



Helen Macpherson Smith Trust

Grantee resource: Developing Your Outputs and Outcomes

As part of your grant application, you will be asked to describe how you will measure progress and what success will look like. This brief guide is intended to help you create “output” and “outcome” metrics that provide clear benchmarks for deliverables and expected results. These key measures will form the basis of future reporting to HMSTrust, should your application be successful.



Evaluation helps us to track and understand the progress of HMSTrust and our grantees in achieving strategic objectives; to share lessons and learnings; and ultimately, increase the impact of our grantmaking.

The Role of Metrics

A succinct set of metrics provides insights into a project’s theory of change and allows us and our grantees to track progress towards our mutual goals. They should be meaningful and achievable as you will be asked to report progress against the benchmarks set in your metrics. Ultimately, collecting and using metrics and other data leads to increased impact in the areas in which we both work in the Victorian community.

Basic Terminology

- Metric:** A metric is a specific output or outcome related to the work of the proposed grant. Ideally, all metrics should contain 5 key pieces of information (see next page).
- Outputs:** These are the activities, products or services to be completed or delivered. Output measures do not address the value or impact of your work. As a general rule, if the measure is referring to something the grantee will do or produce, then it is an output.
- Outcomes:** Outcomes are the expected benefits or other positive changes that occur as a result of the activities, products, or services completed or delivered by the grantee. In other words, if outputs are successfully completed, outcomes are the benefits that would accrue to participants and/or target audiences.

The 5 Components of a Good Metric

We recommend that you include these 5 pieces of information.

1. **WHO** will complete the output or be the beneficiary of the outcome?
2. **WHAT** is the activity or result expected to be achieved?
3. **BY WHEN** will it occur?
4. **HOW MUCH** will be done or accomplished (i.e., how many or what percent)?
5. **HOW WILL WE KNOW** the result was achieved?

HOW WILL WE KNOW

There are multiple ways of knowing whether an output or outcome is achieved. In some cases, organisations may conduct surveys, interviews, or focus groups with clients. In other cases, organisations will rely on service or administrative records, or staff will hold the knowledge of whether something was achieved (i.e. if a person was hired or a regulation changed) based on observation or judgement.

EXAMPLE OUTPUT:

By July 2020 (BY WHEN), 50 (HOW MUCH) schoolteachers from North East Region (WHO) will participate in behavioural management training (WILL DO WHAT) as measured by participant enrolment records (HOW WE KNOW).

EXAMPLE OUTCOME:

By June 2021 (BY WHEN), 80% (HOW MUCH) of the schoolteachers who participated in behavioural management training (WHO) will have the skills and confidence to strengthen the educational performance of students with cognitive/behavioural/social challenges (WILL DO WHAT) as measured by qualitative and quantitative weekly data collection, academic grading of students, and parent feedback (HOW WE KNOW).

Selecting the Right Metrics

When deciding what metrics to include, consider the most important **deliverables** to be produced as part of the grant - these are your outputs. Then imagine the ways in which you would know if the project was **successful** - these are your outcomes. They could include increasing the diversity of program participants, increasing the sustainability of an arts organisation, improving student retention numbers, increased opportunities for independent artists to earn income, etc.

While a project or program will often have many expected outputs and potential outcomes, it is important to identify the small number of metrics that are most important for gauging progress and/or learning that can inform your work.

Finally, please aim to create a focussed set of outputs and outcomes that are clear, concise and relevant to your goals and to the goals of HMSTrust's programs and key objectives.

OTHER CONSIDERATIONS WHEN SELECTING METRICS:

- Think through how the activities you conduct lead to the results you seek. Choose the metrics that best tell this story for your organisation;
- Include outputs and outcomes that occur during the grant period; in some cases, you might include outcomes that are only beginning to occur during the grant period;
- Focus on data that you are already collecting, for yourself or other funders;
- Don't worry about getting locked in by metrics, they can be amended if plans change; and
- Not every output or outcome is directly measurable, you may need to find an alternative or exclude some items.

Acknowledgements

HMSTrust gratefully thanks the [Ewing Marion Kauffman Foundation](#) and the [Barr Foundation](#) for letting us adapt their material to develop this resource.