## Summary Agenda

### Tuesday, June 14

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
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<tbody>
<tr>
<td>2-5 pm</td>
<td>Early Track Session</td>
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### Wednesday, June 15

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
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<tbody>
<tr>
<td>8:30 AM</td>
<td>Breakfast</td>
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<tr>
<td>9:00 AM</td>
<td>Plenary: Welcome &amp; Intro</td>
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<tr>
<td>9:20 AM</td>
<td>Plenary: Keynote</td>
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<tr>
<td>10:15 AM</td>
<td>Plenary: Bigger than One Business</td>
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<tr>
<td>11:30 AM</td>
<td>Break</td>
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<tr>
<td>11:45 AM</td>
<td>Plenary: Lightning Talks</td>
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<tr>
<td>12:40 PM</td>
<td>Lunch</td>
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<tr>
<td>2:00 PM</td>
<td>Simultaneous Breakout Sessions</td>
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<tr>
<td>3:05 PM</td>
<td>Simultaneous Breakout Sessions</td>
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<tr>
<td>4:05 PM</td>
<td>Break</td>
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<tr>
<td>4:20 PM</td>
<td>Plenary: Evidence &amp; Expectations for Impact</td>
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<td>5:45 PM</td>
<td>Close</td>
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<tr>
<td>6:30 PM</td>
<td>Offsite: Happy Hour</td>
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<tr>
<td>7:45 PM</td>
<td>Offsite: Salon Dinners</td>
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### Thursday, June 16

<table>
<thead>
<tr>
<th>Time</th>
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<tbody>
<tr>
<td>8:30 AM</td>
<td>Breakfast</td>
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<tr>
<td>9:00 AM</td>
<td>Plenary: Navigating Impact Investing</td>
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<tr>
<td>9:30 AM</td>
<td>Plenary: Valuing Financial and Social Performance</td>
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<td>10:45 AM</td>
<td>Break</td>
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<td>11:00 AM</td>
<td>Simultaneous Breakout Sessions</td>
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<td>12:30 PM</td>
<td>Lunch</td>
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<td>1:30 PM</td>
<td>Simultaneous Breakout Sessions</td>
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<tr>
<td>3:05 PM</td>
<td>Simultaneous Breakout Sessions</td>
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<tr>
<td>4:10 PM</td>
<td>Closing Plenary</td>
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<td>Close</td>
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<td>Time</td>
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<tr>
<td>8:30 AM</td>
<td>Breakfast</td>
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<tr>
<td>9:00 AM</td>
<td>Welcome and Introduction</td>
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<tr>
<td>9:15 AM</td>
<td>Keynote Address</td>
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<td></td>
<td><em>John Gargani, President, American Evaluation Association</em></td>
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<tr>
<td>10:15 AM</td>
<td><strong>Bigger than One Business: Evaluating at the Ecosystem Level</strong></td>
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<td>More and more organizations are taking on a systems-view or ecosystem approach to their work. Rather than just focusing on individual entrepreneurs or transactions, they are beginning to address the entire system in which entrepreneurs operate. As we embark on this work, how can we assess the strength of a system, evaluate systems-level changes, and coordinate our efforts as a community? Panelists in this session will provide three perspectives.</td>
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<tr>
<td></td>
<td><strong>Panelists:</strong></td>
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<td>Victor Mulas, World Bank</td>
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<td>Marcie Parkhurst, FSG</td>
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<td>Matthew Ripley, ILO</td>
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<td>Moderated By: Randall Kempner</td>
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<td>11:30 AM</td>
<td>Break</td>
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<td>11:45 PM</td>
<td>Lightning Talks</td>
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<td>A series of quick talks that focus on trends in impact measurement practice, integrating feedback loops, and balancing rigor with practicality.</td>
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<tr>
<td></td>
<td>1. <strong>Trends in Impact Investing:</strong> Hannah Schiff, The GIIN</td>
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<td>2. <strong>Accelerator Performance:</strong> Caitlin O'Donnell, Goizueta Business School, Emory University</td>
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<td>3. <strong>Right-sized Evaluation:</strong> Thoaí Ngo, Innovations in Poverty Action</td>
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<td>4. <strong>Lean Data:</strong> Venu Aggarwal, Acumen</td>
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<tr>
<td>12:40 PM</td>
<td>Lunch</td>
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<td><em>Lunchtime Activities Start @ 1 pm</em></td>
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<td><strong>Show &amp; Tell:</strong> Connect with participants around the specifics of your measurement approaches: Smith Room</td>
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<td><strong>Demo Session:</strong> Newdea: Small Conference Room</td>
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2:00 PM  | **Simultaneous Breakout Sessions**

1. **Mixed Methods & Qualitative Insight**
   - This case-based session will dive into the ways that qualitative data can support quantitative results, with a special focus on how qualitative-driven insight can inform program design. Examples come from TechnoServe’s Chile program Impulsa tu Empresa, and research from ANDE on what works in acceleration.
   - **Panelists:**
     - Juan Carlos Thomas, Technoserve
     - Abigayle Davidson, ANDE
     - Moderated By: Kate Scaife Diaz, Technoserve
   - **Downstairs 1A**

2. **Data Driven Funders at the Grant, Portfolio, and Systems Level**
   - **Panelists:**
     - Lauren Reed, Qualcomm Wireless Reach
     - Diana Harbison, US Trade and Development Agency
     - Moderated by: Genevieve Edens, ANDE
   - **Medium Room**

3. **Open Data for the SGB Sector**
   - This workshop will focus on ways to use open data to communicate impact and inform operations. We will cover the entire process of integrating open data, from identifying data needs to selecting and validating sources, to joining open data with your organization’s internal data.
   - **Discussion Leader:**
     - Evan Tachovsky, Media Development Investment Fund
   - **Downstairs 1B**

4. **The Business Value of Impact Measurement**
   - The GIIN will share preliminary findings from a soon-to-be released qualitative study of the connection between impact measurement and business value. The session will be an opportunity to hear the latest findings, ask questions, and share feedback with the GIIN.
   - **Discussion Leader:**
     - Hannah Schiff, The GIIN
     - with Jaime Ramirez, Grassroots Business Fund
   - **Gildenhorn**
Simultaneous Breakout Sessions

1. **Designing the Impact Tools of Tomorrow, Today: Session One**
   - Office: FMA, a strategic and financial advisory firm, will lead a Google Design Sprint-style workshop to evaluate the current tools available for evaluation. The session will involve collaborative design-thinking and will end with a demonstration of how lessons from machine learning, computer vision, and agent based models can be used to evaluate impact in real-time.
   
   **Session Leader:**
   
   Davey Gibian and Andrew Haimes, Office: FMA

2. **What is Balanced Design, Monitoring, Evaluation, Research and Learning?**
   - This session will explore efforts by a large implementing partner and a research organization to promote data-driven operations, both within their own organizations and within a larger consortium seeking to innovate learning in the context of USAID programming. Participants will be introduced to the concept of balance, the principles underpinning it, and benchmarks for assessing it.
   
   **Session Leaders:**
   
   Bridgett Lavin, World Vision
   Thoai Ngo, Innovations in Poverty Action
   Jessie Pinchoff, Innovations in Poverty Action

3. **Rapid Feedback Loops**
   - With mobile penetration at an all-time high (more than 73% of African adults own a mobile phone), we now have the possibility – and a responsibility – to engage the people we serve in real-time, including in the design and ongoing evaluation of interventions. This session will focus on using mobile messaging to make real-time adjustments to programs and strategies. Cases will include customer research in last-mile markets for Facebook, healthcare satisfaction surveys of clinic patients in Brazil with the World Bank, and national public opinion polls with the Center for Global Development.
   
   **Session Leader:**
   
   Rebecca Weissburg, VotoMobile

4. **Navigating between Impact Intent and Impact Metrics**
   - As part of the Global Impact Investing Network’s work in helping investors translate their impact intentions to specific metrics, their IRIS and Impact Measurement team has been working with industry experts to create concrete, sector-based impact measurement guidance. This session will provide an early view at the guidance emerging from this work, specifically for investors targeting transactions in emerging markets clean energy investments. This hands-on working session will rely on attendees operating in clean energy to provide input on how their organizations have decided what it matters for them to measure.
   
   **Session Leader:**
   
   The IRIS Team

4:05 PM  **Break**
### 4:20 PM  
**Plenary: Evidence and Expectations for Impact**

As we approach nearly a decade of using the term “impact investing,” we can finally see hard data about the “investing” side – but what can we say about the “impact” side of the equation?

We’ve seen rigorous research challenge many fundamentals of development practice – the microfinance industry is a great example in the past decade. So how do we get more rigorous research and better social performance measurement in impact investing? And what should we do if the results challenge our fundamentals?

**Panelists:**
- Laura Foose, Social Performance Task Force
- Tara Murphy Forde, Global Partnerships
- Moderator: Kelly McCarthy

### 5:00 PM  
**Follow Up Discussion**

An activity focused on assumptions and the evidence base

### 5:45 PM  
**Close**

### 6:30 PM  
**Happy Hour**

Join us at Halcyon House in Georgetown for a reception and the launch of ANDE’s State of the Sector report

- 3400 Prospect St NW – Washington, DC 20007
- 6:30 – 8 pm

**RSVP was required.**  
Want to attend, but not on the list? Please connect with an ANDE staff member

### 7:45 PM  
**Salon Dinners**

Optional dinners around town
### Thursday, June 16

**8:30 AM**  
**Breakfast**

**9:00 AM**  
**Navigating Impact Investing: Would “Impact Classes” Help?**

As compelling as impact investing has become, many investors still remain stymied in their efforts to put capital to work addressing social and environmental challenges. Colleagues from Tideline, Duke University, & Omidyar Network have been working on a simplifying “impact classification system” to put alongside “asset classes” to help investors readily match their financial and impact objectives to the right products. How could such a system crack the code of impact investing for investors and advisors? Cathy will share progress to date and collect feedback on early frameworks for this new effort.

*Cathy Clark, CASE i3 Initiative on Impact Investing at Duke University*

**9:30 AM**  
**Valuing Financial and Social Performance - Developing an Integrated Approach**

There is growing demand for reporting that integrates impact performance and financial performance in a holistic and nuanced way, but few examples of how to apply these concepts in this sector. This session will focus in on analytical approaches that have been developed for other users, that the SGB sector can learn from. We will discuss specific approaches that integrate social and financial performance, understand how they are being applied, and discuss the implications of considering the social alongside the financial.

**Panelists:**
- William Burkart, The Investment Integration Project
- Kitrhona Cerri, World Business Council for Sustainable Development
- Roland Pearson, Enclude

*Moderated by: Jacob Gray, Wharton Social Impact Initiative*

**10:45 AM**  
**Break**

**11:00 AM**  
**Simultaneous Breakout Sessions**

1. **Data Visualization, Level 1: The Simplification & Emphasis Approach to Telling a Story with Data**

Visualizing data through charts, tables, and diagrams helps you deliver bite-sized information that stakeholders will understand at a glance and retain for the long run. In this hands-on session, you’ll learn how to transform Microsoft Excel’s default graphs into graphs that more clearly articulate the key findings from your project. First, you’ll simplify graphs by removing borders, grid lines, tick marks, and clip art. Second, you’ll emphasize your desired message with text. Third, you’ll emphasize your desired message with color. **Attendees are strongly encouraged to bring laptops (not tablets or smartphones) with Microsoft Excel so that they can fully participate in this interactive session.**

*Session Leader:*

*Ann Emery*
Demystifying Data Science: What Quantitative Methods Can (and Can’t) Do for You

This workshop will demystify data science, big data, and machine learning using non-technical language and practical examples from MDIF’s experience.

We will cover how to find the right analytic technique to solve a problem, common pitfalls, and strategies for building a data science team regardless of budget or staffing level.

Session Leader:
Evan Tachovsky, Media Development Investment Fund

Metrics for Policy and Regulatory Impact on SGBs

Led by the new working group focused on policy, regulatory, and legal issues this discussion will focus on metrics and methods for assessing the impact of policy and regulatory change affecting the SGB sector as well as policy advocacy activities.

Panelists:
Denise Baer, Center for International Private Enterprise
Katrin Kuhlmann, New Markets Learning Lab
Marc Schleifer, Center for International Private Enterprise
Ambassador (ret.) John Simon, Total Impact
Moderated by: Kim Bettcher, Center for International Private Enterprise

Technology for Data Collection in International Development

Data collection is the building block of M&E work. Digital survey tools have added new elements to survey design, such as skip logic, data validation, and decision trees. New technologies, such as biometrics, remote sensors, and satellite imagery, provide additional tools for data collection and identifying beneficiaries. Understanding these tools, how to design and deploy digital surveys, and how to combine active and passive data collection is necessary to maximize the value from data collection effort. This 90-minute workshop will focus on building skills and strategies to better collect and manage data using a variety of tech tools. It will feature an interactive case study exercise and an immersive technology demo.

Session Leader:
Nick Martin, TechChange

Evidence Gap Maps

Evidence Gap Maps consolidate what we know and do not know about ‘what works’ in a particular sector or sub-sector by mapping out existing and ongoing systematic reviews and impact evaluations in that sector. In this session, we’ll dive in to what an evidence gap map is and how it compares to other evidence synthesis efforts. We’ll then focus on how the maps can be used to make decisions around implementation, funding, and policy.

Session Leader:
Kristen Rankin, 3ie
12:30 PM  Lunch

Lunchtime Activities Start @ 12:45 pm

Book Club: A discussion of high-impact research and reports: Medium Room

Demo Session: SoPact: Small Room

Feedback Session: ANDE members only (Metrics & Research Learning Lab meeting): Gildenhorn

1:30 PM  Simultaneous Breakout Sessions

1. Data Visualization, Level 2: Dashboard Design from Start to Finish
   We’ll spend the first 30 minutes learning about the step-by-step dashboard design process, which involves customizing dashboards for your audience, sketching graphs on paper and within a grid system, adding the right amount of white space, and establishing a visual hierarchy. Then, we’ll spend the remaining 60 minutes creating a dashboard or two from scratch within Microsoft Excel. You’ll learn to insert spark lines, data bars, and conditional formatting, and to adjust the dashboard so that it can be printed or PDF’d neatly on one page. *Attendees are strongly encouraged to bring laptops with Microsoft Excel so that they can fully participate in this interactive session.*
   
   **Session Leader:**
   Ann Emery

2. Salesforce.com - From CRM to Impact Data Management
   Are you searching for a cloud-based platform to manage your client data? Does your organization use Salesforce, and you’re considering expanding its functionality for M&E? Join this session for an in-depth discussion of Salesforce.com and what it can do for M&E data management.
   
   **Session Leader:**
   Elaine Chang, TaroWorks
   Tilly Josephson, Vera Solutions
   Lauren Reed, Qualcomm Wireless Reach

3. Embedded Experimentation: How behavioral science can help organizations leverage rigorous research methods for practical applications
   The increasing use of rigorous research in program evaluation over the past few years has advanced our understanding of economic decision-making, but the methods are often perceived as expensive, inaccessible, and incompatible with program needs. This session dives in to the ways behavioral science provide a unique lens to design rigorous, yet relevant tests within organizational operating structures at low cost and limited human capacity. This session will focus on three case studies of embedded experimentation with organizations in Kenya, and what drives a suitable environment to promote these tools (both internally and externally).
   
   **Session Leader:**
   James Vancel, Busara Center for Behavioral Economics

4. Adopting Lean Data
   
   **Session Leader:**
   Venu Aggarwal, Acumen
   Julie Peachey, Grameen Foundation
Designing the Impact Tools of Tomorrow, Today: Session Two
Office:FMA, a strategic and financial advisory firm, will lead a Google Design Sprint-style workshop to evaluate the current tools available for evaluation. The session will involve collaborative design-thinking and will end with a demonstration of how lessons from machine learning, computer vision, and agent based models can be used to evaluate impact in real-time.

Session Leader:
Davey Gibian and Andrew Haimes, Office:FMA

Simultaneous Breakout Sessions

1. Metrics for the Sustainable Development Goals: SDG-IRIS Crosswalk
The advent of the Sustainable Development Goals offers an opportunity to explicitly link the small and growing business sector to the global development agenda. The SDG targets often present intuitive metrics for social enterprises addressing complex problems in the most resource-poor settings...but how are they connected to IRIS, the existing metrics language for impact investors? This session will include a presentation of a draft “translation table” that links IRIS to the SDGs, and a discussion of ways to make this product useful for fellow practitioners. Participants will gain a greater understanding of the links between IRIS and SDG and become more proficient in re-framing their existing metrics. They will also have an opportunity to help shape this product for the ecosystem.

Session Leader:
Joseph Schuchter, Miller Center for Social Entrepreneurship, Santa Clara University

2. Evidence Uptake for Accelerators
This session will begin with an exploration of the ways that accelerators are integrating performance data into their operations. We will also discuss the connection between performance data and evaluation or research, and navigating partnerships between academics and practitioner organizations. We expect a lively discussion on the advantages of collaborating with entrepreneurship researchers, as well as some of the challenges, and ways to align expectations.

Session Leaders:
Caitlin O’Donnell, Emory University
Saurabh Lall & Abby Davidson, ANDE

3. Lessons from TechnoServe’s Corporate Measurement Program
TechnoServe is four years into an ambitious adventure to collect consistent and rigorous impact data from across a diverse portfolio of projects to foster learning and exchange, and to measure progress against its mission. This experiment has yielded some painful lessons and surprising insights, which have ultimately allowed TechnoServe to better deliver its mission and live its values. This session will share some key lessons for any other agencies that are or considering aggregating results from disparate projects and some of the insights that this unique data set offers.

Session Leaders:
Krisila Benson & Kate Scaife Diaz, TechnoServe
Evaluation Toolkits for Social Enterprises

The Duke Global Health Institute Evidence Lab is developing an evaluation toolkit designed to help social enterprises in health use creative methods to derive value from their impact measurement. We will briefly highlight the toolkit, which includes four diverse modules, including instructions for assessing changes in patients’ access to care, an economic analysis decision tree, and a tracking tool to help measure sector influence. We will then discuss avenues of use for the toolkit, and how use of the toolkit may expand beyond social enterprises in health to donors, investors, and social enterprises in other sectors.

Session Leader:
Jennifer Headley, Duke Global Health Institute Evidence Lab

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<tr>
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<td>Closing Plenary</td>
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*Icons made by Oliver from www.flaticon.com*