



# LabODD

The road for impact by  Cerise

## Make the SDGs a roadmap for impact!

Better measure results with beneficiaries to improve the impact of mission-driven organizations, in connection with the SDGs.

July 2020 - June 2023

Co-financed by AFD's CSO  
Initiatives Mechanism



18-month review (July 2020 - December 2021)

Program of activities in 2022

# What is « LabODD » (SDG Lab)?

- A CERISE-led working group to implement and monitor the project “Make the SDGs a roadmap for impact!”
- Members are French and international NGOs, social investors and their partners on the ground: microfinance institutions and social enterprises.
- Mainly in **Africa** and **South Asia**
- Focus themes: **Inclusive Finance**, **Energy Access**, **Agriculture**
- Transversal dimension: **Gender** approach
- Duration: 3 years (2020-2023)
- Budget: **756 000 Euros** co-financed by AFD and external co-financing (e-MFP, Incofin, BlueOrchard, NMI, etc.)



## Active organizations in working groups



# Where do we want to go with this project?

**Strengthen outcomes measurement with the beneficiaries,**  
in connection with the SDGs, to make good decisions, **have a better impact!**

- **Understand** the SDG framework, **integrate** it into strategies and operations
- **Collect reliable data** from beneficiaries, **analyze** and **use** the data in decision-making
- **Make more transparent and concrete** the reporting of impact organizations on their contribution to the SDGs
- Suggest **standard outcomes indicators** in relation to the SDGs, specific SDGs dashboards, benchmarks, report formats

**Collective creation**

**Open access  
resources**

**Field applications**

# Main achievements

## 2020

- October 1-2: **Launching** LabODD, virtual meeting, 30 participants
- October to November : **State of outcomes measurement practices** and use of the SDG framework. Results published in March 2021.
- November 5: **Introduction to MetODD-SDG**, 21 participants
- November 18 & 24: 2<sup>nd</sup> LabODD meeting during EMW, with the e-MFP Investors Action Group, 33 participants

## 2021

- March 18: 3<sup>rd</sup> LabODD meeting, 30 participants
- March 25: Launching **Energy Group**, 14 participants
- May to July: **4 Energy Group workshops**, around 15 participants
- June 15: publication of **Key Resources** related to the SDGs
- June 24: expert meeting / **Agri scoring tool** (IISD + investors)
- September 21: : 4<sup>th</sup> LabODD meeting, 18 participants
- October 7: **Co-development workshop** with ADA and Enda Tamweel to measure the impact of a solar irrigation project in Tunisia
- October 18-22: participation in **SAM 2021** in Rwanda, training workshop on outcomes management
- November 3: publication of a **Guidance Note** with e-MFP and SPTF (Draft Working Paper)
- November 17: 5<sup>th</sup> LabODD meeting with eMFP Investors AG (EMW 2021), 35 participants

# Two approaches

## By theme

- **Inclusive Finance**: support the collection of new client data (building questionnaires) and the analysis of existing client data (dashboards). Key SDGs for the sector: 8, 1, 5.
- **Energy Access**: a dedicated working group to strengthen knowledge on outcomes measurement, harmonize indicators and methodologies, guarantee good data quality. Focus on the productive use of energy. Key SDGs: 7, 1, 3 and 8.
- **Agriculture**: measure responsible investment in agriculture by building a “RAI Agri Scoring Tool”, with [IISD](#). Key SDGs: 2, 1, 8.
- **Gender**: with [EdM](#), [CARE](#) and [SIDI](#), exchange workshops in 2022; sharing the work of the Grameen Foundation: [RICHES](#).

## By methodology

### Logical framework and definition of indicators:

- [OIF](#): logical framework and data collection protocol for two projects, methodological note to come in 2022.
- [Benoo](#): experience sharing to make better use of existing data in the energy access sector.
- [Invest In Visions](#): SDG-related reporting framework for a microfinance fund and a fund targeted at SMEs.
- [BioBag](#): support on MetODD-SDG to measure the contribution to SDGs 12, 8 and 9 (work with students at [DEFIS 2020](#)).

### Questionnaires and data collection tools:

- Identification of practical tools for collecting data from beneficiaries ([KoBoToolbox](#), [TolaData](#)).
- Discussions with [60 Decibels](#) on the Lean Data approach and their Financial Inclusion Index under development.
- Co-development workshop with [ADA](#) and [Enda Tamweel](#) to improve their satisfaction questionnaire regarding a solar irrigation project.



# 2022 Program Activities

- Continue to identify resources related to the SDGs.
- **Inclusive Finance**, **Energy Access** and **Agriculture**:
  - ✓ Around 12 support projects for the collection and analysis of existing and new key data (satisfaction, perception of changes, etc.) and the definition of standard indicators per SDG Target;
  - ✓ 3 examples of simple and relevant questionnaires for outcomes data by type of impact organization;
  - ✓ A summary grid of the strengths and limitations of practical data collection tools;
  - ✓ 3 capitalization notes: enhancing existing data, construction of a logical framework and selection of monitoring indicators, survey method to collect and use data at beneficiary level.
- **Inclusive Finance**: an online data entry tool for the identified indicators to digitize the reporting aligned with the SDGs (from MetODD-SDG, create a reporting table of outcomes related to the SDGs, 2023).
- **Genre** : contact CERISE key partners, assess their needs and suggest lines of work within the LabODD / a Gender Group. Question the approaches and practices for measuring outcomes through a Gender vision.
- Virtual trainings and LabODD meetings.

# 2022 Calendar | Calendrier 2022

January	February	March	April	May	June	July	August	Sept.	Oct.	Nov.	Dec.
Janvier	Février	Mars	Avril	Mai	Juin	Juillet	Août	Sept.	Oct.	Nov.	Dec.
	LabODD #6	GENDER Group Groupe GENRE		LabODD #7				LabODD #8			
Measuring responsible investment in agriculture <i>Mesure de l'investissement responsable dans l'agriculture</i>											
First report on support to microfinance <i>Premier bilan accompagnement microfinance</i>											
Support to other microfinance institutions <i>Accompagnement autres institutions de microfinance</i>											

## Introduction to



### Webinar

November 5th, 2:30 pm  
(CET/Paris time)



A method for mission-driven organizations to track their contribution to the SDGs



Vers des indicateurs de résultats  
standards pour les IMF ?

LabODD  
The road for impact by Cerise



60\_\_decibels



# Résumé des réalisations 2020-2021 Main Achievements

**LabODD Energy Group**

**A VOS CALENDRIERS - SAVE THE DATES**

**Prochaines réunions**

Suite à la réunion de lancement du Groupe Énergie, nous vous proposons 4 ateliers d'échanges et de réflexion entre mai et juillet, pour favoriser le partage d'expériences et travailler à la définition d'un cadre commun de mesure des résultats :

- #1 - Théorie du changement et cadre des ODD - mardi 11 mai
- #2 - Besoins et attentes des différentes parties prenantes - jeudi 27 mai
- #3 - Données existantes et leur utilisation - jeudi 17 juin
- #4 - L'approche "lean data" - jeudi 1er juillet

Horaires : 14h30 - 16h00 CEST  
Animation bilingue français-anglais  
Sur Zoom





# Summary

- State of outcomes measurement practices
- Review of Key Resources related to the SDGs
- Summary of activities in **Inclusive Finance**
- The CERISE / e-MFP / SPTF Guidance Note
- Summary of activities initiated in **Agriculture**
- Summary of activities for **Energy Access**



## State of outcomes measurement practices

Investigate the level of understanding, interest and ownership of outcome measurement and the SDG framework.

- Survey targets: members and partners involved in the project
- Format: quantitative and qualitative online survey (Google Form)
  - ❑ How is outcomes measurement and the SDG framework understood, used in strategic plans, operations, decision-making and annual reports?
  - ❑ What is the nature and quality of the data collected?
  - ❑ The constraints and limits of data collection?

# State of practices – Sources and driving messages

## Some driving messages:

- Blog Rockefeller : priority on improved evidence
- GIIN Understanding Impact Performance
- Cgap, donors to leverage the potential of data

*palpable demand for  
more robust, meaningful  
evidence of social change*

*growing commitment to  
transparency around impact  
results and a heightened  
appetite for impact  
performance analyses*

*availability and quality of  
data doesn't automatically  
translate to impact*

## Feedback from CERISE's partners:

- 15 indepth surveys from investors, FSP, TA providers
- Exchanges during first LabODD meetings and European Microfinance Week, November

# A need for improved evidences

Needs For	IMPROVE	PROVE	PAY ATTENTION
<b>FSP / SB</b>	<ul style="list-style-type: none"> <li>• What works or not</li> <li>• Constant feedback =&gt; Continuous improvement</li> <li>• Capacity to adapt (time of crisis)</li> </ul>	<ul style="list-style-type: none"> <li>• Objectives achieved?</li> <li>• External com'</li> <li>• Information for lenders/ investors</li> </ul>	<ul style="list-style-type: none"> <li>• Strong relationship with clients</li> </ul>
<b>Investor</b>	<ul style="list-style-type: none"> <li>• Integrate non-financial focus in selection</li> <li>• Better data collection at sector level</li> </ul>	<ul style="list-style-type: none"> <li>• Verify impact thesis</li> <li>• Accountability to own investors</li> <li>• Verify target clients</li> </ul>	<ul style="list-style-type: none"> <li>• Knowledge for the sector</li> <li>• Put the clients at the center</li> </ul>

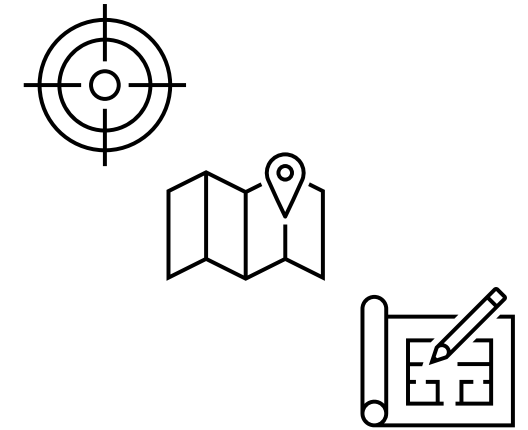
# Constraints in data collection

Limits on For	PROCESS	DATA	CLIENT PERSPECTIVE
<b>FSP / SB</b>	<ul style="list-style-type: none"> <li>• Cost, time, complexity,</li> <li>• Leadership</li> </ul>	<ul style="list-style-type: none"> <li>• Reliability</li> <li>• Expertise/ capacity for analysis / tools</li> <li>• Staff turn over</li> </ul>	<ul style="list-style-type: none"> <li>• Reporting burden, Confidentiality</li> <li>• Legal constraints</li> </ul>
<b>Investors</b>	<ul style="list-style-type: none"> <li>• Costs, time</li> <li>• Harmonization</li> </ul>	<ul style="list-style-type: none"> <li>• Too much data ?</li> <li>• Involvement vs. independence</li> </ul>	<ul style="list-style-type: none"> <li>• Indirect collection</li> <li>• End customer only one stakeholder in the value-chain</li> </ul>
<b>Both</b>		<ul style="list-style-type: none"> <li>• Alignment of expectations</li> </ul>	



# Conclusion: needs and strategy

- **Plenty of resources / experiences:** how to navigate and guide users for better use of data?
- **Align** on the data, SDG as a common language, towards basic standards indicators of outcome
- **Simplified, efficient** data collection: how to make better use of existing data, ensure the quality and concentration of the data collected
- **Covid and crisis** as a change-maker for customer data collection: take advantage of the momentum!



# Key Resources related to the SDGs

Concrete & operational tools and resources for investors and social entrepreneurs to measure their contribution to the SDGs.

- Targets: social investors and businesses
- Format: a living PDF document [available on CERISE website](#)



- ✓ The existing principles & standards
- ✓ Data collection and reporting tools
- ✓ Case studies and examples of good practices
- ✓ Literature review to go further



# Inclusive Finance

Support in the collection and analysis of new and existing client data for use in decision-making.

- Targets: social investors, microfinance institutions, networks
- Deliverable: a Guidance Note by CERISE, e-MFP and SPTF
  - Recent trends influencing outcomes management
  - Challenges and first steps towards usable outcomes data, and aligned expectations
  - Towards standards outcomes indicators for MFIs



# Activities Summary

⇒ Depending on the social strategy and logical framework of each partner, what are the SDGs to which the organization contributes? Which targets within these SDGs? Which outcomes indicators?

## **Client data collection:**

- Satya India (with Ankuram, support BlueOrchard) – end in October 2020
- Crystal Georgia(support Incofin) – end in July 2021
- Satin India (with Kadence and Ankuram, support NMI) – end in October2021
- Pamecas Senegal and Juhudi Kilimo Kenya (with Incofin and local consultants from SPM Professionals Network) – launching in November 2021

## **Analyzing existing client data:**

- Banco Popular Honduras, FIDRA Côte d'Ivoire, Assilassimé Togo, Fundación Dominicana de Desarrollo (with SPTF) – end in Q1 2021
- Save India – end in December 2021
- R20 Myanmar (with MCRIL and support Incofin) – work in progress, end mid-2022

## **Discussions with e-MFP on savings-related indicators.**

This work is synthesized in the Guidance Note with e-MFP and SPTF.

# Note d'orientation (Brief)

## **“Outcomes management for Financial Service Providers: A proposed standard framework aligned with the Sustainable Development Goals”**

Draft Working Paper, Version Nov 03, 2021.

Prepared by CERISE in collaboration with SPTF Outcomes Working Group and  
e-MFP Investors Action Group





# Recent trends influencing outcomes management

1. There are growing demands for accountability
2. Getting data has gotten easier and cheaper
3. We've adjusted our expectations of what financial inclusion can achieve
4. The SDGs have emerged as a common framework
5. Investor interest in outcomes is growing ...
6. ... But outcomes are not yet a priority for most FSPs



# SPTF Research: Key Feedback on Outcomes Data



- In general, FSPs do not see **impact** data as valuable for their own needs
- The outcomes that are relevant for FSPs to focus on are **nearer-term outcomes**, because these are **actionable**.
- Though experts agree that FSPs should know whether products are meeting clients' needs, **there is not consensus on what specific indicators to use** to collect data
- It is essential to get **qualitative** customer feedback on a regular basis
- Satisfaction survey data cannot serve as a proxy for outcomes data
- FSPs need to collect outcomes data in order to improve the products and services. Outcomes data are useful when they help the FSP **make decisions**.

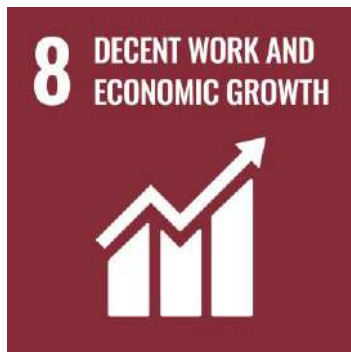


Vers des indicateurs de résultats standards pour les IMF ?

Towards standards outcomes indicators for FSP?



# Focus on the Targets of SDGs 8, 1 & 5



- 8.3 Promote development-oriented policies that support productive activities, decent job creation (...) through access to financial services



- 1.2 By 2030, reduce at least by half the proportion of men, women and children of all ages living in poverty in all its dimensions according to national definitions
- 1.4 By 2030, ensure that all men and women, in particular the poor and the vulnerable, have (...) access to (...) appropriate financial services, including microfinance



- 5.1 End all forms of discrimination against all women and girls everywhere
- 5.2 Eliminate all forms of violence against women and girls
- 5.5 Ensure women's full and effective participation and equal opportunities for leadership at all levels of decision-making in (...) economic (...) life



## Outcomes indicators and SDG 8

SDG Target	Indicator
<b>8.3 Promote development-oriented policies that support productive activities, decent job creation (...) through access to financial services</b>	Increased employment in financed business (legal working-age/adult family members, wage workers) (integrate notions of “decent work” and “formal jobs”), on average, for all productive loans
	Changes in business revenue: 1) annual sales; 2) annual net income
<b>...entrepreneurship, creativity and innovation...</b>	Number of new businesses created
	Changes in business practices, towards business professionalism (with list of positive changes towards new products, changes in business decisions, new processes)
<b>...encourage the formalization and growth of micro-, small- and medium-sized enterprises...</b>	Number of SMEs formalized (tracking changes)
	Changes in business assets (% invested in tools/equipment/productive assets; changes in total business assets)
<b>Target 8.3 globally</b>	Perception of change by the entrepreneurs
	Business attitude: <ul style="list-style-type: none"> <li>• Confident in ability to be successful</li> <li>• Satisfaction with business earnings</li> </ul>
	Feel optimistic about the future



# Outcomes indicators and SDG 1

SDG Target	Indicator
<b>1.2 By 2030, reduce at least by half the proportion of men, women and children of all ages living in poverty in all its dimensions according to national definitions</b>	Acquisition of household assets (bed, stove, refrigerator, TV, bicycle, etc.)
	Improved basic needs (toilet, drinking water, clean cooking, school for children)
	Financial tools/ changes in liquid assets (livestock, jewelry, etc.)
	Change in number and quality of meals
	Income (number of sources, change, stability)
	Or, as a proxy, average monthly household expenditure
<b>1.4 By 2030, ensure that all men and women, in particular the poor and the vulnerable, have (...) access to (...) appropriate financial services, including microfinance</b>	Financial tools: change in savings balance
	% clients that can better manage their budget/ expenses/finances
	Ability to face major expense
	Perception of change in quality of life (and reasons)
	After years 3 and 5: % of households above the selected poverty line, who were below the line at entry

## Outcomes indicators and SDG 5

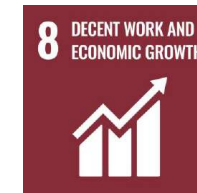
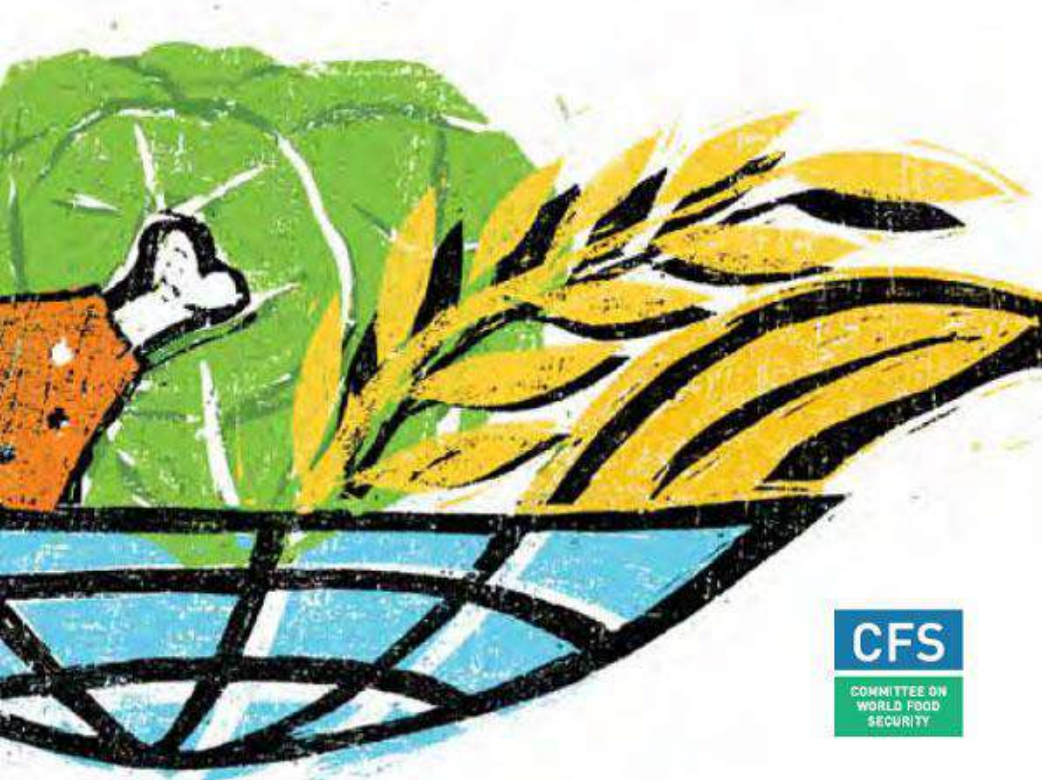
SDG Target	Indicator
<b>5.1 End all forms of discrimination against all women and girls everywhere</b> <b>5.5 Ensure women's full and effective participation and equal opportunities for leadership at all levels of decision-making in (...) economic (...) life</b>	Capacity to use the loan for her own economic activity
	Capacity to contribute financially to the household needs
	Capacity to make decisions regarding the use of the household resources
	% of women who report that they are more comfortable voicing their opinions (at workplace, in household, in community, depending scale of intervention of the organization)
	% of women who report a perception of decreased discrimination/ easier access to work
<b>5.2 Eliminate all forms of violence against women and girls.</b>	Domestic violence: % of women who report that the use of financial product created unintended harm/ has resulted in a list of negative coping mechanisms (child labor, gender-based violence, etc.)

# PRINCIPLES FOR RESPONSIBLE INVESTMENT IN AGRICULTURE AND FOOD SYSTEMS

## Agriculture

Measure responsible investment in agriculture by assessing the practices and outcomes of agribusiness companies and producer organizations.

Build a “**RAI Agri Scoring Tool**” aligned with the SDGs and consistent with the principles of the Food and Agriculture Organization of the United Nations (FAO).



# RAI Agri Scoring Tool

- May 2021: discussions on how to measure responsible investment in agriculture, including outcomes measurement, to support IISD (International Institute for Sustainable Development).
- Need for a rating tool to assess the practices and results of agribusiness companies and producer organizations, in line with the principles of Responsible Investment in Agriculture ([RAI principles](#)) defined by the [FAO](#).
- Building a “RAI Agri Scoring Tool” including practice indicators in line with international standards, and outcomes indicators aligned with SDGs 2, 1 and 8.
- In collaboration with investors and the CSAF (Council for Smallholder Agriculture Finance).
- The first version of the RAI Agri Scoring Tool (Excel format) by CERISE will be tested with various partners supporting responsible investment in agriculture (late 2021 and early 2022).
- Review scheduled for 2022 and finalization of the tool in 2023.





## Energy Access

A special working group: **LabODD Energy Group**

To **explore the issues and practices** of outcome measurement, in link with the SDGs, for impact organizations involved in the energy access sector (social businesses and impact investors)

- ✓ **Question** current approaches and practices
- ✓ **Appropriate** the SDG framework
- ✓ **Experiment** in the field
- ✓ **Share** experiences
- ✓ **Capitalize**

[Blog](#)



# Achievements / Réalisations

## PHASE 1 – DISCUSSIONS & BRAINSTORMING

**1. Theories of change and  
SDG framework**

1. Théorie du changement et  
cadre des ODD (11/05)

**2. Needs and expectations of  
different stakeholders**

2. Les besoins et attentes des  
différentes parties prenantes  
(27/05)

**3. Existing data and how  
to use them**

3. Les données existantes et  
leur utilisation (17/06)

**4. The « lean data »  
approach**

4. L'approche « lean  
data » (01/07)

ENTREPRENEURS  
du Monde

IIP INVESTISSEURS  
& PARTENAIRES

ada

WE  
LIGHT  
Light my Village

Benoo

Solarly

# Lessons Learned / Leçons apprises

## BLOG ARTICLE

[Article en français](#)

[Article in English](#)



## Les leçons apprises des premiers ateliers

### Accès à l'énergie : un cadre commun de mesure des résultats est-il possible ?

Au sein du LabODD de CERISE, le Groupe Energie s'est constitué autour de l'envie de partager les expériences entre pairs, et de définir un cadre commun de mesure, analyse et reporting des résultats. Au cours des premières réunions, une question a toutefois rapidement émergé : est-il vraiment possible de s'aligner sur un cadre commun de mesure des résultats dans un secteur aussi diversifié que celui de l'accès à l'énergie ?

Entre mai et juillet 2021, le Groupe Energie a mené **quatre ateliers** autour de cette question. Cet article en présente les **principales conclusions**.

# Work in progress / En cours

## PHASE 2 – EXPERIMENTATION

- **Guide and support energy access social businesses** in outcome data collection, analysis and use
- **Share experiences** on data collection, analysis and use **through regular workshops**
- **Guider et accompagner différentes entreprises sociales d'accès à l'énergie** dans la collecte, l'analyse et l'utilisation de données de résultats
- **Partager les expériences** en matière de collecte, analyse et utilisation des données de résultats à travers des **ateliers réguliers**

## CO-DEVELOPMENT WORKSHOPS

- A member shares his current issue in terms of outcome measurement, the others help him

## ATELIER DE CO-DEVELOPPEMENT

- Un membre soumet sa problématique actuelle en matière de mesure des résultats, les autres l'appuient

# 1<sup>st</sup> Co-dev Workshop / 1<sup>er</sup> Atelier de codéveloppement

October 7th, 2021 / Jeudi 7 octobre 2021

## SOLAR IRRIGATION

- Results measurement of the Eco-shams project led by Enda Tamweel & ADA
- Next step: follow client surveys results

## IRRIGATION SOLAIRE

- Mesure des résultats du projet Eco-shams mené par Enda Tamweel & ADA
- Prochaine étape : suivre les résultats des enquêtes clients







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# LabODD

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## We continue in 2022!

