



Aspen Network of  
Development Entrepreneurs

# Metrics From the Ground Up

June 12-13, 2018  
Washington, D.C.



#ANDEMetrics



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# AGENDA

## TUESDAY • JUNE 12

- 8:30 Registration and Breakfast
- 9:00 Welcome and Introduction
- 9:30 Speed Networking
- 10:30 Plenary 1: *Looking Back and Projecting Forward*
- 11:45 Plenary 2: *Right-Fit Evidence for the Social Sector*
- 12:30 Lunch
- 1:30 Breakout Session 1 (60 minutes)
- 2:45 Breakout Session 2 (60 minutes)
- 4:00 Plenary 3: *Impact measurement is dead. Long live impact measurement!*
- 5:15 Day 1 Close & Reception

## WEDNESDAY • JUNE 13

- 8:15 Breakfast and Demo Sessions
- 9:00 Welcome
- 9:35 Plenary 4: *Measuring and Managing Impact with a Gender Lens*
- 10:45 Working Session 1: *Building Collective Solutions*
- 12:30 Lunch
- 1:30 Breakout Session 3 (60 minutes)
- 2:45 Breakout Session 4 (60 minutes)
- 4:00 Plenary 5: *Closing Session*
- 4:45 Day 2 Close



## TUESDAY • JUNE 12

8:30 AM *Registration and Breakfast*

9:00 AM **Welcome and Introduction**

9:30 AM **Speed Networking**

10:15 AM *Break*

10:30 AM **LOOKING BACK AND PROJECTING FORWARD**

This discussion will start with a reflection of the progress that the sector has made since the first Metrics from the Ground Up conference held a decade ago. We will also highlight the “sticky” issues that seem to stay with us year after year.

*Kelly McCarthy, The GIIN*

*Brian Trelstad, Bridges Ventures*

*Moderator: Randall Kempner, ANDE*

11:45 AM **RIGHT-FIT EVIDENCE FOR THE SOCIAL SECTOR**

Social sector organizations and funders are paying more attention to the potential for data and evidence to support program management, learning, and improvement. But data collection that isn't done well can waste money without improving decision-making. This discussion presents a set of principles organizations can use to identify the right time to engage in impact evaluation and build systems that provide information to support learning and improvement.

*Dean Karlan, Innovations for Poverty Action*

12:30 PM *Lunch*



## TUESDAY • JUNE 12 (CONTINUED)

1:30 PM

### BREAKOUT SESSION 1

**GILDENHORN  
A**

#### **THE GOLDEN THREAD: COLLECTING DATA ACROSS THE 5 DIMENSIONS OF IMPACT**

*Olivia Prentice, Impact Management Project*

This session will share new outputs from the Impact Management Project. Over the past 6 months, the IMP team has been working with enterprises to shape guidance on what data enterprises need to collect to understand all their effects on people and planet – including using direct beneficiary feedback – and how this data can be summarized for investors. For the investors in the room, we will discuss how this enterprise data can be used to assess whether your impact goals have been met.

**PENNER**

#### **WHAT IS 'GOOD ENOUGH' MONITORING AND EVALUATION?**

**Presenting tools to integrate your Monitoring, Evaluation, Research and Learning (MERL) strategy with program Design (D)**

*Heather Esper and Yaquta Fatehi, The William Davidson Institute at University of Michigan (WDI)*

*Vava Angwenyi, Vava Coffee and Gente del Futuro (GDF)*

Complex contexts and innovative programs, coupled with limited resources, require teams to make tradeoffs between design and monitoring, evaluation, research, and learning (MERL) activities resulting in disjointed components of the program-cycle. To address this, we introduce BalanceD-MERL i.e. an intentional bridge between program design and utilization-focused evaluation, using four principles: right-sized, relevant, responsible, and trustworthy. In this session, we present newly developed tools beginning with the maturity matrix which provides a roadmap to develop MERL strategies that are precisely designed to the needs of the program while right-sized to resources available. This will be followed by other tools that capture best practices from our experience of using the approach in our pilot programs. Vava Angwenyi, the founder of Vava Coffee and co-founder of Gente del Futuro, will share her perspective of the approach as a small and growing business (SGB) owner and practitioner – what works well, what are the challenges, and how to make this approach more user-friendly for the SGB sector. In this interactive session, we also want to hear from the audience on how to further refine these tools and what lessons have they learned from their experiences in balancing M&E with other activities.



## TUESDAY • JUNE 12 (CONTINUED)

1:30 PM

### BREAKOUT SESSION 1 (CONTINUED)

SMITH B

#### USING RIGOROUS EVIDENCE TO ACHIEVE IMPACT IN SGB DEVELOPMENT

*Elizabeth Koshy, Innovations for Poverty Action*

Following a decade of fruitful collaborations between the worlds of research and practice, a promising body of rigorous evidence has emerged identifying effective solutions to some of the most pressing challenges small and growing businesses (SGBs) face. The sector is at a crucial juncture in which stronger partnerships between decision-makers and academics will be needed to build on the existing knowledge and enable the co-creation of a more intentional, cohesive, and actionable learning agenda for SGB development. Focusing on IPA's extensive research in this sector, this session will provide an overview of the state of the evidence and suggest new avenues for a consolidation research agenda. Attendees will be encouraged to participate in discussions on the challenges and opportunities incorporating lessons from randomized evaluations into their institutional programming and learning.

GILDENHORN  
B

#### USING OUTCOME DATA TO GUIDE STRATEGIC DECISIONS

*Amelia Greenberg, Social Performance Task Force*

The Social Performance Task Force (SPTF) Outcomes Working Group has found that many struggle not in collecting outcome data, but in figuring out what to do with this data. Too often data is being collected but not used well, or not used at all, outside of reporting externally to funders. This workshop will focus on what SPTF has learned so far, share participants' experience, and foster debate.

2:45 PM

### BREAKOUT SESSION 2

GILDENHORN  
A

#### THE IMPACT TOOLKIT

##### Consolidating Your Impact Measurement and Management Resources

*Adam Dolin, The Global Impact Investing Network (GIIN)*

The Impact Toolkit is a recently launched database designed to direct impact investors to the supporting resources most relevant to their impact measurement and management needs. This session will introduce the Impact Toolkit and contextualize its role in a rapidly shifting marketplace. Also featured will be an interactive component on the emerging findings, challenges, and questions stemming from its development.



## TUESDAY • JUNE 12 (CONTINUED)

2:45 PM

### BREAKOUT SESSION 2 (CONTINUED)

**GILDENHORN  
B**

#### **SYSTEMS APPROACHES TO UNDERSTANDING ENTREPRENEURSHIP ECOSYSTEMS**

*Matt Guttentag, LINC LLC*

This discussion will focus on using systems approaches to understand entrepreneurship ecosystems. Right now, most ecosystem analyses take a landscape approach, identifying different factors that are important opportunities and challenges in a given ecosystem. However, entrepreneurship ecosystems are complex, with interdependent factors and relationships making it difficult to predict the impact of any given intervention on the ecosystem as a whole. This session will explore different systems approaches that can be used to better understand the complex dynamics of entrepreneurship ecosystems, giving participants an introduction to a set of tools to start using in designing their own interventions.

**PENNER**

#### **MOVING BEYOND METRICS: HOW TO ARTICULATE INVESTOR CONTRIBUTION**

*Daniel Brett, Pacific Community Ventures*

*Caitlin Rosser, Calvert Impact Capital*

While impact metrics are still a core part of our impact measurement and management (IMM) practice, we're finding more and more that articulating the unique value we bring as an investor - our investor contribution, or additionality - is just as key to understanding our true impact on our borrowers and the communities they serve. It provides us much more insight to be able to actually manage our impact than just collecting impact metrics. Join Pacific Community Ventures InSight and Calvert Impact Capital's IMM team for an interactive discussion on how to 'move beyond metrics' - and whether, as an industry, we even should.

**SMITH B**

#### **BUILDING A MEASUREMENT AND ANALYTICS SYSTEM FOR TECHNOLOGY-ENABLED INTERMEDIARIES**

*Miriam Chaum, Philanthropy University*

*David Wynn, MicroMentor*

Traditional Measurement & Evaluation in a nonprofit or social enterprise has typically involved surveys that are administered in-person just a few times a year. What does M&E look like when the intervention itself is a technology product that generates data 24/7? Or when beneficiaries are hidden behind a website login? How can technology-enabled organizations ensure that they build the traditional foundations of an M&E system while taking best advantage of and managing risks associated with their new data bounty?



## TUESDAY • JUNE 12 (CONTINUED)

### 4:00 PM **IMPACT MEASUREMENT IS DEAD. LONG LIVE IMPACT MEASUREMENT!**

Impact measurement is extractive, time-consuming, top-down, and driven by the need to ‘prove’ feel-good achievements to asset owners, or to use in glossy publications. Measurement doesn’t have to be like this. In fact, social impact measurement can play a core role in creating both social and commercial value for businesses. By understanding impact on customers, companies can solve real pain points; by listening to suppliers’ perspective on the value proposition, companies can increase product quality and decrease attrition; by engaging with employees, firms can and boost productivity and lower turnover. There’s a need to reframe measurement from a bottom-up perspective: As a way of delivering on a core company mission.

*Helen Baker, DFID Impact Programme / PwC UK*

*Sonia Kuguru, Acumen*

*Severin Luebke, DFID*

*Moderator: Randall Kempner, ANDE*

5:15 PM *Close*

### 5:30 PM **HAPPY HOUR**

Join us for a reception and get to know your fellow participants, and ANDE members and friends from the DC area. Get ready for a scavenger hunt that will test your IMM skills.



## WEDNESDAY • JUNE 13

8:15 AM *Breakfast*

8:15 AM **DEMO SESSIONS**

- **Measuring Entrepreneurship Ecosystems with Social Network Analysis** (*Penner*)
- **Amp Impact: A Live Demo on Tracking Performance Indicators to Amplify Impact-Driven Organizations** (*Smith B*)
- **Enabling families to assess their levels of poverty” Experiences from the field** (*Gildenhorn B*)

9:00 AM **WELCOME & INTRODUCTION**

Learn more about the emerging impact measurement projects and how you can get involved.

*Olivia Muiru, B Lab East Africa*

*Sonia Kuguru, Acumen*

*Noel Verrinder, Genesis Analytics*

*Lynn Railsback, CapitalPlus Exchange*

*Courtney Bolinson, Engineers without Borders Canada*

9:35 AM **ANNOUNCING THE GENDER LENS IMPACT MEASUREMENT FUND**

*Carolina Robino, International Development Research Centre (IDRC)*

9:45 AM **MEASURING AND MANAGING IMPACT WITH A GENDER LENS**

What does it mean to invest with a gender lens and to measure and manage the impact of these investments? This session will provide an overview of gender lens investing, with a focus on measurement and management considerations to inform decision-making.

*Christina (CJ) Juhasz, WWB Asset Management*

*Heather Kipnis, IFC*

*Moderator: Mabinty Koroma-Moore, The GIIN*

10:30 AM *Break*





## WEDNESDAY • JUNE 13 (CONTINUED)

### 10:45 AM **BUILDING COLLECTIVE SOLUTIONS**

Led by participants, the goal of this session is to generate potential collective solutions to these “sticky” problems that we face as a sector.

12:30 PM *Lunch*

### 1:30 PM **BREAKOUT SESSION 3**

#### **GILDENHORN A** **DOES A NEW JOB MEAN A BETTER JOB?** **Measuring quality instead of quantity**

*Jennifer Himmelstein, ACDI/VOCA*

*Adriano Scarampi, MarketShare Associates*

Projects and businesses often collect data on the number of new jobs generated, but rarely do they measure changes in the quality of existing or new jobs. There is a breadth of literature and tools available for generating this information. This discussion will cover the value of collecting this data as well as methods of measurement.

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#### **SMITH B** **ENTERPRISE TECHNOLOGY FOR THE SOCIAL SECTOR** **To buy, build, or blend?**

*Peter Blair, Vera Solutions*

There is a movement across the social sector towards greater transparency, accountability, and data-informed decision-making. But with overarching considerations for impact measurement technologies, such as accessibility, security, flexibility, and scalability of tools, it is not always clear whether to buy a data solution, build one yourself, or implement a blend of the two. Leveraging low-cost, user-friendly technology, Vera Solutions has helped more than 240 organizations convert their ‘dead’ data, stuck in paper forms, unwieldy spreadsheets, and email inboxes, into real-time, actionable insights.

In this interactive session, participants will learn from Agha Khan Foundation, Global Health Corps, and ZanaAfrica’s successful technology projects, discuss challenges and best practices, and learn the 3 most important factors to consider when choosing technology tools and platforms that balance your organization’s needs today with your needs tomorrow, while staying within budget.



## WEDNESDAY • JUNE 13 (CONTINUED)

1:30 PM

### BREAKOUT SESSION 3 (CONTINUED)

**PENNER**

#### **USER-DRIVEN IMPACT METRICS FOR OFF-GRID PRODUCTS**

*Scott Graham, FINCA International*

Most impact evaluations start with a set of outcomes – such as improved health or increased incomes – which are then measured within the target population. But what does impact look like from the customer’s perspective, and why does that matter? In this session, FINCA International will share the results of a recent study on the health and safety impacts of off-grid products to illustrate a customer-led approach, showing how the impact perceptions vary by each product, and how those responses were shaped by customer characteristics such as gender and income. Participants will walk away with practical strategies and lessons for adopting customer-driven research methodologies, and tangible research findings pertaining the study of off-grid products from customers’ perspectives.

**GILDENHORN**

**B**

#### **STARTING FROM SCRATCH?**

##### **Refining and Reshaping Your Impact Strategy**

*Kate Williams, Fair Trade USA*

Periodically, organizations re-tool and improve systems and operations to reflect new priorities and endeavors. Fair Trade USA recently started a refresh of its Impact Management System, the scheme used to define, measure, and evaluate the organization’s impact, and to accurately capture the organizations activities. As part of this process, Fair Trade USA is engaging its internal stakeholders in a review of the Theory of Change which will lead to improvements to the M&E system. This session will cover the following questions: how do we think about the utility of an impact framework? When do we know it is time to improve the M&E system? How can we engage users along the value chain? Join this session to take Fair Trade USA’s experience as a starting point for a robust discussion around best practices and feedback.



## WEDNESDAY • JUNE 13 (CONTINUED)

2:45 PM

### BREAKOUT SESSION 4

**PENNER**

#### **A MEASUREMENT APPROACH TO RETAILER DEVELOPMENT**

*Joao Brites, AB InBev*

Come to learn more about AB InBev's Lean Approach to Measure the Commercial and Social Impact of Retailer Development Programs. From this session, participants will get a materialized example of how different concepts, tools and methodologies for M&E are being used to measure the impact of our enterprise development programs in a way that is both robust, low-cost and participant-centered. In particular, we will focus on the implementation of Interactive Voice Response (IVR) surveys, ground rules to gather sensitive data, and standards of evidence.

**SMITH B**

#### **RCTS AND PROJECT IMPLEMENTATION**

##### **Addressing the Challenges**

*James Tinker and Tina Byenklya, Technoserve*

Randomized control trials (RCTs) are often considered the gold standard for measuring impact. Implementing RCTs, however, presents unique challenges to project implementation:

- identifying control participants
- designing a research model before you know your exact enrollment
- sampling when you have multiple cohorts
- managing the tension between the need to stay agile and adapt your program to what is happening on the ground with the researchers' need for you to follow the timeline exactly and keep implementation consistent
- dealing with the time lag in getting results
- selecting a research firm that aligns with your values and working cooperatively with it

This session will provide participants with insights into how real entrepreneurship projects have worked to address these challenges in an RCT.



## WEDNESDAY • JUNE 13 (CONTINUED)

2:45 PM

### BREAKOUT SESSION 4 (CONTINUED)

GILDENHORN  
A

#### HOW TO PRACTICE IMPACT MEASUREMENT AND MANAGEMENT WITH A GENDER LENS?

*Christina (CJ) Juhasz, WWB Asset Management  
Adam Dolin & Mabinty Koroma-Moore, The GIIN*

To examine metric selection for investing with a gender lens, this session will feature a presentation on how the IRIS metrics align to the Women's World Banking's Gender Performance Indicators. CIO of Women's World Banking Asset Management, Christina (CJ) Juhasz will provide an overview of their investment strategy and outcomes. The GIIN will highlight how IMM with a gender lens informed the development of IMM tool - Navigating Impact. After the presentation, participants will be guided through an exercise using the five dimensions of impact developed by the Impact Management Project to articulate what type of impact can be delivered through gender lens investing.

GILDENHORN  
B

#### STATISTICAL LEARNING FOR EASY CUSTOM POVERTY MEASUREMENT

*Rachel Wells, Innovations for Poverty Action*

The Poverty Probability Index (PPI) uses statistical learning to turn long consumption surveys into 10 simple questions to easily determine household poverty rates, but the methodology can also be adjusted or used to predict the outcomes of other variables that are complicated to measure. This session will start with a high-level overview of the statistical learning model that the Poverty Probability Index (PPI) is built on. We will then move into how the methodology is being used to create customized tools to help organizations meet their specific poverty measurement needs beyond the typical PPI. Please bring your ideas, feedback, discussion questions, and poverty measurement goals for a lively discussion about the possible applications of advanced statistical methods for on the ground measurement.

3:45 PM

*Break*

4:00 PM

### CLOSING SESSION

4:45 PM

*Close*

