



**Performance Measurement Practitioners' Workshop
Workshop Report
February 2016**

1. WORKSHOP OVERVIEW

Held at the Inter-American Development Bank on February 3rd & 4th, the fourth annual Performance Measurement Practitioners' Workshop hosted representatives from companies, NGOs, standards, development agencies and lenders. Broadly, the agenda focused on the questions of:

- How can we get more insight into who the smallholder farmers in our supply chains are?
- What do we measure (and how) in order to better understand whether their livelihoods and ecosystems are improving as a result of participating in this supply chain?
- Where we are investing in increased productivity and/or improved livelihoods for smallholder producers; are things improving? Why or why not?

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further collaboration

Over the last 4 years, this evolving group of 50-60 individuals has been meeting as a community of practice (CoP) to share challenges and best practices around these questions and learn from one another in an informal, safe space. More detail on the CoP can be found [here](#).



As the conversations and learning edges of the PM CoP have evolved, the workshop has shifted to reflect this. This year, the workshop focused more on *use* of data rather than just the gathering of data—what and how to measure—as it has in the past. This is because many companies, standards, etc. have been collecting data for a number of years now. We are at the point as a community where we can begin to look broadly at the data and ask, “What is it telling us?” and “How can we make the best use of this to drive change on the ground?”

2. WORKSHOP SESSIONS:

Below you will find descriptions of workshop sessions and, where available, links to session presentations. If you have questions or want to follow up on any of these topics, contact [Emily Shipman](#).

a. DAY ONE:

- **Panel: Getting the most value from data collection**- Barry Callebaut, Mars, Root Capital & Syngenta on the use of data for decision-making and adaptive management within their organizations. The key learnings shared by the panelists focused on maximizing the value of data through stakeholder engagement around study findings, leveraging existing data for deeper insights, and streamlining data collection processes to focus on what is key to their theory of change.

- **Needs & Offers Session:** In plenary participants wrote and shared their needs and offers for collaborating to advance their measurement efforts. [Synthesized results of this activity can be found here.](#)
- **Producer organization level assessment:** COSA presented their PO level assessment tool to assess the strength and capacity of POs; Root Capital shared their research into how to assess the quality of technical assistance within PO and the critical importance of this metric to farmer viability as well as the ability of POs to manage longer term credit. [\[COSA slides\]](#) [\[Root slides\]](#) [\[Root Issue Brief on extension\]](#)
- **Gauging the value of long-term supplier relationships:** Participants discussed metrics that would allow users to build evidence on the value of investing in long-term relationships and capacity building with producer organizations. Results of this brainstorm session [here.](#)
- **Measuring gender equity in smallholder chains:** The Partnership for Gender Equity shared their research on gender equity in coffee value chains and sought feedback to design upcoming supply chain action research pilots [\[slides\]](#).
- **Performance measurement from scratch:** William Davidson Institute shared their work using a deep dive impact assessment to inform the development of a lean performance monitoring system with the Danone Ecosystem Fund [\[slides\]](#). COSA talked about the performance measurement system they have put in place for companies [\[slides\]](#).
- **How dashboards improve management-** COSA shared a reporting dashboard they have developed to promote learning and adaptive management for multiple actors along the value chain [\[slides\]](#).
- **Components of the culture of a learning organization-** Utz Certified shared aspects of their internal cultural shift towards increased learning from their work and the data they collect [\[slides\]](#).



- **The value of a shared data platform-** The IADB presented their SAFE Platform, a consortium for integrated funding in Latin America. Sustainable Harvest and Supply Shift discussed the value of collecting data and having a cohesive infrastructure for various companies to enter in data in anonymized and comparable fashion. SAFE and Sustainable Harvest are both parties to the launch of a shared data platform, the Coffee Data Network [[SAFE slides](#)] [[Coffee Data Network slides](#)].

b. DAY TWO

- **Using data as an entry point for accelerating rural development-** Nestlé and Rainforest Alliance discussed work they had done gathering data to gain an understanding of the context and/or baseline situation for Nestlé's coffee producers. Nestlé underscored the need to think beyond just increasing productivity of the target crop, to a more holistic approach for rural development both at the farm and the landscape level. The group discussed the benefits and challenges of working this way in collaboration with other organizations [[slides](#)]. Keurig Green Mountain complemented this discussion by sharing experience working with the Coalition of Coffee Communities [[slides](#)].
- **Alternatives for communicating results of supply chain studies-** Kylie Hutchinson of Community Solutions shared alternative reporting techniques to allow evaluators and those who report on smallholder supply chain studies ways of sharing their findings that will engage stakeholders [[Link to Kylie's Pinterest page](#) where she houses resources for reporting on evaluation].
- **Building a learning culture in an industry platform:** Cocoa Action, World Cocoa Foundation and Blommer Chocolate updated participants on the framework developed for impact by Cocoa Action, the 12 company collaboration led by WCF and framed the vision of a learning agenda focused on central, common questions facing the sector [[slides](#)]. Blommer shared the challenge of meeting commercial reality with a precompetitive learning aspiration and preconditions for achieving that within a platform like Cocoa Action.
- **Measuring food loss & Waste-** The Food Lab, Rockefeller Foundation, TechnoServe, and CIMS discussed efforts to reduce crop loss in smallholder farming systems and how to measure this in order

to promote learning around where loss is high leverage and what interventions are most effective at reducing loss [\[slides\]](#)

- **Segmentation and social capital indices for more targeted farmer service provision**- Gates Foundation, Starbucks, and Mars. This session shared innovations in measurement around segmentation and social capital: Segmentation based on farmer self perception to see how one might better target services to farmers who are more likely to adopt practices and therefore improve the cost efficiency of farmer outreach; and, social capital based on attitudes towards trust and community relationships as a way to better understand impacts of projects on the fabric of communities and to test for the correlation between strong social capital and uptake of practices. The results presented in the session on segmentation demonstrated real potential for farmer targeting, though also raised the critical importance of confidence in the segmentation approach because of the risk of excluding farmers from trainings and services who might adopt under slightly different conditions. [\[Gates slides\]](#) [\[Starbucks slides\]](#) [\[Mars handout\]](#)
- **Measuring landscape level impacts** - Conservation International & SCAA. Conservation International presented their [Landscapes Accounting Framework](#) to aggregate data to provide an overview of a landscape and the key trends and metrics that can measure its sustainability. Their work in [Peru](#) and Indonesia showed trends including land use change, sources of deforestation, drivers of crop change, etc. SCAA spoke of how this approach will inform how the Coalition for Coffee Communities is analyzing the coffee production landscape in Nicaragua [\[slides\]](#).

- c. Other topics of interest discussed throughout the meeting but not on the agenda were:
1. Exploring the link between farm economics and the future of farming / next generation



2. Better use of existing data and data sharing potential
3. Climate and environmental metrics
4. Nutrition security

See [Needs & Offers Summary](#) for more info on these topics of interest.

3. TOPICS IDENTIFIED AS PRIORITY FOR THE COP LEARNING AGENDA:

A key purpose of this gathering is to understand where there are still gaps in our understanding around what works and what doesn't in smallholder performance measurement and where we need to focus our energy to move the conversation forward. Of all of these topics discussed, a few stand out as important for the Food Lab and other CoP members to organize a work stream around for the coming year. The full list is below and CoP priorities for action are noted with an asterisk (*). Please stay tuned for an announcement from the Lab in the coming months to let you know how to engage on these topics.

**=Topics that the Food Lab will support a continued work stream*

Environmental Performance

- i. Indicators for environmental performance
- ii. Going beyond practice adoption proxies
- iii. Recommended indicators for specific crops & regions
- iv. Resilience (to climate change, market shocks, etc.) *

There are a number of initiatives ongoing to better measure the capacities of smallholders and rural communities to adapt to climate change; COSA is leading a working group on community resilience with Lutheran World Relief; USAID, CCAFS, Root Capital, Rainforest Alliance and SFL are collaborating to build a learning community focused on climate resilience in smallholder chains, and will facilitate open learning sessions on the topics throughout 2016-17 [\[Link\]](#).

Farm Economics

- v. More living income benchmarking * [[Link to Living Income discussion paper](#)]
- vi. More guidance on measuring household income
- vii. Costs of production

Effective reporting to promote learning and engagement around results*

In the coming year, we will look for opportunities to share best (and possibly worst) practices for data reporting and stakeholder engagement around evaluation results. This will include techniques for distilling data down to your 3-4 key findings, how to present data differently for different audiences, and what chart types lend themselves best to different types of data. This sharing will likely take place in the form of webinars announced via our mailing list for the Performance Measurement Community of Practice.

Business contribution to Sustainable Development Goals*

- viii. Mapping equivalency of SDG indicators to Shared Approaches Framework (SAF)
- ix. Showing how companies contribute to SDG targets (now and in future).

In 2014, in partnership with the Food Lab, Business Fights Poverty established a working group to help facilitate additional piloting of the Shared Approaches Framework. We are now proposing to refocus the work of this group to identify how to link current impact measurement frameworks to the new SDG framework, targets and indicators.

The objective is to identify an approach and lay down a framework to help companies link their current smallholder agriculture livelihood goals and impact measurement to the SDG framework, targets and emerging indicators.

We think this will help companies to build a deeper understanding of how their current work contributes to the SDGs and to report against nationally specific SDGs and targets. This in turn will enable their

stakeholders to better understand how the business impacts through the value chain can contribute to their national SDG priorities and identify opportunities to unlock greater impact.

Technical Assistance & Practice adoption*

Additional Indicator areas:

- x. Long-term supplier relationships
- xi. Crop loss *

The Food Lab is working with the Rockefeller Foundation, TechnoServe, PYXERA Global, AGRA, IITA and CIMIS to develop straightforward metrics frameworks to better understand crop loss in smallholder value chains. These metrics frameworks are being tested in 4 chains in East Africa. We will share the metrics along with value chain findings in Q2 '16. Stay tuned for a links to publications and webinars on this topic. And get in touch if you would like more information.

- xii. Gender

Further definition of indicators in SAF to provide guidance for those looking to measure in the same way for increased alignment and comparability *

ISEAL, COSA, and the Food Lab will be consulting their communities of stakeholders for help developing guidance on a core set of indicators derived from—and in common with—the Shared Approaches Framework, ISEAL's Common Core Indicators, and COSA's core set of sustainability indicators. We will be reaching out to the CoP for review and feedback in the coming months.

Matchmaking to facilitate collaboration on studies, learning from data, origin investment, etc. *

The Food Lab, ISEAL, and WWF have collaborated to build the [Sustainability Impacts Learning Platform](#), an online tool for facilitating collaboration on sustainability studies. Over the coming year, we will continue to refine this tool and reach out to users to connect them with one another.

In addition, the Lab will be looking for opportunities to match-make organizations working on similar issues. If you have organizational needs and questions related to smallholder performance measurement, please [reach out](#) and we will let you know whether there are others we know of with whom we can connect you.