Journey to Self-Reliance Secondary Metrics
Quick Reference

Goal: To provide a compendium of suggested metrics and other qualitative resources that can further inform analytical and decision-making processes related to self-reliance beyond the primary metrics and Roadmaps.

Purpose of the tool: Provide a common “hymn sheet” of a wide array of metrics and related information, organized along the Journey to Self-Reliance framework.
- Creating a richer picture beyond the Roadmap.
- Augmenting CDCS planning, project design, and other country-level analyses
- Building out information needed in partnership dialogues.
- Bringing more detail to self-reliance conversations with funders, like the Hill.

What is included? A living compendium of curated resources aligned under the self-reliance metrics framework (7 sub-dimensions under commitment / capacity).

1. Quantitative resources: Indicators include: (1) unpacking of existing metrics; (2) triangulation of existing metrics/issues; (3) new issues that contribute to Self-Reliance.
2. Qualitative resources: Additional resources for conducting qualitative analysis, including a vetted list of resources, assessments, and other suggested analytical tools.

How are the metrics selected? The secondary metrics are reviewed based on a common set of basic criteria:
- Primary criteria:
  - Relevance to the concept and logic of the framework (i.e. the dimension and sub-dimension)
  - Timeliness of the data
  - Soundness of the methodology
- Secondary criteria:
  - For the most part, public, third-party data
  - When relevant, broad country coverage

When will the Secondary Metrics compendium be available? We expect the first version of the Secondary Metrics compendium to be available in early May for use by Agency experts. The compendium will be a living resource that will be updated periodically based on feedback from end users and newly available data.
Overview: The purpose of this document is to answer the most common questions about the Journey to Self-Reliance (J2SR) Secondary Metrics. Specifically, the document will clarify their purpose, how they should be used, and how they were chosen.

1. What are J2SR Secondary Metrics? The secondary metrics and user guide is a resource that USAID staff can use when conducting their own analyses to better-understand a country’s level of self-reliance based on the Journey to Self-Reliance framework and theory of change. Like the primary self-reliance metrics, the secondary metrics will typically be at too high a level to serve as program or performance indicators, although they will be more closely aligned with USAID’s sectors and programmatic areas than the primary metrics, and may therefore play a role in identifying portfolio priorities, informing sector strategies and project design, and shaping programmatic and partnership approaches. They are intended to supplement, not replace, the 17 primary metrics across the dimensions of commitment and capacity.

2. Do we have to use these metrics? No. The J2SR Metrics Team does not require the Agency to use the metrics in the compendium. Rather, the Secondary Metrics represent a set of carefully vetted third-party indicators and underlying sources that could be useful in building a richer picture of a country’s level of self-reliance based on the Country Roadmap. We recognize the compendium does not address all issue areas that can matter to a given country’s journey, and the relevance and utility of a given compendium indicator depends largely on each country’s context / Mission’s need. Bureaus and Missions are free to explore and use other data sources as needed to fully understand key commitment- and capacity-related needs, challenges, and leverage points in their partner country; however, the Agency is strongly encouraged to carefully review any additional data source based on the criteria above.

3. How will they be used? The goal of the secondary metrics is to further inform strategic planning, project design, policy dialogue, and decision-making in Washington and the field by using quantitative and qualitative information that paints a more complete and richer picture of each country’s level of self-reliance. The secondary metrics will provide additional data sources to help USAID staff begin the process of understanding, unpacking, and expanding upon the results contained in the Roadmap, and bring more evidence to bear beyond what the Roadmap itself can provide. This resource will help staff gain a better understanding of what is underpinning the Roadmap scores, while offering new and supplemental information that can provide additional context and meaning to the Roadmap, including when the Roadmap itself may not be accurately
reflecting reality on the ground. More specifically, the Secondary Metrics have four primary purposes:

○ To improve CDCS planning, project design, and other country-level analyses by complementing and augmenting the primary self-reliance metrics with data that is (a) more closely aligned with USAID’s sectors and programs and (b) more sensitive to context-specific issues (e.g. political dynamics, sub-national issues, regional disparities, etc).

○ To yield a richer, more detailed set of self-reliance information that augments the primary metrics (Roadmaps) when discussing self-reliance issues with partners -- whether governments, civil society, or other stakeholders.

○ To provide an explanatory tool for engagement with Congress and other internal and external stakeholders on funding priorities.

○ To inform discussions around strategic transitions by providing a more complete picture of a country’s level of self-reliance.

4. **How were they chosen?** Between November 2018 and March 2019, the Journey to Self-Reliance metrics team engaged with technical, policy, and data experts across the Agency to identify valid, third party data that brings sector-based and other context-specific self-reliance issues into focus. Experts were consulted across USAID/W bureaus and field missions to review a large universe of potential metrics based on three primary criteria:

○ Relevance to the concept and logic of the framework (i.e. the dimensions and sub-dimensions)

○ Timeliness of the data

○ Soundness of the methodology

While third party sources are preferred to demonstrate impartiality, in certain cased USAID data sources have been considered.

5. **Does the Secondary Metrics Compendium include qualitative sources?** Yes, it is important to supplement the quantitative analyses performed by Missions with the secondary metrics with qualitative research that provides a richer picture of a given country’s level of self-reliance. While the majority of the data is quantitative in nature, in certain instances Agency experts identified qualitative sources that meet the three broad criteria listed above. These resources include, but are not limited to, regularly produced country and regional assessment reports or sector-specific assessment reports that address a key development topic area or issue (e.g., State’s annual Trafficking in Persons Report).

These qualitative resources are merely intended to serve as an initial starting point for USAID staff as they begin to unpack the Roadmaps with qualitative research. These resources are not fully comprehensive, often bring a global or regional lense to an issue, and are generally not country-specific. As such, USAID staff are strongly encouraged to
build on what is included in the secondary metrics and analytical guidance by also introducing more country- and context-specific analyses.

6. **Who do I contact with questions?** Please email the Journey to Self-Reliance Metrics Team at [selfreliance@usaid.gov](mailto:selfreliance@usaid.gov) with any questions and we’ll get back to you as soon as we can!