



Tier 2 Rigorous Impact Evaluation Monitoring Spreadsheet Instructions

For Tier 2 Rigorous Impact Evaluation grant recipients, monitoring evaluation enrollment and retention on a regular basis can help keep the study on track. To guide your monthly check-in calls with your evaluation technical assistance (Eval TA) liaison, we ask that you complete and update the attached spreadsheet, which will be the project’s monitoring tool. Your Eval TA liaison and OPA will use the tool to track your progress on evaluation enrollment and data collection. The tool has two tabs: one for designs with a rolling enrollment schedule, and one for designs with cohort-based enrollment. You should use the tab on the tool that corresponds to the enrollment schedule for your study design. When using the monitoring tool, you will see that different cells are in different colors. You only need to fill in information for the **white** cells. Green cells will be completed by your Eval TA liaison, and blue cells will be automatically calculated by the tool (Box 1). Next, we provide instructions for using the monitoring tool for both kinds of enrollment, rolling and cohort.

Box 1. How to use the monitoring tool

The monitoring tool is a spreadsheet with three types of cells:

1. **Green cells.** Filled in by your TA liaison based on information from your approved evaluation design. Row numbers are indicated in the Excel sheet.
2. **White cells.** Filled in by you, the grant recipient. Marked in the Excel sheet with “[user input]” after the field description.
3. **Blue cells.** Automatically calculated by the monitoring tool based on information provided in the white cells. Marked in the Excel sheet with “[calculated]” after the field description.

Rolling enrollment

Your Eval TA liaison will complete the top panel of the tool, which is highlighted in green:

1. Cell B3: Enter the total number of youth that you expect to enroll over the course of the study
2. Cell B4: Enter the total number of months when you will be enrolling youth into your study
3. Cell B5: The total enrollment target per period (automatically calculated based on previously entered data)
4. Cell B6: Enter your expected response rate (RR) for baseline assessments
5. Cells B7–B8: Enter your expected RR for the follow-up assessments [**Note:** the tool includes rows for up to two follow-up periods; however, if your study has more than two follow-up surveys, the TA liaison will add rows for you to record this information.]
6. Cells B9–B10: Enter the timing for follow-up assessments (after enrollment)

You will need to update the bottom panel of the tool. The following instructions provide guidance for filling in the relevant rows of the tool. Each month, you will enter comparable information into a new column to the right of the previous entry. For example, the first time you use the tool, you should use Column B, which corresponds to the first month of enrollment.; in the second month, you enter data into Column C, and repeat this process for subsequent months. **You only need to enter information for cells in white.**

**Enrollment**

1. Row 15: Automatically calculated based on previously entered data.
2. Row 16: Enter the number of youth who enrolled in the treatment group in a given month.
3. Row 17: Enter the number of youth who enrolled in the control group in a given month.
4. Rows 18–21: Automatically calculated based on previously entered data.

Baseline RR

1. Row 22: Automatically calculated based on previously entered data.
2. Row 23: Enter the number of completed baseline surveys for the treatment group for a given month (enter 0 if no surveys were completed).
3. Row 24: Enter the number of completed baseline surveys for the control group for a given month (enter 0 if no surveys were completed).
4. Rows 25–27: Automatically calculated based on previously entered data.

Note: *The tool includes additional calculations of baseline RR for the treatment and control groups in Rows 54 and 55. To view this information, unhide these rows.*

Follow-Up 1 RR

1. Row 28: Automatically calculated based on previously entered data.
2. Row 29: Enter the number of treatment group youth who are eligible for the first follow-up survey for a given month (enter 0 if no youth are eligible for the period).
3. Row 30: Enter the number of control group youth who are eligible for the first follow-up survey for a given month (enter 0 if no youth are eligible for the period).
4. Row 31: Automatically calculated based on previously entered data.
5. Row 32: Enter the number of completed follow-up surveys for the treatment group for a given month (enter 0 if no surveys were completed).
6. Row 33: Enter the number of completed follow-up surveys for the control group for a given month (enter 0 if no surveys were completed).
7. Rows 34–37: Automatically calculated based on previously entered data.

Note: *The tool includes additional calculations of RR for the first follow-up separately for the treatment and control groups in Rows 58 through 65. To view this information, unhide these rows.*

Follow-Up 2 RR

1. Row 38: Automatically calculated based on previously entered data .
2. Row 39: Enter the number of treatment group youth who are eligible for the second follow-up survey for a given month (enter 0 if no youth are eligible for the period).
3. Row 40: Enter the number of control group youth who are eligible for the second follow-up survey for a given month (enter 0 if no youth are eligible for the period).



4. Row 41: Automatically calculated based on previously entered data.
5. Row 42: Enter the number of completed second follow-up surveys for the treatment group for a given month (enter 0 if no surveys were completed).
6. Row 43: Enter the number of completed second follow-up surveys for the control group for a given month (enter 0 if no surveys were completed).
7. Rows 44–47: Automatically calculated based on previously entered data.

Note: *The tool includes additional calculations of RR for the second follow-up separately for the treatment and control groups in Rows 68 through 75. To view this information, unhide these rows.*

Cohort Enrollment

Your TA liaison will complete the top panel of the tool, which is highlighted in green:

1. Cell B3: Enter the total number of youth that you expect to enroll over the course of the study
2. Cell B4: Enter the total number of cohorts of youth you will be enrolling into your study
3. Cell B5: Enter your expected RR for baseline assessments
4. Cells B6–B7: Enter your expected RR for the first and second follow-up assessments [**Note:** *The tool includes rows for up to two follow-up periods; however, if your study has more than two follow-up surveys, the TA liaison will add rows for you to enter this information.*]
5. Cells B8–B9: Enter the timing for the first and second follow-up assessments after enrollment

You will be entering information in the bottom panel of the tool. The following instructions provide guidance for filling in the required rows. Each month, you will enter comparable information into a new column to the right of the previous entry. For example, the first time you use the tool, you should use Column B, which corresponds to the first month of enrollment for the first cohort; in the second month, you will enter data into Column C, and repeat this process for subsequent months. **You only need to enter information for cells in white.**

Enrollment

1. Row 14: Automatically calculated based on previously entered data.
2. Row 15: Enter the number of youth who you expect to be enrolled each month (enter 0 if no youth are expected to enroll in a given month).
3. Row 16: Enter the number of youth who enrolled in the treatment group in a given month or for a given cohort.
4. Row 17: Enter the number of youth who enrolled in the control group in a given month or for a given cohort.
5. Rows 18–21: Automatically calculated based on previously entered data.

Baseline RR

1. Row 22: Automatically calculated based on previously entered data.



2. Row 23: Enter the number of completed baseline surveys for the treatment group for a given month (enter 0 if no surveys were completed).
3. Row 24: Enter the number of completed baseline surveys for the control group for a given month (enter 0 if no surveys were completed).

4. Rows 25–27: Automatically calculated based on previously entered data.

Note: *The tool includes additional calculations of baseline RR for the treatment and control groups in Rows 54 and 55. To view this information, unhide these rows.*

Follow-Up 1 RR

1. Row 28: Automatically calculated based on previously entered data.
2. Row 29: Enter the number of treatment group youth who are eligible for the first follow-up survey for a given month (enter 0 if no youth are eligible for the period).
3. Row 30: Enter the number of control group youth who are eligible for the first follow-up survey for a given month (enter 0 if no youth are eligible for the period).
4. Row 31: Automatically calculated based on previously entered data.
5. Row 32: Enter the number of completed first follow-up surveys for the treatment group for a given month (enter 0 if no surveys were completed).
6. Row 33: Enter the number of completed first follow-up surveys for the control group for a given month (enter 0 if no surveys were completed).
7. Rows 34–37: Automatically calculated based on previously entered data.

Note: *The tool includes additional calculations of RR for the first follow-up separately for the treatment and control groups in Rows 58 through 65. To view this information, unhide these rows.*

Follow-Up 2 RR

1. Row 38: Automatically calculated based on previously entered data.
2. Row 39: Enter the number of treatment group youth who are eligible for the second follow-up survey for a given month (enter 0 if no youth are eligible for the period).
3. Row 40: Enter the number of control group youth who are eligible for the second follow-up survey for a given month (enter 0 if no youth are eligible for the period).
4. Row 41: Automatically calculated based on previously entered data.
5. Row 42: Enter the number of completed second follow-up surveys for the treatment group for a given month (enter 0 if no surveys were completed).
6. Row 43: Enter the number of completed second follow-up surveys for the control group for a given month (enter 0 if no surveys were completed).
7. Rows 44–47: Automatically calculated based on previously entered data.

Note: *The tool includes additional calculations of RR for the second follow-up separately for the treatment and control groups in Rows 68 through 75. To view this information, unhide these rows*