### Apply Key Concepts to Your Work

#### Measurement Worksheet

<table>
<thead>
<tr>
<th>Organization Name</th>
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</table>

1. **What is the ultimate impact, change or goal that you are trying to achieve in your work?**
   - Impact

2. **Outcomes:** What change(s) would you expect to see in the near term to know that you are on the path to your goal?
   - Outcome
   - Outcome
   - Outcome

3. **Indicators:** What evidence will tell you if you are making progress toward your outcomes?
   - Indicator(s)
   - Indicator(s)
   - Indicator(s)
ABA Bar Leadership Institute
Metrics that Matter
March 2020
Agenda

1. Context: Social Sector Shifts
2. Measurement 101
3. Apply Key Concepts to Your Work
4. Wrap-up and Questions
Goals for Today

1. Build knowledge of key measurement concepts
2. Apply this information to your work
3. Remind us of the role that measurement can play in our work and the value it can offer
Agenda

1. Context: Social Sector Shifts
2. Measurement 101
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4. Wrap-up and Questions
Social Sector Shifts
The vernacular of the sector is changing…
Social Sector Shifts
The landscape is evolving...
Social Sector Shifts
Funders are more focused on evaluation....
Social Sector Shifts
Organizations are asking different kinds of questions…

Are we making progress toward our goals?

How can we improve our programs?

Are our programs and initiatives making a difference?

What are we learning about what it takes to create change?
Social Sector Shifts
Donors are asking different kinds of questions…

What is YOUR impact?

How do YOU know that YOU are making a difference?

What is the return on investment?

Why should I give to your organization over another organization?
Social Sector Shifts
Continuum of Approaches

Anecdotes & Stories
- Qualitative and narrative reflection

Outputs & Activities
- Counts and quantitative data; often measures activities and level of effort

Outcome Measurement
- Quantitative or qualitative; indicates the degree of progress and focuses on learning and improving

Impact Evaluation
- Randomized controlled trials (RCTs); Designed to assess casual links and prove
What have these shifts meant for your organization?
Take 3 minutes
Answer this question for your organization with someone from another organization
What have these shifts meant for your organization?
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1. Context: Social Sector Shifts

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Measurement 101
What outcomes are we working to achieve?

If we do this…
It will create this near-term change…

...and will ultimately put us on the path to this long-term change
Theory of Change for Bar Associations: Illustration

If we do this…

Provide Professional Development

It will create this near-term change...

Improve lawyers’ ability to adapt to the changing legal environment

...and will ultimately put us on the path to this long-term change

Increase lawyers’ professional satisfaction in the practice of law

Impact

Time
Measurement 101
Anatomy of an Outcome

1. Describes a **desired change** in status, condition or behavior

2. Uses an **active verb** to signal the type of change that is desired, which is often **directional** in nature (i.e. increase, improve)

3. Outcomes can often specify the beneficiary to make the desired change more specific or add other descriptive language

Increase access to education for girls

- **1**
- **2**
- **3**
Measurement 101
Focus measurement on outcomes, not activities

<table>
<thead>
<tr>
<th>Activities</th>
<th>Outcomes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Conduct training</td>
<td>Increase job readiness</td>
</tr>
<tr>
<td>Manage tutoring program</td>
<td>Improve academic achievement</td>
</tr>
<tr>
<td>Host healthy living program activities</td>
<td>Improve participant health</td>
</tr>
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</table>
Key Questions for Developing and Right-sizing Outcomes

1. Are they within our **sphere of influence** and control? Are our outcomes **credible**?

2. Do they describe the **trajectory or direction of change** we seek?

3. Do they describe a **meaningful** change in status, condition or behavior in the near term? (e.g. 1 to 3 years)

4. Are they **measurable**? Is there a way for us to observe, capture or discern progress and results?
I will know that we are making progress toward this outcome, if I see this...
Measurement 101
Anatomy of a Metric

1. A way to *approximate progress* toward an outcome or objective

2. Often quantitative in nature and written as a # or %

3. May not be perfect and might evolve over time

% of visitors who become members
Attributes of Good Metrics

Before

Regional unemployment rate

% of participants who remain employed after 3 years

# of stakeholders contacted

After

Credible

% of participants placed in jobs

Feasible

% of participants who remain employed for 90 days

Valuable

% of stakeholders who are supportive
## Metrics Development: SMART Metrics

<table>
<thead>
<tr>
<th>Specific</th>
<th>Simply written and clearly defined</th>
</tr>
</thead>
<tbody>
<tr>
<td>Measurable</td>
<td>Tangible evidence (data or information) is available and accurate</td>
</tr>
<tr>
<td>Actionable</td>
<td>Easy to understand and clear when to take action</td>
</tr>
<tr>
<td>Relevant</td>
<td>Closely related to the work</td>
</tr>
<tr>
<td>Timely</td>
<td>Data is available in a timely manner</td>
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</table>
Measurement 101
How many metrics should we have?

1 to 3 metrics per outcome

Keep it simple

Be parsimonious
Metrics Development

I will know that we are making progress toward this objective, if I see this...
Metric Development
Example Outcomes for Bar Associations

• Increase meaningful lawyer volunteerism through the bar

• Strengthen CLE programming for lawyers

• Increase visibility of the importance of legal institutions and the rule of law

• Increase diversity of the bar’s revenue streams
## Metrics Development

<table>
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<tr>
<th>Outcome</th>
<th>Metric Development Question</th>
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<tbody>
<tr>
<td>Increase meaningful lawyer volunteerism</td>
<td>How would we know if we increased meaningful lawyer volunteerism through the bar?</td>
</tr>
<tr>
<td>through the bar</td>
<td></td>
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</table>
## Metrics Development

<table>
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<th>Outcome</th>
<th>Example Metrics</th>
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</table>
| Increase meaningful lawyer volunteerism through the bar | • # of lawyers who complete volunteer hours  
• % change in lawyers who complete volunteer hours  
• % of lawyer volunteers who are *highly engaged* (*e.g. at least X hours*)  
• % of lawyer volunteers who report that they valued their experience  
• % of lawyer volunteers who would recommend this experience to others |
# Metrics Development

<table>
<thead>
<tr>
<th>Outcome</th>
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<tbody>
<tr>
<td><strong>Strengthen CLE programming for lawyers</strong></td>
<td>How will we know if we have strengthened CLE programming for lawyers?</td>
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### Strengthen CLE programming for lawyers

<table>
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<th>Outcome</th>
<th>Example Metrics</th>
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| Strengthen CLE programming for lawyers | • # of lawyers who participate in CLE programming  
• % of participants who report that the programming met or exceeded their expectations  
• % of participants who report that they learned a new approach, strategy or technique that they plan to use in their practice |
# Metrics Development

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<tr>
<td>Increase visibility of the importance of legal institutions and the rule of law</td>
<td>How would we know if we increased the visibility of key messages related to the importance of legal institutions and the rule of law?</td>
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## Metrics Development

### Outcome

**Increase visibility of the importance of legal institutions and the rule of law**

### Example Metrics

- Total (＃) reach of key communication mechanisms (e.g. website, newsletters or key articles)
- ％ growth in total audience
- Total (＃) reach of social media promoting key messages
- ％ of social media audience that is engaged (e.g. like, share, other)
- Total (＃) reach via earned media on this topic
### Metrics Development

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<td>Increase diversity of the bar’s revenue streams</td>
<td>How will we know if we have diversified our revenue?</td>
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<tr>
<td>Increase diversity of the bar’s revenue streams</td>
<td>• Total revenue from all sources</td>
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<tr>
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<td>• % of revenue from each source</td>
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<td>• % change in non-membership revenue</td>
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PRACTICE!
Discussion Overview

1. Break into groups of 2

2. Using the worksheet, discuss and document your partner’s **ultimate impact** (big goal) and **outcomes** (near term changes that are needed). Each partner uses the worksheet to interview their partner. (10 minutes each)

3. At the end of the discussion, **organizations will use the worksheet to share their key indicators** and why they are important (e.g. linked to outcomes and impact)
# Apply Key Concepts to Your Work

## Measurement Worksheet

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What is the **ultimate impact, change or goal** that you are trying to achieve *in your work*?

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**Outcomes**: What change(s) would you expect to see in the near term to know that you are on the path to your goal?

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### 3. Indicators

**Indicators**: What evidence will tell you if you are making progress toward your outcomes?

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ABA Bar Leadership Institute - 2020
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PRACTICE!
Discussion

1. What was surprising about this discussion?

2. What is your favorite metric that emerged from this discussion?
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Questions, Wrap-up and Next Steps
Feel free to follow-up with me

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