



SCALA

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Final Report on SCALA Pilot Results and recommendations Date: 11 May 2017


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Executive Summary: This report shares results of the pilot conducted with the organization and includes recommendations for future measurement endeavors (1/2)

Goals of the pilot

- The Metrics Lab (an initiative of SCALA) aims to help member organizations measure their socio-economic impact through a common framework, such that they can enhance their positive impacts on their micro-distributors as well as improve business outcomes such as retention and sales
- The goals of the pilot were to test the common framework while also creating customized data collection processes and surveys for the organizations participating in the pilots

Six pilot phases

There were six distinct phases in the pilot

- Phase 1: Selected key indicators through document review, conversations with senior management and qualitative interviews with key stakeholders
 - Indicators selected: empowerment at home (decision-making, influence on family), self-efficacy (general, time management, sales skills, financial skills), quality of life of children, pride, use of mobile technology for Kiteiras activities, strength of social network, social support and Progress out of Poverty (PPI)
- Phase 2: Developed data collection process and draft data collection manual for the survey pretest and the pilot data collection phases
- Phase 3: Identified existing instruments to measure indicators and developed survey, showcards, informed consent section in survey introduction, and excel database
 - Developed pretest training materials and conducted remote training for interviewers in San Salvador
 - Pretested survey with 12 micro-distributors through cognitive interview methodology (after each day of pretesting, WDI led debrief sessions to discuss issues)
- Phase 4: Implemented improved post-pretest version of the survey with 50 micro-distributors and updated data collection manual based on these experiences
- Phase 5: Conducted two key analysis on the data: Cronbach's alpha on multi-item scale questions and descriptive statistics on all indicators
- Phase 6: Revised survey based on pilot results and developed recommendations for future impact measurement endeavors

Executive Summary: This report shares results of the pilot conducted with the organization and includes recommendations for future measurement endeavors (2/2)

Key Recommendations

WDI captured lessons learned from each stage of the pilot- from indicator selection and refinement to data analysis. We provide recommendations to guide the organization on future impact measurement activities. Key recommendations include:

1. Continue to support quality impact measurement activities such as survey administration, by building monitoring and evaluation capability among staff
2. Continue to focus on measuring multi-dimensional poverty outcome indicators and conduct an impact assessment using a robust research design
3. Systematically and regularly measure impacts on micro-distributors to gain a more nuanced understanding of their needs, as well as how these needs change over time, in order to better address them through business activities
4. Pretest and pilot any changes or adaptations to the survey or interview format with the representative population to ensure accurate data collection
5. Prior to conducting any data collection, conduct trainings with enumerators on interview techniques and best practices
6. Only collect data– both qualitative and quantitative–that will be used by the organization for some purpose such as impact assessment, reporting, adaptive management, decision-making on design etc

The Metrics Lab is a SCALA initiative that helps its member organizations measure their socio-economic impacts through a common framework. The Metrics Lab worked with three organizations to test the framework and develop context-specific surveys and data collection processes for each of them

The Metrics Lab

- The Metrics Lab, an initiative of SCALA and led by WDI, is helping organizations measure their socio-economic impact such that they can enhance positive impacts on their stakeholders and improve business outcomes such as retention and sales

The Metrics Lab Framework

- The Metrics Lab has developed a simple, standardized framework which can be independently adapted across the SCALA network in order to guide decision making within organizations and encourage learning across the micro-distributor network
 - Results from organizations collecting data on framework indicators can be aggregated across the network to demonstrate the beneficial impacts of the micro-distributor model to outside stakeholders

The pilots

- To test this framework, the Metrics Lab put out a call to the SCALA network in search of member organizations interested in conducting pilots
- To pilots allow for testing the following processes: indicator selection, data collection, survey development and data analysis. The three organizations selected were:
 - i. **Chakipi Acceso**, a last-mile distribution venture in Peru that provides women with sales training and then supplies them with products such as nutritious foods, personal care items, pharmaceuticals, and solar lamps that they sell in their communities
 - ii. **Kiteiras**, a micro-distribution network of door-to-door saleswomen managed by “madrinhas,” or godmothers, in poor communities in Brazil. The program empowers women through entrepreneurship training, healthy eating advice and life skills coaching
 - iii. **Supply Hope**, a non-profit in Nicaragua that helps families living in poverty earn income through micro-franchises. Mercado Fresco has more than 90 stores located in the homes of micro-franchise operators. Through these stores, women provide access to affordable, quality food, including fresh vegetables and dairy products to the communities

The well-researched, internally developed, framework used in the pilots is holistic, multidimensional, flexible and promotes aggregated learning across organizations

Features of the framework	Description	Benefits
Holistic	<ul style="list-style-type: none"> Indicators capture both business and social changes 	<ul style="list-style-type: none"> Organizations able to use social indicators to improve business outcomes and guide improvements in operations
Multidimensional	<ul style="list-style-type: none"> Indicators capture outcome and impact level changes Indicators capture changes in economic, capability and relationship well-being Indicators capture negative impacts Indicators measure short-term and long-term changes 	<ul style="list-style-type: none"> As opposed to only outputs, organizations gather outcome and impact level data on micro-distributors As opposed to only economic changes, organizations capture changes in capability well-being such as decision making, self-efficacy etc. and relationship well-being such as support for children, social network etc. of micro-distributors Programs need indicators they can track and use on a regular basis to guide decision-making (short-term), as well as indicators that demonstrate their contribution to poverty reduction (longer-term)
Flexible	<ul style="list-style-type: none"> This standardized framework allows for flexible selection of indicators as deemed necessary by the organization 	<ul style="list-style-type: none"> Organizations can adapt the framework such that they only collect indicators that meet their personal data needs (versus a one-size fits all approach) Organizations can select indicators based on their stage of growth: pilot, growth and scale stages
Aggregative	<ul style="list-style-type: none"> The framework promotes aggregated learning, decision-making, and benefits to the SCALA network 	<ul style="list-style-type: none"> Data collected from standardized indicators across member organizations can be aggregated, leading to rapid learning and sharing of best practices across SCALA initiatives
Well-researched	<ul style="list-style-type: none"> The framework is developed after reviewing and adapting key indicators from six existing metric frameworks and tools that have already gained credibility within the development community 	<ul style="list-style-type: none"> Organizations do not need to carry out research on finding the appropriate framework Organizations can track their contribution to Sustainable Development Goals explicitly related to micro-distribution

Goals from the pilots included creating context-specific tools and processes for the organizations, testing the framework, and learning lessons across pilots to share with the broader SCALA network

Goals for the organization	Goals for the Metrics Lab	Goals for the SCALA network
Select context-specific indicators from the Metrics Lab Framework	Test the framework that includes social and business, long-term and short-term indicators	Create learning on common indicators, data collection practices, survey development and data analysis
Develop a context-specific data collection process and survey which includes best practices from the field	Identify best practices in collecting data on common socio-economic indicators	Guide decision-making within organizations
Train staff on survey pretesting (cognitive interviewing) as well as data collection of impact indicators	Gather and present quantitative evidence of organizations' socio-economic impact, annually	Demonstrate benefits and impacts of micro-distributor network to outside stakeholders such as external funders
Launch and set up the initial steps required to measure socio-economic impact	Conduct long-term, in-depth, data collection with pilot organizations to assess continued value of metrics and adapt indicators over time	Set up groundwork to measure socio-economic impact of SCALA members to enhance business outcomes such as retention and sales, and address vulnerabilities along the value chain

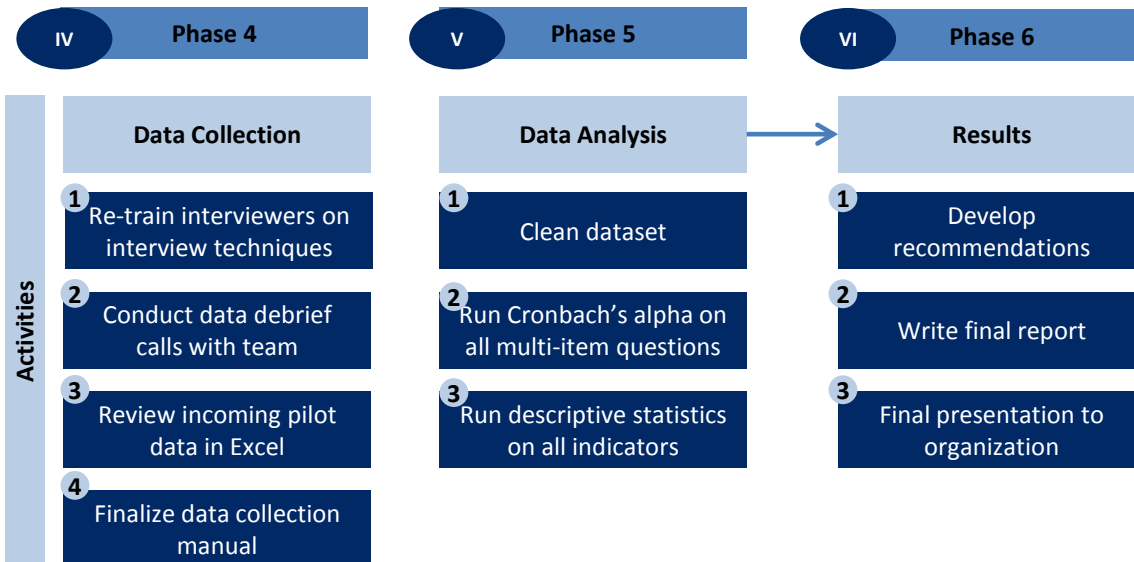
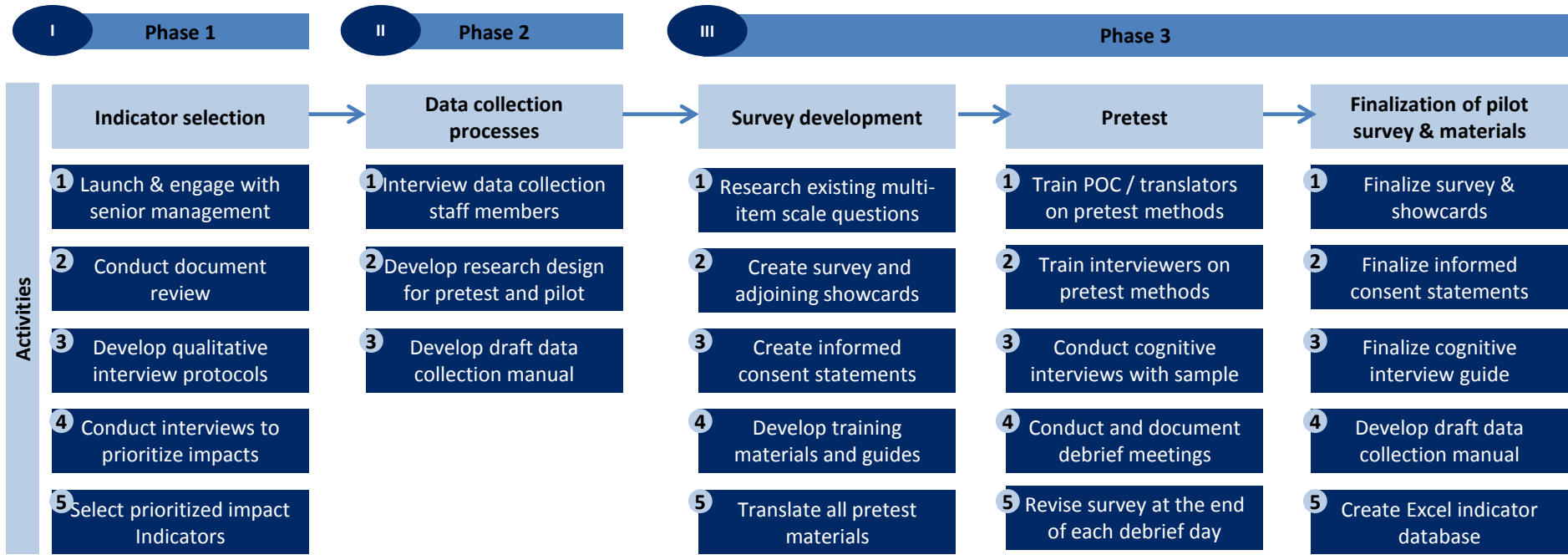
The pilot activities began in May 2016 and all phases were completed by May 2017

Activities	Approximate dates												
	May 2016	June 2016	July 2016	Aug 2016	Sept 2016	Oct 2016	Nov 2016	Dec 2016	Jan 2017	Feb 2017	Mar 2017	Apr 2017	May 2017
Phase 1: Indicator identification & selection	█	█	█										
Phase 2: Data collection process development			█	█									
Phase 3: Survey instrument development with pretest				█	█	█							
Phase 4: Data collection with pilot sample							█	█	█				
Phase 5: Data analysis									█	█	█		
Phase 6: Report development and presentation											█	█	█

Each of the six phases were associated with a specific goal. The pilot began with indicator selection and ended with the development of the final report. The final report includes recommendations for future impact measurement activities

Phase	Name of Phase	Goal of Phase
Phase 1	Indicator identification and selection	Identify and select full list of potential context-specific indicators for the pilot that are valuable to management and reflect the impact on the micro-distributors
Phase 2	Data collection process development	Develop data collection process plan (including information on how to select the pretest/pilot samples; and the size of those samples) that is efficient, effective and reduces burden on organization staff
Phase 3	Survey instrument development (refined through pretest)	Train interviewers on cognitive interviewing methods to conduct the pretest. Develop context-specific survey with showcards and informed consent section
Phase 4	Data collection	Collect data for the pilot and finalize the data collection manual for future impact measurement activities
Phase 5	Data analysis	Calculate Cronbach's alphas for all multi-item scale questions and descriptive statistics for all impact and demographic indicators
Phase 6	Report development and presentation to the organization	Develop final report that shares recommendations, lessons learned during the pilot, findings and also methodology

Activities were grouped into six phases. Each phase provided inputs for the next and consisted of detail-oriented activities to achieve the goals of the pilot



To help accomplish goals of the pilot, the following formal interviews and meetings were conducted: in phase 1 and 2, we conducted three qualitative interviews in total. In phase 3, we conducted 12 cognitive interviews. In phase 4, the survey was administered to 50 micro-distributors

Interview with Key Stakeholder	Number of Interviews
Phase 1	
In-depth, qualitative, focus-group style, interview with 5 organization staff and one individual interview to discuss the impacts of the organization on micro-distributors and select prioritized indicators	2
Phase 2	
In-depth qualitative interview with organization staff to discuss organization’s existing data collection processes and ‘touch points’ with micro-distributors	1
Phase 3	
Cognitive interviews with micro-distributors during pretest to develop a context specific survey for the organization	12
Debrief sessions with senior level management and enumerator team	4
Group meetings with senior level management to discuss WDI’s recommended changes to post-pretest survey, in order to finalize for use in pilot	1
Phase 4	
Interviews with micro-distributors to collect survey data for the pilot	50
Debrief sessions with senior level management and enumerators to learn of progress and problem-solve issues	2

This is a snapshot of the key formal interviews and meetings that took place. Please note several other informal meetings and conversations took place to accomplish the goals of the pilot

Phase 1 activities were conducted between May and July 2016 to first identify potential indicators from the common framework and then, based on qualitative interviews, select prioritized indicators for the pilot

Activity	Approximate timeline
Conducted phase 1 kickoff call with organization's senior management	May 2016
Reviewed documentation sent by organization to identify potential indicators of interest and select relevant ones from the framework	June 2016
Developed interview protocol based on the learnings from the documents as well as based on impacts of interest identified by senior management	June 2016
Conducted focus-group interview with point of contact (POC) and organization to better understand the type of business and social impacts that occur on women selling Kiteiras products	June 2016
Coded and analyzed interview notes	June 2016
Developed draft list of final indicators selected for the pilot and sent to POC	June 2016
Received feedback and question on draft indicators and discussed questions for POC via email	June - July 2016
Finalized indicators based on feedback. WDI shared final indicators for pretest and pilot via email	July 2016

The prioritized indicators selected for the pilot can be organized into three types of well-being: capability, relationship, and economic. Additional demographic-based indicators were also included in the survey

Capability Well-being	Relationship Well-being	Economic Well-being
Self-efficacy <ul style="list-style-type: none"> • General • Time management & planning • Sales skills • Financial skills 	Pride <ul style="list-style-type: none"> • For organization 	Progress out of Poverty (PPI)
Empowerment at home <ul style="list-style-type: none"> • Decision-making • Influence on family 	Social network <ul style="list-style-type: none"> • Personal • Professional 	
Support provided to children	Social support <ul style="list-style-type: none"> • From Kiteiras 	
Use of mobile technology related to Kiteiras activity		

Demographic and Other Indicators		
Gender; age; education level; civil status	Years of sales experience	Trainings received from other programs
Formal registered business (Yes/No)	Gold methodology savings group member (Yes/No)	Cellphone ownership (Yes/No)
Head of household (Yes/No)	Household size and composition (Children 0-5 years; 6-12 years; 13-18 years)	Number of current customers (#)

See annex for (1) more detailed description of new and existing indicators selected for the pilot and (2) complete list of qualitative questions

For more information on the three types of well-being, please see <http://wdi.umich.edu/knowledge/multi-dimensional-impacts-enhancing-poverty-alleviation-performance-the-importance-of-implementing-multidimensional-metrics/>

All documents from phase 1, including the final list of indicators selected for the survey, are available in the submissions folder

Phase 1 documents

<https://drive.google.com/open?id=0B4LJix-Mdkd5NkNWbUsxZzFaT3c>

Document Name and Number	Brief Description
1. Metrics Lab Pilot Proposal	This proposal includes an overview of Metrics Lab pilot process, including an outline of the workplan, pilot activities, and the associated costs of each phase of the pilot
2. Phase 1 Kickoff Call Slide Deck	Reviews the goals and phases of the pilot, the roles and responsibilities for various activities required, and the timeline for phase 1
3. Qualitative Interview Protocol (blank)	Includes an outline of all the questions that were explored during the two qualitative interviews conducted with 6 total organization staff. The purpose of these interviews were to determine what impacts women were most likely to experience as a result of being micro-distributors
4. Qualitative Interviews A. WDI notes: Group interview B. WDI notes: Raphael interview C. Audio recordings	Theses interview notes and audio recordings are from the qualitative interviews conducted in phase 1, including a group interview with 5 organization staff and an individual interview with Raphael Marco. Content from these interviews was used to select the prioritized indicators to be included in the survey
5. Phase 1 Deliverable: Final Indicators	This deliverable is a slide deck which includes a complete list of indicators selected for the pretest/pilot. A complete summary of activities conducted in phase 1 is also included. Note: In this file, some content is written in blue text in order to indicate revisions which were added after WDI received feedback from the organization

Phase 2 activities were conducted between July and August 2016 to develop a context-specific data collection plan for the pretest and the pilot; lessons from these would also be used in future measurement efforts

Activity	Approximate timeline
Conducted phase 2 kick off call	July 2016
Reviewed documentation on data collection processes sent by organization	July 2016
Conducted interview with data management and field operations staff to understand organization's existing data sources and data collection processes such as current touch-points with micro-distributors; also engaged in many informal conversations with the POC and team via email and Skype	July 2016
Drafted data collection process plan	July 2016
Received feedback from organization and revised data collection process plan accordingly	July - August 2016
Finalized data collection process plan	August 2016

Based on conversations with persons involved in data collection during phase 2, we identified the sample and process to complete a successful pretest*

Pretest Sample

1. 12 Kiteiras from San Salvador - Includes Kiteiras randomly selected¹ from each level:
 - 4 Gold
 - 4 Silver
 - 4 Bronze
2. Women only (no male Kiteiras)
3. Existing Kiteiras only (Those that have been Kiteiras for 3 months or longer)
4. Does *not* include godmothers
5. Will include Kiteiras who have received training from World Vision

Data Collection Time and Location

1. Face-to-face interviews using a paper-based survey implemented by enumerators who are trained by WDI
2. Survey data is collected at the Kiteiras' home. Surveys will be conducted on an individual basis, at a date/time agreed upon by the enumerator and the Kiteiras
3. Note: No supervisors should be present (within earshot of the interview)

Based on conversations with persons involved in data collection during phase 2, we identified the sample and process to complete a successful pilot (1/3)



Pilot Sample

1. 50 - 55 Kiteiras - Includes Kiteiras randomly selected³ from each level
 - 7 Gold (13%)
 - 10–11 Silver (20%)
 - 33–37 Bronze (67%)
2. Women only (no male Kiteiras)
3. Existing Kiteiras only (Those that have been Kiteiras for 3 months or longer)
4. Does *not* include godmothers
5. Does *not* include any Kiteiras interviewed during pretest
6. Will include Kiteiras who have received training from World Vision

Data Collection Time and Location

1. WDI estimates that pilot data collection will take approximately four weeks and will occur in San Salvador
2. Survey data is collected the Kiteiras' home – ideally at a standardized point in time for all Kiteiras
3. Surveys will be conducted on an individual basis, at a date/time agreed upon by the enumerator and the Kiteira
4. *Note:* No supervisors should be present (within earshot of the interview)

Source: <http://downtoearth.danone.com/2015/05/19/rafaela-biamante-it-was-a-great-experience-to-look-at-the-social-side-of-the-project-as-much-as-the-business-aspect/>¹⁷

Based on conversations with persons involved in data collection during phase 2, we identified the sample and process to complete a successful pilot (2/3)

Steps to complete prior to pilot

1. POC selects and confirms team of about 5 enumerators who will collect data during pilot. Once selected, POC shares names and information about enumerators with WDI via email.
2. POC coordinates logistics for the remote enumerator training (lead by WDI), including but not limited to:
 - scheduling date/time/location for the training (based on enumerator and WDI availability)
 - translating training materials for use by enumerators
 - sharing all requested documents with enumerators prior to the training
3. WDI conducts remote training with team of enumerators who will collect data for the pilot
4. The POC randomly selects Kiteiras from each level (50-55 total Kiteiras) to interview for the pilot and coordinates logistics with enumerator team to contact Kiteiras to arrange interviews and conduct interviews within the pilot period
 - *Note:* Enumerators may need to contact more than 50-55 Kiteiras because some may be unavailable/unable to meet, cancel their interview, etc
5. With oversight from the POC, the enumerator team will schedule interview times and location with each Kiteiras on a case-by-case basis. *Note:* Ideally, data collection will take place in the home of each individual Kiteiras interviewed or at a time/location that is already an existing touch point between the Kiteiras and project staff
6. The POC will oversee data entry logistics and process for the pilot to collect new (survey) and data on existing indicators

Based on conversations with persons involved in data collection during phase 2, we identified the sample and process to complete a successful pilot (3/3)

Steps to complete during pilot

Kiteiras will be interviewed in-person by enumerators using a paper-based survey

1. Recommended # of surveys per week of pilot data collection:
 - Week 1: 12 interviews
 - Week 2: 12 interviews
 - Week 3: 13–16 interviews
 - Week 4: 13–15 interviews
2. Throughout data collection:
 1. Assigned staff will enter existing indicators from Danone Brazil and World Vision Brazil for each of the Kiteiras that will be surveyed into excel database (repeat each week for 4 weeks).
 2. After entering existing data for Kiteiras, assigned staff will enter survey data (new indicators, demographic indicators, and open-ended qualitative data) into the excel database for the matched respondent. Repeat for 4 weeks
 3. If after data entry, data is found to be missing due to error, enumerator follows up with respondent to ask for missing information
 4. POC translates or organizes translator to translate all data in excel database into English
 5. POC sends completed and translated excel database to WDI for review on a weekly basis.
 6. WDI will oversee data collection and discuss timelines and learn of any data collection issues, with POC; POC coordinates any resulting changes to logistics associated with pilot data collection
3. Data security: All physical data (surveys) needs to be kept in locked cabinets and all computer files with data should be stored in locked folders

All documents from phase 2, including the pretest and pilot data collection process plans, are available in the submissions folder

Phase 2 documents

<https://drive.google.com/open?id=0B4LJix-Mdkd5TnY1UmhGeG42ck0>

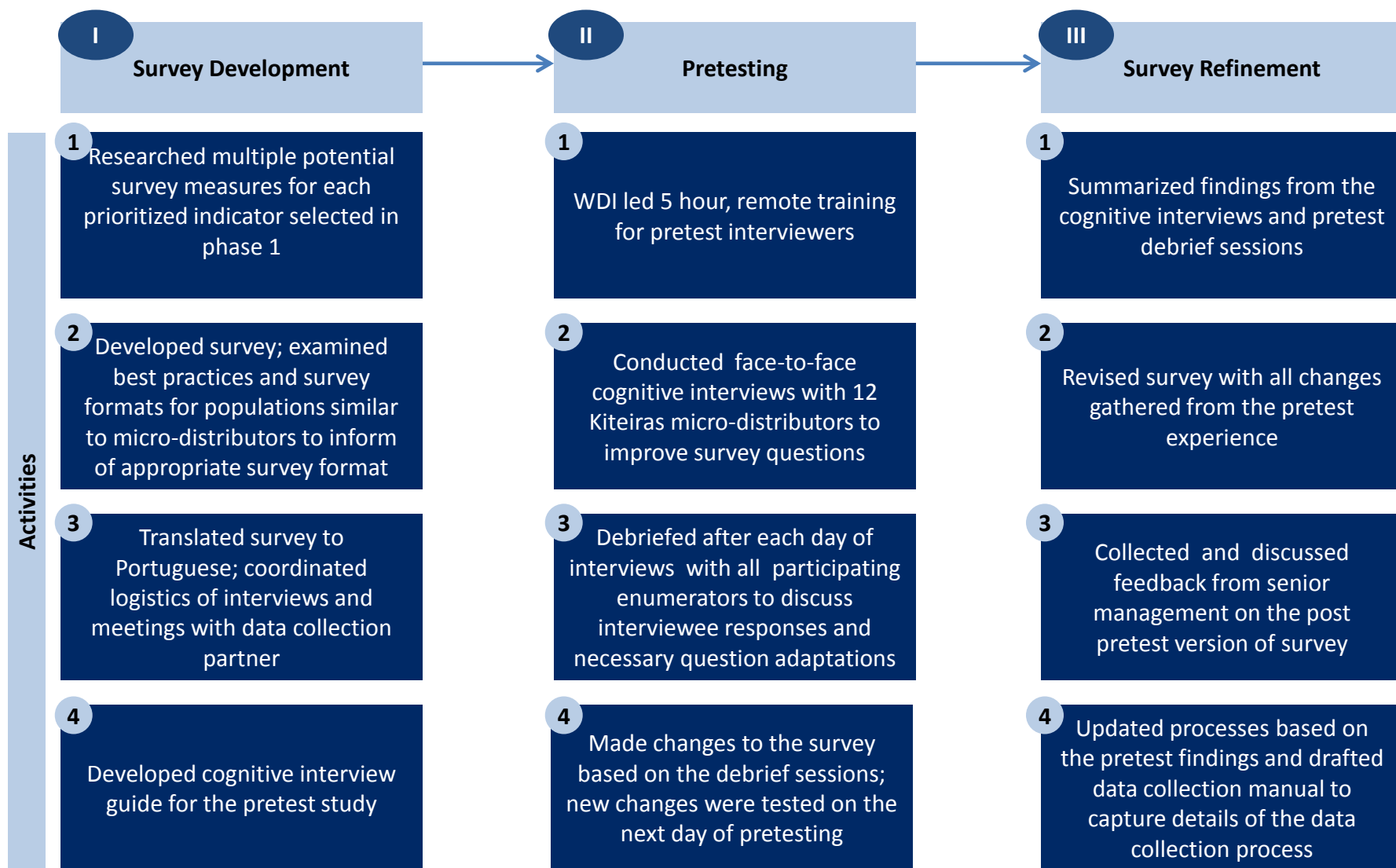
Document Name and Number	Brief Description
1. Phase 2 Kick-off Call Slide Deck	Reviews phase 2 goals and responsibilities related to various required activities. Also provides a high-level overview of data collection processes for upcoming pretest (phase 3) and pilot (phase 4) phases
2. Interview with Anna Ussier about data collection process plan	WDI conducted this interview with Carla Panizo, the data management and field operations staff identified as a key person to speak with on understanding data collection and maintenance. MP3 recording
3. Phase 2 Deliverable: Data Collection Process Plan	This deliverable includes updated information regarding the goals and objectives of the phase 2 data collection process plan, as well as in-depth explanation of the data collection details for the pretest (phase 3) and pilot (phase 4)

Phase 3 activities were conducted between August and October 2016. We developed and pretested the survey and then, based on results from the cognitive interviews, revised and finalized the survey for use in the pilot

Activity	Approximate timeline
Conducted phase 3 kick off call	August 2016
Drafted all survey materials (i.e., survey, informed consent form section in the survey, and survey showcards) and sent to POC for feedback	August 2016
Conducted feedback calls with POC to revise all survey materials	August 2016
Finalized all pre-pretest survey materials based on feedback	August 2016
Drafted, revised, and finalized cognitive interview guide*	August - September 2016
Coordinated pretest logistics (e.g., pretest sample selection, interview schedule and data entry for cognitive interviews)	August - September 2016
Conducted pretest (e.g., translator/POC training, enumerator training, debrief sessions and updates to survey materials)	September 2016
Finalized post-pretest (i.e., pilot) survey, informed consent form, survey showcards and cognitive interview guide based on lessons learned from the pretest	September - October 2016

*See Annex for more detailed information on the purpose of the pretest and the cognitive interview technique

Successful completion of all pretest activities led to the development of a context-specific survey. All enumerators involved in the pretest were trained in cognitive interviewing



All documents from phase 3, including the pretest and pilot surveys and the cognitive interview training materials, are available in the submissions folder

Phase 3 documents

<https://drive.google.com/open?id=0B4LJix-Mdkd5UEtuTjRjdjE1RHM>

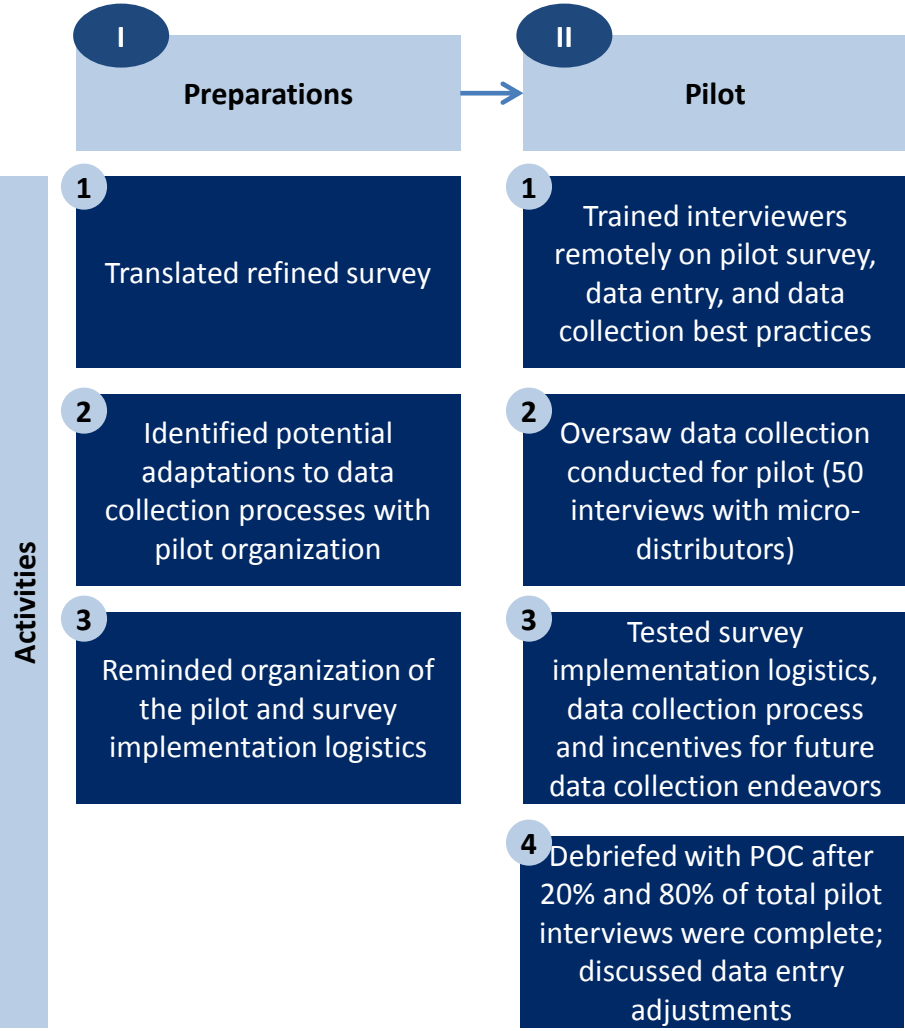
Document Name and Number	Brief Description
1. Survey Instrument A. Pretest survey version B. Post pretest version	Original (pretest) and revised (post-pretest) survey. Includes WDI recommended changes based on lessons learned from the pretest, as well as explanation of the related implications for future analyses
2. Informed Consent Form	Explains to potential participants: the purpose of the survey, why they are candidates for the research, what risks, benefits, and alternatives are associated with the research, and what rights they have as respondents
3. Showcards	These were printed and used by enumerators for relevant survey questions
4. Cognitive interview training materials A. Cognitive interview guide B. Enumerator training slides	These documents contain information about the cognitive interview technique that is used to refine and improve survey questions for respondents, as well as an overview of the important role that enumerators play during the pretest
5. Detailed itinerary for pretest	Copy of pretest schedule used, which includes logistical details for carrying out a successful pretest, including interview times, names of interviewees and enumerators conducting interview
6. Summary of lessons learned from cognitive interview debriefs	This file captures WDI notes from all debriefs held during the pretest period, including documentation of suggested changes and revisions made to the survey

Phase 4 activities were conducted between November 2016 and January 2017, to collect pilot data with a sample of 50 new and existing micro-distributors

Activity	Approximate timeline
Developed example indicator database in Excel for organization to adapt for input of survey data during pilot	November 2016
Developed data collection process manual (post-pretest version) to be used to train enumerators on the pilot survey and data collection for the pilot	November 2016
WDI conducted remote 4 hour training for pilot enumerators	December 2016
WDI oversaw and closely monitored data collection from 50-55 new and existing micro-distributors	December 2016 - January 2017
WDI reviewed data, managed timelines, and conducted data collection debrief calls throughout pilot data collection	December 2016 - January 2017



The survey was administered to 50 micro-distributors (included both new and existing). A training was conducted for enumerators on interview techniques



Breakdown of the sample selected for the pilot (the total size of the sample = 50 respondents)

Category	Interviews conducted per category
Existing micro-distributors (>6 months with organization)	36
New micro-distributors (<6 months with organization)	9
Micro-distributors with Unknown start date	5
Gold level Kiteiras	31
Silver level Kiteiras	6
Bronze level Kiteiras	5
Kiteiras with Unknown/unreported level	8
Stable Kiteiras	35
Active Kiteiras	7
Inactive Kiteiras	8

All documents from phase 4, including an example indicator database and the data collection manual and training guide, are available in the submissions folder

Phase 4 documents

<https://drive.google.com/open?id=0B4LJix-Mdkd5WU1DRzg0Ynl2dGc>

Document Name and Number	Brief Description
1. Example Excel Indicator Database	Provides an example database for entering survey data into Excel, including an example of how to calculate PPI scores in Excel (based on respondent's answers to the PPI survey questions, i.e., raw data) using the “=IF” function. Note: organizations will need to adapt the PPI calculation formula because the PPI point values associated each question of the 10 PPI scorecard questions varies by country
2. Data collection debrief notes	These documents include WDI comments on the indicator database data received from the pilot organization at 20% (Debrief 1) and 80% (Debrief 2) completion of pilot data collection
3. Data collection manual	The data collection manual serves a similar purpose to phase 3 ‘cognitive interview guide’ because it is used to help train current and future enumerators on the survey and relevant processes; it also include information/instructions for person responsible for data entry
4. Enumerator training guide for pilot	This Excel document includes a training version of the final pilot survey. Training notes are presented in column AF

Phase 5 activities were conducted between January and March 2017 to first analyze the pilot survey data and then develop recommendations to improve the survey and data collection and reporting

Activity	Approximate timeline
Reviewed incoming pilot data and identified missing or inaccurately entered data	January 2017
Prepared a clean database	January 2017
Conducted Cronbach's alpha analysis on all multi-item scale questions	January - February 2017
Calculated descriptive statistics for all impact and demographic indicators	February 2017
Updated the survey and developed recommendations to improve the survey based on data analysis	February – March 2017



WDI conducted analysis of Cronbach's alpha (CA) values for all multi-item survey questions to identify the internal consistency of the group of items and further strengthen the survey (1/3)

Cronbach's alpha (CA):

- A measure of "internal consistency"
- Tells you whether the several sub-items/statements that form a multi-item question 'hold' together, i.e. do they measure the same construct (e.g., the construct of "self-efficacy" or "household empowerment")
- Alpha scores range from 0.0 to 1.0 in absolute value

Key for understanding Cronbach's alpha scores:

Green	Good - Cronbach's alpha is between 0.70 and 1.0; i.e., the items in the multi-item question hold together
Orange	Okay - Cronbach's alpha is between 0.60 and 0.69. Historically, researchers have desired to have Cronbach's alphas above 0.7 for a scale; However, for the purpose of this pilot, we believe Cronbach's alpha above 0.6 to be acceptable given the multi-faceted nature of the constructs being measured (e.g., strength of time management self-efficacy, QOL of children)
Red	Unacceptable - Cronbach's alpha is below 0.60; i.e., the items in the multi-item question do not hold together

Example of Cronbach's alpha analysis and recommended changes:

<i>Survey Question (based on pilot version of survey)</i>	<i>Indicator</i>	<i>CA Original (pilot)</i>	<i>Recommended changes to the question</i>	<i>CA New (post-pilot)</i>
Q11 "For the next few questions, think about how you managed your time..."	Time management self-efficacy	0.49 (n=49; 7 items)*	Delete this multi-item question; Keep 6b and 6c as single-item measures	N/a; CA not calculated for single-item measures

Useful definitions:

- CA New – A revised calculation of the Cronbach's alpha score. This demonstrates what the CA value would be for a given survey question if all recommended changes to the question are made as suggested by WDI
- Multi-item measure – A survey question that include two or more sub-items that are analyzed/calculated together (e.g., if question 26 has items 26a-26d, then it is considered 'multi-item'; whereas question 42 includes only item 42a and hence it is considered a 'single-item' measure)

* 'n' is sample size & 'items' are the number of statements in the multi-item question

WDI conducted analysis of Cronbach's alpha (CA) values for all multi-item survey questions to identify the internal consistency of the group of items and further strengthen the survey (2/3)

Survey Question (based on pilot version of survey)	Indicator	CA Original (pilot)*	Recommended changes to the question	CA New (post-pilot)
Q11 <i>"For the next few questions, think about how you managed your time..."</i>	Time management self-efficacy	0.49 (n=49; 7 items)	Delete this multi-item question; Keep 6b and 6c as single-item measures	N/a; CA not calculated for single item measures
Q12 <i>"...the next set of statements which are on your sales techniques..."</i>	Sales self-efficacy	0.49 (n= 49; 3 items)	Delete 12b and 12c	N/a; CA not calculated for single item measures
Q13 <i>"How do you grade your skills in the following areas?"</i>	Financial self-efficacy	0.50 (n=48; 6 items)	Delete 13b, and 13d-13f	0.62 (n=49; 2 items)
Q14 <i>"...now I would like to ask you how you feel about yourself..."</i>	Self-efficacy (General)	0.49 (n= 50; 4 items)	Delete 14c	0.63 (n=50; 3 items)
Q16 <i>"...ask you about your use of a cellular telephone..."</i>	Mobile use for Kiteiras	0.69 (n=43; 4 items)	None required	--
Q18 <i>"I want to learn more about how frequently you use WhatsApp for your Kiteiras activity."</i>	WhatsApp use with Kiteiras	0.74 (n=33; 6 items)	A) None required B) Remove item 18e	A) N/a B) 0.75 (n=33; 5 items)
Q20 <i>"I want to know how frequently you use WhatsApp to talk with your customers..."</i>	WhatsApp use with customers	0.60 (n=34; 4 items)	None required	--

*'n' is sample size & 'items' are the number of statements in the multi-item question
Self-efficacy is one's belief in one's ability to succeed in specific situations or accomplish a task. During the Kiteiras pilot, four different measures of self-efficacy were collected, including micro-distributors self-efficacy related to (a) time management and planning, (b) sales skills, and (c) financial skills, as well as (d) a general measure of overall self-efficacy

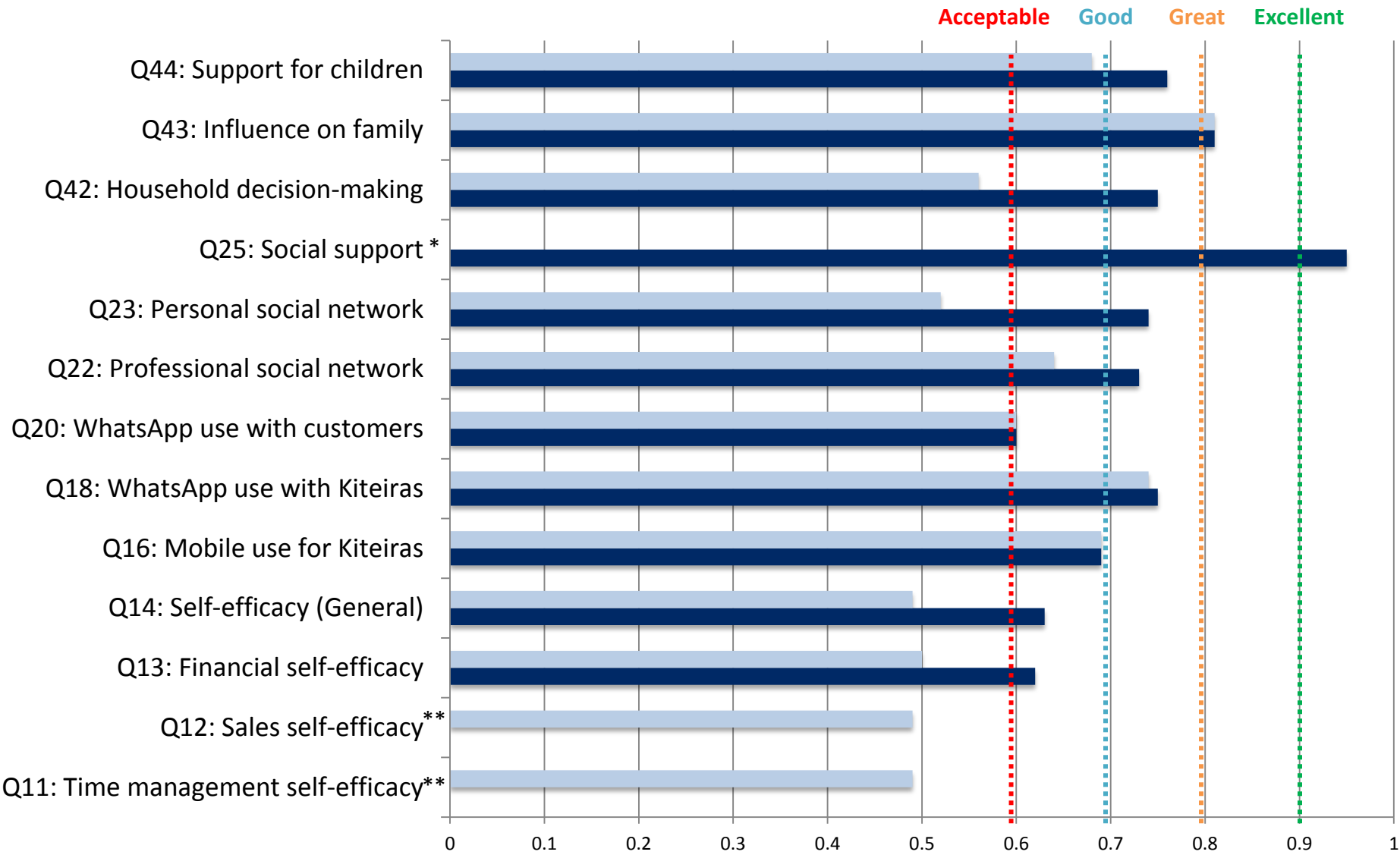
WDI conducted analysis of Cronbach's alpha (CA) values for all multi-item survey questions to identify the internal consistency of the group of items and further strengthen the survey (3/3)

Survey Question (based on pilot version of survey)	Indicator	CA Original (pilot)*	Recommended changes to the question	CA New (post-pilot)
Q22 <i>"I would like to ask you questions about the types of people you discuss your sales strategies and challenges with..."</i>	Professional social network	0.64 (n=50; 6 items)	Remove item 22a	0.73 (n=50; 5 items)
Q23 <i>"I would like to ask you questions about the types of people you discuss your personal life and challenges with"</i>	Personal social network	0.52 (n=50; 5 items)	Remove item 23c and 23e	0.74 (n=50; 3 items)
Q25 <i>"Think about how you interacted with your fellow Kiteiras and how they interacted with you"</i>	Social support	-- (n=17; 5 items)**	Remove items 25c and 25e	.95 (n=17; 3 items)
Q42 <i>"I would like to know more about your relationship at home with your partner or a senior family member..."</i> (home empowerment)	Household decision-making	0.56 (n=40; 3 items)	Remove item 42b	0.75 (n=40; 2 items)
Q43 <i>"I am going to ask you about your opinion about your role in your house..."</i>	Influence on family (home empowerment)	0.81 (n=49; 3 items)	None required	--
Q44 <i>"I would like to ask you some questions related to parenting and the support provided by you to children in your house"</i>	Support for children	0.68 (n=32; 4 items)	Remove item 44d	0.76 (n=32; 3 items)

'n' is sample size & 'items' are the number of statements in the multi-item question

**Due to the low number of respondents who answered this question, the number of sub-items needed to be reduced before CA could be confidently calculated

Using Cronbach's alpha analyses, 10 out of 13 multi-item survey questions reached acceptable reliability standards



Old CA score
New CA score

*Old CA score not reported because, due to the low number of respondents who answered this question, the number of items for this question needed to be reduced before CA could be confidently calculated

**New CA not reported because CA is not calculated for single-item measure

We calculated the descriptive statistics for all demographic indicators, final impact indicators, and existing business indicators. Here, we list the mean for each indicator

Final Impact Indicator	Mean
Financial self-efficacy (scale of 7, where 7 is highest)	5.38
Self-efficacy general (scale of 7, where 7 is highest)	5.43
Mobile Use for Kiteiras Activity (scale of 7, where 7 is highest)	5.28
WhatsApp Use with Kiteiras (scale of 7, where 7 is highest)	3.20
WhatsApp Use with Customers (scale of 7, where 7 is highest)	3.81
Professional Social Network (scale of 7, where 7 is highest)	2.17
Personal Social Network (scale of 7, where 7 is highest)	1.13
Social Support from Kiteiras (scale of 7, where 7 is highest)	2.41
Household Decision-Making (home empowerment) (scale of 7, where 7 is highest)	5.76
Influence on Family (home empowerment) (scale of 7, where 7 is highest)	6.11
Support for Children (scale of 7, where 7 is highest)	6.10
Pride	5.84

Demographic/Existing Business Indicator	Mean
Age	34.84
Education level complete (scale of 12, where 12 is highest)	7.18
Sales experience (years)	8.72
Number of customers	39.56
Household size	3.36
Household members 5 years or younger	.56
Household members age 6 to 12	.44
Household members age 13 to 18	.26
Household income earners	1.18
Micro-distributor is head of household (Scale of 2, where 1 is "no" and 2 is "Yes")	1.49
Average income (R\$)	198.47
Average sales (R\$)	661.58

These examples can provide a useful snapshot for how to display descriptive statistics and 'cut' data by new and existing micro-distributor status

1) Display differences in mean scores across new and existing micro-distributors

Indicator	New Micro-distributor (Mean)	Existing Micro-distributor (Mean)
Duration of interview (hh:mm)	00:49	00:54
WhatsApp Use with Kiteiras (scale of 7, where 7 is highest)	2.71	3.25
Professional Social Support (scale of 7, where 7 is highest)	2.08	2.22
Household Decision-Making (home empowerment) (scale of 7, where 7 is highest)	5.94	5.66
Financial self-efficacy (scale of 7, where 7 is highest)	6.11	5.16

2) Report key descriptive statistics of key indicators for entire sample

Survey Question	Indicator	Mean	Median	Mode	SD	Range	N
Q1	Age	34.84	31	32	11.87	20-65	49
Q5	Sales experience (years)	8.72	6.5	4	7.49	.5-30	50
Q8	Number of Customers	39.56	30	30	38.62	10-200	50

3) Display differences in mean scores of respondents across Bronze, Silver, and Gold levels

Indicator	Bronze (Mean)	Silver (Mean)	Gold (Mean)
Number of Customers	36.38	57.83	56.80
Self-efficacy general (scale of 7, where 7 is highest)	5.41	5.61	5.53
WhatsApp Use with Kiteiras (scale of 7, where 7 is highest)	3.25	2.37	3.90

New micro-distributors were those who had sold Kiteiras products for less than 6 months at the time of pilot data collection while existing" micro-distributors were those who had sold Kiteiras products for more than 6 months

We use the PPI to determine the likelihood of an individual household or a group of households living below the poverty line. While individual household PPI scores cannot be averaged, the individual household poverty likelihood values can be averaged. Here are the steps to calculate the poverty rate of a group of households

Steps to determine the rate of poverty of a group of households:

1. Calculate the PPI score for each individual household
2. Convert the PPI score to the likelihood value of living below the poverty line. To do this, use the PPI-provided lookup tables to convert PPI scores to their associated poverty likelihoods
3. Find the average of the poverty likelihood values of all the households surveyed
 - A poverty likelihood is the probability that an *individual household's* expenditure level falls below a poverty line. For example, a poverty likelihood of 30% reflects a three-in-ten chance that a household is poor.
 - For example, using the table to the right, World Vision could use a total PPI score of 25 to report: *"A micro-distributor with a PPI score of 25 has a 23.2% likelihood of living below the USAID 'Extreme' poverty line in Brazil"*

PPI Score	USAID "Extreme" Poverty Line	
	Total Below the USAID "Extreme" Poverty Line	Total Above the USAID "Extreme" Poverty Line
0-4	80.2%	19.8%
5-9	77.2%	22.8%
10-14	65.0%	35.0%
15-19	47.0%	53.0%
20-24	36.1%	63.9%
25-29	23.2%	76.8%
30-34	15.2%	84.8%
35-39	8.3%	91.7%
40-44	5.1%	94.9%
45-49	3.1%	96.9%
50-54	2.1%	97.9%
55-59	1.2%	98.8%
60-64	1.2%	98.8%
65-69	0.4%	99.6%
70-74	0.6%	99.4%
75-79	0.0%	100.0%
80-84	0.0%	100.0%
85-89	0.0%	100.0%
90-94	0.0%	100.0%
95-100	0.0%	100.0%

See Annex for more information on PPI analysis and reporting

See this short video on how a PPI is made: <https://www.youtube.com/watch?v=IEvJHalvbJk>

For more information see: <http://www.progressoutofpoverty.org/blog/why-averaging-ppi-scores-wont-work>

Source: Microfinance Risk Management, L.L.C <http://www.progressoutofpoverty.org/country/brazil>

All documents from Phase 5, including data analysis results and final recommended survey changes, as well as the final versions of the indicator database (with the pilot data), are available in the submissions folder

Phase 5 documents

<https://drive.google.com/open?id=0B4LJix-Mdkd5UVEzcU50aWliV1U>

Document Name and Number	Brief Description
1. Cronbach's alpha (CA) results table	This table shows what the original Cronbach's alpha (CA) was for each question and the new CA score when questions are changed as per WDI's recommendations
2. Descriptive statistics A. All indicators B. Comparison of New vs Existing Kiteiras C. Comparison of Bronze, Silver and Gold levels	SPSS outputs which includes a report of descriptive statistics for (a) all survey questions, as well as a comparison of descriptive statistics across (b) new and existing micro-distributors and (c) the level of the micro-distributor
3. Clean indicator database	Final deliverable. A clean copy of all the raw pilot data which was used to conduct analyses during phase 5
4. Final indicator database with final indicators	This version of the indicator databases is ready to use if all recommended changes to survey were implemented by the organization. WDI updated the spreadsheet to reflect the revised survey question numbering, creation of final indicators (e.g., 'total self-efficacy') and PPI score calculation formulas
5. Final Survey with WDI recommended changes	An updated version of the survey, post-pilot, which includes WDI's question-by-question recommended survey changes based on lessons from the pilot and phase 5 data analyses

Phase 6 activities were conducted from late March to mid-May 2017; this included developing the final report and recommendations and presenting these to senior management

Activity	Approximate timeline
Developed final report	March - April 2017
Developed and refined final recommendations	April 2017
Presented final report to senior management	May 2017



WDI created recommendations related specifically to each phase of the pilot process, as well as for the survey, interviewers, and for use across the SCALA network (1/4)

Phase 1 and 2

1. Continue to support quality impact measurement activities such as survey administration, by building monitoring and evaluation capability among staff

- i. Hire one person at the organization devoted to monitoring and evaluation activities, or have an existing staff member adopt this role as part of his/her responsibilities. This person should be responsible for the organization's impact assessment efforts, research and data collection requirements as well as data analysis and reporting plans. Engage in and seek regular training opportunities related to the focus of their measurement activities
- ii. Conduct trainings with enumerators (staff members or representatives from the data collection partner) before any data collection instance to inform of best practices when administering surveys and the survey questions with the purpose of each question. Include short quizzes, two-way dialogue opportunities and role playing activities to keep the enumerators engaged during trainings

2. Continue to focus on measuring multi-dimensional poverty outcome indicators and conduct an impact assessment using a robust research design

- i. Develop and implement a robust research design to conduct an impact assessment; this can include a baseline-endline (see Annex for commonly used design) with a representative comparison group
- ii. Discuss the need for a (1) true baseline, and (2) a comparison group
- iii. To establish a more accurate baseline, we strongly recommend that the organization begin collecting data from micro-distributors when they are still 'new.' That is, they have been selling products for *less than 2 months*, preferably as soon as they are registered and *before* they receive any training from the organization; utilize the survey developed in this pilot
- iv. A good rule of thumb is to have 200* treatment group respondents at endline and 200 comparison group respondents at endline; another common practice is to assume a 20% attrition rate of respondents from baseline to endline
- v. Look for positive and unintended negative impacts; management should pay careful attention to identifying the likelihood and magnitude of negative social and economic impacts in order to improve operations and outcomes for the business

WDI has also provided recommendations on processes and training in the data collection manual. Please refer to the manual for detailed guidance on these topics.

*This number is calculated based on power analysis. More information can be found here: http://www.3rs-reduction.co.uk/html/6_power_and_sample_size.html

WDI created recommendations related specifically to each phase of the pilot process, as well as for the survey, interviewers, and for use across the SCALA network (2/4)

Phase 1 and 2 continued

3. Systematically and regularly measure impacts on store owners to gain a more nuanced understanding of the needs of micro-franchisees, as well as how these needs change over time, in order to better address them through business activities

- i. Embed data collection processes into the program to decrease the burden on organization staff and survey respondents
- ii. Administer the survey to micro-franchisees at an interval that is determined by the organization staff to help capture both short- and long-term impacts, e.g. conduct an impact assessment every three years
- iii. Develop a monitoring system that tracks indicators where statistical relationships exist (as discovered from the impact data analysis). Frequency of data collection for this monitoring system (e.g., once per quarter using the same relevant survey questions used in this study) should be adjusted and right-sized based on existing resources such as staff time

4. Consider other methods of data collection such as using an independent third-party partner to conduct the assessment

- i. Hiring a third party to conduct the impact assessment interviews can reduce response bias and can be perceived as less biased to funders
- ii. A less expensive alternative is that the organizations' staff continue to administer the surveys themselves. If this option is chosen, commission an independent assessment of impacts every few years to ensure objectivity of the findings
 - i. If this option is used, please account for time away from regular duties; time to attend cognitive interview training and arrange interviews, travel costs to the interview site for both the interviewer and interviewee, and time to conduct pretest interview
 - ii. If this option is used, please ensure enumerators are trained in skillfully asking respondents for truthful and honest answers and also in reminding the respondent that negative responses will not affect their relationship with the organization

WDI created recommendations related specifically to each phase of the pilot process, as well as for the survey, interviewers, and for use across the SCALA network (3/4)

Phase 3

1. Pretest and pilot any changes or adaptations to the survey or interview format with the representative population to ensure accurate data collection

- i. Pretest questions that need to be added or adapted
- ii. Pretest the survey when administering it in a new location for adaptation to the local context
- iii. Pretest the survey if the survey interview format were changed to an electronic administration format (e.g., using tablets)
- iv. The pretest sample should include a minimum of 10-12 micro-distributors

2. Prior to conducting any cognitive interviews in the future, offer refresher trainings for enumerators that will administer the pretest

- i. Assign one member of the team to be responsible for the training. His/her tasks should include printing all training materials, managing logistics and ensuring the training is run effectively
- ii. If more than one enumerator is conducting cognitive interviews, debrief meetings should be held on each day that cognitive interviews are conducted. This is essential - enumerators must debrief on their findings and co-develop solutions to test on the next day of pretesting

The Survey

1. Adopt the question-by-question recommended survey changes provided in the the “Final Survey with WDI recommended changes” document. Additionally, we provide several other general recommendations related to the current and any future surveys:

- i. For new questions which ask respondents to report their answer in terms of the frequency of their actions, *avoid* vague response options that do not help quantify respondent’s answers. The best response options, in order of ‘best-to-use’: Actual numbers (e.g., 5 times a week), number ranges (e.g., from 2-3 times a week), and approximate ranges (e.g., everyday, a few times a week)
- ii. Avoid creating questions with “Agree” to “Disagree” scales as these can be confusing to respondents
- iii. Avoid negatively framed questions or those with double-negatives as these can be confusing to all
- iv. Always translate *and back-translate* survey questions that are first created/written in English
- v. Use separate data entry sheets to record survey responses to save resources on printing surveys

WDI created recommendations related specifically to each phase of the pilot process, as well as for the survey, interviewers, and for use across the SCALA network (4/4)

Phase 4

- 1. Continue to support quality data entry practices by building staff capabilities**
 - i. Increase support to persons responsible for entering new and existing survey data on micro-distributors into Excel through ongoing trainings and dialogues
 - ii. All survey data should first be entered as raw data (i.e., exactly as it was recorded in the survey)
- 2. Adopt commonly used best practices when administering surveys**
 - i. No upper level management should be present during interviews as this increases the potential that a respondent will provide biased answers in an effort to appear favorably. This may also make the respondent feel nervous and uncomfortable, and thus influence their response
 - ii. When surveying female micro-distributors, male interviewers should not be selected unless absolutely necessary because this has the potential to bias respondent answers
 - iii. Always conduct interviews in a private space, free from distractions and away from other people who may bias their responses such as their family members or other micro-distributors
 - iv. Conduct trainings with enumerators before any data collection to remind them of interview techniques and best practices

Phase 5

- 1. Convert all PPI raw data into PPI scores and report as values in terms of “poverty likelihood”**
 - i. Information is provided in the phase 5 data analysis section on how to analyze and report PPI values
- 2. Only ask key qualitative questions in the survey and use all data collected**
 - i. Use qualitative data to “dig deeper” and expand on related quantitative data
 - ii. If qualitative data is not being coded and analyzed to inform learning, remove these questions; include only one over-arching question which can be used to gather meaningful quotes on impacts from micro-distributors
- 3. Remove qualitative and quantitative questions from the survey where the data is not used (analyzing, reporting, etc)**
 - i. Utilize every piece of data such that you do not create burden on the respondent (especially important to avoid creating survey fatigue)
- 4. Use appropriate excel functions to conduct descriptive stats as well as other bivariate analysis***

*Please see annex for commonly used Excel functions for descriptive statistics and bivariate analysis

We compared indicators selected across all 3 SCALA Metrics Lab pilots

Chakipi	Supply Hope	Kiteiras
Self-efficacy <ul style="list-style-type: none"> • General • Time management & planning • Sales skills • Communication 	Self-efficacy <ul style="list-style-type: none"> • General • Time management & planning • Sales skills • Financial skills 	Self-efficacy <ul style="list-style-type: none"> • General • Time management & planning • Sales skills • Financial skills
Empowerment at home <ul style="list-style-type: none"> • Decision-making • Influence on family 	Empowerment at home <ul style="list-style-type: none"> • Decision-making • Influence on family 	Empowerment at home <ul style="list-style-type: none"> • Decision-making • Influence on family
Quality of life of children <ul style="list-style-type: none"> • Overall QOL, health, and resources and support 	Quality of life of children <ul style="list-style-type: none"> • Overall quality of life and health 	Support provided to children
Nutrition for children	Nutrition for children	
Aspirations for children (qualitative question)	Aspirations for children (qualitative question)	
Pride <ul style="list-style-type: none"> • For organization 	Pride <ul style="list-style-type: none"> • For organization/business • For community 	Pride <ul style="list-style-type: none"> • For organization
Progress out of Poverty (PPI)	Progress out of Poverty (PPI)	Progress out of Poverty (PPI)
Social support <ul style="list-style-type: none"> • From Chakipi colleagues • From Chakipi promoter 	Access to information, goods, and services <ul style="list-style-type: none"> • Use and access to services • Satisfaction of services in barrio 	Social Network <ul style="list-style-type: none"> • Personal • Professional Social support <ul style="list-style-type: none"> • From Kiteiras colleagues
	Prior income	Use of mobile technology related to their Kiteiras activity
Various demographic and business indicators	Various demographic and business indicators	Various demographic and business indicators

We developed recommendations across the three pilots

Recommendations Across Pilots

- Allocate resources to increase organizational capacity to carry out monitoring and evaluation activities *across* the SCALA network
- Include an indicator in the Metrics Lab framework that focuses on the impact on the children. This was identified as an important impact across all three pilots
- When resources allow, let experts conduct the pretest: findings from the pilot revealed stronger survey measures (as indicated by Cronbach's alpha) were created when WDI conducted a portion of the pretest interviews and lead the debrief sessions



CHAKIPI
acceso

kiteiras
DESENVOLVENDO
O EMPREENDEDORISMO

supply hope

All final deliverables, from phase 1 indicator selection to phase 6 reporting, are available in the submissions folder

Final Deliverables:

<https://drive.google.com/open?id=10a8dgg3glx9VkV2h32mWf8TD9g6nOlpiUhwLzdkQphQ>

Phase	Final Deliverable
Phase 1: Indicator identification & selection	1. Complete list of indicators selected for the pilot
Phase 2: Data collection process development	1. Data collection process plan
Phase 3: Survey instrument development (aka, “The Pretest”)	<ol style="list-style-type: none"> 1. Survey instrument (used for pretest) 2. Informed consent form 3. Data collection process manual with <u>cognitive interview training guide</u> for enumerator (used in pretest version) 4. Context-specific survey instrument (post-pretest version) 5. Transcripts of cognitive interviews conducted by WDI staff 6. Summary of lessons from cognitive interviews debriefs
Phase 4: Data collection (aka, “The Pilot”)	<ol style="list-style-type: none"> 1a. Data collection process manual (post-pretest version) 1b. Enumerator training guide that explains the survey
Phase 5: Data analysis	1. Clean database used to conduct pilot analysis (Note: Tab 3 also includes final database which has been updated based on WDI’s recommended survey changes)
Phase 6: Reporting	<ol style="list-style-type: none"> 1. Final report (PowerPoint) 2. Final Post-pilot survey, including recommended final changes based on data analysis findings

We want to thank the teams across the different organizations that we worked with (Acknowledgements in alphabetical order per organization)

William Davidson Institute Team

1. **Rebecca Baylor**, Research Associate, WDI Performance Measurement Initiative
2. **Daniel DeValve**, Project Administrator, WDI Grants Management Department
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4. **Yaquta K. Fatehi**, Sr. Research Associate, WDI, Performance Measurement Initiative

IDB

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Others

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3. **Rafael Marco**, Danone's São Paulo Sales Supervisor (Phase 1 interviewee)
4. **Sthefanie Petti**, Sustainability Effectiveness Board, World Vision Brazil
5. **Raniere Pontes**, Special Projects Coordinator, World Vision Brazil
6. **Sophia Ribeiro**, World Vision Brazil
7. **Sandra Sonoda**, Partnerships and Funding Manager, World Vision Brazil
8. **Ana Ussier**, Danone Brazil
9. And special thanks to all enumerators who helped collect interview data during the pretest and pilot phases.

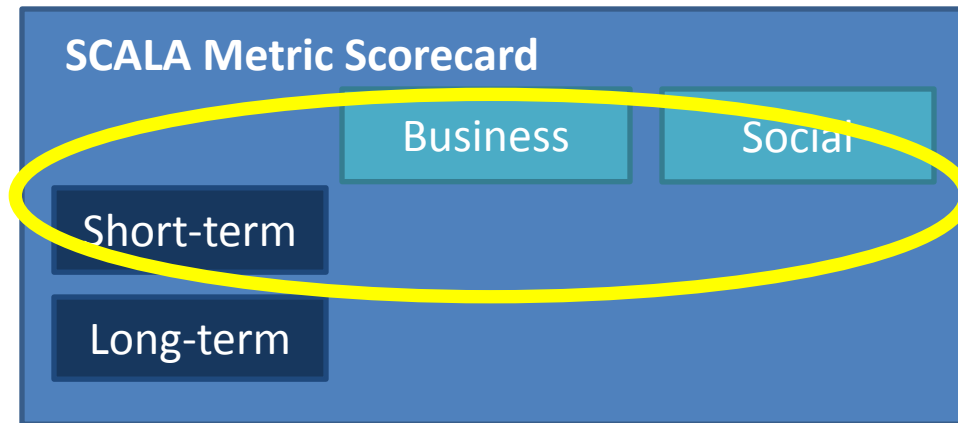
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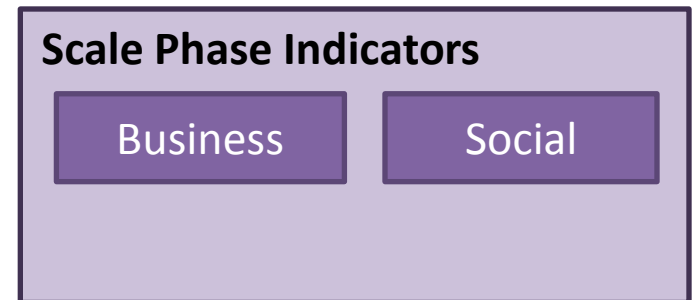
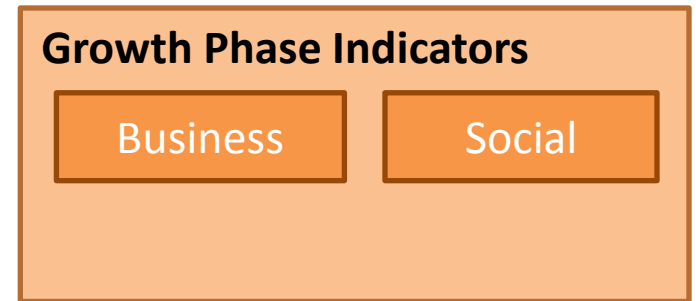
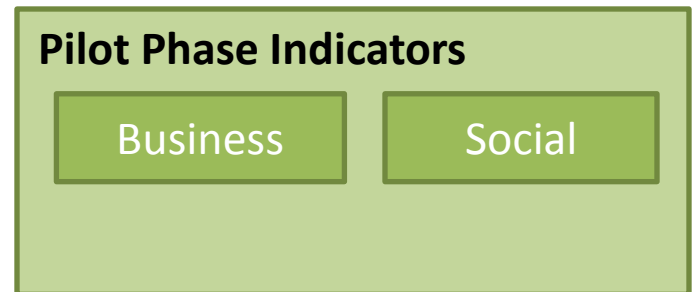
Features of the framework* include core component with focus on short-term indicators (1/6)

Goal: Keep framework simple, practical and flexible (not a one size fits all approach)

Core metrics collected by all SCALA members



Optional metrics by stage of growth



Features of the framework: Core social indicators in the framework– short-term (2/6)

Unit of Analysis	Theme	Core Elements	Indicator	Examples
Micro-distributor	Economic Opportunity	Livelihood	Income	Income of micro-distributor prior to and after joining organization
			Sales	Sales of micro-distributor compared to the organization's average sales per micro-distributor
		Economic Resilience	Income stability	Stability of the micro-distributor's income week to week
			Assets	Assets owned by the micro-distributor such as TV, car, radio, type of flooring, toilet, number of rooms in home, electricity source, water source, etc.
			Credit	Micro-distributor's access to credit such as loans
	Empowerment	Capabilities (Knowledge and Skills)	Financial literacy	Financial management knowledge gained by micro-distributors through training and on the job
			Self-esteem	Self-assessment of self-worth and abilities by micro-distributor
		Empowerment	Empowerment	Self-assessment of influence, power, self-determination and competence by micro-distributor
		Non-economic Resources	Access to information/goods/services	Micro-distributor's access to technology as well as services such as health care, transportation, etc.
			Social support	Support micro-distributor receives (advice as well as resources) by individuals in their social network
	Enterprise	Enterprise Growth	Entrepreneurship index	Micro-distributor's decision-making skills, general knowledge, network, and income
			Gradual 'formality'	Degree of formality of micro-distributor's job such whether they receive social security and other benefits such as health care
		Opportunity Cost	Opportunity cost	Number of hours micro-distributor works versus number of hours spent with family
		Brand Leverage	Pride	Micro-distributor's pride for the organization and brand
		Career Progression Path	Aspirations/hope	Micro-distributor's opportunity for growth and advancement as well as rewards and incentives.

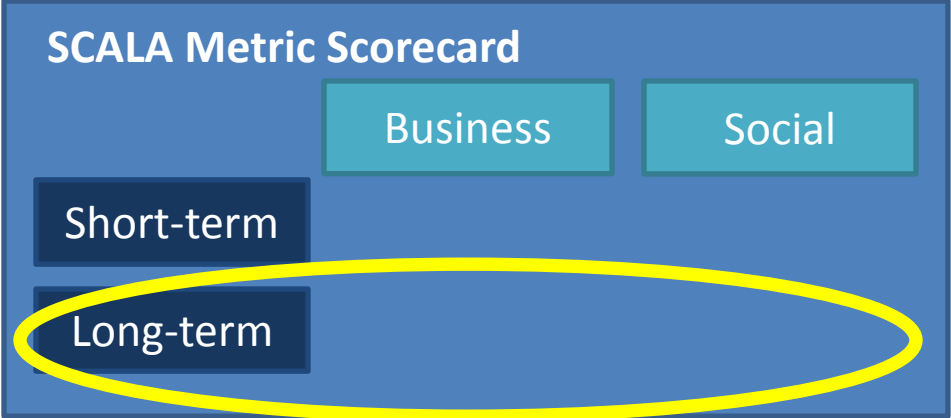
Core business indicators in the framework - short-term (3/6)

Unit of Analysis	Theme	Core Elements	Indicator	Examples
Business	Business	Sales	Sales and growth	Sales growth of the organization over the past year
			Sales revenue	Average sales per year of the organization
		Talent Retainment	Retention	Retention of micro-distributors per month
		Mission	Contribution to enterprise business and social strategy	Degree to which program contributes to both the business and social mission
		Satisfaction	Market share	Percentage of clients recommending organization
		Social Capital	Number of advisors	Number of board members, advisory board members, venture advisors identified and on-boarded by the company
			Number of ecosystem partners	Number of systemic partners and collaborations established by the company
		Capital	\$ Capital raised	New capital raised in the form of equity, debt or grants received
		Reach	Number of BoP lives reached	Number of unique BoP individuals who were clients of the organization during the reporting period
			Number of employees	Number of BoP and non-BoP paid full time and part-time employees or staff across organization
Number of countries reached	Number of countries the organization is operating within			

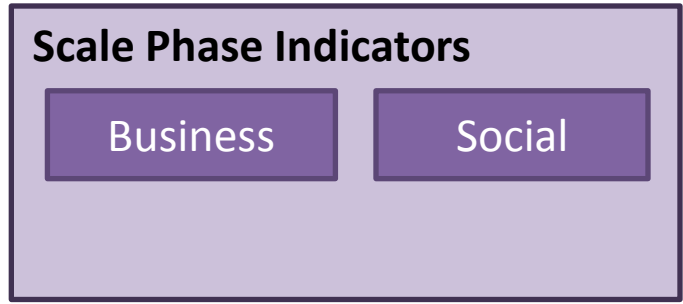
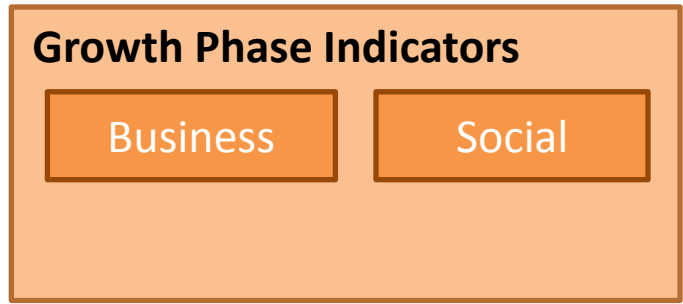
Core components of framework with focus on long-term social indicators (4/6)

Goal: Keep framework simple, practical and flexible (not a one size fits all approach)

Core metrics collected by all SCALA members



Optional metrics by stage of growth

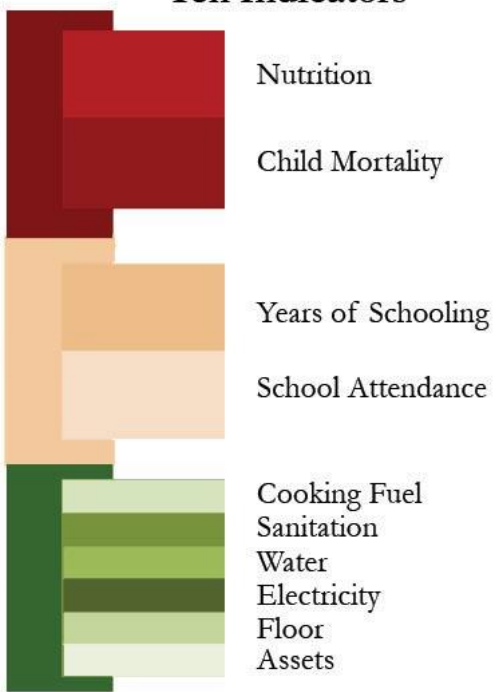
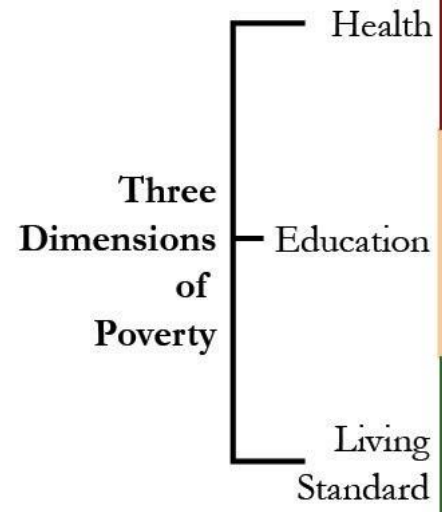


Core social indicators in the framework – long-term (5/6)



Social

Ten Indicators



- Nutrition
- Child Mortality
- Years of Schooling
- School Attendance
- Cooking Fuel
- Sanitation
- Water
- Electricity
- Floor
- Assets

PPI® Scorecard for Peru

To assist with collection, organizations can use the household roster located on the third page to assist with questions 1 & 2.

Entity	Name	ID	Date (DD/MM/YY)
Participant:			Joined: _____
Field agent:			Today: _____
Service point:			Household size: _____

Indicator	Response	Points	Score
1. How many members does the household have?	A. Seven or more	0	
	B. Six	7	
	C. Five	12	
	D. Four	17	
	E. Three	22	
	F. Two	27	
	G. One	34	
2. In the past week, how many household members ages 14 or older did any work? (not counting household chores)	A. One or none	0	
	B. Two	2	
	C. Three	6	
	D. Four or more	9	
3. What is the highest educational level that the female head/spouse completed?	A. None, pre-school, or kindergarten	0	
	B. Grade school (incomplete)	3	
	C. Grade school (complete), or high school (incomplete)	4	
	D. No female head/spouse	6	
	E. High school (complete), or non-university superior (incomplete)	7	
	F. Non-university superior (complete), or higher	13	
4. How many rooms are used only as bedrooms?	A. None	0	
	B. One	2	
	C. Two	4	
	D. Three or more	8	
5. What is the main material of the exterior walls?	A. Mud, matting, wattle and daub, adobe, stone with mud, or other blocks	0	
	B. Wood, stone, stone blocks with mortar or cement, or brick or cement blocks	4	
6. What fuel does the household most frequently use for cooking?	A. Charcoal, kerosene, or other	0	
	B. Firewood	3	
	C. Gas (LPG or natural), electricity, or does not cook	7	
7. Does the household have a refrigerator/freezer?	A. No	0	
	B. Yes	3	
8. Does the household have a blender?	A. No	0	
	B. Yes	6	
9. How many color televisions does the household have?	A. None	0	
	B. One	5	
	C. Two or more	9	
10. Does the household have a cellular telephone?	A. No	0	
	B. Yes	7	

Business

Indicator	Examples
Market intelligence	Assessment of interaction between micro-distributors and target communities effect on gaining intelligence about markets and responding effectively to meet market needs
Brand awareness and market reach	Assessment of effect of micro-distributors on expanding market reach to BoP communities and creating awareness of the brand in new markets (including cost-effectiveness assessment)

Core business indicators in the framework – long-term (6/6)

Unit of Analysis	Theme	Core Elements	Indicator	Examples
Business	Business	Efficiencies	Market intelligence	Assessment of interaction between micro-distributors and target communities effect on gaining intelligence about markets and responding effectively to meet market needs
			Brand awareness and market reach	Assessment of effect of micro-distributors on expanding market reach to BoP communities and creating awareness of the brand in new markets (including cost-effectiveness assessment)

How the indicators in the framework relate to SDGs (1/2)

Unit of Analysis	Theme	Core Elements	Indicator	Examples	SDGs			
					Goal 1	Goal 5	Goal 8	Goal 17
Micro-distributor	Economic Opportunity	Livelihood	Income	Income of micro-distributor prior to and after joining organization	1.1		8.5	
			Sales	Sales of micro-distributor compared to the organization's average sales per micro-distributor				
		Economic Resilience	Income stability	Stability of the micro-distributor's income week to week	1.5			
			Assets	Assets owned by the micro-distributor such as TV, car, radio, type of flooring, toilet, number of rooms in home, electricity source, water source, etc.	1.5	5.6a		
			Credit	Micro-distributor's access to credit such as loans	1.4	5.6a	8.3	
	Empowerment	Capabilities (Knowledge and Skills)	Financial literacy	Financial management knowledge gained by micro-distributors through training and on the job	1.5			
			Self-esteem	Self-assessment of self-worth and abilities by micro-distributor				
		Empowerment	Empowerment	Self-assessment of influence, power, self-determination and competence by micro-distributor		5.5		
		Non-economic Resources	Access to information/goods/services	Micro-distributor's access to technology as well as services such as health care, transportation, etc.	1.4	5.6b		
			Social support	Support micro-distributor receives (advice as well as resources) by individuals in their social network	1.5			
	Enterprise	Enterprise Growth	Entrepreneurship index	Micro-distributor's decision-making skills, general knowledge, network, and income			8.3	
			Gradual 'formality'	Degree of formality of micro-distributor's job such whether they receive social security and other benefits such as health care	1.3	5.6c	8.3	
		Opportunity Cost	Opportunity cost	Number of hours micro-distributor works versus number of hours spent with family		5.4	8.8	
		Brand Leverage	Pride	Micro-distributor's pride for the organization and brand				
		Career Progression Path	Aspirations/hope	Micro-distributor's opportunity for growth and advancement as well as rewards and incentives.				

How the indicators in the framework relate to SDGs (2/2)

Unit of Analysis	Theme	Core Elements	Indicator	Examples	SDGs			
					Goal 1	Goal 5	Goal 8	Goal 17
Business	Business	Sales	Sales and growth	Sales growth of the organization over the past year			8.2	
			Sales revenue	Average sales per year of the organization				
		Talent Retainment	Retention	Retention of micro-distributors per month				
		Mission	Contribution to enterprise business and social strategy	Degree to which program contributes to both the business and social mission				
		Satisfaction	Market share	Percentage of clients recommending organization				
		Social Capital	Number of advisors	Number of board members, advisory board members, venture advisors identified and on-boarded by the company				17.16, 17.17, 17.3, 17.6, 17.7, 17.8, 17.9, 17.11, 17.13, 17.15
			Number of ecosystem partners	Number of systemic partners and collaborations established by the company				17.16, 17.17, 17.3, 17.6, 17.7, 17.8, 17.9, 17.11, 17.13, 17.15
		Capital	\$ Capital raised	New capital raised in the form of equity, debt or grants received				17.3
		Reach	Number of BoP lives reached	Number of unique BoP individuals who were clients of the organization during the reporting period	1.1			
			Number of employees	Number of BoP and non-BoP paid full time and part-time employees or staff across organization			8.5	
Number of countries reached	Number of countries the organization is operating within							

WDI recognizes it is important to recognize the boundaries and limitations of the pilot as well as address any conflicts of interest

Boundaries of the pilot:

1. Findings from this pilot cannot provide impact data; the results of this pilot cannot be used to say what impacts the organization is having on their micro-distributors
2. This pilot is not a baseline study; as a result, data collected from this pilot cannot be used as a “baseline” against which to monitor and assess an activity's progress and effectiveness during its implementation and after the activity is completed
3. This pilot did not determine what considerations to take in to account when selecting members of a comparison group (if a research design in the future requires this)

Conflicts of interest:

1. The authors of this report did not have any financial or research-related conflicts of interest which would have affected or restricted the findings of this pilot

Final list of new indicators selected for the pilot survey (1/2)

Indicator	Reason for selection	Type of indicators (social, business, short term, long term)	Maps to SDG goal
Empowerment at home , includes decision-making and influence on family matters	In the original proposal, we listed 'empowerment' as an indicator to collect in the pilot. Based on insights gained from phase 1 interviews about the organizations impact on women's empowerment, women's 'empowerment at home' was selected	Social, short-term	Goal 5.5
Self-efficacy* includes general self-efficacy measure as well as a focus on time-management and planning, financial skills, and sales skills	We chose to collect self-efficacy related to certain skills because women could possibly gain these through trainings and experience with organization	Social, short-term	Goal 1.5
Support provided to children (due to increase flexibility in time)	In the original proposal, we listed 'aspirations/hope' as a potential indicator. Based on insights gained from interviews, we specifically selected support women provide to children in their household	Social, short-term	N/A
Social support (with a focus on personal and professional support received)	This indicator was not listed in the proposal but has been included here because of insights gained from the focus group interview	Social, short-term	Goal 1.5

Final list of new indicators selected for the pilot survey (2/2)

Indicator	Reason for selection	Type of indicator (social, business, short term, long term)	Maps to SDG goal
Use of mobile technology with focus on how WhatsApp is used with other Kiteiras and customers	This indicator was not listed in the proposal but has been included here because of insights gained from the focus group interview	Social, short-term	Goal 1.5
Pride for organization	This was included in the original proposal and was selected based on insights gained from Phase 1 interviews	Social, short-term	N/A
Progress out of Poverty (PPI)	This was included in the proposal and was selected based on insights gained from Phase 1 interviews	Social, long-term	N/A

Final list of strong qualitative questions selected for the pilot survey

Qualitative interview questions

I am interested in learning more about why you took this job. What three things do you like most about your Kiteiras activity?

In addition to hearing what you like about Kiteiras, I want to learn about what Danone and World Vision can do to improve and make being a Kiteira better for you. Any answer you share with us will remain anonymous and will not be shared with anyone. Please tell me what three things are the least attractive about this Kiteiras activity?

Please share stories about your experience interacting with your children after you have started this Kiteiras activity. In what ways, if any, has doing the Kiteiras activity changed the amount of time, support, etc you provide with your children? Please provide an example.

Has the health and nutrition of your family changed since you started this Kiteiras activity? Please provide 2-3 examples.

What can the management at the Kiteiras project do better? This means what can management improve in day to day activities and operations? I remind you that your answer is confidential and will not interfere in your work.

Final list of existing business indicators selected to be reported by the organization during the pilot

Indicator	Reason for selection	Type of indicator (social, business, short term, long term)	Maps to SDG goal
Income (monthly) from the organization (reported for 3 months to assess income stability) – this is at the individual level	Based on document review, conversations with senior management and focus group interview from Phase 1	Social, short-term	Goal 1.1 and 8.5
Sales (monthly) – this is at the individual level	Based on document review and conversations with senior management	Business, short-term	N/A
Retention Status (Active, Inactive)– this is at the individual level	Based on document review and conversations with POC	Business, short-term	N/A
Kiteiras level (gold, silver and bronze)	Based on document review and interviews from Phase 1	Business, short-term	N/A

The phase 3 pretest served was very important because its purpose was to improve the survey for the pilot and teach enumerators how to conduct cognitive interviewing (1/2)

1. The purpose of the pretest is to improve the survey such that we test a context-specific survey in the pilot phase
2. For the pretest, we will use cognitive interview techniques to:
 - i. Make sure respondents understand each question
 - ii. Improve the survey section order (ensure logical flow as well as keeping sensitive questions towards the end of the survey) and reduce length
 - iii. Understand how the respondents comprehend, interpret, and answer each question
3. Based on the results, we will make changes to the survey, including:
 - i. Change the wording of the questions such that it is easier to understand
 - ii. Incorporate the local language of the micro-distributors
 - iii. Shorten the survey
 - iv. Improve the 'INTERVIEWER NOTES' that explain how to read the survey

Note: In order to limit each pretest interview to 1.5 hours, WDI will assign interviewers to ask only certain survey sections (For example, Part A, C, and G).

For last 2 interviews: Interviewers will test the entire survey without cognitive interviewing, including the time taken to answer each question and section

The phase 3 pretest served was very important because its purpose was to improve the survey for the pilot and teach enumerators how to conduct cognitive interviewing (2/2)

What is Cognitive Interviewing?

An interview method where interviewers ask additional questions about a survey in order to identify and analyze sources of error in a survey. For the pretest, interviewers will focus on the cognitive thought processes that micro-distributors use to answer each survey question.

Interviewers should observe and focus on:

1. Verbal feedback – Micro-distributor’s answers to questions and probes
2. Non-verbal feedback (very important!) – Micro-distributor’s body language, expressions, looks of confusion, etc

What are ‘Probes’?

‘Probes’ are the additional questions that an interviewer asks the micro-distributor about a particular question in the survey.

For each survey question, we want micro-franchisees to:

1. Tell us if any specific words or phrases in the question were confusing. Do they have any questions?
2. Let us know if the can the survey question can be worded differently such that it is easier or clearer for all other micro-distributors to answer
3. Describe how they decided to provide the answer they gave
4. Explain what the survey question means to them (what do they think the question is asking?)

More information on random selection of the sample used in data collection

For the pilot sample, each micro-distributor should have an equal chance of being selected for an interview. The women should not be individually chosen by project staff.

To select a sample of 50-55 persons:

1. Make two separate lists one with all the new micro-distributors and another with all the existing micro-distributors
2. For each list, assign every individual a unique number,
3. Use a random number generator to randomly generate approximately 28 numbers for each list; these numbers correspond to the micro-distributors selected for the pilot, and
4. Ideally, persons selected for the pilot ***should not***
 - i. Be trained or employed by another program/project or
 - ii. Be micro-distributors who have left the organization and returned to the project after a period of absence

List of original questions used in the pre-pretest version of the survey with links

Indicator	Sources	Additional information
Time management	https://cepa.stanford.edu/sites/default/files/time%20management%20final.pdf	See page 11 for information on time management analysis
Sales skills	Adaptive Selling: Conceptualization, Measurement, and Nomological Validity: Rosann L. Spiro and Barton A. Weitz http://personal.psu.edu/faculty/j/x/jxb14/JMR/JMR1990-1-061.pdf ; Shortened versions: http://www.uab.edu/Communicationstudies/humancommunication/PRSIBCORASSP,2007,465-486.pdf ; http://mesharpe.metapress.com/media/9c59kctvwpcuwlmgadt/contributions/h/0/2/9/h029164r11850t54.pdf	Robinson and William (2002) proposed the shorter version (5 scales) of adaptive selling questionnaire, and it has been validated & used.
General Self-Efficacy (GSE)	Jerusalem, Matthias, and Ralf Schwarzer. "Self-efficacy as a resource factor in stress appraisal processes." (1992). http://userpage.fu-berlin.de/health/engscal.htm	How to analyze scale: http://userpage.fu-berlin.de/health/engscal.htm
Influence on family	https://www.google.com/url?sa=t&rct=j&q=&esrc=s&source=web&cd=1&ved=0ahUKEwjw9sL-q-rSAhULyoMKHTgzAYIQFggcMAA&url=http%3A%2F%2Fwww.mdpi.com%2F1660-4601%2F8%2F6%2F1772%2Fpdf&usg=AFQjCNH_5nhOTTF735kirnbdK-UGoFfBkw&sig2=4P0RhskfDzga5fZuDoYu2w	Original source measured Individual Community-Related Empowerment. (See page 1781). tested in Estonia.
Use of technology	http://managementjournal.usamv.ro/pdf/vol.XV_1/Art2.pdf ; http://www.emeraldinsight.com.proxy.lib.umich.edu/doi/pdfplus/10.1108/17410390510628418 ; http://scholar.sun.ac.za/handle/10019.1/80184 ; http://www.ruforum.org/sites/default/files/Charles%20Levi%20Thesis.pdf	
Children's Quality of Life	http://dl2af5jf3e.scholar.serialssolutions.com/?sid=google&auinit=U&aualast=Ravens-Sieberer&atitle=KIDSCREEN-52+quality-of-life+measure+for+children+and+adolescents&id=doi:10.1586/14737167.5.3.353&title=Expert+review+of+pharmacoeconomics+%26+outcomes+research&volume=5&issue=3&date=2005&spage=353&issn=1473-7167 http://www.who.int/mental_health/media/en/76.pdf?ua=1	
Nutrition for children	Developed for this survey. Looked at this link: http://ac.els-cdn.com/S1499404606600699/1-s2.0-S1499404606600699-main.pdf?_tid=0edb332e-8099-11e4-a0ed-00000aacb360&acdnat=1418235739_0d2f1f05cf2ad69f73866a2fc83449c9	
Strength of social network	Author: Erika Deserrano; http://www.povertyactionlab.org/evaluation/women-farmers-and-barriers-technology-adoption-rural-uganda	Used with low income populations in Uganda.
Financial self-efficacy	Wilson, F., Kickul, J. and Marlino, D. (2007), "Gender, entrepreneurial self-efficacy, and entrepreneurial career intentions: implications for entrepreneurship education", Entrepreneurship Theory & Practice, Vol. 31 No. 3, pp. 387-406. Source: http://search.proquest.com/docview/859635880?pq-origsite=360link&accountid=14667 Microfinance Impact on Poor Rural Women Household-Level Employment: Bargaining Models Approach (The DESCI1 Case: Tigray State, Northern Ethiopia)	

Commonly used Excel functions

1. Calculate descriptive statistics in Excel

- i. Find the range of scores by first finding the lowest (minimum) and highest (maximum) values with “**=min()**” and “**=max()**” Excel functions and then, using subtraction to calculate the range (the distance between the minimum and maximum values)
- ii. Find the quartiles to understand which scores fall in the 25th percentile, 50th percentile, etc.
 - i. Find the 25th percentile with **=quartile(range,1)**
 - ii. Find the 50th percentile with **=quartile(range,2)**
 - iii. Find the 75th percentile with **=quartile(range,3)**
 - iv. Find the 100th percentile with **=quartile(range,4)**
- iii. Calculate measures of central tendency and dispersion to find the mean **=average()**, median **=median**, mode **=mode()** as well as the standard deviation **=stdev** and variance **=var()**

2. Compare the relationship between two sets of scores— such as the relationship between pre- and post- scores or between New and Existing micro-distributors

- i. Correlations between scores can be calculated by typing **=correl()**, selecting the two arrays, i.e., columns of data that you want to compare, and then typing a closing **)**. Note: This formula calculates the Pearson's r correlation coefficient of the two data sets

3. Determine whether the differences between two scores (e.g., pre- and post- scores, New and Existing micro-distributors) is statistically significant

- i. Statistical significance can be calculated by typing **=ttest()**, select the first array (column of data), select the second array of data, type a **2** to conduct a 2 tailed ttest, and then type a **1** to conduct a paired (dependent) t-test or a **2** to conduct a two sample (independent) t-test)
- ii. Full formula: **=ttest(array 1, array 2, tails, type)***
- iii. Note: This formula returns a p-value. Lower numbers (below .01) indicate statistical significance

4. Conduct cronbach's alpha analysis in excel: <https://www.youtube.com/watch?v=yvzVI1G8RBg>

***“Tails”** A 2-tailed t-test means that you are *not* hypothesizing the direction of the relationship between the scores in array 1 and array 2. A 1-tailed t-test means that you are hypothesizing the direction (e.g., you are certain that post-test scores will be higher than pre-test scores. Most likely, your organization will want to calculate a 2-tailed t-test.

* **“Type”** of t-test. For the **=ttest()** formula, enter a “1” for a paired samples t-test (i.e., respondents in array 1 are identical to the respondents in array 2). Enter a “2” for an independent t-test (where respondents in array 1 are not the same as respondents in array 2).

Progress out of Poverty Index® for Brazil

Entity	Name	ID	Date (DD/MM/YY)
Participant:	_____	_____	Joined: _____
Field agent:	_____	_____	Today: _____
Service point:	_____	_____	Household size: _____
Indicator	Value	Points	Score
1. How many members does the household have?	A. Five or more	0	
	B. Four	6	
	C. Three	11	
	D. Two	17	
	E. One	20	
2. Do any household members ages 5 to 18 go to private school or private pre-school?	A. No	0	
	B. Yes	5	
	C. No members ages 5 to 18	7	
3. How many years of schooling has the female head/spouse completed?	A. Three or less	0	
	B. Four to eleven	2	
	C. Twelve or more	8	
	D. No female head/spouse	8	
4. How many household members work as employees with a written contract, as civil servants for the government, or in the military?	A. None	0	
	B. One	4	
	C. Two or more	13	
5. In their main occupation, how many household members are managers, administrators, professionals in the arts and sciences, mid-level technicians, or clerks?	A. None	0	
	B. One or more	8	
6. How many rooms does the residence have?	A. One to four	0	
	B. Five	2	
	C. Six	5	
	D. Seven	7	
	E. Eight or more	11	
7. How does the household dispose of sewage?	A. Ditch, other, or no bathroom	0	
	B. Simple hole, or directly into river, lake, or ocean	2	
	C. Septic tank not connected to public sewage/rainwater system	3	
	D. Septic tank connected to public sewage/rainwater system	4	
	E. Direct connection to public sewage/rainwater system	5	
8. Does the household have a refrigerator?	A. No	0	
	B. Yes, with one door	5	
	C. Yes, with two doors	10	
9. Does the household have a washing machine?	A. No	0	
	B. Yes	7	
10. Does the household have a cellular or land-line telephone?	A. None	0	
	B. Cellular but not land-line	5	
	C. Land-line but not cellular	6	
	D. Both	11	

By [Mark Schreiner](#) of Microfinance Risk Management, L.L.C., developer of the PPI.

Total score:

More information on the PPI



Category Likelihoods according to Brazil PPI™ Score

PPI Score	Half-Minimum-Wage Line		Quarter-Minimum-Wage Line		One-Minimum-Wage Line	
	Total Below the Half Minimum Wage Line	Total Above the Half Minimum Wage Line	Total Below the Quarter-Minimum-Wage Line	Total Above the Quarter-Minimum-Wage Line	Total Below the One-Minimum-Wage Line	Total Above the One-Minimum-Wage Line
0-4	95.0%	5.0%	71.7%	28.3%	99.5%	0.5%
5-9	93.4%	6.6%	65.4%	34.6%	99.6%	0.4%
10-14	89.4%	10.6%	51.6%	48.4%	99.5%	0.5%
15-19	81.1%	18.9%	35.0%	65.0%	98.5%	1.5%
20-24	68.7%	31.3%	24.6%	75.4%	96.2%	3.8%
25-29	54.2%	45.8%	16.1%	83.9%	92.2%	7.8%
30-34	41.1%	58.9%	10.5%	89.5%	85.0%	15.0%
35-39	26.1%	73.9%	6.2%	93.8%	75.3%	24.7%
40-44	17.4%	82.6%	3.9%	96.1%	61.8%	38.2%
45-49	12.4%	87.6%	2.6%	97.4%	52.0%	48.0%
50-54	6.9%	93.1%	1.7%	98.3%	35.6%	64.4%
55-59	3.4%	96.6%	1.2%	98.8%	24.4%	75.6%
60-64	2.1%	97.9%	1.1%	98.9%	15.4%	84.6%
65-69	1.0%	99.0%	0.4%	99.6%	8.9%	91.1%
70-74	1.1%	98.9%	0.6%	99.4%	3.9%	96.1%
75-79	0.1%	99.9%	0.0%	100.0%	1.4%	98.6%
80-84	0.1%	99.9%	0.0%	100.0%	0.8%	99.2%
85-89	0.0%	100.0%	0.0%	100.0%	1.4%	98.6%
90-94	0.0%	100.0%	0.0%	100.0%	0.0%	100.0%
95-100	0.0%	100.0%	0.0%	100.0%	0.0%	100.0%



Category Likelihoods according to Brazil PPI™ Score

PPI Score	Two-Minimum-Wage Line		USAID "Extreme" Poverty Line		\$1.25/Day/2005 PPP Poverty Line	
	Total Below the Two-Minimum-Wage Line	Total Above the Two-Minimum-Wage Line	Total Below the USAID "Extreme" Poverty Line	Total Above the USAID "Extreme" Poverty Line	Total Below the \$1.25/Day/2005 PPP Line	Total Above the \$1.25/Day/2005 PPP Line
0-4	100.0%	0.0%	80.2%	19.8%	46.4%	53.6%
5-9	100.0%	0.0%	77.2%	22.8%	34.2%	65.8%
10-14	100.0%	0.0%	65.0%	35.0%	24.0%	76.0%
15-19	99.9%	0.1%	47.0%	53.0%	14.0%	86.0%
20-24	99.7%	0.3%	36.1%	63.9%	10.2%	89.8%
25-29	99.4%	0.6%	23.2%	76.8%	7.1%	92.9%
30-34	98.7%	1.3%	15.2%	84.8%	4.6%	95.4%
35-39	96.5%	3.5%	8.3%	91.7%	3.3%	96.7%
40-44	93.7%	6.3%	5.1%	94.9%	2.0%	98.0%
45-49	89.6%	10.4%	3.1%	96.9%	1.9%	98.1%
50-54	82.1%	17.9%	2.1%	97.9%	1.5%	98.5%
55-59	69.4%	30.6%	1.2%	98.8%	1.0%	99.0%
60-64	58.8%	41.2%	1.2%	98.8%	1.1%	98.9%
65-69	42.9%	57.1%	0.4%	99.6%	0.4%	99.6%
70-74	29.8%	70.2%	0.6%	99.4%	0.6%	99.4%
75-79	19.4%	80.6%	0.0%	100.0%	0.0%	100.0%
80-84	10.3%	89.7%	0.0%	100.0%	0.0%	100.0%
85-89	7.5%	92.5%	0.0%	100.0%	0.0%	100.0%
90-94	5.7%	94.3%	0.0%	100.0%	0.0%	100.0%
95-100	0.0%	100.0%	0.0%	100.0%	0.0%	100.0%

More information on the PPI



Category Likelihoods according to Brazil PPI™ Score

PPI Score	\$2.50/Day/2005 PPP Poverty Line		\$3.75/Day/2005 PPP Poverty Line		\$5.00/Day/2005 PPP Poverty Line	
	Total Below the \$2.50/Day/2005 PPP Line	Total Above the \$2.50/Day/2005 PPP Line	Total Below the \$3.75/Day/2005 PPP Line	Total Above the \$3.75/Day/2005 PPP Line	Total Below the \$5.00/Day/2005 PPP Line	Total Above the \$5.00/Day/2005 PPP Line
0-4	81.8%	18.2%	93.7%	6.3%	99.0%	1.0%
5-9	77.8%	22.2%	92.0%	8.0%	97.4%	2.6%
10-14	66.1%	33.9%	87.3%	12.7%	94.3%	5.7%
15-19	49.0%	51.0%	76.0%	24.0%	90.3%	9.7%
20-24	37.2%	62.8%	64.0%	36.0%	80.3%	19.7%
25-29	23.9%	76.1%	47.6%	52.4%	67.5%	32.5%
30-34	15.4%	84.6%	33.4%	66.6%	53.3%	46.7%
35-39	8.6%	91.4%	19.7%	80.3%	37.2%	62.8%
40-44	5.2%	94.8%	12.0%	88.0%	26.0%	74.0%
45-49	3.2%	96.8%	7.8%	92.2%	20.1%	79.9%
50-54	2.1%	97.9%	4.0%	96.0%	10.6%	89.4%
55-59	1.2%	98.8%	2.0%	98.0%	5.6%	94.4%
60-64	1.2%	98.8%	1.5%	98.5%	3.8%	96.2%
65-69	0.4%	99.6%	0.7%	99.3%	1.8%	98.2%
70-74	0.6%	99.4%	0.8%	99.2%	1.3%	98.7%
75-79	0.0%	100.0%	0.1%	99.9%	0.1%	99.9%
80-84	0.0%	100.0%	0.0%	100.0%	0.3%	99.7%
85-89	0.0%	100.0%	0.0%	100.0%	0.0%	100.0%
90-94	0.0%	100.0%	0.0%	100.0%	0.0%	100.0%
95-100	0.0%	100.0%	0.0%	100.0%	0.0%	100.0%

Source: Microfinance Risk Management, L.L.C. based on the 2008 PNAD

A commonly used research design includes a baseline and an endline along with a comparison group when resources permit

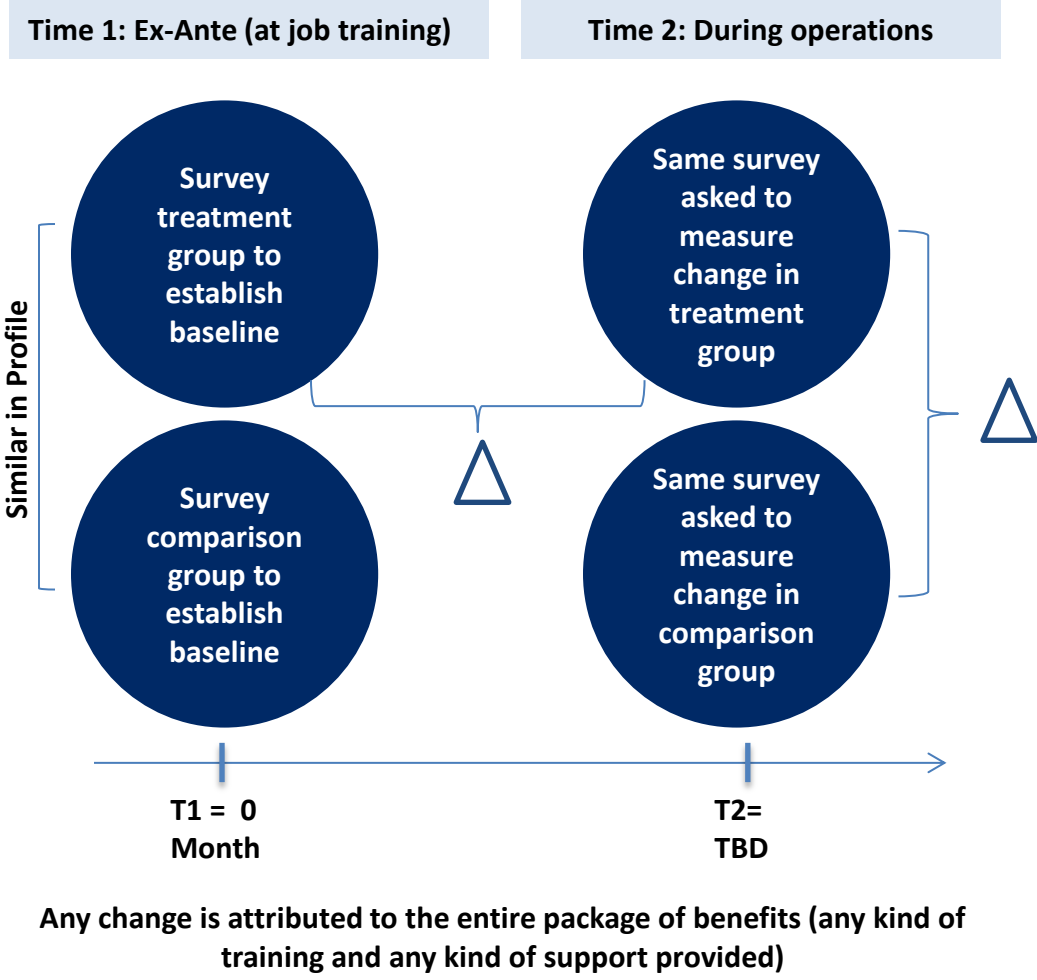
Research Question: What is the impact on low-income women from working with an organization

Why two groups: a treatment and a comparison group?

- 1. Two groups allow us to establish a similar baseline
- 2. Two groups help us to rule-out natural improvements (i.e. participants might change or improve naturally over time) or events in the outside world that might be causing the changes that we see

Why the ex-Ante (baseline) and follow-up (endline) data collection points?

- 1. The ex-ante impact measurement serves as the baseline to compare the project's results with later evaluations
- 2. The follow-up measurement (endline) assesses the mid-term results of the intervention and compares the data to the baseline with sufficient number of salespersons to make strong conclusions



In order to develop solutions for the future, WDI lists key challenges encountered during the course of this project. Some of these issues occurred with all three pilots and a few of the primary challenges were also created by WDI

1. Point of Contacts (POCs):

1. Throughout the length of the three pilots, WDI worked with a combined total of eight POCs instead of the expected three POCs leading to WDI investing more time than anticipated in getting POCs up to speed
2. POCs did not follow through on all responsibilities and often did not understand the crucial role they played in ensuring all processes were implemented successfully and efficiently; this was from scheduling meetings/coordinating schedules, to translating all required documents, resulting in WDI guiding the POC more often than initially estimated

2. Existing data on business indicators:

1. In some cases, staff had a limited knowledge on existing data currently being collected on business indicators resulting in investing more time than anticipated in gathering this data

3. Shifting deadlines and delays:

1. There were often shifts in timelines for receiving feedback from the organization; in some cases, WDI also experienced poor engagement from key staff members

4. Implementation of sample selection for the pilot:

1. The sample selection protocols prescribed by WDI were not followed as hoped. The employed methods also differed from the envisioned steps carried out by the organization

5. Cognitive interviewing:

1. Cognitive methodology is a difficult technique to grasp. WDI developed a detailed training on cognitive interviewing concepts and processes and found that an in-person training was more effective than remote trainings. This is because key pillars of the technique needed to be revisited with enumerators on the debrief calls throughout remote pretests
2. Experiences showed that the pretest conducted by WDI served the organization better. WDI requested that the training include a practice role play but were not sure if this occurred

6. Technical capacity

1. WDI sometimes tended to use very technical language which created confusion for the pilot organization staff

7. Multiple methods of communication

1. WDI used multiple methods of communication – skype, google hangout, webex, gotowebinar, teleconference line. This caused undue inconvenience for pilot organizations and should have been standardized from the phase 1 kickoff call

References used during this project

- IDB Donors Memorandum – BRAZIL – EMPOWERING LOW-INCOME WOMEN THROUGH THEIR INCORPORATION IN A COMMUNITY-BASED INCLUSIVE DISTRIBUTION NETWORK (IDN) – (BR-M1133)
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- Types of well-being: <https://hbr.org/2009/05/making-better-investments-at-the-base-of-the-pyramid>
- Good resource of evaluation: <http://www.betterevaluation.org>
- Examples of Likert scales: <https://www.uc.edu/content/dam/uc/sas/docs/Assessment/likert-type%20response%20anchors.pdf>
- Information on how big your sample should be in order to say your survey results are representative of your population: https://help.surveymonkey.com/articles/en_US/kb/How-many-respondents-do-I-need
- Power analysis for calculating sample size for impact assessments:
 - <http://stats.idre.ucla.edu/other/mult-pkg/seminars/intro-power/>
 - <http://statsoft.ru/home/textbook/modules/stpowan.html>
- Introduction to Qualitative coding: http://programeval.ucdavis.edu/documents/Tips_Tools_18_2012.pdf
- Cronbach's alpha analysis in Excel: <https://www.youtube.com/watch?v=yvzVl1G8RBg>
- PPI Links:
 - Brazil PPI: L.L.C <http://www.progressoutofpoverty.org/country/brazil>
 - PPI scoring and analysis
 - <http://www.progressoutofpoverty.org/blog/why-averaging-ppi-scores-wont-work>
 - <https://www.freedomfromhunger.org/client-outcome-performance-cope-indicators-database>
 - “This straightforward tool automatically calculates the poverty likelihoods for up to ten poverty lines for each beneficiary”– <http://www.progressoutofpoverty.org/data-tools>
 - PPI FAQ:
 - <http://www.progressoutofpoverty.org/faq-page#n496>