

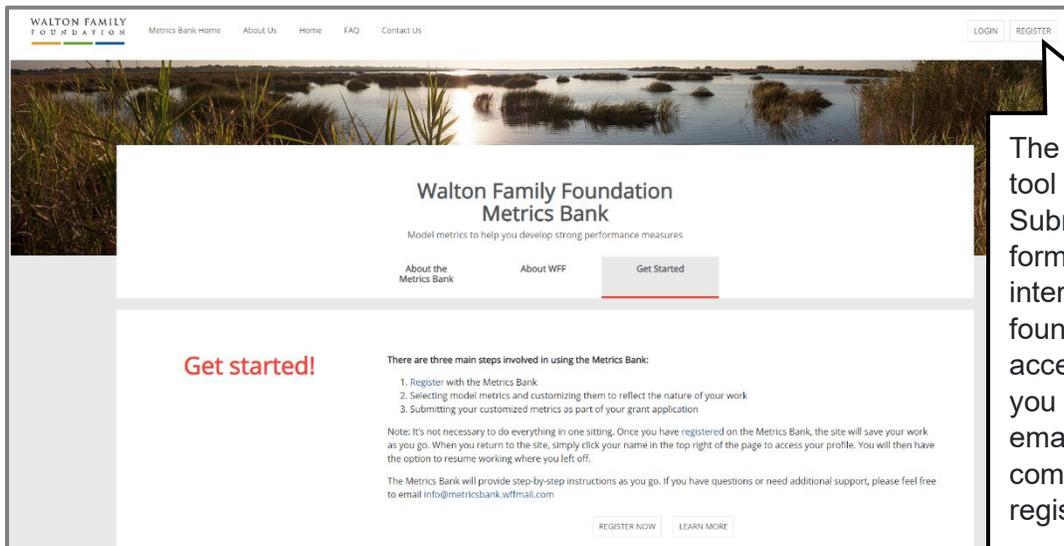
Walton Family Foundation Metrics Bank: Step-by-Step Guide

metricsbank.waltonfamilyfoundation.org

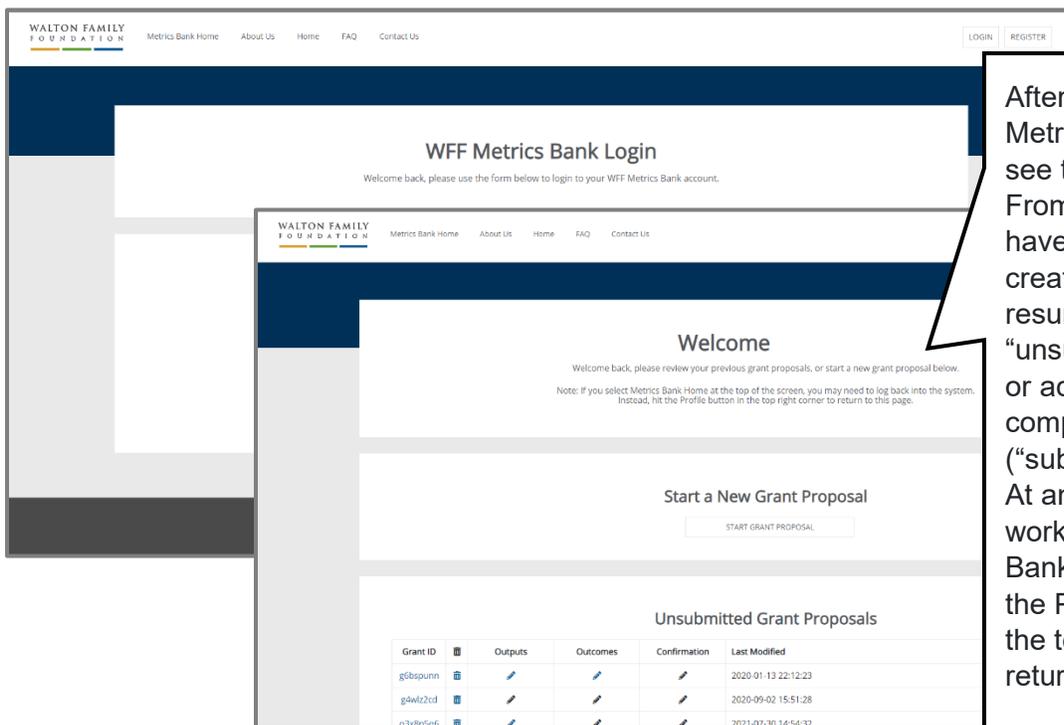
The Walton Family Foundation's Metrics Bank is an interactive online repository of more than 300 customizable "model metrics" derived from actual performance measures established by grantees over two years. The Metrics Bank will help grantees streamline the process of developing good performance measures.

This guide and the online FAQs explain how to use the Metrics Bank. If you have questions or need additional support, please email info@metricsbank.wffmail.com. For more information on how to develop strong performance measures, please see our videos and written guides at the bottom of the Learning page of the foundation's website at <https://www.waltonfamilyfoundation.org/learning>

Step 1: Register with the Metrics Bank



The Metrics Bank is a tool for grantees. Submitted registration forms will be reviewed internally by the foundation. Once access is approved, you will receive an email with a link to complete the registration.



After logging into the Metrics Bank, you will see the Profile Page. From here you will have the option to create new metrics, resume your work on "unsubmitted" metrics, or access previously completed ("submitted") metrics. At any point while working in the Metrics Bank, you can click the Profile button in the top right corner to return to this page.

Step 2: Select model metrics and customize them to reflect the nature of the work

Size & Duration

The number of performance measures included in each Grant Agreement should reflect the level of funding, length of the grant period and the type and complexity of the work being conducted. The performance measures are not meant to capture every detail of the work required to implement a project. Instead, they serve as a representative sample of the most important outputs and outcomes that reflect the theory of change.

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Grant Amount Per Year	Length of Grant Period		
	1 year	2 years	3 years
Less than \$100k	3 outputs & 1 outcome	4 outputs & 1 outcomes	5 outputs and 3 outcomes
Between \$100k and \$500k	4 outputs & 2 outcomes	5 outputs & 3 outcomes	6 outputs and 4 outcomes
More than \$500k	5 outputs & 3 outcome	6 outputs & 4 outcomes	7 outputs and 5 outcomes

Please select your grant size and duration below.

Program Officer:

Grant ID:

Grant Size:

Grant Duration:

GO BACK SAVE & EXIT SAVE & CONTINUE

Start by entering the name of your Program Officer, the size and duration of the grant, and the grant ID*

Navigation buttons at the bottom of each page will allow you to go back to the previous step, continue to the next step, or save and exit.

* The grant ID number is assigned by SmartSimple (the foundation's grant management system) when you start an application. If you don't know your grant ID, please contact your Program Officer.

Outputs & Outcomes

Outputs are the direct products and services delivered by a program and outcomes are the impact of those products and services.

The model metrics are organized into output categories (e.g., capacity building, media content) and outcome categories (e.g., academic improvement, increased support). You may select up to five output categories and five outcome categories. A list of model metrics for those categories will appear. Then you will select which metrics you would like to customize for the project. Each model metric has a “fill in the blank” field corresponding to the five key elements of a good performance measure (what, who, when, how much and how will we know).

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Outputs

In this section, you will select the output categories and metrics that are most applicable to the work you are doing.

Step 1: Choose your categories. Using the list provided on the left side of the page, select 1-5 categories of metrics that you'd like to review and customize. Keep in mind the guidelines on the previous page regarding the total number of metrics you should aim for given the size and duration of your grant.

Step 2: Customize your metrics.

- When you have selected your categories, a list of model metrics will appear. Each model metric has a “fill in the blank” field corresponding to the five key elements of a good performance measure (what, who, when, how much and how will we know).
- For each category you chose, select a model metric(s) that best suits the type of work you will be doing. When you click on the model metric, a pop up window will appear so that you can customize each field. There is a calendar picker to select the target completion date. The evidence field (how we will know) has a dropdown list of options suited to the model metric that you selected.
- When you are done customizing each metric, hit “Save” and the customized metric will appear at the top of the screen.
- Scroll to the very bottom of the page if you would like to create a fully customized metric.

Step 3: Proceed to outcomes. When you are done with your outputs, hit the “Continue” button at the bottom of the page to move on to outcomes.

If you get disconnected or have to stop, your submissions will automatically be saved and can be accessed later by clicking on your profile in the top right corner. You will then have the option to resume working on these metrics.

Output Categories

- Arts & Culture Education
- Arts & Culture Programming
- Budgeting/Organizational Efficiency
- Capacity Building
- Coalition-Building
- Communications Strategy/Planning
- ... System
- ... of Instructional Models
- ...ational Programming

Please select up to 5 pertinent output categories from the list to the left (Hold the control button on your keyboard to select multiple categories)

Your Metrics

CONTINUE WITH SELECTED CATEGORIES

Select 1-5 categories of metrics that are most applicable to the work. Hold the control button to select multiple categories.

Once you have selected your categories, a list of model metrics will appear.

Note: It's not necessary to do everything in one sitting. Once you have logged in, the site will save your work as you go. When you return, you may pick up where you left off.

Outputs & Outcomes (continued)

The screenshot shows the Walton Family Foundation Metrics Bank interface. At the top, there is a navigation bar with 'Metrics Bank Home', 'About Us', 'Home', 'FAQ', and 'Contact Us'. On the right, there are 'LOGOUT' and 'PROFILE' buttons. A message states: 'If you get disconnected or have to stop, your submissions will automatically be saved and can be accessed later by clicking on your profile in the top right corner. You will then have the option to resume working on these metrics.'

The main content area is divided into two sections: 'Output Categories' and 'Your Metrics'. The 'Output Categories' section has a dropdown menu with options: Arts & Culture Education, Arts & Culture Programming, Budgeting/Organizational Efficiency, Capacity-building, Coalition-building, Communications Strategy/Planning, Data System, Diversity of Instructional Models, Educational Programming, and Enhance Community Space. The 'Your Metrics' section shows a list of 'Model Metrics' with columns for 'Category' and 'Model Metric'. The 'Add Metric' pop-up window is open, prompting the user to customize a metric by filling in fields for 'By Date', 'Grantee', 'evidence', and 'analysis'. It includes 'SAVE' and 'CANCEL' buttons.

Category	Model Metric
Budgeting/Organizational Efficiency	By [Date], [Grantee] will conduct a financial audit and financial planning process with a third-party provider, as measured by [what]. The financial analysis will include [what].
Budgeting/Organizational Efficiency	By [Date], [Grantee] will conduct a financial audit and financial planning process with a third-party provider, as measured by [what]. The financial analysis will include [what].
Budgeting/Organizational Efficiency	By [Date], [Grantee] will revise their financial model and engage with [what] to inform the revision, as measured by [what].
Budgeting/Organizational Efficiency	By [Date], each of [target part] investments in key priorities will be measured by [what].
Coalition-building	By [Date], [Grantee] will increase membership in [name of coalition] by [X%], as measured by [what].
Coalition-building	By [Date], [Grantee] will convene a [X] member type of coalition that will meet at least [X] times a year to discuss [issue or policy areas], as measured by [what].
Coalition-building	By [Date], [Grantee] will finalize [strategy/program plan] and launch the broader [X] member coalition, as measured by [what].
Custom Metric	None of these are applicable to my work. I would like to create a custom metric.

A pop-up window will appear when you click on a model metric, allowing you to customize each field. When you click "Save" your metric will appear at the top of the screen.

This screenshot shows the same Walton Family Foundation Metrics Bank interface, but with the 'Add Custom Metric' pop-up window open. The 'Model Metrics' list is visible in the background. The 'Add Custom Metric' window prompts the user to describe the change or accomplishment, select a date, and choose the type of evidence. It includes 'SAVE' and 'CANCEL' buttons. At the bottom of the page, there are three buttons: 'GO BACK', 'SAVE & EXIT', and 'SAVE OUTPUTS & CONTINUE'.

Scroll to the very bottom of the page if you would like to create a fully customized metric.

When you are done with your outputs, click the "Continue" button at the bottom of the page to move on to outcomes. The process for customizing outcomes is the same, select a category, choose a model metric and fill in the blanks.

Step 3: Submit the customized metrics as part of your grant application

The exported metrics can be uploaded directly to your grant application in SmartSimple. You may also choose to share them with your team and/or Program Officer for further discussion.

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Metrics Bank Grant Submission Confirmation

Please review your draft performance measures below. If needed, you can go back to make changes or choose different metrics. Keep in mind that the number of outputs and outcomes should be based on the size and duration of your grant. When you are satisfied with the metrics, hit the "Submit" button. This will give you the option to export your metrics into an Excel or PDF file, where you can make additional text edits if needed.

Your Program Officer will work with you to refine these draft metrics as appropriate to best suit your work and meet WFF's requirements.

Outputs

Category	Metric	Edit Metric	Delete
Budgeting/Organizational Efficiency	By , will conduct a financial audit and financial planning process with a third-party provider, as measured by . The financial analysis will include .		
Budgeting/Organizational Efficiency	By , will revise their financial model and engage with to inform the revision, as measured by .		

Outcomes

Category	Metric	Edit Metric	Delete
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GO BACK SAVE PROPOSED METRICS SUBMIT PROPOSED METRICS

Review the full set of metrics. If necessary, you can go back to make changes or choose different metrics.

When you are satisfied with the metrics, click the "Submit" button. This will provide the option to export the metrics into an Excel or PDF file, where you can make additional text edits if needed.

Note: To edit the PDF version, you will need to re-save the file in Word format.

You may view these metrics later by going to the Profile Page and selecting them from the list of Submitted Metrics.

Questions? Please refer to the FAQs section of the Metrics Bank website or email info@metricsbank.wffmail.com for additional support.