TOOL 2

Guide for Measuring in Partnership

Your working copy: fill it in with your partners and save it with the date in its file name.

This exercise will help partners understand what is realistic together and agree on a meaningful shared measurement approach..

If you used Tool 1, bring forward the program purpose. If not, begin here by aligning on shared questions and what decisions data should support. More than one outcome may be relevant. The partnership does not have to measure everything; focus on the outcome question or questions that are useful enough and feasible enough to pursue together

1. Understand the context

For this partnership/program, work with your partners to plot approximately where the program is today. The purpose is to align on the realities of the program and begin conversations about where the program is headed.

DIMENSION		PLOT APPROXIMATELY WHERE YOU ARE	
Product supply	Variable / excess		Planned / predictable
Program Relationships	Newer /		Established /
Partners Involved	many partners		Fewer sustained
Visibility after products are received	Limited / periodic / sampled		Regular / repeated
Existing data	Sparse / fragmented		Routine / aligned
Reporting frequency	periodic		longitudinal
Staff resources for measurement	Few to no dedicated staff		Dedicated staff and technical support
Budget considerations	No allocated M&E budget		Full M&E budget
Ability to influence measurement together	Limited		Strong
Strategic tie	Excess product / operational		Purposefully tied to a broader impact strategy
			
			
			

2. Compare perspectives

Understand partner needs and perspectives. Relabel the partner columns as needed. Differences are useful information for designing a workable approach.

QUESTION	Partner 1	Partner 2	Partner 3	WHAT DO WE NEED TO ALIGN?
Are outputs enough for this program?				
How would this evidence be useful for us?				
Why does this program tie into a larger impact strategy?				
What decision will the evidence inform, and how will it be useful?				
What evidence already exists?				
What type of data can we realistically access or collect?				
Which partners have capacity for which measurement tasks?				
What resources may be available?				
What support may be required?				
What burden would new collection create, if any?				

> Measurement capacity: Have an open discussion about which partners are best positioned for which tasks—standardizing, collecting or accessing data, managing and calculating metrics, gathering qualitative information and stories, interpreting findings, and using or communicating results? Where would support make the work more realistic and who is willing to commit in what timeframe?

Given these conditions, what kind of measurement is realistic for this partnership?

Capacity and budget are part of measurement design

If a measurement approach requires new downstream reporting, partners should discuss the resources needed before assigning responsibility. Capacity includes staff time, systems, data access, technical skills, travel, translation, connectivity, supervision, analysis, and the ability to act on the findings. Budget should be explicit when additional work is being requested.

QUESTION	WHY IT MATTERS
Is this information already collected?	Reuse existing evidence before creating a new reporting requirement.
What additional work would be required?	Make staff time and operational burden visible.
Who has the systems and skills to do the work?	Do not assume the partner closest to the data has the capacity to compile or analyze it.
What will it cost?	Measurement may require direct budget, not only goodwill.
Who will fund or support the added work?	Shared outcomes should not shift unfunded work downstream.
Will the evidence be useful to the local partner?	Data should support local planning, negotiation, learning, or advocacy as well as upstream reporting.
Can a lighter approach answer the question?	Sampling, periodic observation, or fewer fields may be more proportionate.

3. Agree on the approach

WE AGREE ON...	DECISION
Question we are trying to answer	
AMI impact area / priority indicator	
Existing evidence we will use	
Additional evidence genuinely needed	
Who provides what	
Who compiles / calculates	
Who adds qualitative context	
Who interprets the findings	
Reporting period / frequency	
Capacity or technical support needed	
Budget required and who covers it	
How local partners will use the findings	
How findings will be returned / shared	
When we will revisit the approach	

These next steps can be developed incrementally. Start with what the program and partnership can support now, identify where you'd like to ultimately end up and strengthen it as the evidence, relationships, and capacity develop.

- Priority Metric Cards
- Planning and Making the Most of Your Impact Story
- Collecting Stories and Qualitative Evidence