Metrics from the Ground Up
Washington, DC   June 12-13, 2018

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 the sector has made since the first Metrics from the Ground Up conference was held a decade ago, and 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**
Dean Karlan, Innovations for Poverty Action

| 12:30 PM | *Lunch* |

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 have 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 summarised 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.

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 figuring out what to do with that 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	## New Resources to Navigate Impact Measurement & Management

The GIIN's IMM Team

Fragmentation is often cited as a challenge to advancing impact measurement and management (IMM). To improve the current state of IMM, the GIIN has launched two new publicly available resources: Navigating Impact and the Impact Toolkit. These two resources aim to address fragmentation in approaches to IMM. This 60-minute session will give attendees the opportunity to familiarize themselves with these two sources that are aligned in addressing current challenges in the market, and then in parallel sessions according to interests, gain a deeper familiarity with the resources. |
| *Gildenhorn B* | ## Systems Approaches to Understanding Entrepreneurship Ecosystems

Matt Guttentag, LINC LLC

This discussion will focus on using systems approaches to understanding 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 manageable, 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 that just collecting impact metrics. |
| *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? 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? |

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 for 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.

Severin Luebke, DFID

Jessica Martin, Acumen
Helen Baker, Pricewaterhouse Coopers

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) Poverty Stoplight (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, IDRC*
9:45 AM	**Measuring and Managing Impact with a Gender Lens** What does it mean to invest with a gender lens and measure and manage the impact of those investments? This session will provide an overview of gender lens investing, with a focus on measurement and management considerations to inform decision-making. *Moderator: Mabinty Koroma-Moore, The GIIN*

10:30 AM	*Break*

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* 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.
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

Draft agenda – sessions subject to change

| | 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. |

User-Driven Impact Metrics for Off-Grid Products

Penner

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.

Starting from Scratch? Refining and Reshaping Your Impact Strategy

Gildenhorn B

Kate Williams, Fair Trade USA

Fair Trade USA recently started a refresh of its Impact Management System, the system used to define, measure, and evaluate our organizational impact. As part of this process, Fair Trade USA is engaging multiple stakeholders in a review of the Theory of Change as well as the monitoring and evaluation system itself. How do we think about the utility of an impact framework, when do we know it is time to improve, and 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.

2:45 PM | **Breakout Session 4**

A Measurement Approach to Retailer Development

Penner

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. Out of 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.

RCTs and Project Implementation: Addressing the Challenges

Smith B

James Tinker, Technoserve

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

Statistical Learning for Customized Simple Poverty Measurement

Gildenhorn B

Rachel Wells, Innovations for Poverty Action

This session will cover how the Poverty Probability Index (PPI) team is beginning to use their statistical learning models (that are usually used to turn long consumption surveys into 10 simple questions to easily determine household poverty rates) for poverty measurement beyond the typical PPI. After hearing a high-level overview of the PPI statistical methodology and how it has been customized for various organizations to meet their specific poverty measurement needs, 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 simple measurement.

3:45 PM	*Break*
4:00 PM	**Closing Session**
4:45 PM	**Close**