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

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?

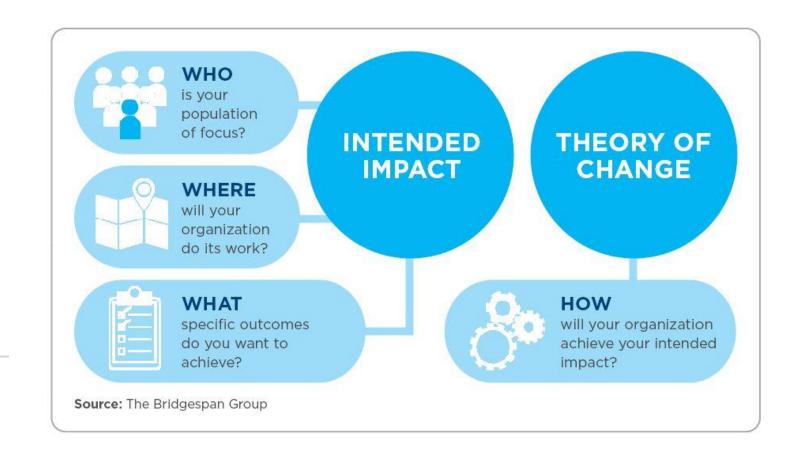


Getting Started

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

INPUTS

LOCAL LEARNING ECOSYSTEM

ACTIVITIES

SHORT TERM OUTCOMES 1-2 YEARS INTERMEDIATE TERM OUTCOMES 2-3 YEARS LONG TERM OUTCOMES 4-5 YEARS

ANCHOR

ORGANIZATIONS Lead local initiative



LOCAL PARTNER ORGANIZATIONS AND ADVOCATES

Provide learning opportunities and support local initiative



COLLECTIVE SHIFT AND LRNG

Lead national initiative and provide core infrastructure, supports, and brand Youth, parents, educators, mentors, staff, and volunteers

Neighborhoods, communities, built environment, and assets

Informal Educational Institutions

Formal K-12 Educational Institutions

Postsecondary Educational Institutions

Business and Industry

Local/Municipal Government

Local and National Policies, Programs, and Initiatives

YOUTH

Engage in digital and local learning experiences

Share with peers, parents, mentors, and educators

Earn digital badges and develop digital portfolios

Contribute to LRNG platform and content

ANCHOR ORGANIZATIONS

Customize and promote LRNG to local learning ecosystem

Curate learning content and experiences

Build and support local community of practice with partner organizations

Mobilize local leaders, promote currency, and build awareness of initiative

Secure funding

LOCAL PARTNER ORGANIZATIONS

Create and provide learning experiences

Issue digital badges

Participate in community of practice

Support local initiative

EMPLOYERS AND POSTSECONDARY INSTITUTIONS

Provide and support learning and career experiences

Promote and design digital badges

Integrate digital badges into hiring and enrollment processes

YOUTH LEARNING

Connection to peers and mentors	Perseverance, hope, and confidence in ability to pursue passion	Strong social and professional networks	
Self-directed learning	Personalized learning path	Technical expertise and mastery in chosen passion	
Influence on the LRNG platform			
mindence on the Entro platform		Civic engagement	



LEARNING ECOSYSTEM

Improved learning programs	More equitable access to learning	Stable funding for local initiative and learning ecosystem Equity, Connected Learning and digital badges integrated into education, workforce and other policies and programs	
Connected learning system	Coordinated learning system actors		
actors	Equity, Connected Learning, and		
Buy-in for LRNG, Connected Learning, and digital badges	digital badges prominence in youth programs		
Program data availability	Data informing policy and practice	Data serving as strategic tool	



YOUTH OPPORTUNITIES

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Digital badges and portfolios	Technical and 21st Century skills	High school attendance and		
shared as evidence of learning	Pursuit of employment, higher	graduation		
Awareness of postsecondary and career possibilities	education, and creative opportunities	Enrollment in postsecondary institutions		
Engagement of employers and		Internships and jobs		
postsecondary institutions		Local workforce reflecting local talent and demographics		

Young people from all backgrounds have the opportunities they and thrive in the estyle of I

Urban Institute: https://www.urban.org/pol icy-centers/cross-centerinitiatives/beyond-highschool-education-andtraining/projects/youthpathways-postsecondarysuccess-and-careers/citieslrng/lrng-logic-model

Developed by the Urban Institute, March 2016.

Using a Theory of Change

TOC vs Logic Model

Build Consensus

Build a Learning Roadmap

Identify Gaps and Assumptions

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?

...relying only on observable change?

...missing the context of how change happens?

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

- 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/strategydevelopment/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

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!

Let's keep talking! dtsin@equalmeasure.org



freehspectrum



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



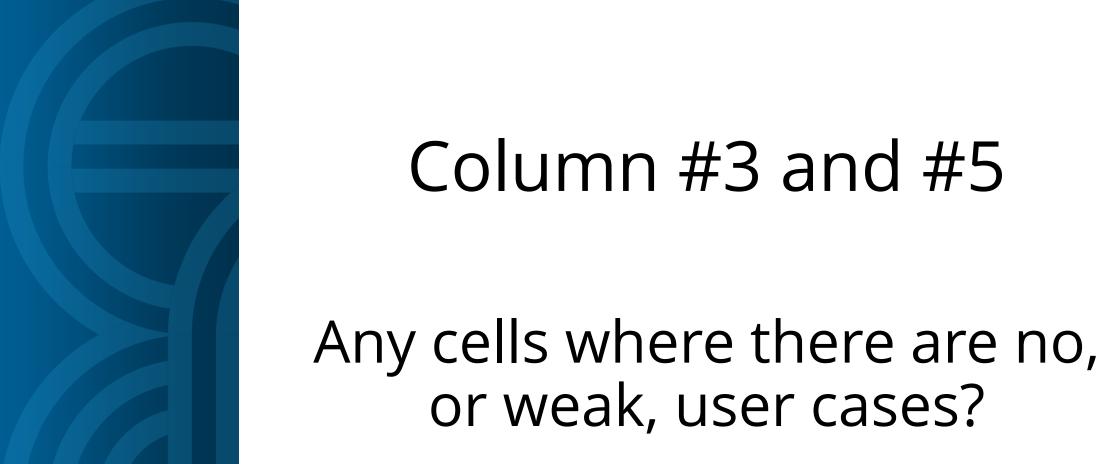
Step 6.

Total Count of Uses



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

60 seconds



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.