Metrics and Milestones

In carrying out this project, we would measure our progress by tracking certain metrics, and we would measure our success by the achievement of milestones, described below. The milestones are calibrated such that we would aim to hit all of them, and expect to hit 80% of them. The Machine Intelligence Research Institute (MIRI) has gone through the process of shoring up their non-profit fundamentals; we will draw upon some of that expertise to expedite the process (and have consulted with MIRI staff in the choosing of these milestones).

These milestones are important, but would not be immediate priorities for us in the absence of a grant. Without a grant, our main focus would be on scaling up the workshop program, with significant executive time spent selling workshop seats, in attempts to raise revenue. In that case we expect to hit ~15% of these milestones in the given timeframes.

- **Milestone: Good financial reports (6 months).** Within 6 months of the grant, we will be able to quickly generate financial reports to answer questions such as "How much have we raised over the past [time period]?", "How much have we spent on [category] over [time period]?", or "What is our current burn rate?" that are no more than one month out of date.
- **Milestone: CFAR metrics (6 months).** Within 6 months of the grant, we will devise clear metrics related to our stated mission (pointing competent people at important problems, and increasing the skills and competencies of those people), we will have a system in place to measure those metrics, and we will be using those metrics to affect our ongoing operations and programs. Metrics will cover:
    - Subjective participant satisfaction with workshops (short and long term)
    - Impact of CFAR on participants' attempts to be effectively altruistic. (We can measure this in part by tracking significant changes in plans that participants report making after CFAR workshops. To see how we are currently measuring this dimension, see appendix A.)
    - Effect of CFAR programs on participants' personal effectiveness. (To see how we are currently measuring this dimension, see appendix B.)
    - Impressions that alumni and donors have of CFAR (and CFAR's organizational competence).
    - Organizational efficiency (e.g., number of staff hours required to put on a workshop)
- **Milestone: Donor Stewardship (6 months).** Within 6 months of the grant, we will have a number of new systems and practices in place to assist with donor stewardship, including the following (or similar):
    - Regular (monthly or quarterly) newsletters describing progress and updates.
    - Regular (quarterly) financial reports to the board, and regular (annual) financial reports to the public.

- ○ Regular (annual) public reviews of progress, and public statements of strategic plans and goals.
  - ○ A cleaned-up donor database, plus automated systems to make sure staff notice new medium-to-large donations.
  - ○ A policy of having staff maintain relationships with top donors outside of fundraisers, and keep them engaged with CFAR over time, plus automated systems to help them do so.
  - ○ A system for tracking and responding to donations (e.g., automatically sending donation receipts) that is up-to-date and automated.
  - ○ Occasional events (such as "open house" events) with donors.
- ● **Milestone: Staff Management (12 months).** Within a year of the grant, have clear common knowledge within the organization of what each employee's role is, and what they are and are not responsible for. (We suspect that doing this well will require experimenting with newly well-defined roles, and iterating, over the course of the year.)
- ● **Milestone: Published Metrics (12 months).** Within a year of the grant, publish our metrics, along with a discussion of what we're measuring, how we're measuring it, and why. This will include publishing an explicit model of our mission and how we plan to achieve it, and a discussion of how we think each metric relates to the success of our mission. This will also include a discussion of our goals and concrete targets. It may also include a discussion of which metrics we are not entirely satisfied with, and/or which experiments we are planning to run in order to figure out how to better measure our progress towards our mission.
- ● **Milestone: Customer Management (12 months).** Within a year of the grant, we will have systems and infrastructure in place that streamline and automate the way we handle workshop participants. This includes:
  - ○ Decreasing the amount of staff time required for engaging with each individual participant (in order to sell them on the workshop, do any financial aid evaluations, orient them to the workshop and where to show up, check in about food allergies, make sure they put in their deposit and eventually pay in full, etc.). To do this, we will begin by measuring the amount of staff time required for each task, and then work to reduce that time, mainly via automation and systematization.
  - ○ Automate tasks such as the creation of personalized name badges, schedules, and workbooks.
  - ○ Create a participant database that allows us to easily look up their survey responses, which other participants they've referred to the workshop, whether they received financial aid, etc.