

# Presentation # 7 Metrics

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- Building For Tomorrow: Natasha DeStepfan, Mario Lorente
- Simusolar: Ankita Kohli, Ravi Kongara
- KadAfrica: Bhargav Brahmbhatt, Erin Horiuchi
- HipoCampus Centros (Mexico): Evelyn Cano, Adriana Pedraza
- HippoCampus Learning Centers (India): Sylvia Lawrence, Sijith Salem
- MoringaConnect: Brooke Langer, Alyssa Masangcay
- Vega Coffee: Shelley Meyer, Sudha Nemani
- Food For Education: *Martins Okoh*
- Nizam Potential Energy: Bao Dong, Alexandra Luong

# Presentation # 7: Metrics and Accountability

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1. List the metrics currently kept by your organization (by type):

1.5 pts

- Financial Resources
- Organizational Resources
- Process/Activity
- Outcome/Impact

2. Compute an “SROI Lite” for your organization?

0.5 pt

**Note:** define “successful outcome” and specify what measure of investment (e.g. total expenses) you are using (and the time period).

# Build for Tomorrow Metrics

Type	BT's Category	Key Metrics
Financial Resources	Financial, Sales, Fundraising	6
Organization Resources	Governance & People Performance	2
Process/ Activity	Marketing, Product/Service Development, Supply Chain	10
Outcome Impact	Social Impact, Environmental Impact, Impact Report/Schools, Impact Report Students, Impact Report Fellows, Impact Report/Metrics,	52
TOTAL	All metrics	70

# Build for Tomorrow Metrics

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- SROI Lite
  - Successful Outcome: Building a new school
  - Investment: Total Expenses
  - Time Period: One year (2016)
- $\text{SROI Lite} = \$1,781,304 / 14 = \$127,236$  per school built

# Simusolar Metrics

## Financial and Organizational Resources

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- Financial Resources
  - Revenue
  - Months of Capital
  - Gross Margin
  - EBITDA Margin
  - Cash Received from Customers
  - Cash Outflow ex. Inventory
  - Ending Cash
  - Debt/Assets
  - Interest Coverage Ratio
  - Average Cost of Financing
- Organizational Resources
  - % Promoted
  - Avg Monthly Turnover

# Simusolar Metrics

## Process/Activity and Outcome/Impact

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- Process/Activity
  - Sales per Sales Staff per Month
  - Customer Acquisition Cost (% Rev)
  - Sales Mix
  - Service Cost (Per Quarter) % of Portfolio
  - PaR (Productive Equip)
  - % Defaults Historic
  - Days Inventory
- Outcome/Impact
  - Cumulative Customer Count
  - Increased Household Disposable Income
  - Agricultural Productivity
  - Greenhouse Gas Reduction
  - Customer Satisfaction
  - PPI Survey - Index measure

# Simusolar Metrics

## SROI Lite and the “successful outcome”

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- Number of customers - \$859/customer
- Increase in household disposable income - \$3.97/household
- Amount of CO<sub>2</sub> offset - \$671/ton of greenhouse gas reduced

# KadAfrica

## Key Metrics: Financial Resources

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Financial Resource	Amount
Year-to-date Revenue	Kad Estate Revenue: \$5,180 Outgrower Revenues: \$10,809 OSG Revenues: \$8,794 Seedling Revenues: \$5,832 Other KAD Estate Crops: \$533 Total Revenue: \$31,148
Expenses	COGS: \$37,652 Salaries: \$89,485 Overhead: \$5100 Administration: \$21,659 Total OpEx: \$149,439



# KadAfrica

## Key Metrics: Organizational Resources

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- Volunteers provide educational support related to finance, modern farming methods, and common business practices
- 40 employees, 9 key employees:
  - Eric Kaduru, CEO and Co-founder
  - Rebecca Kaduru, Managing Director and Co-founder
  - Alexander Ruhweza, Operations and Sales Manager
  - Sam Mwanguhya, Community Engagement Manager
  - Ann-Elise Francis, Program Director
  - Andrew Opiolo, Head Agronomist
  - Christine Kunyunyuzi, Program Manager
  - Wendy Akumu, Finance and Administration Manager
  - Rachel Kanyunyuzi, Office Manager



# KadAfrica

## Key Metrics: Process/Activity

Organizational Dashboard	Actual	Target
<b>Operational Indicators - KadAfrica Estate</b>		
KadAfrica estate - new acres planted under other crops (acres/time period)	0	0
KadAfrica estate - cumulative acres planted other crops (acres)	5	3
KadAfrica estate - new acres planted under passion fruit (acres/time period)	0	6
KadAfrica estate - cumulative acres planted under passion fruit (acres)	6	6
<b>Operational Indicators - OSG Program</b>		
# of Plots/Acres	10 plots/30 acres	11 plots/33 acres
# of Girls Recruited	90	270
# of Girls Activey Enrolled	179	270
# of Girls Graduated	134	160
<b>Operational Indicators - Outgrowers</b>		
# Farmers Contracted	12	10
# of Acres Contracted / Under cultivation	9	5

# KadAfrica

## Key Metrics: Outcome/Impact

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- The Process / Activity metric also measure the Outcome/ Impact

Operational Indicators - OSG Program		
# of Plots/Acres	10 plots/30 acres	11 plots/33 acres
	# of Girls Recruited	90
	# of Girls Activey Enrolled	179
	# of Girls Graduated	134
		270
		160

- Beneficiaries receive 625% increase in monthly income. An increase from \$3 to \$20 earned per month

# KadAfrica

## Key Metrics: Expected vs. Actual SROI

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- Expected SROI: \$72 / girl
- Actual SROI:
  - $\$72 / \text{girl} * 1,752 \text{ successful outcomes} = \$126\text{K}$
  - Cash flow from Op Ex indicates \$162K
  - Cost per outcome is  $\$162\text{K} / \$72 = \$92.50 / \text{girl}$
- Discrepancy may be due to:
  1. Inaccurate estimation of total costs, such as overhead
  2. aMore successful outcomes than what was published at the time of their cash flow calculation

# HipoCampus Centros

## Metrics currently tracked

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### Financial Resources

1. Income
2. Operating & Capital Expenses
3. Capex & Depreciation

### Organizational Resources

1. Number of learning centers
2. Regional staff employees
3. Number of unfilled positions

### Process/Activity

1. Parent Satisfaction
2. Center Quality GPA
3. Teacher Evaluation

### Outcome/Impact

1. Number of children enrolled
2. Child Development
3. Quality of Interactions

# HipoCampus Centros

## SROI Lite

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- Successful outcome: Number of learning centers (100 centers by 2021)
- Measure of Investment: Total capital invested, about \$ 1.84M USD (estimated through 2021)
- SROI Lite =  $\$1.84\text{M} / 100 = \$18,400 \text{ USD}$ , which is equivalent to \$368,000 MXN invested per center

# M<sup>ringa</sup>C<sup>nnect</sup>

By: Brooke Langer and Alyssa Masangcay

# MoringaConnect Metrics

## FINANCIAL RESOURCES

- Gross profit
- Net profit margin
- Net gross margin
- Annual revenue / Annual expenses
- Breakeven sales
- Annual contributed income

## ORGANIZATIONAL RESOURCES

- Number of trained employees
- Farmer to extension officer ratio
- Employee turnover rate
- Length of time to fill open positions

## PROCESS/ACTIVITY

- Number of moringa farmers reached
- Number of customers and countries served
- Length of time to close deal
- Number of times to pass/fail quality standard
- % of product returns
- Number or % of negative customer reviews

## OUTCOME/IMPACT

- Number of local jobs created
- Amount of increased income for farmers
- Number of products purchased by total and per product type, each for Moringa Foods and True Moringa
- Number of trees planted



# Moringa Connect Metrics

## SROI Lite

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### ALTERNATIVE #1

- Based on the number of moringa farmers reached.
- Successful outcome: The number of moringa farmers in Ghana who partner with MoringaConnect.
- Measure of investment: The total capital expenditure to date (as of 2017).
- $\text{SROI Lite} = \$1,226,750 / 2,300$
- $\text{SROI Lite} = \$533 \text{ invested/farmer}$

### ALTERNATIVE #2

- Based on the additional income provided to the moringa farmers.
- Successful outcome: The amount of additional revenue provided to the moringa farmers in Ghana who partner with MoringaConnect.
- Measure of investment: The total capital expenditure to date (as of 2017).
- $\text{SROI Lite} = \$1,226,750 / \$415,251$
- $\text{SROI Lite} = \$2.95 \text{ per additional income dollar}$