



Increase your Client Outcomes IQ

By Tamra Thetford
and Joyce Klein

March 2014

*This guide was updated
by Lavanya Mohan in
September 2016*



FIELD
at the Aspen Institute


THE ASPEN INSTITUTE

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*This guide was updated by Lavanya Mohan in
September 2016 to reflect changes to
microTracker.org*

FIELD

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Ready to increase your “client outcomes IQ”?

The work of microenterprise development organizations is all about entrepreneur/client outcomes. Government, philanthropy, and individuals invest in microenterprise development organizations because they want to see entrepreneur outcomes, such as businesses that start, grow, and create jobs. Entrepreneur success stories are a powerful tool for sharing microenterprise outcomes. However, in an increasingly constrained funding environment, quantitative data on entrepreneur outcomes provide more concrete evidence crucial for raising funds and ensuring scarce resources are best used.

How many times has your organization been asked the following questions about the entrepreneurs it serves?

- What is your business survival rate?
- What percent of clients move forward with starting their business?
- How large are the businesses in terms of revenues?
- Do revenues grow after the client’s business receives business development services or loans from your organization?
- How much do your clients with businesses earn for themselves, and does that grow over time?
- How many jobs do these clients’ businesses create? What are the average hours and wages for their employees?

MicroTracker.org can help you answer these questions by providing data on entrepreneur outcomes from programs that work with FIELD to use a standard process to collect comparable data on their entrepreneur outcomes. We have designed this guide to help you use microTracker.org to:

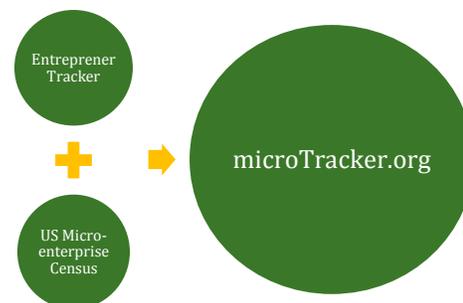
- Learn more about the outcomes of entrepreneurs who participate in microenterprise program services.
- Communicate more effectively about client outcomes — as advocates, brand builders, fundraisers, and advisers to the clients you serve.
- Measure your organization’s outcomes against other programs, as a means to help improve your program practices and results.
- Show you how to use microTracker to address critical organizational needs, including raising funds, engaging in advocacy, developing your brand, and improving and communicating about your performance.

What is the difference between MicroTracker and the US Microenterprise Census?

MicroTracker, previously known as MicroTest, is a long-running data collection effort, conducted by FIELD at the Aspen Institute. It captures both performance and outcome measures submitted by microenterprise organizations from across the country. It also includes a set of data tools and services that assist microenterprise development organizations (MDOs) to assess and improve their effectiveness.

EntrepreneurTracker captures data on the outcomes of clients who receive services from MDOs. The data are collected by organizations that participate in microTracker’s annual client outcomes survey, which uses a common survey and set of data collection and cleaning protocols. The data from the survey fuel the “Entrepreneur Data” and “Analyze Entrepreneur Data” tools on microTracker.org. The site creates an aggregated data set that describes the experiences of MDOs’ clients and allows for comparisons across organizations nationwide that have reported this type of data.

US Microenterprise Census has been conducted periodically since 1992. The census, as its name implies, attempts to capture MDO performance data from a large segment of the industry. This data set fuels the “Industry Data” and “Analyze Industry Data” tools on the microTracker site and allows for comparison across a wide group of organizations that have reported data.



MicroTracker.org client outcomes features

The microTracker site provides data and analytic tools to help you understand what happens to clients after they receive program services. These data come from surveys microenterprise programs conduct with their clients approximately one year after receiving services. Each year microenterprise programs work with FIELD through the EntrepreneurTracker program, which is part of microTracker, to use a standard survey tool and protocols to interview clients about their outcomes. FIELD then cleans, aggregates, and analyzes these results.

The microTracker site provides aggregate data — the results across all of the clients in the data set — and allows you to filter for specific indicators. These include filtering the client outcomes data by state, particular types of client and program characteristics, the type of services clients received, as well as to show the results for individual programs that participated in EntrepreneurTracker.

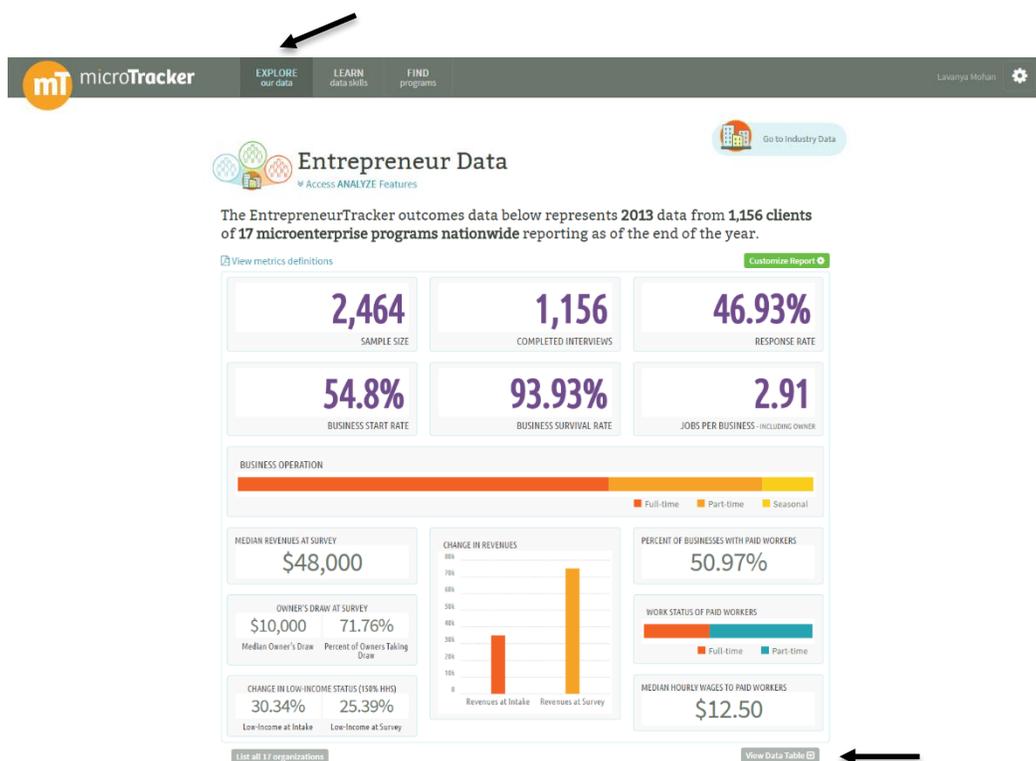
There are six key ways you can use the microTracker site and data to increase your “outcomes IQ.” Some are simpler and some are more complex. Some are free with a microTracker registration and some require a paid Premium or EntrepreneurTracker subscription. We indicate the type of subscriptions needed as we discuss the different ways to access the data in this guide. More detailed information on subscriptions and pricing is available at www.microtracker.org/pricing.

#1: Get a picture of what microenterprise program clients achieve

The site provides some data free of charge to all registered users that can be used for general communications, for advocacy, and even to demonstrate the potential impact of your work by showing what others in the field have achieved.

Free
Registration

On the microTracker site, select the “EXPLORE our data” option in the microTracker navigation bar. Then select “Entrepreneur Data.” You will land on a page that provides key statistics for all microenterprise development organizations that have reported their client outcomes data to microTracker.



The data show you the outcomes that clients report after one year of services received from microenterprise programs. You can access more information by selecting “View Data Table,” which shows you descriptive statistics such as the mean, median, minimum and maximum values, and the number of respondents for each data point.

The EntrepreneurTracker outcomes data below represents 2013 data from 1,156 clients of 17 microenterprise programs nationwide reporting as of the end of the year.



In addition to aggregate results for a particular year, the dashboard allows you to filter the data in a few ways. Select the “Customize Report” option to access data for previous years. The “Customize Report” option also allows you to filter the data to see results according to the type of services clients received or geographic areas served by microenterprise organizations that participated in EntrepreneurTracker.

5 clients of
Dashboard Filters

Year
Please select the fiscal year for which you would like to view data.

2013

Targeting and Scale
To filter aggregate data by client characteristics, program characteristics and program performance indicators click on the headings below.

Program Characteristics

- ▼ Organizational Focus
 - All Programs
 - Lending focused
 - BDS focused
- ▼ Area Served
 - All Areas
 - Rural
 - Urban
 - Statewide
 - Multistate

▼ Filter by State

National

Apply Filters **Cancel**

The Entrepreneur Data dashboard provides key insights into the outcomes reported by clients served by microenterprise programs. These data can be useful for your communications efforts and allow you to quickly access information you can compare to your own results. If your organization has not collected client outcomes data yet, the dashboard can help identify the type of outcomes your own program might collect.

2: Examine the outcomes demonstrated by clients or businesses with specific characteristics

Above we illustrated how to use the “EXPLORE our data” page to access the Entrepreneur Data dashboard to view and filter client outcomes of all organizations that have reported data to microTracker each year.

With a Premium subscription, you can dive deeper into the data to understand the outcomes experienced by clients or businesses with particular characteristics. On the Entrepreneur Data page, scroll down to the “Analyze Entrepreneur Data” section at the bottom of the page and select the “EntrepreneurTracker Client Outcomes” category to explore these measures. For example, you can see the outcomes for clients according to their gender, race or ethnicity, income, or business characteristics, or the services they received.

Premium
Subscription

The screenshot shows the microTracker website interface. At the top, there is a navigation bar with 'EXPLORE our data', 'LEARN last year's', and 'FIND programs'. Below this, the main content area features a section titled 'Analyze Entrepreneur Data' with a 'Premium Subscription Feature' tag. The text describes exploring data on outcomes of entrepreneurs after receiving services or loans. A green button labeled 'EntrepreneurTracker Client Outcomes' is highlighted with an arrow. To the right, there is a box titled 'Participate in the EntrepreneurTracker Process' with a 'Learn More' button. The footer contains links for 'Home', 'About microTracker', 'About EntrepreneurTracker', and 'Contact Us'.

You will then be taken to the report builder page for the “EntrepreneurTracker Client Outcomes” data category. The data you will see at this point are the aggregate findings from all microenterprise programs that reported their client outcomes data to microTracker through the EntrepreneurTracker survey. If you do not want to pull data on all of these metrics, select the “Customize Report” tool so you can select key indicators relevant to your specific questions and filter the results.

The data show you the outcomes that clients report after one year of services received from microenterprise programs.

The “Year” filter corresponds to the calendar years in which clients experienced the outcomes. For example, year 2013 provides the outcomes that clients experienced in calendar year 2013, approximately one year after receiving services during fiscal year 2012.

Analyze Entrepreneur Data

Explore program-level entrepreneur outcomes data and build custom reports that provide you the ability to compare or benchmark an organization's entrepreneur outcomes data with other MDOs on standardized metrics. Use the "Customize Reports" feature to select specific metrics to compare data, and use the "Add Another Report" feature to explore and compare additional categories of metrics. Also, use the "Access Other Metrics" feature to access other metrics categories.

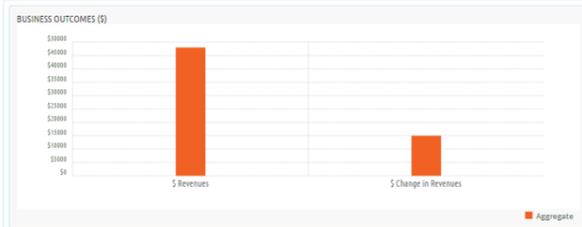
[Access Other Metrics](#)

EntrepreneurTracker Client Outcomes

Year: 2013

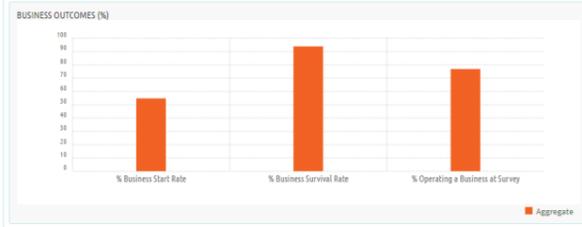
Download Report [\(pdf\)](#)

[Customize Report](#)



Download [\(png\)](#)

[View Data Table](#)



Download [\(png\)](#)

[View Data Table](#)

Analyze Entrepreneur Data

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EntrepreneurTracker Client Outcomes

Year: 2013

Download Report [\(pdf\)](#)



Download [\(png\)](#)



Report Filters

Year

Please select the fiscal year for which you would like to view data.

Indicators

Select the specific indicators you would like included on your report.

[Access Other Metrics](#)

Data Comparisons

Use this feature to type in specific microenterprise development organizations for which you would like to view data. You can compare up to six data points of nationwide, state, or individual organizations per report.

[Customize Report](#)

Targeting and Scale

To filter aggregate data by client characteristics, program characteristics and program performance indicators click on the headings below.

[Apply Filters](#)

[Cancel](#)



[View Data Table](#)



Select the “Year” filter, a drop-down menu that shows the years for which client outcomes data are available. You can also select the “Indicators” filter to choose indicators you are interested in learning about.

Report Filters

Year

Please select the fiscal year for which you would like to view data.

2013

Indicators

Select the specific indicators you would like included on your report.

[View metrics definitions](#)

Clear All Indicators

Business Outcomes (\$)

- \$ Revenues
- \$ Change in Revenues

Business Outcomes (%)

- % Business Start Rate
- % Business Survival Rate
- % Operating a Business at Survey

Entrepreneur Outcomes (\$)

- \$ Owner's Draw
- \$ Change in Owner's Draw

Business Operation

- Full-Time Operation
- Part-Time Operation
- Seasonal Operation
- Unknown

Entrepreneur Outcomes - Businesses Taking an Owner's Draw

- Taking an Owner's Draw
- Not Taking an Owner's Draw

Employment Outcomes - Business with Paid Workers

- With Paid Workers
- Without Paid Workers

Employment Outcomes (\$)

- Hourly wages paid to workers

Employment Outcomes (\$)

- Annual wages paid to workers

Employment Outcomes (#)

- Jobs per Business (including owner)

As the above list of indicators indicates, there are many ways to filter the data. How can you use the detailed analysis that comes from applying these filters? In our experience, users apply this feature in a number of key ways:

- To answer advocacy questions or target fundraising pitches in more nuanced or targeted ways.
- To offer realistic guidance to clients on the outcomes they might achieve, based on the outcomes of clients with similar characteristics.
- To understand how the profile of your clients compares to the profiles of peers with similar program missions and outcomes.
- To compare your client results to those of other programs to see whether they are equally good, stronger, or weaker.
- To identify programs that reach clients with similar characteristics to whom you can reach out to share experience on outcomes and practices.

3: Compare your outcomes against other programs or groups of peers that match your program's characteristics

Comparing your organization's outcomes to those of your peers, or of specific organizations, can help you better understand your performance and pinpoint opportunities for improvement. You can find out how your program is similar and different, and reach out to organizations with stronger performance to explore the reasons for their success or factors that might account for their stronger performance.

MicroTracker provides many different ways to find peer groups or programs that are similar to yours. You can define a peer group by:

- Geographic target market (rural, urban, statewide, or multi-state)
- Organizational focus (lending-led or training-led)
- Organizational type
- Scale in terms of numbers of clients, staff size, and/or budget
- Program age
- Target market

You can also choose specific **individual microenterprise programs** to compare data with your own, or you can compare it to those of all microenterprise development organizations (MDOs) that have submitted data to microTracker through EntrepreneurTracker. You likely will want to see how your own client outcomes' results compare to industry-wide results. Use the "Data Comparisons" filter to type in up to six data points, which can include national data, your program data, other individual programs' data, or state-specific data.

Data Comparisons

Use this feature to type in specific microenterprise development organizations for which you would like to view data. You can compare up to six data points of nationwide, state, or individual organizations per report.

National x California (CA) x Women's|

- Women's Business Development Center-IL
8 S. Michigan Avenue Suite 400 Chicago, IL 60603
- Women's Initiative for Self Employment (Women's Initiative for Self Employment and Alternativas para Latinas en Autosuficiencia (ALAS))
1398 Valencia Street San Francisco, CA 94110
- Women's Southwest Federal Credit Union
P.O. Box 720207 Dallas, TX 75372
- Women's Business Center at Florida Tech

- ▶ Organizational Focus
- ▶ Organizational Type
- ▶ Program Age
- ▶ Area Served
- ▶ Staff Size

Program Performance Indicators

- ▶ Program Scale
- ▶ Demographics
- ▶ Race and Ethnicity
- ▶ Costs and Efficiencies
- ▶ Low Income Status
- ▶ Microfinance Metrics

Apply Filters Cancel

Returning to a snapshot of the “Targeting and Scale” filters, you can select one program characteristic or several. You may be interested in comparing your data to those of organizations with similar characteristics to you. You can filter for multiple targeting and scale categories simultaneously. The more you choose, the smaller the number of organizations that will be included. However, you might find several that are very similar to your organization whose results are worth comparing to your own and learning from.

Targeting and Scale

To filter aggregate data by client characteristics, program characteristics and program performance indicators click on the headings below.

Program Characteristics

▼ Organizational Focus

- All Programs
- Lending focused
- BDS focused

▼ Area Served

- All Areas
- Rural
- Urban
- Statewide
- Multistate

▼ Organizational Type

- All Types
- CDC
- CDFI
- Credit Union
- Stand-Alone
- CAA
- Network
- Other

▼ Staff Size

- All Sizes
- Fewer than 2 FTEs
- 2-5 FTEs
- Greater than 5 FTEs

▼ Program Age

- Any Age
- 0-5 Years Old
- 6-10 Years Old
- 11+ Years Old

Program Performance Indicators

- ▶ Program Scale
- ▶ Demographics

Tip! Start by choosing one or two indicators, and see the size of the pool of reporting organizations in the peer group you are trying to evaluate.

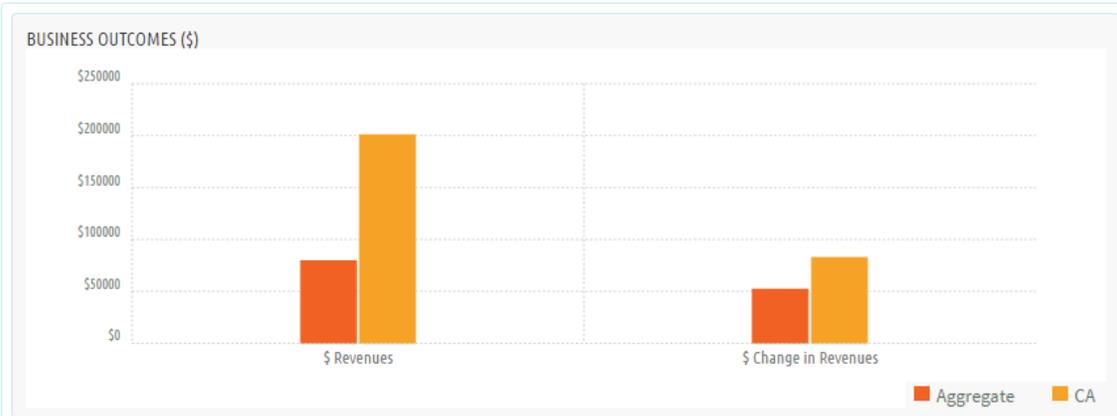
In the example below, we have chosen to filter only for lending-focused organizations and to view those results first before filtering for additional program characteristics. The results display in graphs. The example below shows client outcomes indicators for all lending-focused programs that have reported data to microTracker, compared with lending-focused organizations in California that have reported data to microTracker. You can use your cursor to hover over bars to see the indicator values. Additionally, you can also select the “View Data Table” feature to view the data as a table. Furthermore, you can download the data as a PDF report or the graphs as images, for easy insertion into reports or slides. The filters that you have applied will show below the “EntrepreneurTracker Client Outcomes” title. Finally, remember that typing in your organization or peer organizations in the “Data Comparisons” section of the report will add additional bars to the charts below, allowing you to compare across aggregate results (for the entire EntrepreneurTracker data set), data for geographic regions, and specific MDOs at a single glance.

EntrepreneurTracker Client Outcomes

Fiscal Year: 2013 Organizational Focus: Lending focused Area Served: All Areas Organizational Type: All Types Staff Size: All Sizes
 Program Age: Any Age

Download Report [\(pdf\)](#)

Customize Report



Download [\(png\)](#)

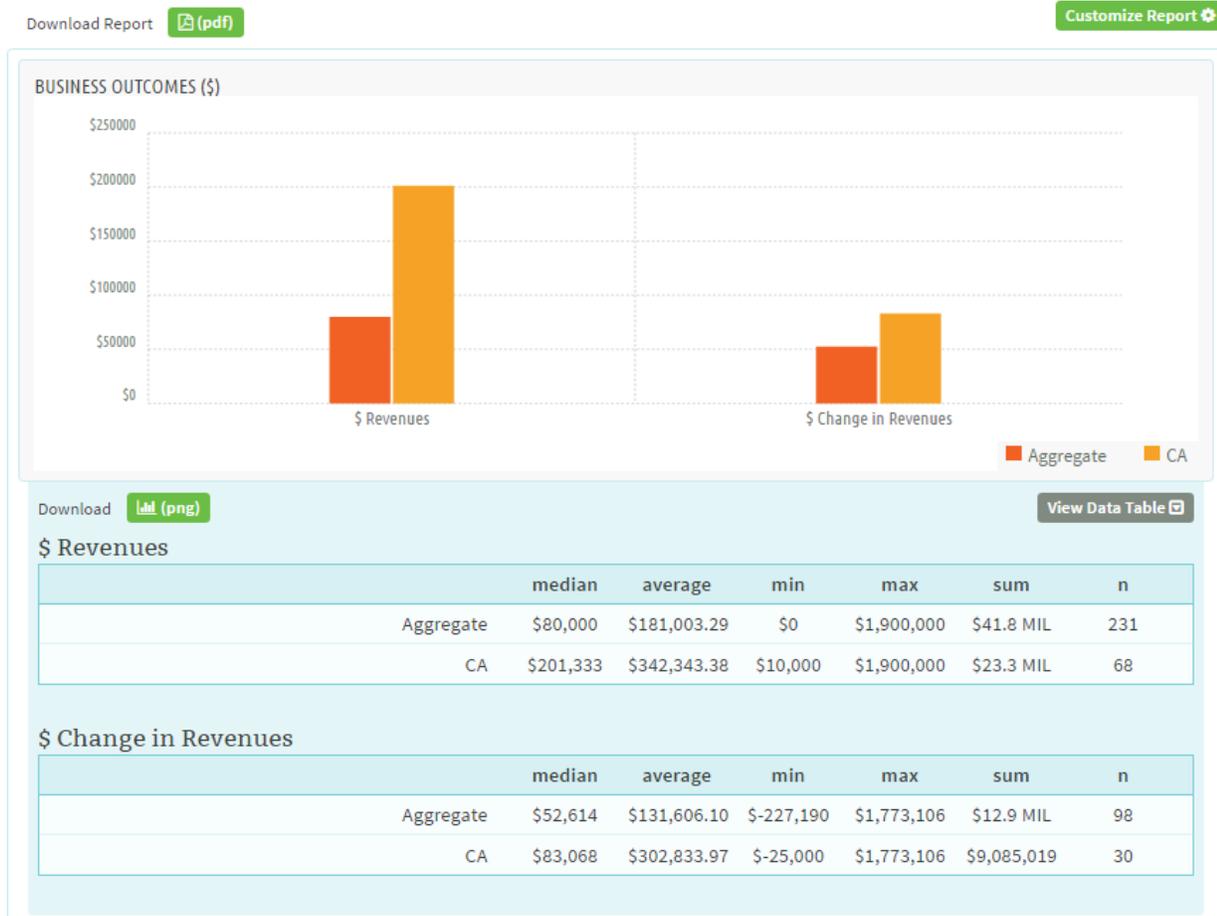
View Data Table



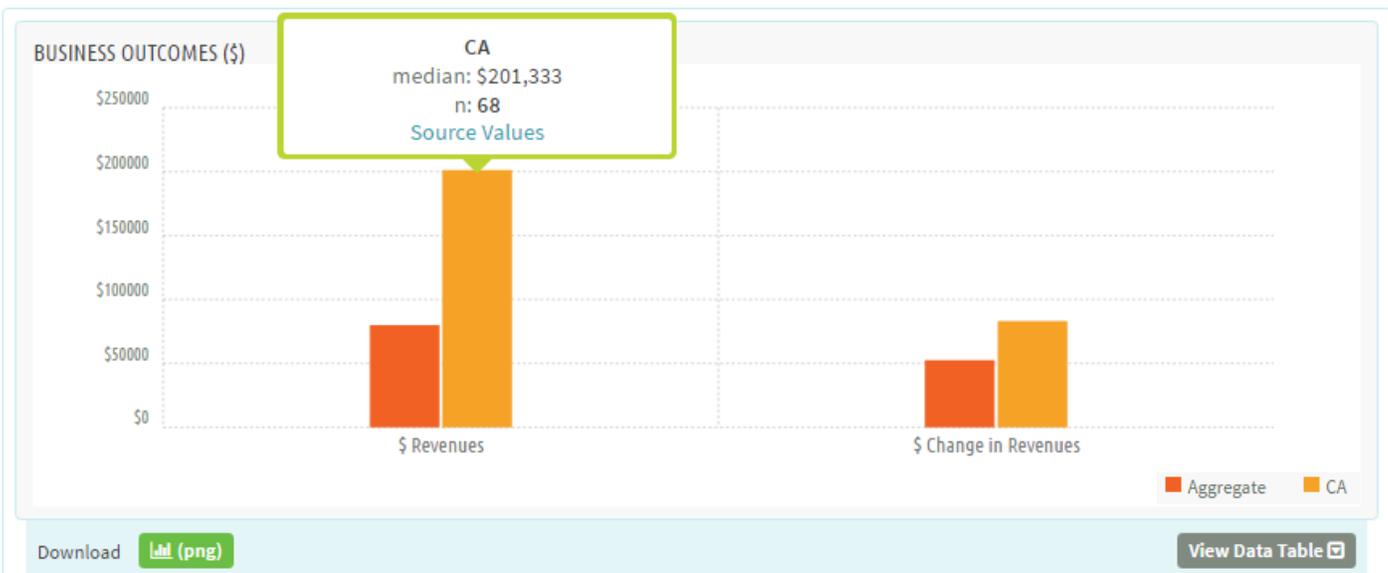
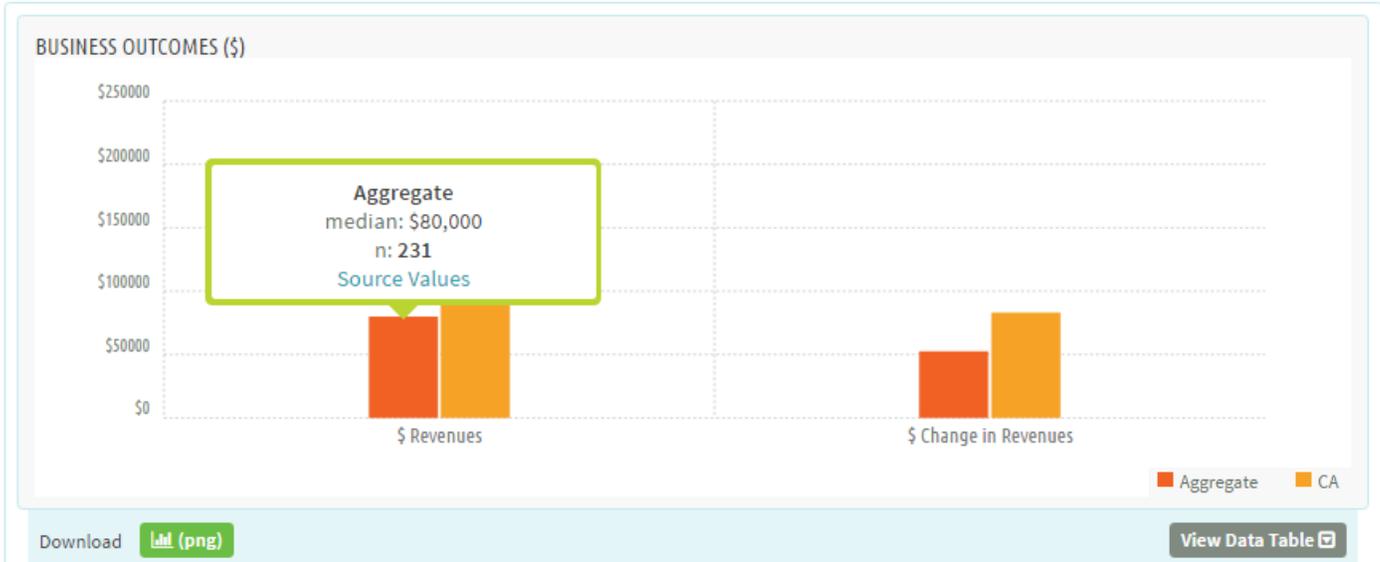
Download [\(png\)](#)

View Data Table

When you select the “View Data Table” feature for each graph, you will be able to view the results for your selected measures in table format.



If you hover over each bar, you can view the median value for each of the indicators you have selected. The illustration below shows the EntrepreneurTracker results for all lending-focused organizations that reported on each measure to microTracker. In this example, the 2013 median client business revenues for all lending-focused MDOs that reported data is \$80,000, and the median for California lending-focused MDOs that reported data is \$201,333.



If you double click on the national data bar, you will see a pop-up that lists the five other lending-focused microenterprise development organizations that reported on a particular client outcomes indicator, in this case, client business revenues in 2013.

Tip! This is an excellent way of finding individual organizations against which to benchmark your organization’s client outcomes data.

EntrepreneurTracker Client Outcomes

Fiscal Year: 2013 Organization: EntrepreneurWorks.org Client Type: ALL Client Size: ALL Client Status: ALL

Program Age: Any Age

Download Report

BUSINESS OUTCOMES

\$25000
\$20000
\$15000
\$10000
\$5000
\$0

Optimize Report

Name	median	average	min	max	n
Justine PETERSEN	\$32,400	\$87,167.63	\$0	\$515,975	107
Entrepreneur Works	\$41,500	\$79,689.89	\$0	\$500,000	28
TMC Development Working Solutions	\$247,500	\$408,671.42	\$10,000	\$1,900,000	50
Valley Economic Development Center, Inc.	\$130,889.50	\$158,098.83	\$20,000	\$453,000	18
Utah Microenterprise Loan Fund (UMLF)	\$119,500	\$249,077	\$100	\$1,223,840	28

\$ Revenues \$ Change in Revenues

Download Download Data Table

\$ Revenues

	median	average	min	max	sum	n
Aggregate	\$80,000	\$181,003.29	\$0	\$1,900,000	\$41.8 MIL	231
CA	\$201,333	\$342,343.38	\$10,000	\$1,900,000	\$23.3 MIL	68

You may also be interested in comparing your data to those of organizations operating state-wide or other types of geographic areas. You can also filter for multiple targeting and scale categories simultaneously. For example, as shown below, you can filter for lending-focused, statewide, mature programs operating for more than 11 years.

Targeting and Scale

To filter aggregate data by client characteristics, program characteristics and program performance indicators click on the headings below.

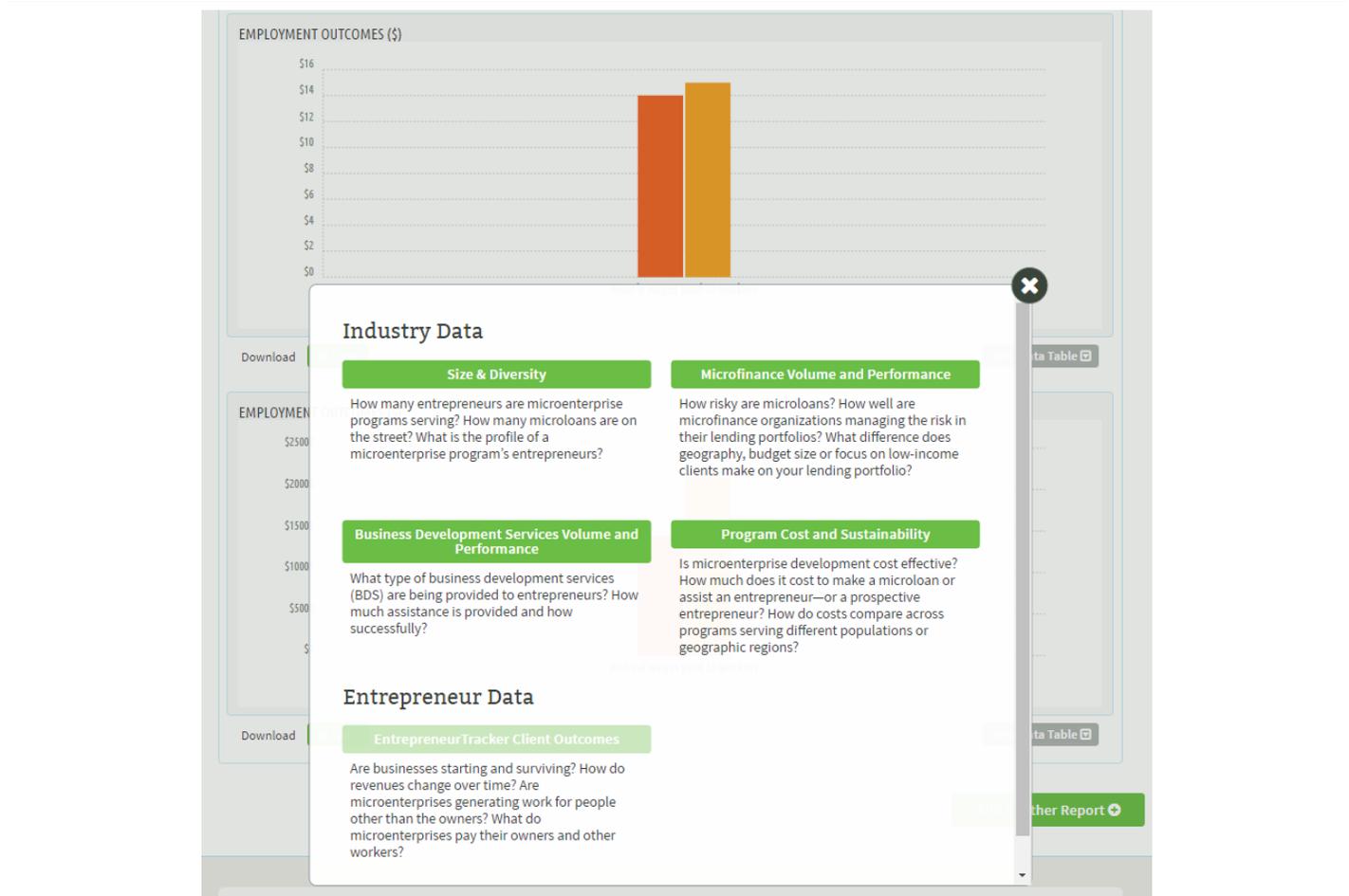
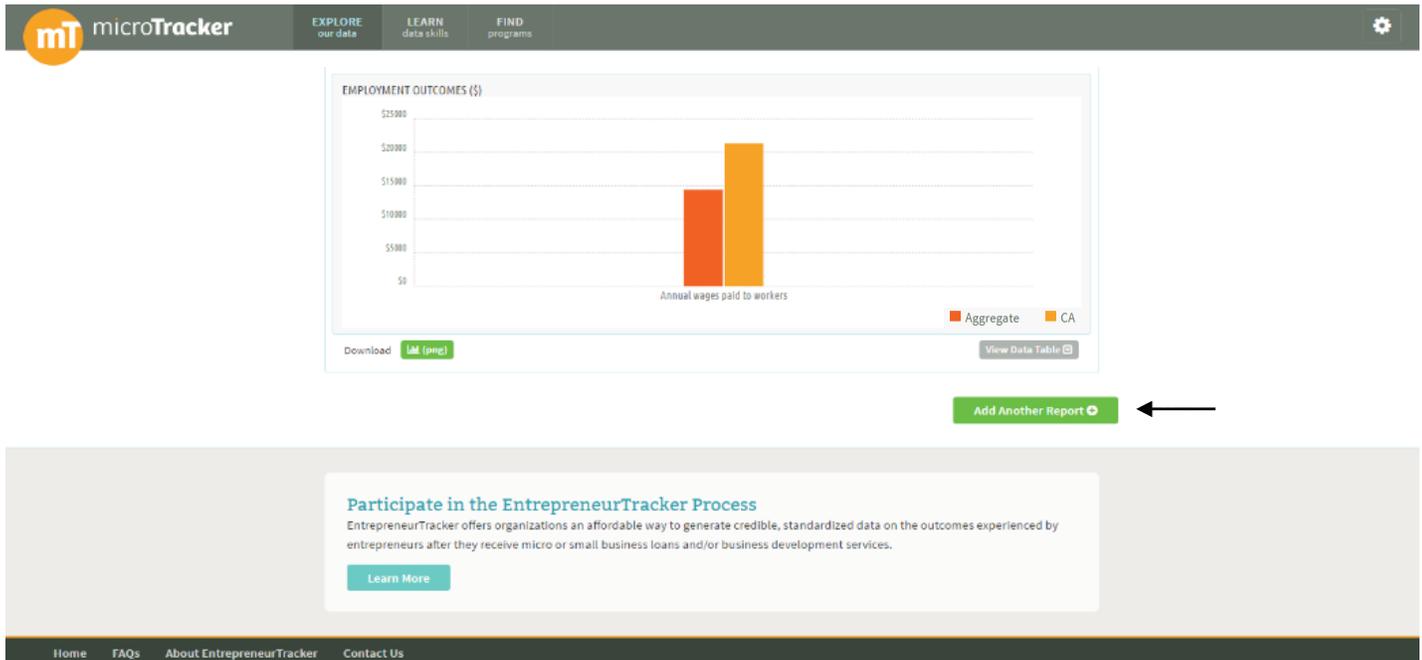
Program Characteristics

<p>▼ Organizational Focus</p> <ul style="list-style-type: none"><input type="radio"/> All Programs<input checked="" type="radio"/> Lending focused<input type="radio"/> BDS focused	<p>▼ Area Served</p> <ul style="list-style-type: none"><input type="radio"/> All Areas<input type="radio"/> Rural<input type="radio"/> Urban<input checked="" type="radio"/> Statewide<input type="radio"/> Multistate
<p>▼ Organizational Type</p> <ul style="list-style-type: none"><input checked="" type="radio"/> All Types<input type="radio"/> CDC<input type="radio"/> CDFI<input type="radio"/> Credit Union<input type="radio"/> Stand-Alone<input type="radio"/> CAA<input type="radio"/> Network<input type="radio"/> Other	<p>▼ Staff Size</p> <ul style="list-style-type: none"><input checked="" type="radio"/> All Sizes<input type="radio"/> Fewer than 2 FTEs<input type="radio"/> 2-5 FTEs<input type="radio"/> Greater than 5 FTEs
<p>▼ Program Age</p> <ul style="list-style-type: none"><input type="radio"/> Any Age<input type="radio"/> 0-5 Years Old<input type="radio"/> 6-10 Years Old<input checked="" type="radio"/> 11+ Years Old	

Program Performance Indicators

- ▶ Program Scale
- ▶ Demographics

Once you have explored the client outcomes data reported through EntrepreneurTracker, you may also be interested in exploring data indicators on microenterprise program performance, as reported through the US Microenterprise Census. To mine for this additional data you can select the “Add Another Report” option at the bottom of the graphs you have already created. A pop-up will show you the other categories of data to explore.



Up to this point, we have assumed that your own client outcomes data are not included on microTracker. Certainly, you may have your own outcomes data that you can use to compare to the data on the site, and that will be helpful to you. But such comparisons can become even more powerful if you participate in FIELD's EntrepreneurTracker client outcomes survey process.

4: Participate in FIELD's EntrepreneurTracker client outcomes process

Participating in FIELD's annual EntrepreneurTracker client outcomes process allows you to join other microenterprise programs across the country to collect data that are comparable in every way to the outcomes data on microTracker. Participating in the process involves an additional cost based on the size of your organization's client base or survey sample. If you choose to participate in EntrepreneurTracker, your organization will use FIELD's tested survey protocols and instruments to survey either a random sample or all of your clients. Your data will be cleaned and analyzed by microTracker staff and loaded on the microTracker site.



EntrepreneurTracker
(Additional Pricing
based on sample size)

You can then use the Analyze tool to call up your organization's data and see side-by-side comparisons between your results and those of others. This can help you see most clearly how your clients match up against those of other organizations. It may give you something to brag about, or it may show you where you want to do more research or exploration into why you see differences. FIELD staff will also provide you with a guidance in understanding and using your data.

5: Demonstrate competence and transparency

When you participate in FIELD's EntrepreneurTracker client outcomes survey process, your data are shared publicly on microTracker along with your organizational and program performance data.

Apart from the ease of having all your key data in one place, sharing your outcomes results clearly signals to funders and other stakeholders that your organization is a learning organization and is committed to transparency. Even with data that are not perfect in every way (and no organization's data are), making your data publicly available signals your organization's commitment to quality and performance, as well as its willingness to contribute to the industry by helping build this database and to be publicly accountable for results.

EntrepreneurTracker

Do you need credible data on the outcomes of your micro and small business clients to support program management and fundraising? FIELD's EntrepreneurTracker helps you capture and share the power of your work with key data such as:

- ▶ Business start and survival rates
- ▶ Jobs supported
- ▶ Changes in revenue
- ▶ Hourly wages paid to workers
- ▶ Movement out of poverty



How does EntrepreneurTracker work?



Why do industry leaders use EntrepreneurTracker?



70% of nonprofit leaders indicate that **at least half of their funders** require impact measures for grant reporting.

— *Nonprofit Finance Fund, 2014 State of the Nonprofit Sector Survey*

STANDARDIZATION

"Funders always want comprehensive and consistent evidence. They don't just want qualitative anecdotes... We use our data in every funding report to represent our overall performance quantitatively."

Paul Quintero,
CEO, Accion East and Online

CREDIBILITY

"... because of the robustness in the metrics and the survey, the comparability—and the fact that the survey is external makes it more objective"

Kathy Ricci,
CEO, Utah Microenterprise Loan Fund

INSIGHTS

"(It) has helped enlist discussion on how we can improve in a competitive market, what it costs to create a job, how we compare... We'd done some impact surveys before, but none that are as wholesale, systematic, and organized."

Leslie Benoiel,
Executive Director, Entrepreneur Works



FIELD at the Aspen Institute offers different levels of service to fit your program and budget. To learn more, contact microtracker@aspeninstitute.org.

Visitors to microTracker can quickly find programs that participate in the FIELD EntrepreneurTracker client outcomes survey.

On the microTracker site, select the “FIND programs” option in the microTracker navigation bar. You will land on a page that provides you individual program profiles of organization’s client outcomes data reported through EntrepreneurTracker.

Find programs
Choose a microenterprise development program to explore.

MicroTracker.org's program profiles present data from each of the microenterprise organizations that has reported data through either the US Microenterprise Census or EntrepreneurTracker. Use the program index below to search for and access individual program profiles, which include key data points and graphs. The profiles include the most recent data submitted by the organization through the US Microenterprise Census tool and EntrepreneurTracker survey.

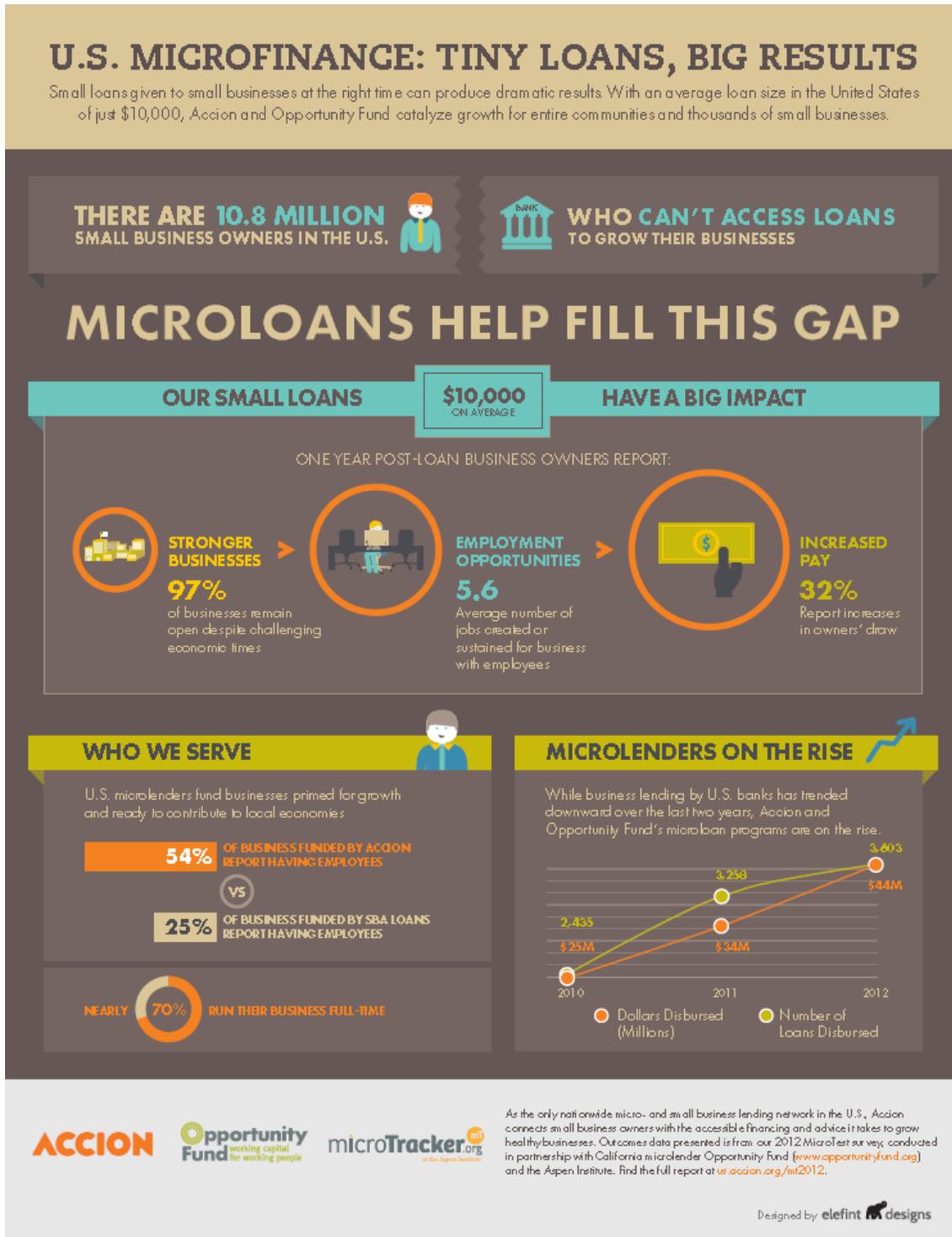
To explore industry and entrepreneur data, visit [Explore Our Data](#).

Search Filter by state Data Year EntrepreneurTracker

SCORE, Inc. Chico, CA	Census (FY): 2014, 2013, 2012, 2011	
Access to Capital for Entrepreneurs, Inc. Cleveland, GA	Census (FY): 2014, 2013, 2012, 2011, 2010, 2008	
ACCION Chicago Chicago, IL	Census (FY): 2014, 2013, 2012, 2011, 2010, 2008	EntrepreneurTracker: 2013, 2012
Accion East Accion East New York, NY	Census (FY): 2014, 2013, 2012, 2011, 2010, 2008	EntrepreneurTracker: 2013, 2012, 2011
Accion New Mexico Albuquerque, NM	Census (FY): 2014, 2013, 2012, 2011, 2008	EntrepreneurTracker: 2013, 2012, 2011
Accion San Diego Microlending Program San Diego, CA	Census (FY): 2014, 2013, 2012, 2011, 2010, 2008	EntrepreneurTracker: 2013, 2012
Adams Brown Counties Economic Opportunities Inc. Adams Brown Microenterprise Development Program Georgetown, OH	Census (FY): 2014, 2013, 2012, 2011, 2008	EntrepreneurTracker: 2014

6: Use the data to build your organizational brand

Once you have client outcomes data, displaying the information on microTracker is only one good way to use it. Several programs have leveraged their client outcomes data through external communications. Opportunity Fund and members of the Accion US Network pooled efforts to collect and aggregate client outcomes data. They produced an infographic of key results, a written research report, and reports on key outcomes reported for each participating program.



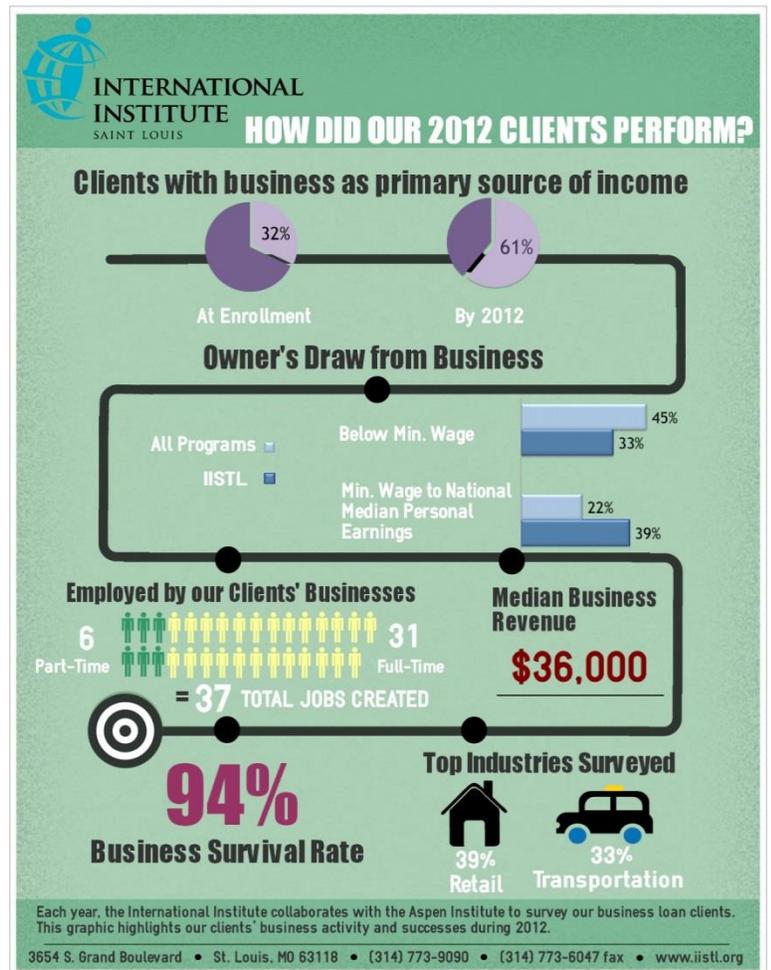
Accion Chicago’s summary, illustrated above, shows high rates of business survival and strong job production by its client businesses. Although only 32 percent of clients reported increases in earnings, this may be due to reinvestment of client profits into the business, or another reason. Sharing more rather than less data enhances credibility and offers stakeholders opportunities to explore and engage with you further, and gives you a chance to increase their understanding of what you are doing and why.

Meet IICDC

The International Institute Community Development Corporation (IICDC) is a subsidiary of the International Institute of Metropolitan St. Louis. IICDC is a certified community development financial institution (CDFI) loan fund that was founded in 2006 to assist refugees and immigrants to start, strengthen, and expand their businesses. IICDC provides technical assistance and financial education classes in conjunction with microloans. IICDC first participated in the client outcomes survey process in 2012.

The IICDC has also put its client outcomes data to work. IICDC wanted to understand how its clients fared compared to those of peer organizations. The International Institute serves primarily low-income immigrants and their families, so it filtered the data by household income and minority status. It then looked at outcomes from organizations that were similar in terms of their age and geographic market, namely young programs serving urban markets. IICDC found it had some great results, in line with or above its peers. It used the data to create the infographic on the right, which allowed the program to highlight its most positive client outcomes in an engaging way.

In addition to any comparing or benchmarking you do with the data, there is fundamental value in having solid, good quality data to “speak outcomes” both internally and externally on behalf of your organization. Knowing in detail the outcomes your clients have experienced and being able to demonstrate that the data are collected in a sound, standardized way that has credibility in the industry, and can help your organization in communications with clients, funders, board members, and other supporters.



Conclusion

We hope you now have a sense of the valuable tools available on www.microtracker.org and that you will be interested in pursuing one or more of the ways to:

- Learn and communicate about aggregate industry outcomes.
- Explore outcomes experienced by specific groups of clients.
- Compare your program's outcomes to field-wide results or those of organizations similar to yours.
- Participate in FIELD's Client Outcomes Survey process and contribute to the outcomes database.
- Demonstrate your accountability and transparency to stakeholders by collecting, contributing, and using well-collected standardized data.

Joining FIELD's EntrepreneurTracker client outcomes Survey process

If you are interested in collecting your own entrepreneur outcomes data by participating in FIELD's annual client outcomes survey, please contact FIELD for more information and pricing at microtracker@aspeninstitute.org.

Appendix

The Data Set

The data explored in this report were drawn from 2013 and 2012 EntrepreneurTracker client outcomes data. The 2013 client outcomes data were drawn from surveys of 1,156 microenterprise entrepreneurs who received a loan or a significant training or technical assistance service in FY2012 from one of the 17 participating MDOs. The 2012 client outcomes data were drawn from surveys of 1,757 microenterprise entrepreneurs who received a loan or a significant training or technical assistance service in FY2011 from one of the 24 participating MDOs. The programs participated with FIELD in collecting outcomes data on their clients using a tested survey and following standardized protocols. Participating programs randomly selected clients to answer questions about their business, household, and individual outcomes. All data were submitted to and cleaned by FIELD staff, then aggregated and analyzed to produce accurate data on client experiences.

Although relatively few organizations have produced client outcomes data compared to the hundreds that have provided performance data to microTracker, the thousands of completed surveys provide a robust and valuable look at the experience of clients served by the microenterprise programs. In any given year, the programs providing the data have client bases and program services that mirror those of the industry in some ways, but differ in others. For example, in 2010, we found that programs that participated in the client outcomes process tended to offer the same products and services as the 343 other organizations that had reported organizational data to microTracker. Their clients also were similar in terms of gender and minority status. On the other hand, the organizations that collected outcomes data that year tended to serve urban areas more than rural, and a lower percentage of low- to moderate-income people.¹ They were larger in terms of numbers of individuals served, loans made, budget and staff size. However, their median loan size was lower than industry median, suggesting that their lending reaches the more disadvantaged and early stage businesses.

This how-to guide shows how microTracker's analytic tools enable you to cut the aggregate data in ways that allow you to look at groups of clients or programs that mirror your own program more precisely or have the characteristics of the types of clients you want to understand. That is the value of bringing all these data together in one place.

¹ In aggregate, the outcomes programs serve 15 percent fewer individuals at or below 80 percent of the Department of Housing and Urban Development median and 20 percent fewer individuals at or below 150 percent of the Department of Health and Human Services poverty guideline.

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