Monitoring, Learning & Data

Monitoring inclusion helps organizations understand whether systems and programs create equitable experiences for different groups. It focuses on ethical, safe, and meaningful data practices that enable better decisions without causing harm. This section encourages learning-driven approaches to track progress and improve inclusion over time.

Areas that are covered in this section

- Ethical and safe data collection
- Meaningful disaggregation (gender, disability, location, etc.)
- Participant feedback loops
- Learning integration and adaptation
- Risk mitigation and consent

Practical Considerations

Group	Key Considerations
Women & Gender	Collect gender data safely and respectfully.
LGBTQIA+	Ensure confidentiality and voluntary disclosure.
Disability	Track accommodation needs and responses.
Neuro divergence	Offer multiple data formats (visual, verbal, written).

Group		Key Considerations
	Ethnic minorities	Provide translated or culturally relevant tools.
	Rural or Remote	Offer offline or phone-based feedback options.

Ethical and Safe Data Collection

According to the EU Data Protection Regulation (GDPR), there are two broad categories of compliance organizations need to understand: data protection and data privacy.

- Data protection means keeping data safe from unauthorized access.
- Data privacy means empowering your users to make their own decisions about who can process their data and for what purpose. This involves explaining why data is collected, how it will be used and the people's rights over their data in a simple, easy to understand manner and obtaining consent before collecting data.

GDPR lays out the data privacy rights and principles that all living humans are guaranteed under EU law. Organizations are obligated to facilitate these rights. To facilitate this, they must transparently and openly provide people with the information they need to understand how their data is collected and used. You can find a simplified version of the GDPR principles and practical purposes in the resources section.

In addition to GDPR, the organizations engaging in data collection should be mindful of the following:

- **Ensure representation of diverse perspectives:**
  - It is important to ask whose voice is heard and whose perspective is not sought. If required, undertake targeted outreach. Translate data collection instruments into local languages wherever needed.
- **Allowing diverse forms of data collection:**
  - Data can be collected in an anonymous or identified manner. Design data collection tools with accessibility in mind. Allow for multiple forms of engagement including in-person, online, text based or voice based (voice notes or Interactive Voice Response (IVR) based data collection).
- **Cultural sensitivity:**
  - The MEL team should be educated about the cultural context of the communities they work with and must be trained to engage in a sensitive and respectful way.
- **Sharing of learnings:**
  - The learnings must be shared back with participants wherever possible
- **Freedom to express identity:**
  - Provide multiple-select checkboxes or open-ended questions so that participants are able to express the full complexity of their identities. Also provide the choice of not answering.

Adapted from GDPR.eu (n.d.), Guide to Data Privacy and Protection under GDPR; Kaplowitz, R. & Laroche, J. (2020), More than numbers: A guide toward diversity, equity and inclusion (DEI) in data collection, Charles and Lynn Schusterman Family Philanthropies; Rella Kaplowitz (2020), 5 Best Practices for Equitable and Inclusive Data Collection.

Meaningful Data Disaggregation

The term "disaggregated data" refers to data that can be used to generate statistics and indicators for population groups defined by (or disaggregated by or broken down further into) one or more dimensions or characteristics (commonly sex, geographic area, and/or age). The results are referred to as disaggregated statistics or indicators. The entire process is referred to as data disaggregation.

Disaggregation involves breaking down data into smaller information units. When data are sufficiently disaggregated, multidimensionality and intersectionality of inequalities are better brought to the surface and analyzed. It is also used to understand who is being included or excluded. It ensures that programs can identify gaps and respond to the needs of different groups, rather than treating all participants as the same.

Adapted from global practice on disaggregated data and inclusive programming, including insights from the Global Facility for Disaster Reduction and Recovery (GFDRR), this section provides how data can be used beyond reporting but as a tool for continuous learning, adaptation, and decision-making towards program design and implementation progress.

However, collecting disaggregated data for inclusion may unintentionally lead to risks or exclusion, particularly in contexts where identity-related information (such as gender, disability, ethnicity, or sexual orientation) is sensitive in terms of social or political situations. In addition, many assessments focus on economic data or asset-based data, which ignore the lived experiences of women and other marginalized groups.

To address these gaps, organizations should integrate the data with participatory and context-sensitive approaches. It includes local communities' engagement to identify needs, using various methods to understand marginalized groups, and preparing actionable practices such as community mapping, need assessment, and local organization partnership to foster inclusion.

Adapted from Asian Development Bank (ADB) (2023), Guidebook on Data Disaggregation for the Sustainable Development Goals; Global Facility for Disaster Reduction and Recovery (GFDRR) (2024), Inclusive Community-Based Risk Assessment Practices.

Participant Feedback Loops

Feedback loops play a crucial role in supporting diversity and inclusion efforts by providing a platform for employees to share their experiences, perspectives, and suggestions for improvement. By collecting and acting on feedback from diverse groups of employees, organizations can create a more inclusive work environment and drive positive change.

An effective feedback loop is a continuous process where you collect feedback, analyze it, take action, and close the loop by communicating what you have done with the input. Organizations that do this well see measurable results: higher retention, more innovation, and teams that feel safe enough to truly say what is going on. Feedback can be positive in the form of compliments or negative in the form of critiques. Regardless of the sentiment of the feedback, organizations should always aim to close the loop.

Feedback loops can be conducted in different formats. What makes each format unique is who is providing the feedback and what changes the organization is going to make based on that feedback.

Organizations should keep in mind the following to ensure an effective and inclusive feedback process:

- **Set clear expectations:**
  - Explain the types of feedback you want, such as ideas for efficiency or safety, and clarify what you will not consider.
- **Ensure anonymity when needed:**
  - Many employees will only share honest feedback if they know their identity is protected. Provide anonymous options, especially for sensitive topics.
- **Communicate regularly:**
  - A suggestion box should not feel like a place where feedback is ignored. Share updates, highlight implemented ideas and thank employees for participating.
- **Act quickly on submissions:**
  - Review feedback on a set schedule and assign ownership for follow-up. Prompt action demonstrates accountability. This requires adequate leadership support as well.
- **Recognize contributions:**
  - Acknowledge even anonymous ideas in team meetings or company newsletters. Recognition encourages ongoing participation.

Adapted from SurveyConnect (2024), How can feedback loop support diversity and inclusion?; Deepler 2026, Creating effective feedback loops within organizations; SurveyMonkey (2026), What is a feedback loop?; Indeed 2026, Suggestion box.

Feedback Loop Formats & Considerations:

- **Survey:**
  - Surveys can be anonymous or identified. Anonymity can empower stakeholders to provide honest feedback. However, anonymous feedback must be balanced with open dialogues in meetings and check-ins. Researchers should choose survey platforms and tools that ensure data security. These platforms should be accessible as well. For example, data can be collected via Google Forms as well as text-based surveys. Keep questions clear and unbiased.
- **Semi-structured interviews:**
  - The data collection team must be trained in cultural sensitivity. The team must also be aware of the power dynamics between the researcher and the participants. Obtain consent before recording.
- **Focus Group Discussions:**
  - Be Mindful of the power dynamics within the group and design groups accordingly. For example, in a conservative context, young participants might feel hesitant about speaking up in front of elderly participants.
- **Suggestion Boxes:**
  - This is a form of non-oral feedback. This can be made anonymous as well.

Implementing Changes Based on Feedback

- **Prioritize the issues:**
  - Create a priority list and tackle the most critical issues first.
- **Develop a plan:**
  - Define specific actions, assign responsibilities to team members, and set deadlines.
- **Involve your team:**
  - Collaboration leads to more creative solutions and ensures that everyone is aligned with the goals.
- **Test and Iterate:**
  - Implement the changes and then test them to ensure they resolve the issues identified. Document the learnings.

- **Track Progress and Outcomes:**
    - Regularly review feedback metrics and make necessary adjustments.
- **Foster a feedback culture:**
    - Recognize and reward efforts to gather and act on feedback, reinforcing its importance within your organization.

Adapted from Pixel Free Studio 2024, How to improve UX with feedback loops, Pixel Free Studio.

Learning Integration and Adaptation

Learning integration and adaptation refers to the process by which organizations use monitoring data and feedback to enhance the programs and activities. It also approaches an ongoing reflective method where adjustments could be made through the program cycle instead of assuming data collection as a one-time exercise.

Adapted from IRIS+ and UNDP guidance, this section encourages organizations to treat monitoring not as a compliance activity but as a continuous learning engine that drives more equitable and effective programming.

Developed by the Overseas Development Institute, the adaptive management approach provides organizations with structured methods to respond to complexity by integrating real-time learning, iterative decision-making, and flexibility in program implementation.

Adapted from Pasanen, T. & Barnett, I. (2020), Supporting adaptive management: monitoring and evaluation tools and approaches (Working Paper 569), Overseas Development Institute (ODI).

Making Learning and Adaptation Work in Practice

There is no shortage of tools and approaches to measure learning and adaptation. Moreover, applying specific tools alone does not guarantee that learning and adaptation will happen. The important part is how these approaches are applied in practice to inform decisions.

In practice, organizations can strengthen learning and adaptation by focusing on three key areas:

- **Apply tools with purpose:**
    - Select and adapt learning and adaptation approaches based on the specific learning needs of the program, rather than using them as standard requirements.
- **Design for reflection, not just data collection:**
    - Ensure that data collection and analysis processes are structured to generate insights, encourage discussion, and surface diverse perspectives, including those of participants.
- **Link learning to decision-making:**
    - Create clear pathways for insights to inform both day-to-day operations and longer-term strategic choices, ensuring that learning leads to visible changes in programs.

Beyond understanding the approach's method, it is also crucial to choose it. There is rarely a single “best” approach; thus, using different methods to receive different strengths is useful in different contexts. The organizations should focus on choosing a mixed approach that depends on programs’ needs and constraints rather than looking for the perfect tool.

The choice of methods or approaches depends on several things, including:

Evidence and learning needs	• What are the program's key learning priorities, evaluation questions, and accountability requirements? • What type of data is needed to support informed adaptation?
Program characteristics	• What type of program is being implemented? • How long will it run? • Do its design and timelines align with the requirements of different MEL approaches?
Available resources	• What time, staff capacity, and technical expertise are available for data collection, analysis, reflection, and decision-making?

Overview of MEL Approaches for Learning and Adaptation

Start simple. Not all programs need complex methods; choose approaches that match your capacity, timeline, and learning priorities.

Approach	When to use it?	What does it help?
Applied Political Economy Analysis (PEA)	Start of program; revisit when context changes	Understand context, power, and stakeholders
Theory of Change (ToC)	Design stage and ongoing reflection	Map how change is expected to happen
Scenario Planning	Planning or "pause and reflect" moments	Prepare for different possible futures
Outcome Mapping	Throughout implementation	Track changes in stakeholder behavior.

Approach	When to use it?	What does it help?
Nimble Randomized Controlled Trials (RCT)	Pilot or testing phases	Test what works best between options
Outcome Harvesting	Review points or program end	Identify intended and unintended results
Contribution Analysis	Mid-term or end	Assess the program's contribution to outcomes

Risk Mitigation and Consent

When working with participants from marginalized or vulnerable groups, organizations have a responsibility to collect, store, and use data safely and ethically. Conversely, poor data practices can lead to real harm such as exposure, discrimination, or even loss of trust within an organization.

Risk mitigation means identifying and reducing potential harms before they happen. Consent means ensuring participants understand and freely agree to how their information will be used - before it is collected.

What to Collect and What Not to Collect

Collect	Do Not Collect
• Name or identifier only if necessary for program delivery • Participation preferences and accommodation needs • Gender identity using self-identification options • Location (general, e.g. region) • Stories or quotes with explicit consent • Feedback on program experience	• Full personal details unless strictly required • Medical diagnoses or health history unless directly relevant • Sexual orientation unless voluntarily disclosed • Precise home address unless essential • Photos or videos without signed permission • Immigration or legal status

A simple rule: if you cannot explain why you need it, do not collect it.

Adapted from European Parliament and Council of the European Union (2018), General Data Protection Regulation (GDPR), Article 5; Inter-Agency Standing Committee (2023), Operational Guidance on Data Responsibility in Humanitarian Action; International Committee of the Red Cross (2020), Handbook on Data Protection in Humanitarian Action.

Before Collecting Any Data or Stories, Ask:

- Do participants clearly understand what is being collected and why?
- Have they given informed, voluntary agreement?
- Do they know how their information will be stored, used, and shared?
- Can they withdraw consent at any time without consequences?
- Have consent forms or processes been made available in the right language and format?
- Have staff been briefed on respectful and confidential data handling?

Types of Consent

Types	What does it mean and when to use it?
Informed consent	• The participant is fully explained what data is collected, why, how it will be used, and who will see it before agreeing ◦ Use it always; this is the minimum standard for any data collection
Explicit consent	• A clear, active agreement - signing a form, ticking a box, or verbal confirmation that is recorded. ◦ Required for sensitive data such as photos, stories, disability, gender identity, or financial information

Types	What does it mean and when to use it?
Opt-in consent	• Participant actively chooses to participate - nothing is assumed ◦ Recommended for all program data collection involving vulnerable groups
Ongoing consent	• Consent is reconfirmed at key stages, not just at the start ◦ Use when stories, photos, or data will be reused over time or in new contexts

Important: Consent must always be freely given; participants should never feel that refusing will affect their access to the program or services.

Adapted from European Parliament and Council of the European Union (2018), General Data Protection Regulation (GDPR), Article 7; ICTworks (2019), How to Add Informed Consent to Your Responsible Data Practices.

What Valid Consent Looks Like in Practice

At a minimum, participants should always be clearly told:

- That providing data is voluntary and they can withdraw consent at any time without penalty
- That refusing or withdrawing consent will not affect their access to the program, services, or support
- What information is being collected and why, in simple, everyday language, not technical or legal terms
- What types of data are involved, for example, name, location, photo, financial details, personal story, or health information
- Who will see or have access to their data, including whether it will be shared with donors, partners, or government bodies
- How long their data will be kept and how it will be stored or archived
- What the benefits are for them or their community from sharing their data
- What risks exist, such as loss of privacy or confidentiality, and what steps are being taken to reduce those risks

For consent to be legally and ethically valid, organizations must also ensure the following:

- Consent is presented in clear, plain language, separate from other information, easy to read and understand
- Participants have the right to withdraw at any time, and withdrawing must be just as easy as giving consent
- Withdrawing consent does not affect anything that happened before the withdrawal; participants should be reassured of this
- Organizations must be able to demonstrate that consent was obtained and keep simple records of when and how consent was given
- Consent must never be made a condition of accessing a service, program, or support

Adapted from ICTworks (2019), How to Add Informed Consent to Your Responsible Data Practices; European Parliament and Council of the European Union (2018), General Data Protection Regulation (GDPR), Article 7.

Context Matters When Seeking Consent

Consent processes must be adapted to the people and communities involved. Consider:

Language and literacy	Use plain language, local languages, or visual formats where needed
Power dynamics	Be aware that gender, age, cultural background, or community status can affect whether consent is truly free and voluntary
Vulnerable groups	Provide extra support to individuals who may face discrimination or harm if their identity or information is disclosed
Digital risks	Ensure data collection is transparent when collecting digitally, as there might be some risks such as data breaches, re-identification, or even digital tracking
Safe spaces	Choose safe, private, and accessible settings when approaching some individuals or groups for consent

Adapted from ICTworks (2019), How to Add Informed Consent to Your Responsible Data Practices; Inter-Agency Standing Committee (2023), Operational Guidance on Data Responsibility in Humanitarian Action.

How to Respond When Someone Does Not Consent

Non-consent must always be respected immediately and without question.

Situation	Response
Participant declines to share personal information	• Accept without question. • Do not ask again to change their mind. • Do not offer incentive to answer again.
Participant does not want their photo or story used	• Provide a sticker or mark that they do not want so other teams (such as the media or PR team) can understand quickly. • Remove or do not collect the material. • Confirm with them that it will not be used.
Participant withdraws consent after data is collected	• Delete or anonymize the data as soon as possible. • Inform the participant that this has been done. • Double-check again with team members .
Participant is unsure or needs more time	• Give them space. • Provide information in their language and allow them to decide without pressure. • Accept and respect their decision.
Participant cannot provide written consent due to literacy or disability	• Offer verbal consent with a witness or an accessible alternative format. • Never skip consent entirely.

Adapted from ICTworks (2019), How to Add Informed Consent to Your Responsible Data Practices; Prosper Strategies (2024), How to Respectfully Engage Your Stakeholders in Nonprofit Storytelling.

Potential Risks and How to Overcome Them

Potential Risks	Practical Actions
Identity exposure	Sharing someone's name, photo, or story reveals their identity without full understanding of consequences. • Consider: Always use explicit consent. Offer anonymity as a default option. Explain clearly where and how content will be published.
Re-traumatization	Collecting sensitive stories or experiences without proper support in place. • Consider: Training staff in trauma-informed practice. Give participants the right to stop at any time. Avoid probing for painful details unnecessarily.
Data breach	Personal data is accessed, stolen, or shared without authorization. • Consider: storing data securely, such as with two-step authentication or two factors, to make it secure. Limit access to relevant staff only. Use password protection and encrypted storage.
Misrepresentation	Stories or data are edited or used out of context in ways that harm or misrepresent participants. • Consider: Share content with participants before publishing. Obtain approval for how their story or image will be used.
Language and literacy barriers	Participants sign or agree to consent without fully understanding what they agreed to. • Consider: Provide consent information in plain language and local languages. Use verbal explanation with a witness as an alternative to written consent.

Adapted from Inter-Agency Standing Committee (2023), Operational Guidance on Data Responsibility in Humanitarian Action.

Practical Considerations

Group	Key Considerations
Women & Gender	• Allow self-identification rather than assuming gender. • Explain clearly why gender data is collected and how it will be used. • Ensure stories or photos are not shared in ways that could affect safety or reputation.
LGBTQIA+	• Never collect or disclose sexual orientation or gender identity without explicit, informed consent. • Ensure all data is stored confidentially. • Disclosing someone's identity without consent can place them at serious risk.
Disability	• Focus data collection on participation needs and accommodations, not medical diagnoses. • Provide accessible formats for consent forms and data collection tools. • Include "prefer not to answer" options.
Neuro divergence	• Keep consent processes clear, simple, and jargon-free. • Allow extra time and offer alternative formats such as verbal explanation alongside written forms. • Avoid overwhelming participants with lengthy documentation.

Group		**Key Considerations**
	Ethnic minorities	• Translate consent forms and data collection tools into relevant local languages. • Be aware of cultural contexts where certain questions may feel intrusive or carry stigma.
	Rural or Remote	• Provide offline or paper-based consent options for participants without reliable internet access. • Use simple language and avoid technical terms. Be mindful of digital literacy gaps.

Adapted from Schusterman Family Philanthropies (n.d.), More Than Numbers: A Guide Toward Diversity, Equity, and Inclusion in Data Collection; Inter-Agency Standing Committee (2023), Operational Guidance on Data Responsibility in Humanitarian Action.

Consent Readiness Checklist

Use this before any data or story collection activity:
☐ I know exactly what data I need and why
☐ I can explain this clearly in plain language to participants
☐ Consent forms or processes are available in the right language and format
☐ Participants have been told they can refuse or withdraw without consequences
☐ Sensitive data has been identified and extra protections are in place
☐ Staff involved have been briefed on respectful and confidential data handling
☐ A record will be kept of how and when consent was obtained
☐ A process exists for participants who want to withdraw consent later

Adapted from ICTworks (2019), How to Add Informed Consent to Your Responsible Data Practices; European Parliament and Council of the European Union (2018), General Data Protection Regulation (GDPR), Articles 5 and 7.

Data Privacy and Security

When designing digital products or programs, organizations should assume that security risks exist and proactively embed privacy and security throughout the design and implementation process. This involves collaborating with cybersecurity experts and regularly reviewing and improving systems.

Dos	Don'ts
• Conduct independent security audits (e.g. third-party reviews of code and infrastructure) • Align with established data principles, such as those from United Nations Development Program • Follow internal policies on data privacy and information classification • Minimize the collection of personal and sensitive data • Use existing data sources where possible instead of collecting new data • Obtain informed and explicit user consent for data collection and use • Clearly communicate what data is collected and how it will be used • Design systems for interoperability and reuse using recognized standards • Allow users to access, manage, and request deletion of their data	• Collect data without clear ownership, management, and purposeGather personal data without user knowledge and consentShare personally identifiable information with third parties without consent

Adapted from United Nations Development Programme (n.d.), UNDP data principles.; World Bank Group (2018), Managing personal data responsibly: The World Bank Group personal data privacy policy.

Do No Harm Principles

Digital technologies for data collection can drive positive change, but they can also create unintended harm. It includes understanding that technology is not neutral and that it encompasses biases, power dynamics, and unintended consequences that can affect outcomes, particularly for marginalized groups. Thus, organizations should proactively identify and mitigate risks to people and the environment throughout the design and implementation process.

Cited from UNDP (n.d.), Do No Harm: Digital Standards, United Nations Development Programme.

There are two key areas of two parts: (1) ensure human rights and (2) protect the environment.

Part A: Ensure Human Rights

Digital technology can create unintended harm, such as privacy violation, discrimination, and misuse of data. The organization should apply a human rights-based approach to solve this challenge.

For example, biased datasets can lead to discriminatory outcomes in AI systems. Similarly, platforms designed to maximize engagement may unintentionally promote harmful or misleading content. Even well-intended solutions (e.g. public service platforms) may be misused in ways that undermine rights such as privacy or equality.

Key Reflection Questions

- Who could potentially suffer from this solution, and at what point?
- Which human rights are affected (e.g. privacy, equality, freedom of expression)?
- Who benefits from this solution, and who might be excluded?
- Has informed user consent been obtained?
- Could this solution be misused in harmful ways?
- What unintended consequences could emerge over time?

Part B: Protect the Environment

Digital technologies can support sustainability by improving energy efficiency, enabling cleaner production, and supporting more sustainable systems. However, they can also create environmental harm, both directly and indirectly. These impacts often include high energy consumption, resource extraction, and increasing waste.

Key Environmental Risks

- High energy use (e.g. data centers, AI, blockchain technologies)
- Resource extraction and material use (e.g. rare minerals)
- E-waste and poor disposal systems
- Reinforcing unsustainable behaviors (e.g. overconsumption)
- Indirect impacts across global supply chains

Key Reflection Questions

- What are the energy and resource requirements of this solution?
- What is the full lifecycle (production, use, and disposal)?
- Could this solution create waste or environmental harm over time?
- Does it encourage sustainable or unsustainable behaviors?
- Are there more environmentally responsible alternatives?

Practical Considerations

Group		Key Considerations
⚥	**Women & Gender**	• Allow self-identification (not just binary male or female) • Separate gender identity from sex assigned at birth • Include "prefer to self-describe" and "prefer not to answer." • Avoid assumptions based on names or pronouns • Explain why gender data is collected
✊	**LGBTQIA+**	• Use multi-select options (identity is not fixed or singular) • Include open-ended fields for self-description • Do not combine gender identity and sexual orientation in one question • Ensure confidentiality and voluntary disclosure • Avoid forcing disclosure, make questions optional

Group	Key Considerations
Disability	• Focus on needs and accommodations, not medical labels • Avoid collecting sensitive health data unless necessary (and compliant) • Use functional questions (e.g., difficulty seeing, hearing, mobility) • Provide examples of accommodations (e.g., captions, screen readers) • Include “prefer not to answer."
Neuro divergence	• Offer multiple formats for responses (written, visual, verbal) • Keep questions clear, simple, and structured • Avoid overwhelming respondents with long or complex surveys • Allow extra space for open-ended responses • Consider sensory-friendly survey design (layout, colors, length)
Ethnic minorities	• Use multi-select categories (allow multiple identities) • Include open-text fields for specific identity (e.g., “Karen”, “Rohingya”) • Avoid biased ordering (e.g., don’t always list “White” first) • Use culturally relevant and locally appropriate terms • Clearly explain how the data will support equity
Rural or Remote	• Provide offline or low-bandwidth options (paper, phone, SMS) • Ensure tools are accessible without strong internet • Use simple language and avoid technical jargon • Consider local language translationBe mindful of digital literacy gaps

Adapted from Kaplowitz, R. & Laroche, J. 2020, More than numbers: A guide toward diversity, equity and inclusion (DEI) in data collection.

Case Study from Seedstars - MERL as an Early Warning System: What Your Data Should Help You Fix Next Week

Monitoring, Evaluation, Research, and Learning (MERL) often gets treated as a rearview mirror: it helps explain what happens after a program ends. That's important for reporting. But it's not enough for inclusion because exclusion typically happens during delivery: when timing, formats, or support structures quietly make participation harder for certain founders.

An alternative approach - treating MERL as an early warning system. The goal isn't only to measure outcomes. It's to detect friction in real time, then change the program design before founders disengage.

If inclusion is systems design, MERL is one of the fastest ways to locate where the system is failing.

A predictive MERL approach asks:

- Where are people dropping off?
- What barriers correlate with disengagement?
- Which program elements are working differently for different groups?
- What can we change this week to reduce friction?

This is less about producing a perfect endline report and more about making weekly adjustments that keep founders in the room.

What "predictive" MERL looks like in practice

A predictive MERL system is lightweight enough to run weekly and specific enough to drive action. Seedstars described tools such as:

- Weekly pulse surveys to identify fatigue, confusion, or access issues before they become dropouts
- Dashboards that disaggregate participation and performance (by demographic, and importantly, by barrier type)
- Rapid feedback loops where program teams decide what to change and track whether it worked

A practical way to think about it: MERL should help you identify where your program is leaking potential - and what plug to use.

Shift from identity-only reporting to barrier-aware insight

Seedstars emphasized barrier-based segmentation as a complement to demographics.

Demographics help you understand who is in your program. Barrier tracking helps you understand what conditions participants need to succeed.

Examples of barriers you can track without overcomplicating your data:
- Connectivity (device + bandwidth constraints)
- Time constraints (caregiving, multiple jobs)
- Access constraints (language, disability accommodations)
- Network constraints (mentor/investor access)
- Confidence constraints (pricing, negotiation, public speaking formats)

When you track barriers, your program improvements become more targeted - and often improve the experience for everyone.

What Seedstars changed once MERL revealed the pattern

1) Retention dips linked to caregiving peaks
Seedstars observed women dropping out between weeks 4 and 6. MERL data suggested the dip aligned with caregiving pressure points. They adjusted program timing and added a confidence module. Retention rebounded—suggesting the issue wasn't capability or commitment, but competing demands on time.

2) Underperformance that turned out to be a design issue
In disability cohorts, disabled founders appeared to underperform on certain assignments. MERL helped isolate the problem: the format of the assignment was creating an accessibility barrier. When Seedstars changed how information was gathered, performance improved quickly. The skills were there; the system wasn't reading them.

The lesson: when founders struggle, the first question shouldn't be "What's wrong with them?" It should be "What in our design is making this harder than it needs to be?"

Practical MERL moves you can implement quickly

If you want MERL to guide action, you need a few repeatable habits.

1) Ask questions you can act on next week

Use pulse surveys that point to fixable causes, not vague satisfaction ratings. Examples:

- "What prevented you from completing this week's task?" (select one)
- "Which format would work better next week: live / recorded / asynchronous?"
- "Was anything inaccessible in today's session?" (yes/no + optional details)

2) Watch the "middle weeks" closely

Many programs lose founders after the initial momentum fades. Identify your typical dropout window and instrument it: attendance, assignment completion, confidence signals, and qualitative feedback.

3) Treat the dashboard as a decision tool

A dashboard should not be a display. It should trigger decisions:

- What do we change next week?
- Who needs outreach?
- Which format adjustments will reduce friction?

4) Document what you changed—and what happened

If MERL is a learning system, your changes are the experiment. Keep a simple log:

- Change made
- Hypothesis (what barrier it addresses)
- Indicator you expect to move
- Result after 1–2 weeks

Adapted from Presentation by Tom Sebastian at the ANDE Asia Access and Opportunity Learning Lab Session 4: Policy Frameworks to Foster Inclusion.

AI usage declaration: As the content for this toolkit was prepared by multiple authors, AI tools were used to remove redundancies and to maintain a consistent tone in some sections. AI tools were also used to generate some of the Harvard style references. Human oversight was applied to review, edit and integrate the AI-generated content.