EF+Math Program

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Inclusive Evaluation Activities for Each Stage of a Study

Description
This resource is provided as an example of the Inclusive Evaluation Key Action of "Develop shared evaluation goals with school community members and build collective understanding of how the study plan achieves those goals."

EF+Math commissioned independent, inclusive evaluation studies of three math learning approaches. The EF+Math program team needed to ensure that all involved partners (research and development team members, district partners and educators participating in the study, and the evaluation team members) were contributing to a shared set of study goals, and that all partners were authentically and meaningfully engaged across the evaluation study process. As a result, the EF+Math program team identified a set of activities within each "stage" of an evaluation study that clarify how partners would contribute to the study and how they should interact with each other at key decision points. The set of activities was developed through community conversations and iteration to ensure that actions identified were useful and feasible, and tied to decision points and study processes that had the most potential for impact.

The EF+Math program team used this set of identified activities to guide our collective progress throughout the first year of evaluation studies. We also held a community convening between our first and second year of studies with representatives from each group of our partners present, and used this time to reflect on how the first year had gone, any things that had been learned about how to collaborate effectively, and any changes we wanted to make for the second year of inclusive evaluation studies. After this conversation, we revised the activities to incorporate partner feedback and implemented these activities across our studies.

You may access the finalized set of activities below in this document. Note that the activities are organized into five different stages across an evaluation study:
- Building Relationships and Positive District Experiences
- Establishing and Maintaining Effective Communication Across a Study
- Creating and Enacting Study Designs, Research Questions, Implementation and Data Collection
- Analyzing and Interpreting Data
- Disseminating Findings to Partners and External Audiences

In addition, if you are currently planning or conducting an evaluation and would like to hold a reflective discussion with your team to build collective understanding across study goals and processes, below are the prompts we used in our own community conversations.

This Resource is part of EF+Math's Inclusive R&D Toolkit. It was last updated on 01.2026. To access the complete toolkit and other resources, visit www.efmathprogram.org.

Identifying Inclusive Evaluation Activities Prompts
1. What are the stages of our evaluation study? What would "inclusion" look like and feel like in each stage of the study, for each respective partner group?

2. Where can we create space for partners to engage authentically? Where are there opportunities for input to change or influence decisions?
3. How can we create feedback loops within our processes and build transparency in decision making, so that all partners are informed?
4. Where can we build connections to other ongoing activities or leverage existing resources, to minimize burden and increase mutual benefit for all partners?
5. How do these proposed activities live into our values and goals for inclusive evaluation?

Reflecting on Evaluation Processes Prompts
1. In each stage of the study, what inclusive evaluation activities were planned, and which were able to be implemented?
2. What barriers, if any, did you personally experience or observe in executing the planned activities? What shifts were made (either to adjust a planned activity or to deprioritize an activity), and why?
3. For the inclusive evaluation activities that were able to be implemented in the study, which were the most impactful for each stage (pick 1-3)? For these activities, please describe their impact - what made them impactful for you, and why?
4. What challenges do you anticipate for the next study in each stage? What are possible mitigation strategies for those challenges?
5. What are the key activities in each stage that your team is responsible for? What supports will you need to execute these activities as a team?
6. What touchpoints may we need during the study to check in on progress and adapt as needed?

Inclusive Evaluation Activities for Building Relationships and Positive District Experiences

Necessary Activities
All partners begin meetings with check ins or implement cross-team coffee chats to develop deeper relationships.
R&D team and independent evaluator team coordinate their attendance at meetings and responses to district communications for streamlined, clear, and positive interactions with district partners.
R&D team and independent evaluator team prioritize responsiveness to districts in a reasonable and timely manner, using communication practices that can be scaled across multiple partners.
R&D team and independent evaluator team communicate transparently with (potential) district partners regarding the stage of inclusive R&D and the possible roles for educator insights. Educator partners understand their role and their ability to impact either the prototype or the study.
R&D team provides upfront and transparent information regarding options for use of the prototype beyond study, including costs and support. District interests and/or needs in the long term regarding use of prototype (and continued partnerships) are clearly communicated to all partners.
Independent evaluator plans a smooth offboarding process from the study that includes R&D team and EF+Math. R&D team coordinates district offboarding with any options for continued use or partnership outside of the study.
District partners are asked about self perception of their role as valued partners in the study, measured through educator focus groups, educator advisors participating in the study offboarding, and district offboarding questions.
Recruitment-Specific Activities
All contract and/or agreement language is reviewed prior to processing to ensure: -- Asset-based and collaborative language is used to describe activities -- Expectations for time are clearly laid out -- Compensation is fair for the time commitment expected
District partners have the opportunity to review and negotiate contracts prior to signing.
R&D team is brought into partnership early to form long-term relationships with districts.

Inclusive Evaluation Activities for Establishing and Maintaining Effective Communication Across a Study

Necessary Activities
External educator advisors review materials describing the study for asset-based framing, collaborative language prior to being shared with future district partners
Independent evaluator, R&D teams, and district administrators identify key personnel to streamline communication. Roles are clearly communicated to all partners. Resources (such as a flow chart) are created to help all partners understand who to contact, for what, and how.
R&D teams and their co-design partners establish feedback loops on a reasonable timeline to gather and share information (bidirectional) about what is working and not working in implementation of the prototype.
Independent evaluator plans a smooth offboarding process from the study that includes the R&D team and EF+Math. R&D team coordinates district offboarding with any options for continued use or partnership outside of the study.
Independent evaluator passes off the relationship with district partners to R&D teams and EF+Math/AERDF as appropriate upon conclusion of study activities. Relationship point of contact with district partners reflects their interest in continued partnership or use of the prototypes.
Independent evaluator and R&D teams create study timeline documents based on available resources from district partners. Either educators participating in the study or additional external educator advisors conduct a review of the study timeline documents to ensure alignment to district and school activities, reasonable nature of check ins and communication plans.
Independent evaluator asks district liaisons how they typically communicate with families/guardians around ongoing initiatives. EF+Math, independent evaluator, and R&D teams use this insight to create materials that communicate the study focus and students' activities to families in the community.
Possible Additional Activities
R&D teams respond directly to implementing teachers when they submit logs or questions. R&D teams provide teachers with support, insights, and appreciation for feedback
District liaisons and educators identify communication structures (format, timing) which make the most sense for them. R&D teams and independent evaluator team members incorporate these insights.

Inclusive Evaluation Activities for Creating and Enacting Study Designs, Research Questions, Implementation, and Data Collection

Necessary Activities
Independent evaluator and R&D teams ask district administrators what types of data or findings they are interested in learning, including connections to other district initiatives. independent evaluator incorporates information of interest to educators and districts into the study research questions.

Independent evaluator and R&D teams reflect with previous study partners or educator advisors, as available, to see what findings were (or would have been) most useful to them. Independent evaluator incorporates information of interest to educators and districts into the initial study research questions. Note: this should be used as preliminary step to support or complement current study partner insights, in case current partners cannot provide this information until later in the partnership and study design process.
Independent evaluator asks educator partners, through a district advisory board structure, about thetypes of data or findings they are interested in learning. Independent evaluator incorporates information and research questions into study plan, as able and needed.
External educator advisors review research questions and the proposed data to answer each of the RQs, and provide feedback regarding partner effort and data utility for educators.
District administrators share the context of classrooms and math instruction with independent evaluator and R&D teams; together, the partners determine how this context impacts the conditions for implementation of the prototype.
independent evaluator and R&D teams reflect with previous study partners or educator advisors, as available, about features of their school context which made it challenging for them to implement the prototype. Suggestions from the educator advisorsare incorporated into study plans and as necessary, identified as opportunities for continued R&D by the product teams.
Independent evaluator discusses and co-creates options for tiered levels of engagement for participating teachers.
Independent evaluator asks district partners (primarily through liaisons or primary points of contact) how the district defines student success and the data sources they use for evidence of student success. Independent evaluator and district partners discuss how data collected within this study can align with needed information for understanding student success by the district.
Necessary Activities
External educator advisors review and revise research questions for cultural responsiveness, asset-based framing of students, and needed additional context.
District partners (primarily through the educators participating in the district advisory board) review and provide feedback on study design feasibility and the prioritization of research questions for their interests.

** communicate power analysis results to all partners - and how it's connected to what has previously been found
** pre-registration (can be internal or external) - with all partners involved - and connections to dissemination processes

Inclusive Evaluation Activities for Analyzing and Interpreting Data

Necessary Activities
Educator advisors participating in the study share with independent evaluator and R&D teams the ongoing district initiatives and data that is most interesting to them.
External educator advisors provide feedback for independent evaluator as to how different combinations of data sources can answer the various research questions. Data is combined/broken into sub-domains only where appropriate, makes sense given its context, OR to serve district/teacher interests.

independent evaluator & educator advisors participating in the study discuss which student groups the district and schools are focused on supporting or learning more about. Independent evaluator leverages these insights in planned data requests from the district and in their analyses.
Educator advisors and EF+Math provide recommendations to independent evaluator regarding student groups that are of interest to the EF+Math community from the districts. Independent evaluator takes these recommendations into their data requests from districts, and into their analyses moving forward.
R&D teams and their advisors provide recommendations to independent evaluator regarding student groups that are of interest to their team to answer research questions, explore key mechanisms around impact and scale, and inform future R&D efforts.
Independent evaluator conducts co-interpretation sessions with district partners to inform analysis and sense-making of the data. Classroom contexts and rationale are considered prior or simultaneously to interpretations in relation to the field.
Independent evaluator conducts co-interpretation sessions with R&D teams and their advisors to inform analysis and sense-making of the data. Classroom contexts and rationale are considered prior or simultaneously to interpretations in relation to the field.
External educator advisors provide guidance to independent evaluator and R&D teams on identifying impactful findings for educators, researchers, and developers that can be externally shared.
Possible Additional Activities
External educator advisors work with EF+Math to create recommendations (that are then shared with independent evaluator) around data to prioritize for cleaning and analysis. Prioritization takes into account district preferences, as possible.
Independent evaluator conducts co-interpretation sessions with EF+Math's external educator advisors to inform analysis and sense-making of the data. Classroom contexts and rationale are considered prior or simultaneously to interpretations in relation to the field.

Inclusive Evaluation Activities for Disseminating Findings to Partners and External Audiences

Necessary Activities
District administrators/liaisons provide insight to how other initiatives/projects/research are shared with the community. Independent evaluator incorporates this information into dissemination plans.
Previous study partners (via educator participants, as accessible)are asked which findings have the most impact on their practice - both to inform dissemination from previous studies and to inform plans for current study disseminations.
Independent evaluator shares a plan with district liaisons and educator advisors that outlines what data will be collected by when. Liaisons identify which data or conclusions would be most useful at the district and school levels, and what formats may be most useful for them to receive findings through.
External educator advisors guidance to independent evaluator and R&D teams in generating possible formats that the findings can be shared for each audience.

Independent evaluator and R&D teams collaborate on creating resources with recommendations for educators; R&D teams and some of EF+Math's external educator advisors are provided the opportunity to review the recommendations prior to being shared externally.
EF+Math, R&D teams, and the independent evaluator create dissemination plans which identify when data will be collected, by when. Plans also outline how different data will be reported (for which audiences and in which formats). Each output is assigned a driver (from either independent evaluator or R&D team) and a target audience. Audiences should be balanced across educator, researcher, developer - in terms of writing style, venue for dissemination, and implications/usefulness of data.
Independent evaluator and R&D teams collaborate on creating resources with recommendations for educators; R&D teams and some of EF+Math's external educator advisors are provided the opportunity to review the recommendations prior to being shared externally.
Additional Possible Activities
Independent evaluator asks the district (via members of the educator advisors participating in the study,) how they typically communicate with families/guardians and uses this information to plan out what "updates" on the study for families could entail in terms of content and format. The district (via members of the) determines what information they'd like to share out with the community and provides guidance on how to partner on next steps.
Independent evaluator asks implementing teachers how they typically communicate with families/guardians and what information they'd like to be able to share about the implementation and student engagement. independent evaluator and implementing teachers create a plan for home communications based on teacher insights, looping in R&D team members where appropriate.