KAUFFMAN FOUNDATION METRIC GUIDE

DEVELOPING OUTPUTS AND OUTCOMES TO DRIVE LEARNING

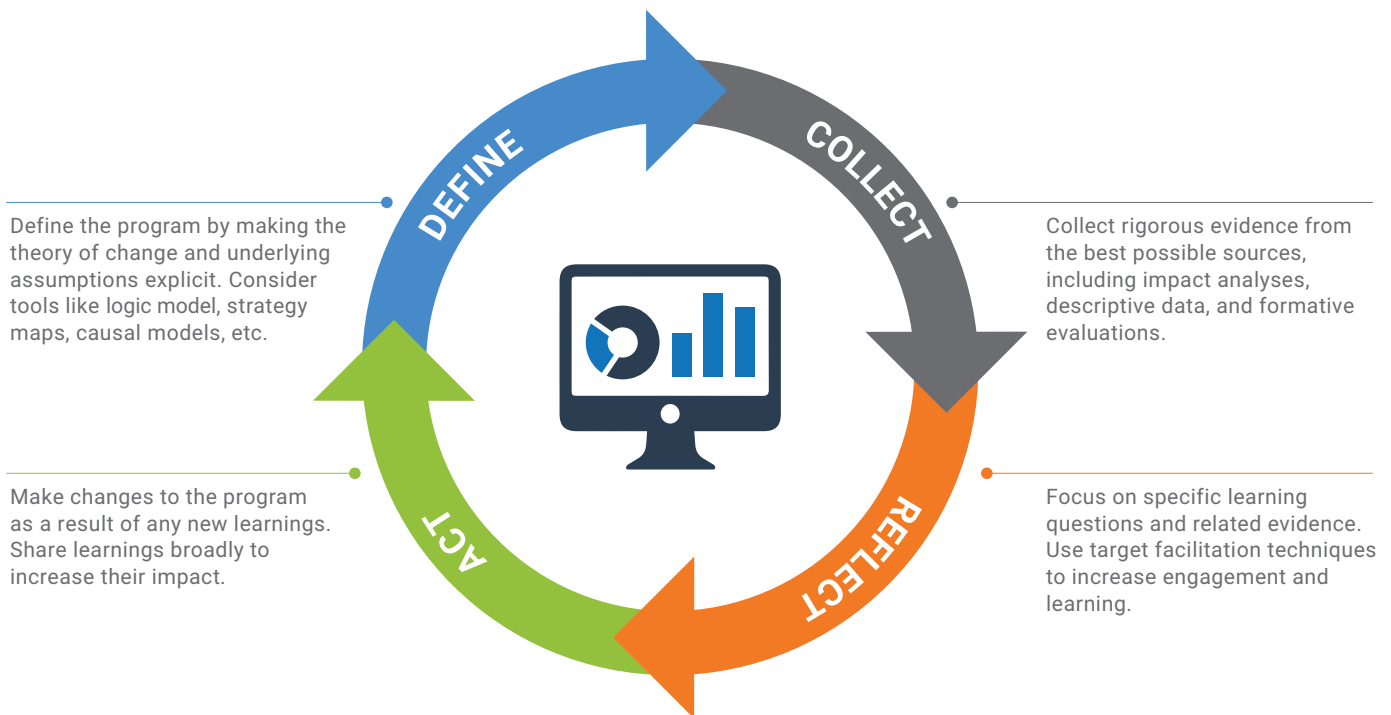EWING MARION
KAUFFMAN
FOUNDATION

This brief guide is intended to help you create key metrics that will form the basis of reporting and learning throughout the grant period. As part of your grant application you will construct a series of "output" and "outcome" metrics that provide clear benchmarks for deliverables and expected results.

1 Why Metrics?

We are committed to working and learning with you to produce results so that every person can have the opportunity to be uncommon and achieve success. To guide our collective work, we use a four step model shown in the accompanying figure: Define, Collect, Reflect, Act.

This process allows us to both track progress toward our mutual goals and learn valuable lessons that improve our programs.

Ultimately, collecting and using metrics and other data to ground our reflections leads to increased impact for our communities.

DEFINE
Define the program by making the theory of change and underlying assumptions explicit. Consider tools like logic model, strategy maps, causal models, etc.

COLLECT
Collect rigorous evidence from the best possible sources, including impact analyses, descriptive data, and formative evaluations.

ACT
Make changes to the program as a result of any new learnings. Share learnings broadly to increase their impact.

REFLECT
Focus on specific learning questions and related evidence. Use target facilitation techniques to increase engagement and learning.

2   Basic Terminology

METRIC
A metric is a specific output or outcome related to the work of the proposed grant.
All metrics must contain 5 key pieces of information (see below) to be considered complete.

OUTPUTS
These are the activities, products, or services to be completed or delivered. As a general
rule, if the metric is referring to something you will do directly, then it is an output.

OUTCOMES
These are the expected benefits or other positive changes that occur as a result of the outputs.
Often beyond our direct control, they are nonetheless critical to testing assumptions and better
understanding impact.

3   The 5 Key Components of a Good Metric

These 5 pieces of information should be included in every output and outcome.

1. WHO will complete the output or be the beneficiary of the outcome?

2. WHAT is the activity or result expected to be achieved?

3. BY WHEN will it occur?

4. HOW MUCH will be done or accomplished (i.e., a numerical target)?

5. HOW WILL WE KNOW the result was achieved?

Example output:
By July 2016 (BY WHEN), our organization (WHO) will place 150 (HOW MUCH) teachers
in Kansas City public schools (WILL DO WHAT), as tracked by signed employment contracts
(HOW WE KNOW).

Example outcome:
By June 2017 (BY WHEN), 80% (HOW MUCH) of the placed teachers (WHO) will be rated as strong
or exemplary by their principals (WILL DO WHAT), as measured by annual performance evaluations
(HOW WE KNOW).

4 Developing Good Metrics

Creating metrics should be a collaborative process with your program officer, who can assist you in determining what to include and how to set ambitious yet achievable targets.

While there will often be many potential outputs and outcomes to choose from, it is important to identify a small number (generally 8-10) that are most important for gauging progress and learning important lessons that can inform your work.

Other considerations when selecting metrics:

» Reflect on how activities lead to the expected results and choose the metrics that best tell this story;

» Only include outputs and outcomes expected to occur during the grant period;

» Focus on data that you are already collecting, for yourself or other funders;

» Strategy leads measurement - metrics can and should be amended if there are substantive strategic shifts that meaningfully change the course of a program or project; and

» Not every metric is measurable, you may need to find a close proxy or exclude some items.

5 How We Use Metrics at EMKF

During the grant period you will be reporting progress against the benchmarks set in your metrics. Program officers use these data and engage in discussions with grantees around the following questions:

• What patterns are you seeing?

• What insights or lessons are you drawing?

• What are the implications for your work?

• What adjustments might be needed moving forward?

Additionally, each year the Foundation collects the lessons and insights generated across all of our grants and programs to create an Annual Learning Report that synthesizes and shares the top themes we observed that year.

Ultimately, our goal is to ensure that time spent developing and reflecting on key metrics informs the work of our grantees, how we make decisions at the Foundation, and hopefully the broader communities in which we work. Your metrics are the critical starting point of this continuous improvement cycle, which is why we believe it's so important to ensure they are measurable and meaningful.