

## Metrics from the Ground Up Conference Agenda

The Aspen Institute  
1 Dupont Circle, NW Ste 700  
Washington, DC 20036

| <b>Monday, June 7<sup>th</sup>, 2010</b> |   |  |                 |
|--|---|--|-----------------|
| <b>Time</b>                              | <b>Topic</b>  | <b>Session Facilitator</b>   | <b>Location</b> |
| 8:00 – 9:00 am                           | Registration/ Check-in<br>Coffee and light breakfast served   |  | Near LCR        |
| 9:00 – 9:15 am                           | <b>Welcoming Remarks</b>  |  | LCR             |
| 9:15 – 10:15 am                          | <b>Social Impact Frameworks, Tools, &amp; Practical Applications</b>  | <b>Veronica Chau</b> , Associate Partner, Dalberg<br><b>Steve Wright</b> , Director of Innovation,<br>Salesforce.com Foundation  | LCR             |
| 10:15 -10:45 am                          | <b>Morning Coffee Break</b>   |  | Near LCR        |
| 10:45–12:00 am                           | <b>New Tools' Progress and Challenges: IRIS, Pulse, and GIIRS</b><br><i>-The managers of the IRIS, Pulse, and GIIRS projects will provide updates on the implementation of these impact measurement tools. This session will include an open discussion about the challenges faced in scaling up adoption.</i>  | <b>Moderator: Antony Bugg-Levine</b> , Rockefeller<br>Foundation<br><b>Sarah Gelfand</b> , Director of IRIS, GIIN<br><b>Andrew Kassoy</b> , Co-Founder, B-Lab<br><b>Joe McVicker</b> , Pulse                         |                 |
| 12:00 -1:15 pm                           | <b>Lunch/ Networking</b>  |  | LCR             |
| 1:30 – 2:30 pm                           | <b>Cultivating a Performance Management Culture</b><br><i>- Keystone Accountability has been running a social investment survey this past year that highlights the value of benchmarking. This past year Grassroots Business Fund and Acumen Fund both independently conducted customer satisfaction surveys with their investees and learned what their investees liked and what they didn't. This session will show the relationship between organizational practice and system and high-light real-world examples.</i> | <b>David Bonbright</b> , CEO, Keystone<br>Accountability ( <i>moderator</i> )<br><b>Brad Presner</b> , Metrics Manager, Acumen Fund<br><b>Rafi Menachem</b> , Social Impact Coordinator,<br>Grassroots Business Fund | LCR             |
| 2:30 – 2:45 pm                           | <b>Afternoon Coffee Break</b>   |  | Near LCR        |
| 2:45 -3:45 pm                            | <b>Panel: The SGB Perspective – Collection and Reporting Challenges</b><br>Brad Magrath, Managing Director, Mobile Transaction Zambia Limited<br>Marcella Echavarria, Founder, SurEvolution   | <b>Moderator:</b><br>Brian Trelstad, Chief Investment Officer,<br>Acumen Fund  | LCR             |

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|                | Ray Clavel, President, Latco International<br>Monica Iturralde, Administration and Development Manager, IES  |   |                   |
| 3:45 – 5:00 pm | <b>Interactive Break-out Groups: Funders, Practitioners, SGBs</b><br><i>-Participants will split into their respective groups to discuss how to attack the problem of collecting metrics by understanding the situation on the ground and the solutions that work</i>  | <b>Facilitator:</b> Sam Reid, McKinsey & Co<br><b>Funder Moderator:</b> Margot Brandenburg, Rockefeller Foundation<br><b>Practitioner Moderator:</b><br><b>SGB Moderator:</b> Sara Olson, SVT | MCR<br>LCR<br>SCR |
| 5:00 – 5:15 pm | <b>Day 1 Wrap-up / Outcomes</b>  | <b>Randall Kempner</b>  | LCR               |
| 5:30- 7:30 pm  | <b>Social Activity: Metrics Progressive</b><br><i>Join us as we venture to the offices of nearby ANDE members where we will be tasked with metrics trivia and served beverages and appetizers. We will be stopping at two locations before all gathering at Science Club for happy hour (1136 19<sup>th</sup> Street).</i> |   | LCR               |

| <b>Tuesday, June 8<sup>th</sup>, 2010</b> |   |   |                 |
|---|---|---|-----------------|
| <b>Time</b>                               | <b>Topic</b>  | <b>Session Facilitator</b>  | <b>Location</b> |
| 8:00 – 8:30 am                            | <b>Registration / Check-in (for new attendees only)</b>   |   |                 |
| 8:30 – 9:00 am                            | <b>Coffee and light breakfast</b>   |   | 1B              |
| 9:00 – 10:00 am                           | <b>When Metrics Matter – and When They’re Superfluous</b><br><i>-Over the past year, the Money for Good initiative has research and analyzed investor and donor behavior. This session will present a comprehensive understanding of the behaviors, attitudes, and motivations of affluent Americans with respect to impact investment, charitable giving, and international entrepreneurship</i>   | <b>Hope Neighbor, Hope Consulting</b>   |                 |
| 10:00 – 10:45 am                          | <b>Defining the Initial Listing and Report Criteria for the NeXii Roll Out</b><br><i>-NeXii aims to organize, improve, and grow the practice of sustainable impact investing by developing the intermediation infrastructure to facilitate access to, and investment in meaningful opportunities for impact investing. This session will take participants through an active demo of the integrated platform and determine input and discussion around its usefulness and applicability to your work.</i> | <b>Tamzin Ractcliffe, NeXii</b><br><b>Jeanne Murtaugh, CEO, NeXii</b><br><b>Joe Latona, NeXii</b> |                 |
| 10:45 – 11:15am                           | <b>Morning Coffee Break</b>   |   |                 |
| 11:15–12:15 am                            | <b>Breakout 1: Applying the IRIS taxonomy for your sector</b><br><i>Come learn how the taxonomy is being applied with funds and SGBs in the</i>   | Agricultural: Margot Brandenburg  | Agricultural: A |

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|                | <i>agricultural, artisanal, TA provider, and energy sectors</i>  | Financial Services: CJ Fonzi<br>Energy/Water: Sarah Gelfand<br>TA Provider: Veronica Chau                                     | Financial Services: B<br>Energy/Water: C<br>TA Provider: D                    |
| 12:15 –1:15 pm | <b>Breakout 2: Rotate</b><br><i>Come learn how the taxonomy is being applied with funds and SGBs in the agricultural, financial services (community finance/microfinance), TA provider, and energy/water sectors</i>   | Agricultural: Margot Brandenburg<br>Financial Services: CJ Fonzi<br>Energy/Water: Sarah Gelfand<br>TA Provider: Veronica Chau | Agricultural: A<br>Financial Services: B<br>Energy/Water: C<br>TA Provider: D |
| 1:15 – 2:15 pm | <b>Lunch and Networking</b>  |   |   |
| 2:15 - 3:00 pm | <b>Learning for Social Impact</b><br><i>-The head of the Learning for Impact Initiative in McKinsey's Social Sector Office will describe this initiative, focusing on 10 core belief on best practices, a database of 150 Tools and Resources for Assessing Social Impact, and a 3 step process for designing an assessment plan.</i>  | <b>Laura Callanan</b> , Social Sector Office,<br>McKinsey & Co.   |   |
| 3:00 – 4:00 pm | <b>Case Studies: Measuring Impact from Palestine to India at the Venture Level</b><br><i>The Middle East Investment Initiative's \$160 million Loan Guarantee Facility managed by CHF International has incorporated practical impact assessment and feedback mechanisms into its operations. Using the BoP Impact Assessment Framework, the William Davidson Institute has developed a low-cost, rigorous approach which it used successfully with VisionSpring in Andhra Pradesh.</i>  | <b>Arun Hsu</b> , CHF International<br><b>Heather Esper</b> , William Davidson<br>Institute                                   |   |
| 4:00 – 4:30 pm | <b>Closing: Outcomes of Day 2 &amp; Next Steps</b>   |   |   |
| 4:30 – 6:00pm  | <b>Free Time for Meetings, Networking, and Individual Consultations (Coffee Break/Refreshments will be available)</b><br><b>-Pulse Demonstration/Consultation</b> with Joe McVicker and Steven Simich of App-X<br><b>-Money for Good Consultations</b> with Hope Neighbor: <i>The Money for Good consultations will allow participants to discuss how to use the results of the MFG Initiative to tailor their products, services, and outreach to the needs of donors and investors, to attract more capital to their organizations. Those that sign up will be asked to do a limited amount of pre-work to make the consultation as valuable as possible. 30 minute one on one sessions.</i><br><b>-ANDE Member Consultations</b> with Lindsey Anderson on becoming IRIS compliant<br><b>-Consultation on the Social E-Valuator</b> with Sara Olson: <i>Organizations can get a one-on-one or small group demo of the Social Evaluator tool, discuss how it relates to their own needs, and have their questions answered regarding how Social Evaluator relates to IRIS, Pulse, GIIRS and other pieces of emerging impact management infrastructure.</i><br><b>-NeXii Platform Demonstration and Feedback:</b> <i>The NeXii platform developers invite engagement and interaction on interface and functionality issues. Come see a more in depth demonstration of the platform and provide feedback to the creators on how it can best be improved/utilized.</i> |   |   |