



## BARR FOUNDATION GRANTEE RESOURCE: DEVELOPING OUTPUTS AND OUTCOMES

At the Barr Foundation, one of the ways that we aim to maximize learning is by linking grant outputs and outcomes to the grantee reporting process. We strive to ensure that these outcomes are meaningful to both us and our grantees, realistic to measure, actionable, and aligned with Barr’s commitment to advancing racial equity.

As part of your grant application to Barr, you may craft a set of metrics – specifically, outputs and outcomes – that imagine and describe what success will look like and how you plan to measure progress. While this ultimately should be a collaborative process with your program officer, this brief guide is intended to help you begin to build a set of metrics that will become the basis of future reporting on progress to Barr.



### The Role of Metrics

Evaluation, when done well, fulfills three main goals:



It is important for grantees and the Foundation to have a shared understanding of what “success” means and the progress we’re making. Metrics can help us get there. We believe that by having a shared understanding of success, grantees can have the flexibility and confidence to manage the work and adapt their approach in pursuit of these goals.

Further, by reflecting on progress and challenges, we hope to learn valuable lessons to improve the Barr Foundation’s programs and share lessons learned with the field. Ultimately, we believe this process leads to increased impact on our shared goals.



## Basic Terminology

### METRIC

A statement describing a specific output or outcome related to the proposed grant. Ideally, all metrics should contain 5 key pieces of information (see below).

### OUTPUTS

Outputs tell the story of what you produced or your organization's activities. Output measures do not address the value or impact of your work, but they can help identify in a concrete way whether the work is going as expected. As a rule, if a metric is referring to something the grantee will do or produce, then it is an output.

### OUTCOMES

Outcomes are the changes in the world that occur as a result of the activities, products, or services completed or delivered by the grantee. Put differently, if the outputs are successfully completed, outcomes are the benefits that would accrue to participants and/or target audiences, communities, or systems.



## The 5 Components of a Strong Metric

We recommend that you include these 5 pieces of information in every metric:

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., how many or what percent)?
5. **HOW WILL WE KNOW** the result was achieved?

*Example output:* By January 2024 (**BY WHEN**), 190 (**HOW MUCH**) Massachusetts educators (**WHO**) will participate in learning excursions to visit innovative school models (**WILL DO WHAT**), as tracked by participant enrollment records. (**HOW WE KNOW**).

*Example outcome:* By January 2024 (**BY WHEN**), 80% (**HOW MUCH**) of educator participants in learning excursions (**WHO**) develop a deeper understanding of personalized learning principles and practices (**WILL DO WHAT**), as measured by grantee staff analysis of participants' reflections after each visit, obtained through surveys, post-visit discussions, and other means (**HOW WE KNOW**).

### How Will We Know?

There are multiple ways of knowing whether an output or outcome is achieved. In some cases, organizations may conduct surveys, interviews, or focus groups. Sometimes, information useful for tracking progress is available publicly, such as through municipal or state agencies or the Census. In other cases, organizations may rely on their own service or administrative records. Sometimes staff hold the knowledge of whether something was achieved based on direct observation or judgment.



## Selecting Useful, Actionable and Equitable Metrics

When deciding what metrics to include, consider the most important **actions or items** to be produced as part of the grant—these are your outputs. Then imagine the ways in which you would know if the project was **successful**—these are your outcomes. Outcomes could include increasing the advocacy capacity or financial health of an organization, improving the college and career readiness of students, etc. If you design and launch a new program, that is an output. The benefit for participants or communities is an outcome.

While a project or program will often have many expected outputs and potential outcomes, it is important to identify a **small number** of metrics that are most important for informing programmatic decisions, for gauging progress, and/or learning that can benefit future projects. Again, this should be a **collaborative** process with your program officer, who can assist you in determining the best metrics to include.

Questions to consider when designing or selecting metrics:

- Is this metric connected to the funded project? Is this result something that we can reasonably believe is connected to our efforts?
- If this is project-based funding, will the result be visible or measurable in the timeframe of the project? If not, are there other leading indicators that might be more feasible to monitor and report on instead? (e.g. budget commitments to infrastructure projects, completion of a design phase or strategic plan)
- How accessible and timely is the data we need? Is the information already available in some way, or is a special effort needed to collect it? Is the cost for this data collection and analysis included in our budget request? Will that data have value to us and our stakeholders beyond reporting to Barr?
- Will the metrics help to inform next steps or be actionable in some way?
- How do the metrics and the process used to develop them reflect our values on equity? *See below for more.*

**The Barr Foundation has made an explicit commitment to invest in racial equity in our program areas and strategies.** Many of our grantees share this commitment and incorporate metrics and measures that reflect their own specific focus on advancing racial equity. Questions and approaches to defining measures of success that you may want to consider include:

### DESIGN

- What are the assets and priorities identified those most impacted by this work that you seek to build on, and how would community members or stakeholders define success in this work?
- How will we know if a diverse constituency is actively engaged in the design of the program or initiative?
- What systemic and structural barriers is your work is addressing, and how might you measure change at that level?

### IMPLEMENTATION

- How will you know that a diverse constituency is actively engaged in managing the program or initiative?
- How will you determine whether the program or initiative is reaching the intended beneficiaries?
- What kinds of feedback will you gather about the program or initiative from intended beneficiaries, partners, or community members? How would that feedback demonstrate progress or indicate a need to adjust?

### OUTCOMES

- How will your metrics help you to understand how your work might have different impacts by race/ethnicity, gender, age, and geography?
- Are there particular equity gaps that your work seeks to close?
- To what extent are intended outcomes equitably distributed among communities?



## Sample Outputs and Outcomes

Below are sample outputs and outcomes from across Barr’s grantmaking areas. When drafting outcomes, less is more. Please strive for a focused set of outputs and outcomes that are clear, concise, and relevant to your goals and to Barr’s programmatic goals. If you’re not clear about Barr’s programmatic goals, ask your program officer. Also, please note there is no need to pair outputs and outcomes. It is common for multiple outputs to lead to a single outcome.

	SAMPLE OUTPUTS	SAMPLE OUTCOMES
<b>ARTS</b>	<ul style="list-style-type: none"> <li>By October 2024, 30+ public offerings including performances by international and local troupes, block parties, ongoing drop-in activities, workshops and demonstrations conducted by and in collaboration with local organizations, as tracked by our events log.</li> <li>By October 2023, a dedicated staff position is created and filled to lead district programming and additional part-time staff is added to support box office and production, as determined by human resources.</li> </ul>	<ul style="list-style-type: none"> <li>By October 2023, the organization is positioned to be a proactive, adaptive, and inspiring cultural leader and desirable partner, as measured by qualitative examples identified by staff and feedback gathered from local community leaders.</li> <li>BIPOC artists’ experiences, skills, and visibility increase, leading to more co-creation of temporary public art by artists and communities within Boston’s neighborhoods of color, where life-affirming contemporary art can uplift a neighborhood and celebrate underrepresented cultures and traditions.</li> </ul>
<b>EDUCATION</b>	<ul style="list-style-type: none"> <li>By January 2024, 80 percent of school district’s students will engage in two high-quality projects per school year, as measured by student participation levels in Project-Based Learning projects as well as teacher survey data.</li> <li>By January 2024, an inclusive design team led by a core group of educators, students, school and district administrators, and community partners meets monthly to develop an implementation plan, as evidenced by monthly meeting minutes and an implementation plan document.</li> </ul>	<ul style="list-style-type: none"> <li>Students demonstrate improved mastery of rigorous academic content by June 2024, as indicated by a 10-percentage point increase in both math and ELA state assessment scores for students engaging in two projects per academic year compared to a matched comparison group of students.</li> <li>By July 2024, issues of equity and school will be more salient among the coalition, with stakeholders regularly using a shared definition of “equity” and “high quality” and advocating for a shared set of policy priorities.</li> </ul>

	SAMPLE OUTPUTS	SAMPLE OUTCOMES
CLIMATE	<ul style="list-style-type: none"> <li>By 2024, at least 1000 workers will have received training and education on how to stay safe in extreme heat and during post-storm clean-up; and know workers' rights to prevent wage and other injustices to which immigrant workers are particularly vulnerable.</li> <li>By the end of 2024, a final comprehensive report including comprehensive business plans for up to three promising new or expanded services is released to the public, including a public forum to present and discuss findings with stakeholders.</li> <li>By June 2024, efforts will be underway to expand organizing efforts to ensure that community voices are being elevated and considered by decision-makers, including targeted efforts to engage youth and elders.</li> </ul>	<ul style="list-style-type: none"> <li>By July 2022, the costs of low- and no-carbon resources in the electric sector have decreased by at least 10%, as measured by change over the July 2016 baseline.</li> <li>By the end of 2022, community residents will have the ability to leverage real-time air quality data to inform their outdoor and indoor activities to reduce pollutant exposure, as measured by air quality app downloads, number of unique users, and usage statistics.</li> <li>A broad coalition of environmental, religious, and climate justice allies join forces with labor leaders to secure support from the state's elected officials for a comprehensive climate jobs agenda, including commitments to strong labor and environmental standards that will allow the economic recovery from COVID-19 to address longstanding racial and economic disparities.</li> </ul>
SECTOR EFFECTIVENESS	<ul style="list-style-type: none"> <li>By December 2023, the organization will disseminate five research publications to its members that bring data-based insights to the field about effective practices, as tracked by web statistics and marketing team records.</li> <li>By the end of 2024, 50 additional foundations will use tools to assess board performance, generating data that is incorporated into publicly available benchmarks.</li> </ul>	<ul style="list-style-type: none"> <li>Members of grassroots organizations – including people of color and historically oppressed communities – better understand how the state budget affects their lives and how to engage in the budget process. As a result, more community members will be active advocates for an anti-racist budget and budget creation process.</li> <li>At least 75% of participants in the 2024 racial equity learning &amp; action cohort show significant or strong learning and growth, based on the facilitators' post-program assessment.</li> </ul>



## Suggested Resources

### GENERAL NONPROFIT EVALUATION

- [Step-by-Step Guide to Evaluation](#): Comprehensive, non-technical guide to evaluation for nonprofit leaders. Chapter 8: Data Collection and Analysis is especially salient to Barr grantees in selecting metrics.
- [Measuring Social Change: Performance and Accountability in a Complex World](#): Shares a helpful framework that distinguishes social change initiatives based on the level of control that an organization has over the process, and the clarity of the links between cause-and effect.
- [Level Best – How Small & Grassroots Nonprofits Can Tackle Evaluation & Talk Results](#): Compelling book about why small nonprofits should engage in evaluation, with tips for low- and no-cost approaches.
- [Data Playbook](#): framework for how organizations can not only capture data more effectively but put it to work. The *What Data to Collect* section is particularly useful for selecting metrics and measures.
- [Community Toolbox](#): Comprehensive community change resource, including logic models and theories of change. Many bite-sized lessons on evaluation-related topics that can help fill in knowledge gaps.

### CULTURALLY RESPONSIVE AND EQUITABLE EVALUATION

- [Equitable Evaluation Framework™](#): Three-part framework for centering equity in any kind of evaluation. Helpful big picture framing for how to align evaluation with equity.
- [Considerations for Conducting Evaluation Using a Culturally Responsive and Racial Equity Lens](#): Step-by-step guidance for creating and implementing culturally responsive evaluations. Includes a helpful practice self-assessment, *Is My Evaluation Practice Culturally Responsive?*
- [Why Am I Always Being Researched?](#): A guidebook with questions for funders, researchers, and nonprofits considering whether to evaluate, from whom to collect data, and how to share findings.
- [We All Count](#): Resources to incorporate an equity framework into data collection and analysis. Practical tips for analysts at any stage of sophistication.
- [How Nonprofits Can Incorporate Equity into Their Measurement, Evaluation, and Learning](#): A step-by-step guide for nonprofits aiming to embed practices that promote equitable forms of measurement, evaluation, and learning into improvement efforts.

### STAKEHOLDER FEEDBACK

- [Fund for Shared Insight](#): Webinars, guides, and case studies about mission-driven organizations that have prioritized constituent feedback in their learning and improvement processes.
- [Listen4Good](#): Capacity building support and tools for mission-driven organizations to incorporate feedback into their ongoing learning by systematically listening and responding to client voices.
- [YouthTruth](#): Surveys for students, staff, and parents about their experiences in school, focused on school climate, culture, and engagement. YouthTruth can help schools develop an action plan based on the results.
- [Hello Insight](#): Surveys for youth and staff about their experience in afterschool and summer programs on topics including social-emotional learning, youth leadership, and college readiness.

## EVALUATING ADVOCACY AND POLICY CHANGE

- [Advocacy Strategy Framework](#): Helpful composite logic model that lists a variety of possible activities and outcomes for policy campaigns.
- [Advocacy Capacity Tool](#): Self-assessment for policy advocacy organizations that can be used as an evaluative tool, or to stimulate inspiration for metrics for a particular campaign.

## PARTICIPATORY APPROACHES TO DATA COLLECTION AND INTERPRETATION

- [Dabbling in the Data](#): Step-by-step instructions for 15 different participatory data analysis strategies that teams can use to interpret data. Written for non-technical audiences.
- [Facilitating Intentional Group Learning](#): Detailed descriptions of 21 approaches to meaning making in groups, ranging from quick, simple activities like dot voting, to more intensive approaches like appreciative inquiry.



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