By the end of this session, we want you to:
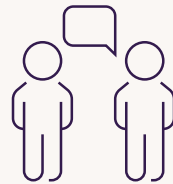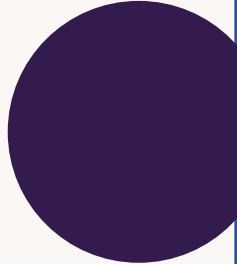
Spread the gospel

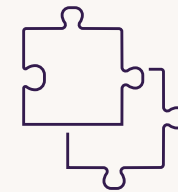Investment in upfront thinking is critical *before* building a MEL system

Have tools

to guide upfront thinking and maximize your data use and learning

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What is
up·front/ˌəpˈfrənt/
Thinking?

Advanced planning to **identify the requirements** of your MEL system

A strong MEL system should **help decision-makers** make deliberate choices about how to achieve programmatic objectives

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WHAT HAPPENS WHEN

Upfront thinking

IS MISSING?

- Measurement is **disconnected from strategy**
- There's a **rush to build digital data solutions** without defining the problem that's being solved
- It can lead decision-makers astray and waste **valuable resources**
- Organizations **can't show impact**

A LACK OF UPFRONT THINKING MEANS THAT THE "LEARNING" IN A MEL SYSTEM IS NEARLY IMPOSSIBLE.

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WHAT DOES

Upfront thinking

ENTAIL?

Design
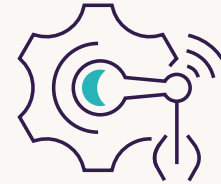
Build

Use and learning

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Design Phase

What's the problem?

What's our role in the solution?

Who's going to use the information?

How will we know when we're making progress?

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Theory of Change

shows how a desired change is expected, with all of the possible pathways leading to change, and why you think they lead to change

Logic Model

zooms in on what your program will tackle; a neat, orderly structure for a particular pathway of change

Use Cases

help you identify, from a user's point of view, how a MEL system should respond to decision-makers' requests

Logic Model

A generic **Logic Model** looks like this

1. Inputs
2. Activities
3. Outputs
4. Outcomes
5. Impact

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Logic Model Example

Starting and
Growing a Business

Example Logic Model: Starting and Growing a Business

Values:
Learning • Discovery • Adaptation • Grit*
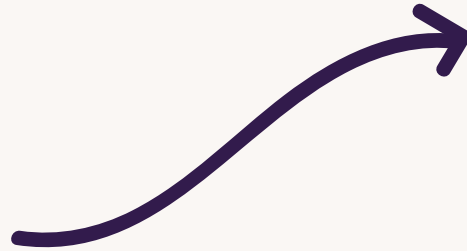
1 Inputs
- New idea
- Capital
- Business plan, including market intelligence
- Talent (staff)

2 Activities
- Business Development
- Marketing and communications
- Deliver and improve the product
- Manage talent

3 Outputs
- New customers
- Sales
- Bigger team
- Product improvements

4 Outcomes
- Revenue
- High-quality product
- Customer satisfaction
- Talent retention (employee satisfaction)

5 Impact
- Market share
- Innovation
- Make the world a better place

*Passion, gumption, hutzpah, moxie, tenacity

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The Build

Which measures are important to capture?

What data sources do we have?

How do they fit together?

What's missing?

Logframe

A **planning tool** that provides an overview of a project's goal, activities, anticipated results, and assumptions

Logical Framework (Logframe) Template

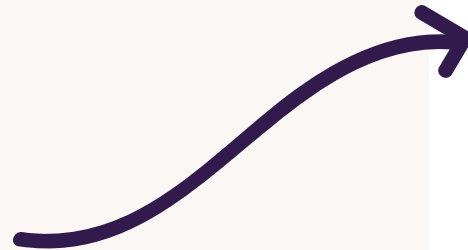| NARRATIVE SUMMARY	INDICATORS	DATA SOURCES	ASSUMPTIONS
Impact:			
Outcome #1:			
Outputs			
Activities (or Inputs)			
Outcome #2:			
Outputs			
Activities (or Inputs)			
Outcome #3:			
Outputs			
Activities (or Inputs)			
Outcome #4:			
Outputs			
Activities (or Inputs)			

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Logframe Example

Starting and
Growing a Business
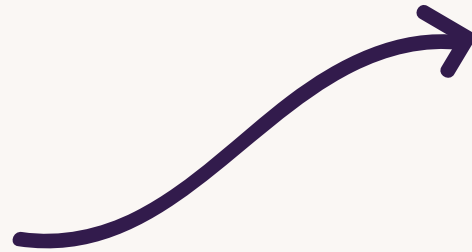
Example Logframe: Starting and Growing a Business

NARRATIVE SUMMARY	INDICATORS	DATA SOURCES	ASSUMPTIONS
Impact:	% Total market share	Trade association data	Market remains stable
Outcome #1:	Annual increase in revenue of X%	P&L statements	Customers are willing to pay Databoom's fees and overhead
Outputs	# Sales per year # New customers per year	Sales records Customer relationship management (CRM) database	Donor funding is available for projects in Databoom's domain
Activities	Business development Annual marketing plans		
Outcome #2:	Databoom's product achieves X/X on quality index	Product quality scorecard	Product quality can be maintained with growth
Outputs	# New product developments # New product improvements	Project management tool (Hubspot)	
Activities	Research and Development Crowdsourcing ideas		
Outcome #3:	At least X% of customers say they're satisfied or very satisfied with Databoom services	Customer satisfaction survey	Databoom maintains a unique position in the market
Outputs	# Repeat customers # Customer referrals	Project management tool (Hubspot)	
Activities	Communications strategy focused on customer engagement		
Outcome #4:	X% of employees retained on an annual basis	HR records	No major shocks in job market
Outputs	X% of employees report being happy or very happy at Databoom	Annual employee survey	
Activities	Employee referral program Coaching for managers Profit sharing Theme parties		

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Use & Learning

Are we seeing the change we expect to see?

How do results differ across audiences, geographies, or other important elements?

What's working? What's not?

What should we stop, continue, or change?

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Digital Data Solutions

MEL indicators can be captured in **dashboards** that enable timely and effective decision-making.

Dashboards can take many forms, depending on the decision-making needs

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THE VALUE OF

Upfront thinking

- Measurement is connected to strategy

- Digital data solutions enable decision-making

- Programmatic objectives and impact are more likely to be achieved

THE L "LEARNING" IN A MEL SYSTEM IS MAXIMIZED

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Thank you!

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in linkedin.com/company/kim-longfield-consulting/

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