

# Metrics from the Ground Up

## June 3-4, 2014 – Washington, DC

ANDE's annual **Metrics from the Ground Up** Conference is a venue to **highlight the progress** that the sector has made towards measuring impact in the past year. It is also a chance for us to **define our direction for the future**.

This year our conversations will focus on **Measurement in Action**, and the catalytic effect that collective action around measurement can have for the small and growing business sector. The event will include 4 deep-dive discussion groups that will identify an opportunity, and come up with next steps to address each.

### **Deep-Dive Discussion Group Tracks**

*Participants will choose one track to follow throughout the conference. Each group will determine a set of specific questions to address over the 2 days that will help them define the opportunity and develop a roadmap for action.*

*Potential questions include: How can we take advantage of aggregated data? How can we share measurement knowledge more effectively? Where are the gaps in the evidence base that we can fill as a group? How can rigorous measurement drive more (and more effective) capital to the sector?*

<b>1.</b>	<p><b>Designing a Learning Lab</b></p> <p>This deep-dive session will focus on collaboration in measurement and evaluation at the organization and ecosystem-level, and develop a long-term collective learning agenda for the SGB sector. We will identify existing challenges with the use of measurement for learning, and think creatively about how to leverage ongoing metrics and research activities to develop shared tools and resources, and facilitate collaborative learning. Ultimately, this track will aim to identify actionable next steps for interested ANDE members to act on this shared objective.</p>
<b>2.</b>	<p><b>Using Assumptions to Estimate Impact without Making an a\$\$ out of You or Me</b></p> <p>The saying goes when “you assume, you make an a\$* out of you and me”, but in order to maintain budgets, organizations must make assumptions to report on their beneficiary level impact. This session will explore the assumptions currently being used by organizations and focus on next steps to provide greater transparency and standards to these assumptions.</p>
<b>3.</b>	<p><b>Women Entrepreneurs</b></p> <p>Currently, there is no set of common standards for organizations that support women entrepreneurs to benchmark their practices and performance. This session will investigate a shared metrics platform for organizations that work with women entrepreneurs, building off of work done by Value for Women and the ANDE Central America/Mexico chapter. This platform for aggregated performance data can provide evidence to make the case for investing in women, decrease transaction costs, and reduce the perceived risks to serving women entrepreneurs.</p>
<b>4.</b>	<p><b>Integrating Impact with Operations and Finance</b></p> <p>Integrated social and environmental performance metrics can help organizations develop better products and services, improve resource allocation, and build more efficient and impactful businesses. This session will focus on not just why to integrate, but how.</p>

*Each participant will choose one discussion group that they will work with throughout the course of the two day conference. There will be three separate Discussion Sessions that will each culminate in a concrete output, such as a plan of action.*

Day 1: Each discussion group will meet to define the problem, identify gaps, and hone in on the opportunity for collaboration.

Day 2: These two sessions will narrow the conversation down to identify a potential solution(s), identify the resources necessary, future steps the sector can take, and ways ANDE can help propel the solution forward

Tuesday, June 3rd	
8:30 AM	<i>Registration &amp; Breakfast</i>
9:00 AM	<b>Welcome &amp; Opening Remarks</b>
10:00 AM	<i>Coffee Break</i>
10:15 AM	<p><b>Plenary Session: <i>Ecosystem Effects: Tracking and Acting on System-Level Data</i></b></p> <p>Kalsoom Lakhani, invest2innovate  Duncan Pollard, Nestle  Kim Bettcher, Center for International Private Enterprise  <i>Moderated by: Randall Kempner, ANDE</i></p>
11:30 AM	<b>Speed Networking</b>
12:15 PM	<i>Lunch</i>
1:15 PM	<b>Deep Dive Discussion Session I</b>
3:00 PM	<i>Break</i>
3:15 PM	<p><i>Small Group Breakout Sessions</i></p> <p><b>1. Measurement as Power</b>  Accountability, learning, sharing. A discussion of why, and for whom, organizations measure.  Jeremy Nicholls, SROI Network</p> <p><b>2. Show AND Tell: Using Visuals to Communicate Your Message</b>  Come for a guide to data visualization with impact, the psychology of visualization, and compelling storytelling with data.  Jacob Eastham, Multimedia Production Group</p> <p><b>3. Evaluating the Intangible: Measuring Advocacy and Influence</b>  A recent flood of studies and reports on the SGB sector led us to think, how do we measure the impact of research? Join a discussion on measuring these “fuzzier” concepts like influence and advocacy.  Robert Medina, Aspen Planning and Evaluation Program  Mike Kubzansky, Omidyar Network  Hui Chan, Citi Foundation</p> <p><b>4. Research and Performance Metrics</b>  How do you meet the needs of data-hungry academics and information-starved accelerators? Learn about an exciting collaboration on tracking and using high quality enterprise data for internal learning and research.  Sean Peters, Emory University  Lily Bowles, Village Capital</p>
4:30 PM	<p><b>Plenary Session: <i>Measurement &amp; Moving the Needle for Impact Investing</i></b></p> <p>A first look at the recommended guidelines put forth by the Impact Measurement Working Group of the Social Impact Investment Taskforce established by the G8. These guidelines aim to create a standard of practice among impact investors, and ensure impact measurement’s fundamental place in impact investing.  Kelly McCarthy, The Global Impact Investing Network  Carolien de Bruin, Monitor Deloitte</p>
5:30 PM	<i>Happy Hour</i>
7:30	<i>Salon Dinners</i>

Wednesday, June 4th	
8:30 AM	<i>Breakfast</i>
9:00 AM	<p><b>Plenary Session: Data Innovations: Updates from the Field</b></p> <p>How can mobile surveys and short-form survey tools help us understand impact? Hear from experiences in the field, testing tools and metrics on a budget.</p> <p>Rohit Gawande, Acumen  Darin Kingston, D.light  Asya Troychansky, Root Capital  <i>Moderated by: Saurabh Lall</i></p>
10:15 AM	<b>Discussion Session II</b>
11:30 AM	<i>Small Group Breakout Sessions</i>
	<p><b>1. Embracing Messiness: Ten Propositions for Evaluating Complexity</b></p> <p>Ideas and examples for non-linear, whole systems, and complexity thinking</p> <p>Srik Gopalakrishnan, FSG</p>
	<p><b>2. Creating a Culture of Measurement: Fair Trade USA</b></p> <p>Should you spend more time on performance metrics or assessing impact? How do you prioritize internal audiences versus external ones? Where do you draw the line between methodology and use? Fair Trade USA will share the process, successes, and challenges in developing a new framework that more clearly incorporates all stakeholders participating in Fair Trade.</p> <p>Meghan Quinlan, Fair Trade USA</p>
	<p><b>3. Portfolio Approach to Measurement</b></p> <p>Hear from three organizations that have developed frameworks to assess their performance at a portfolio level. The session will focus not just on the development of scorecards, but ways that the ratings can be used.</p> <p>Stephanie Simpson, Grameen Foundation  Asya Troychansky, Root Capital  Prashant Chandrasekaran, Intellectap</p>
	<p><b>4. Tracking Impacts: The PPI In Action</b></p> <p>Does your organization want to measure poverty levels quickly and cost-effectively? Have you realized how the Progress out of Poverty Index (PPI) can help you do this? Whether you are new to using the PPI or have used it extensively, join this discussion and share your experiences and challenges.</p> <p>Julie Peachey, Grameen Foundation  Emily Shipman, Sustainable Food Lab  Nobuyuki Otsuka, Multilateral Investment Fund</p>
12:45 PM	<i>Lunch</i>
2:15 PM	<b>Discussion Session III</b>
3:45 PM	<i>Small Group Breakout Sessions</i>
	<p><b>1. Big Data for Small and Growing Businesses</b></p> <p>We tend to think of big data analytics as the domain of big corporations. Learn how the social sector is making use of big data to improve performance and increase impact, and discuss how the SGB sector might adapt these practices to this context.</p> <p>Christine Campigotto Albert, Civis Analytics  Elizabeth Dreicer, Posiba</p>

## 2. More than Just the Enterprise: Frameworks for Entrepreneurial Development

How do you assess your organization's performance when your goals include not just increasing revenue, but also enhancing networks, building skills, and improving confidence for entrepreneurs? Come hear from two organizations tackling these types of measurement.

Lina Maria Useche Kemp, Aliança Empreendedora

Meg Berger, Vital Voices

## 3. A Practical Approach to Counterfactuals and Control Groups

Hear three pragmatic solutions that match method with capabilities, business models, and the purpose of evaluation.

Kevin Hong, Mercy Corps

Darin Kingston, d.light design

*Moderated by: Heather Esper, WDI*

## 4. Health Sector Focus

***Session description and title TBC***

Christina Synowiec, R4D

Joe Egger, Duke University

5:00 PM

*Wrap-up Session & Closing Remarks*