

### *Milestone Purpose*

For Mulago the milestones are both a process and a document. The process (a series of conversations) allows us to come to a better understanding of your organization's current activities, scale strategy and evidence of impact. The document helps align our expectations and hone-in on what the most critical developments will be over the next year or two. Whenever possible, we try to tie the grant milestones to strategic or operating plans you already have in place.

### *Guiding Principles*

- Stay high level – don't get buried in the detail. If the detail is necessary, summarize in the milestones and add the detail in an appendix or footnote.
- Fewer milestones are better than more – stay focused. Pieces of your strategic or operating plan may be part of the milestones, but these documents serve different purposes.
- Pay attention to language; make it succinct.
- Milestones should almost all be observable or measurable. Sometimes they aren't (e.g. multi-year relationship building), but the bias is towards observable and measurable.

### FRAMING DETAIL

These details frame the milestones to follow. They give both of us an opportunity to find alignment and understand the big picture before diving into specific milestones.

- Mission – In 8-words or less, what is the central mission or purpose of your organization? This should include a verb, target population, and an outcome you can measure. For example: "Get smallholder farmers out of poverty."
- What We Do – In 1-2 sentences, help us understand the central thing that you do that leads to the outcome you desire.
- Best Impact Indicators – 1-3 indicators that you are following to build evidence of impact. These should directly relate to the outcome you're driving for in your mission statement.
- Big Ambition – at a high level, what is the big ambition for your work at scale?
  - Doer at scale: Who replicates your solution at scale? You, NGOs, businesses, government?
  - Payer at scale: Who pays for the solution at scale? Government (via taxes or other revenues), Big Aid as grants to NGOs, customers (earned revenue), philanthropy?
  - Distribution channel: How will your solution reach the target population?
- Scale Strategy – for each of your solutions (unique products, programs or services), briefly describe how you plan to move your solution from a pilot, to systematic replication, and into exponential scale.
- Delivery to Date – This gives us a sense of the scale of your key delivery metric(s).
  - Provide both cumulative figures and annual data on your key delivery metric(s) for the most recent fiscal year (e.g. # farmers enrolled).
  - Specify what stage your solution is in (R&D, replication, or scale-up); if you have multiple programs or solutions underway, please identify the stage of each.
- Three-year ambition – What do you hope to accomplish in the next 2-3 years (tying in with your internal planning process) that will help you get to your Big Ambition? These should be high-level, strategic goals.

## MILESTONES

### Solution Delivery

- Solution Demand and Momentum – This describes the delivery (or reach) of your solution (e.g. products, services, and/or other interventions)
  - For larger organizations, this is often broken down by country, or business line, or distribution channel...whatever helps us understand the activities that drive impact.
  - Use a table to summarize delivery activities.
  - The amount of detail is a balance – we need to capture and understand the full range of activities, but we don't need to know all the details.
- Scalability – Are there objectives related to improving the scalability of your solution?
  - Simplifying the solution
  - Reducing costs
  - Testing new distribution channels
- Scale Strategy – Are there objectives that advance the scale strategy outlined on the first page?
  - Engaging or building the capacity of your replicator at scale
  - Engaging the payer at scale
  - If relevant, objectives related to technology platforms, policy, and/or collective action that will accelerate or enable replication of your solution (particularly by others).
- Innovation/R&D: are there new solutions that you are investigating at the R&D stage – not the ongoing iteration and innovation that go along with existing solutions.

### Organizational Capacity

- People – major hires (e.g. the top 5 positions in the company) for the coming year
- Money – fundraising as usual does not need to be a milestone. Examples of important money milestones include:
  - Big increases in total money raised (25% or more)
  - Big increases in the proportion of revenue that is unrestricted
  - Adding a new type of funding source, e.g. government or bi-lateral funding
- Systems – important stuff that allows you to operate with increasing momentum and scale. Examples include:
  - Management information systems and software
  - Financial software and systems
  - HR software and systems
  - CRM or other relationship management systems
  - Data collection and/or impact measurement software and systems
  - Training/support software and systems
- Governance – no need to capture normal board development or recruitment. We are interested in:
  - Changes in how the board operates, e.g. scheduled meetings, overall size, engagement
  - Changes that will affect the composition by 25% or more
- Strategic Planning
  - Only include if this is a major new initiative

## Impact

- Key research initiated or wrapped up – Please highlight any key internal or external studies that are currently underway (e.g. baseline, midline or endline evaluations).
- Impact methodologies being developed – Are you revising or adopting new M&E approaches to help you better understand progress on your mission?
- Results – Actual impact created; may be from internal or external M&E.