n Middle-stage activities working to improve the design and implementation of a specific activity. This could include activities or interventions being tailored or adapted to a new setting, or when considering alternative strategies for program design.
- n Late-stage activities moving from a pilot to a scale-up phase, when there may be outstanding questions about, for example, how the larger scale will affect delivery and concerns about ensuring consistent quality.

8. What else do we need to know to determine if we're a good fit?

RF MERL engagements may be a good fit for:

- n Partners that have activities with the flexibility to make changes based on feedback results
- n Partners who are excited about learning, bought in to this approach, and willing to work closely with RF MERL counterparts
- n Operating Units that have resources available to support RF MERL

RF MERL may not be a good fit for:

- n Activities focused on system-level change where tracking results may require a long time horizon
- n Activities where no additional intervention options are possible, or where research has already indicated the most effective intervention option
- n Activities seeking a summative evaluation only
- n Activities seeking an evaluation of the entire model, rather than discrete components within it

9. Who will I work with from the RF MERL team?

Each engagement will feature a customized team from the RF MERL Consortium based on country, sector, M&E approaches, and other relevant experience. Wherever possible, the RF MERL Consortium will include a team member who is based locally to coordinate the work and oversee any data collection activities the Consortium manages.

10. How do I know if RF MERL works?

We are also conducting MEL on our approach. Our hope is that by drawing on the best practices of proven monitoring and evaluation methods, we can help improve activity effectiveness throughout implementation.

FOR MORE INFO

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