



**CECP**

**Chief Executives for Corporate Purpose**

**Social Investment  
Measurement (SIM)  
Accelerate Community  
2020-2021**

**Meeting #3: February 16, 2021**

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# Agenda: Choosing Metrics

- Recap of Meetings #1 & #2
  - All materials available on MyCECP
- Welcome New Companies
  - Steelcase and UnitedHealth Group
- Consensus Building Through Logic Models
  - Guest Speaker: Dan Tsin, Director, Equal Measure
- Use & User Exercise
- Closing

# Welcome! Once Around the (Virtual) Table:

Please share (2 min):

- Your Name
- Title
- Company
- Show & Tell an item from your workspace



# Consensus Building Through Logic Models

Guest Speaker:  
Dan Tsin  
Director, Equal Measure

# Choosing Metrics

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Chief Executives for Corporate Purpose

2/16/21

*Use the  
chat!*

- First name
- Organization
- Social sector your work with
- Level of excitement for this conversation
  - 1 = I was dragged here.
  - 2 = Reserving judgement until for later.
  - 3 = Couldn't sleep last night in anticipation.



## About me!

- Current Director at Equal Measure
- Former Chief Impact Officer at Urban Alliance
- Passionate about how nonprofits evolve

# Why Collect Metrics?

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# Getting Started

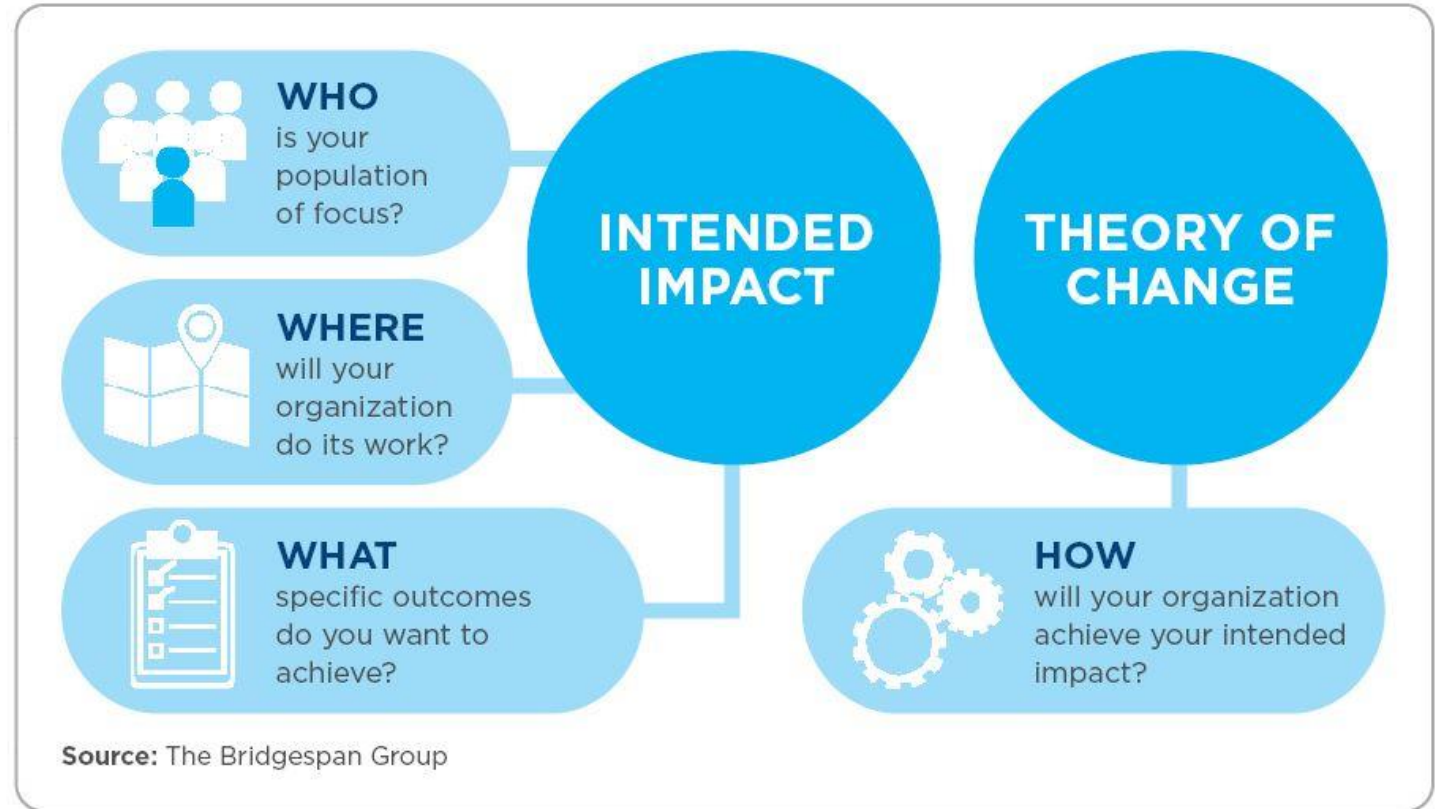


```
graph TD; A[Understand the Intended Impact] --> B[Develop Theory of Change]
```

Understand  
the Intended  
Impact

Develop  
Theory of  
Change

# Starting Questions



# Base Logic Model Components

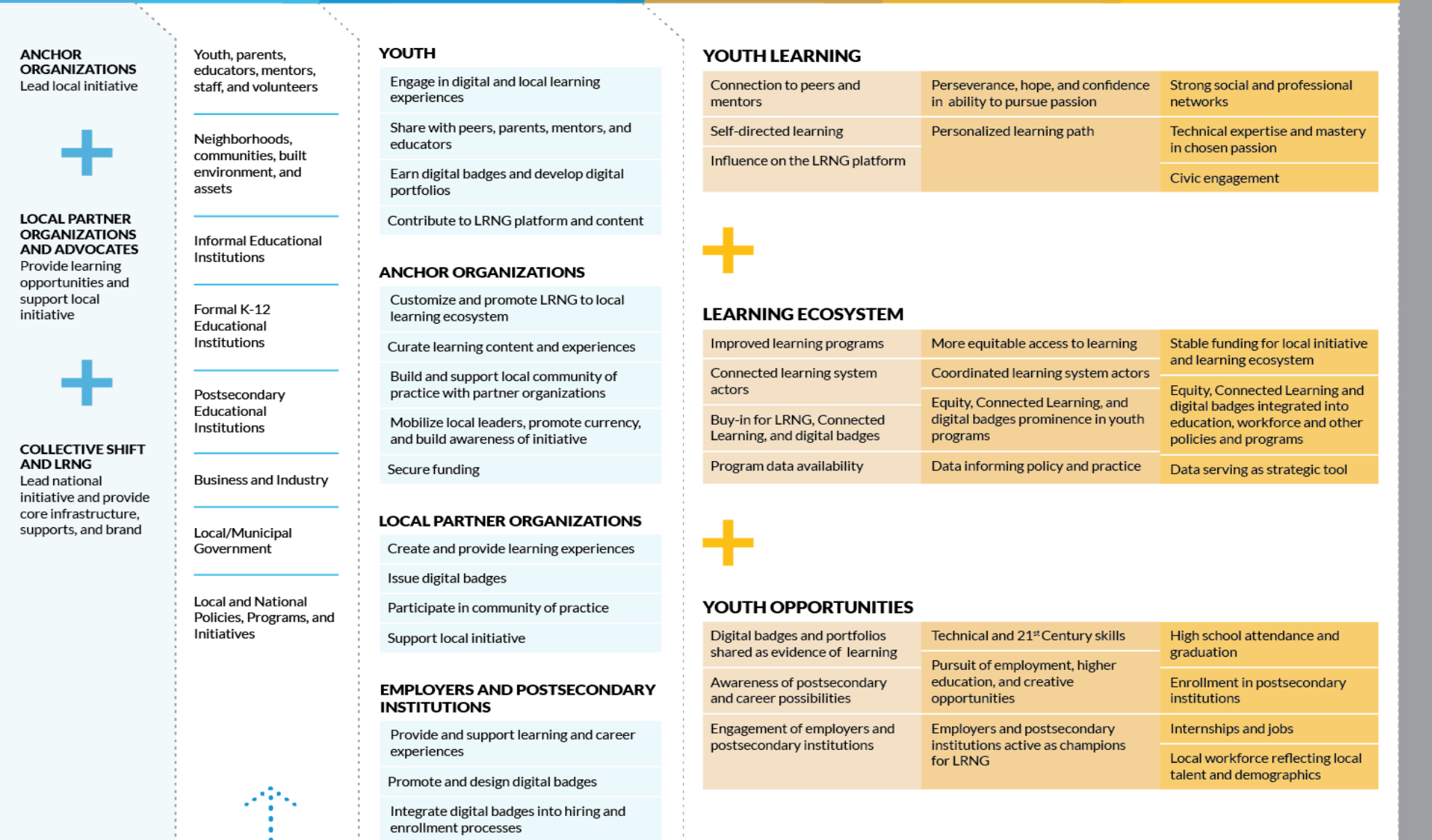
Context/Conditions

Inputs

Strategies to Drive Change

Shorter-Term Outcomes

Longer-Term Outcomes



**GOAL** Young people from all backgrounds have the opportunities they need to pursue a lifestyle of learning and thrive in the connected age.

Urban Institute:  
<https://www.urban.org/policy-centers/cross-center-initiatives/beyond-high-school-education-and-training/projects/youth-pathways-postsecondary-success-and-careers/cities-lrng/lrng-logic-model>

# Using a Theory of Change

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TOC vs Logic Model

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Build Consensus

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Build a Learning Roadmap

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Identify Gaps and Assumptions

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Communicate a Story

# Metrics quantify a result.



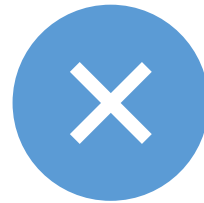
DESCRIBE  
BOTH WHAT  
AND HOW



CAPTURE  
SINGLE  
CONCEPT



MEASURABLE



FEASIBLE



USEFUL



RESPONSIVE

## Considerations for Metric Collection

- Accountability vs Learning Disposition
- Compliance vs Utility
- Funder Orientation vs Participant Orientation

# Are we...

... including our community partners in design?

An orange rounded rectangular box containing the text "... including our community partners in design?". A large, semi-transparent orange arrow points downwards from the bottom right corner of this box towards the top right corner of the box below it.

...relying only on observable change?

A gray rounded rectangular box containing the text "...relying only on observable change?". A large, semi-transparent gray arrow points downwards from the bottom right corner of this box towards the top right corner of the box below it.

...missing the context of how change happens?

A yellow rounded rectangular box containing the text "...missing the context of how change happens?". A large, semi-transparent gray arrow points downwards from the bottom right corner of the box above it towards the top right corner of this box.



## Helpful Practices When Working With Nonprofits

- Codesign and co-interpret
- Track only what matters
- Invest in data capacity and culture
- Layer learning questions with capacity

# Final Questions

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1. How connected are “evaluation” and “learning” in our practice?
2. How has collecting metrics helped us? Helped grantees? Communities?
3. What story do we want to share about the impact of our investment?
4. How can we democratize data collection and interpretation?

# Resources

## Leap of Reason

- Performance Imperative: <https://leapambassadors.org/continuous-improvement/performance-imperative/>

## Bridgespan

- Intended Impact and TOC:  
<https://www.bridgespan.org/insights/library/strategy-development/intended-impact-theory-of-change-landing>
- [https://www.bridgespan.org/bridgespan/Images/articles/intended-impact-theory-of-change/intended-impact-theory-of-change-templates\\_1.pdf](https://www.bridgespan.org/bridgespan/Images/articles/intended-impact-theory-of-change/intended-impact-theory-of-change-templates_1.pdf)

## Urban Institute

- Building a Common Outcome Framework:  
<https://www.betterevaluation.org/sites/default/files/411404-Building-a-Common-Outcome-Framework-To-Measure-Nonprofit-Performance.PDF>

## Equitable Evaluation

- <https://www.equitableeval.org/framework>

# Thank you!

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Let's keep talking!  
[dtsin@equalmeasure.org](mailto:dtsin@equalmeasure.org)





# Use & User Exercise

1. List as many metrics as possible (one metric per line).	2. In 1-2 words, how would you characterize the metric? For example, it is the most effective, newest, most challenging, on your wish list, etc.?	3. Who are the users? Who asks for them, reads them, makes decisions based on them, etc.?	4.Total count of users (#)	5. What are the uses? What purpose does it serve? How is it used?	6. Total count of uses (#)



Step 1.

**List as many metrics as possible**

One metric per line

2 min



Step 2.

**In 1-2 words, how would you  
characterize the metric?**

For example, it is the most effective,  
newest, most challenging, on your  
wish list, etc?

30 seconds





Step 3.

## **Who are the users?**

Who asks for them, reads them,  
makes decisions based on them,  
etc?

90 seconds



Step 4.

# **Total Count of Users**



Step 5.

**What are the uses?**


What purpose does it serve? How is it used?

120 seconds



Step 6.

# **Total Count of Uses**



If you'd like:  
go back and fill in step  
#1-4 with additional  
metrics

60 seconds

# Column #3 and #5

Any cells where there are no,  
or weak, user cases?

Color that entire row in Red

# Column #3 and #5

Any cells where there are many, or strong, user cases?

Color that entire row in Yellow



# Column #1

Any cells marked as 'new'?

Color that entire row in Yellow






## Column #2

Any cells marked as 'don't need' or 'sunset'?

Color that entire row in Red

# Company Results

Company/Name	# of Red	# of Yellow	Neutral (No Color)
Allstate	2	3	1
	2	1	3
Capital One	2	2	3
Macquarie	2-3	2	1
NRG Energy	3	4	0
Steelcase	0	0	6
Tata Consultancy Services	2	4	0
	2	3	3
UnitedHealth Group	0	0	8

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- Any gaps you discovered between priority uses and priority users?
  - Has your opinion of a metric's usefulness improved, the same, or worse?
  - What information do you need to classify all metrics as either red or yellow?

# Upcoming Community Meetings

Mtg	Date	U.S	Germany	Australia	Topic
3	Tues 2/16/21	2:00-3:30pm	8:00 – 9:30pm	6:00-7:30am	Choosing Metrics
4	Tues 4/13/21	3:30-5:00pm	9:30-11:00pm	5:30-7:00am	Collecting Data (of Collect, Compare, Share, Evaluate)
5	Tues 6/15/21	3:30-5:00pm	9:30-11:00pm	5:30-7:00am	Deep Dive into Social Impact Measurement
6	Tues 8/17/21	3:30-5:00pm	9:30-11:00pm	5:30-7:00am	Understanding Social investment Metrics in the Larger ESG Metric Landscape

**Reminder:** Each participating company receives **8 hours of virtual strategic advisement consulting hours** with CECP to assess current approach and provide customized recommendations.