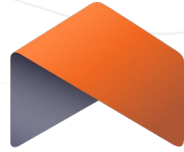# CATALYST
OF SAN DIEGO & IMPERIAL COUNTIES

Funding a thriving region, together.

Data-Driven Philanthropy

Strengthening Relationships and Streamlining Reporting Processes for Enhanced Impact

Housekeeping

- **Welcome y'all!**

- **All attendees will receive a copy of the slides in a follow up email after today's workshop and any corresponding materials**

- **10-12pm with 10 min break**

- **Restrooms are...**

- **We're so excited you're here, LET'S GO!**

Agenda

Part 1 (Intro and workshop)

- Welcome & Introductions - 10 min
- Visual Explorer Icebreaker - 5 min
- IMM What is it and why it matters? - 10 min
- IMM Workshop (Define) - 25 min
- Share out & Discussion - 10 min

Break - 10 min

Part 2 (Discussion, Q/A)

- Strengthening Relationships with Grantees -25 min
  a.   Streamlining the reporting process
  b.   Effective Communication Strategies
- Q&A + Feedback (survey via qr code in deck) - 15 min
- Conclusion / what's next? - 5 min

Let's get talking

Nice to meet you! 👋

Stephen   Greg   Alex

UpMetrics provides an impact measurement and management platform that helps purpose-driven organizations **have an even greater impact on the causes and communities they care about** by making it easy for them to measure, improve, report on, and showcase their impact.
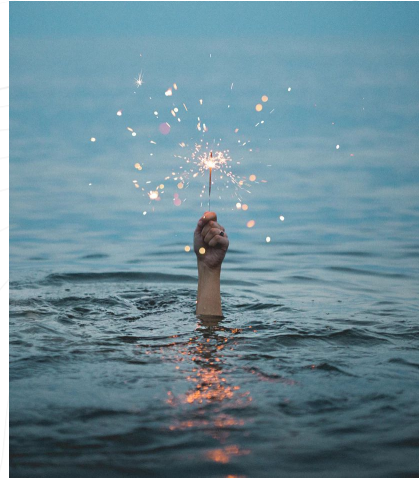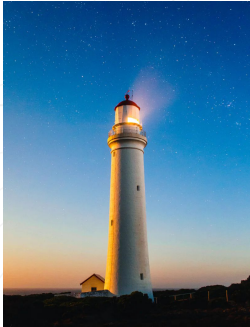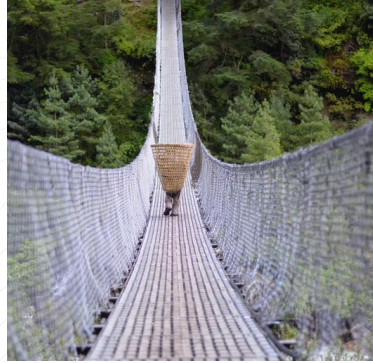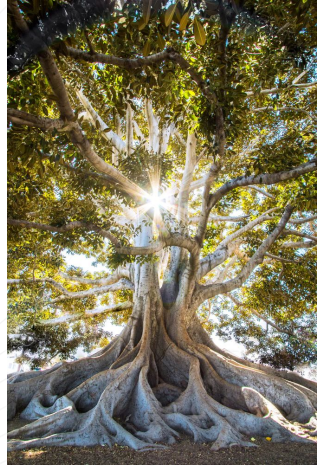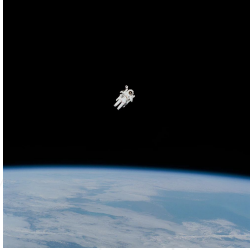
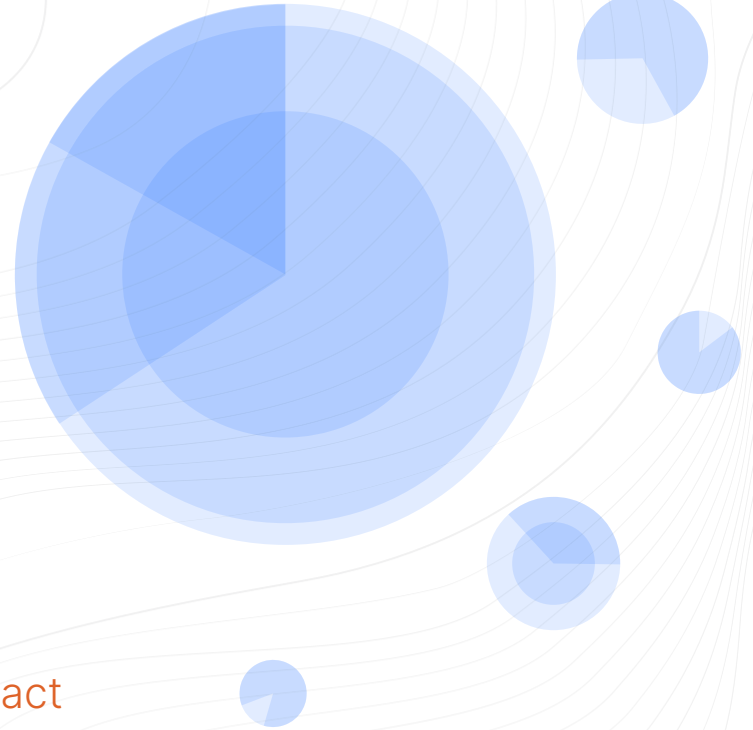# A connected future for the impact ecosystem

Introduce yourself!

- Share your name, role, and organization
- Which photo below best captures you and your work?

Start with WHY

The importance of tracking and measuring impact

Our Why

Supporting your journey

=

More <u>impact</u> within our communities

Pulse Check

Why did you join this learning session?

WHAT IS IMPACT MEASUREMENT?

The process of evaluating the effectiveness of programs, initiatives and interventions, to help organizations determine whether they are meeting their intended goals and delivering intended benefits to their target beneficiaries.

Go beyond tracking what you do (activities), to defining and measuring the short and long term outcomes of your work.

THE IMPACT OF IMPACT MEASUREMENT, WHEN DONE RIGHT

Purpose

Stay focused on driving outcomes in areas that matter most to you.

Credibility

Putting real numbers behind your efforts increases trust with all stakeholders.

Proof of Value

Amplify nonprofit partners' work by giving them numbers to pair with their stories.

Improvement

Don't just measure to measure - measure to improve.

WHY IS IMPACT MEASUREMENT SO DIFFICULT?

- **Complexity** - A wide range of measurement methodologies exist - where to start!

- Data collection and management can be **difficult, messy, and decentralized**

- Driven by select donor requirements vs. internal excitement to own, align and learn

- Limited **capacity** to execute

UpMetrics' IMM Methodology is <u>SIMPLE</u> + helps you measure, manage and communicate your story of impact

DeCAL

DEFINE

COLLECT

LEVERAGE

ANALYZE

Define - Establish your **Impact Framework** to define and operationalize how you measure and communicate performance and community contribution across your primary impact themes.

Collect - Collect, consolidate, and manage all relevant data in one centralized location.

Analyze - Understand impact outcomes and track ongoing progress towards goals and against industry benchmarks

Leverage - Use data to drive effective decision-making, simplify reporting, demonstrate outcomes across key performance metrics, and more **effectively tell your story of impact.**

Why use the framework?

- Provides a structured way to **understand** and **display** the impact of your organization

- Serves as a *data structure*

- Allows you to set **objectives** and **measurable key impact indicators**

Now Let's Dig Deeper...

Who

Who you are serving: e.g. Demographics / characteristics, # of recipients

Example Objective: Support organizations that provide youth training opportunities

Example 1: KII: % of programs with a STEM focus

Example 2: KII: % of BIPOC led nonprofit programs

Example 3: Total # of grantee partners

Who - let's try it together!

Who you are serving: e.g. Demographics / characteristics, # of recipients

Example Objective: Support organizations that provide youth training opportunities

Example 1: KII: % of _____

Example 2: KII: # of _____

What

__What__ are we delivering and how much? e.g. Product, services, capital, etc.

Example Objective: Deliver capital to organizations that provide youth training opportunities

Example 1: KII: % of grants that are multiyear

Example 2: KII: # of grant dollars allocated

Example 3: KII: % of grants that are unrestricted

What - let's try it together!

What *are we delivering and how much? e.g. Product, services, capital, etc.*

Example Objective: Deliver capital to organizations that provide youth training opportunities

Example 1: KII: # of _____

Example 2: KII: % of _____

Group Work Time

Share out

10 min

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Pulse Check

What does it look like if relationships with your grantee partners are 'strengthened'?

Is it this?

What about the real?

As I'm cherishing the last few days of my extended holiday break, I want to make an important ask.

Funders, can you please eliminate any and all proposal and/or reporting deadlines between December 15 and January 15? "Extended" holiday break because the actual holiday break was anything but work-free.

Back on Tuesday. Until then...peace.

Kaci Y. Patterson, MBA · 1st
Cultural Broker—Bridging Philanthropy and Community | Th...
1w · 🌐

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Chief Executive Officer at Downtown Women's Center
Amen!
Like 👍 5 | Reply

Pulse Check

What are some areas of friction that you experience relative to the funder // grantee relationship?

Drive impact through information & relationships

Compliance-focused mindset	Learning-focused mindset
Transactional relationship	**Transformational relationship**
Funder-derived metrics	**Grantee-derived metrics**
Grant report text boxes (as the space for sharing impact stories)	**Grantee-funder conversations** (as the space for sharing impact stories)
Discourages vulnerability, innovation, and growth	**Invites vulnerability, innovation, and growth**

Drive impact through information & relationships

Compliance-focused mindset

Transactional relationship

Fun~~ding~~

How do we go from here…

Grant report text boxes

(as the space for sharing impact stories)

Discourages vulnerability, innovation, and growth

Learning-focused mindset

Transformational relationship

to here? What are the barriers?

Grantee-funder conversations

(as the space for sharing impact stories)

Invites vulnerability, innovation, and growth

Why stories? Why not point to numbers of impact?

- Aren't numbers enough to drive action?

- Stories allow you to:

  - Share complex ideas

  - Inspire ownership of ideas (i.e. tool for your board to go out and better advocate)

  - Foster connection between your stakeholders and the communities you serve

The secret to a good story is data and strategy

Example:

This month:
- 27 families
- 210 volunteer hours
- 4 families graduated
- $6k in fundraising

VS

Angela and her family were one of the **4 families that graduated** from from our program this month, of the **27 families** in our community. Angela said that she could not have gotten back on her feet without our program and the support of other families and our amazing volunteers! We are so proud of Angela and will continue to support her family in their transition. We hit a record **210 volunteer hours** last month as we prepared for our annual fundraiser in February, which we hope will make up for donations being down, although we always expect **low donations** in January. If you have the chance, please consider donating to this important cause and supporting families like Angela's!

To Inspire Action - External & Internal

Lead and Engage with Impact Data:

1. Ensure your Mission is Clearly Defined
2. Create a Compelling Narrative around your Work
3. Identify Your Target Audience
4. Build an Authentic Brand
5. Leverage Social Media and Digital Marketing
6. Engage in Thought Leadership
7. Cultivate a Community
8. Show Impact and Results
9. Listen and Adapt
10. Celebrate Milestones and Successes
11. Go Beyond the Annual Report
12. Stay Committed for the Long Term

Q&A
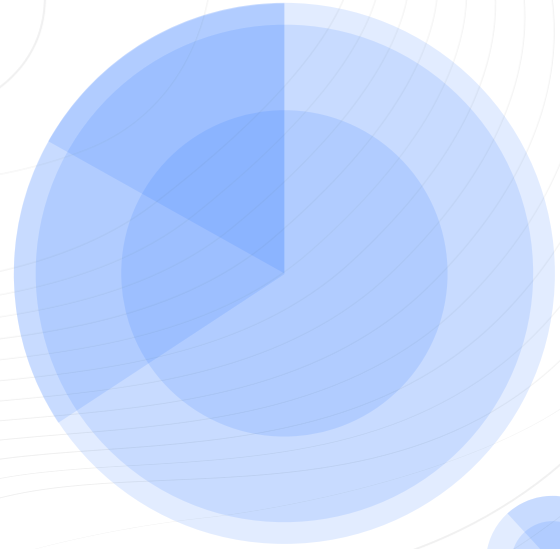
How closely does your organization's grantee reporting requirements align with your stated goals and mission?
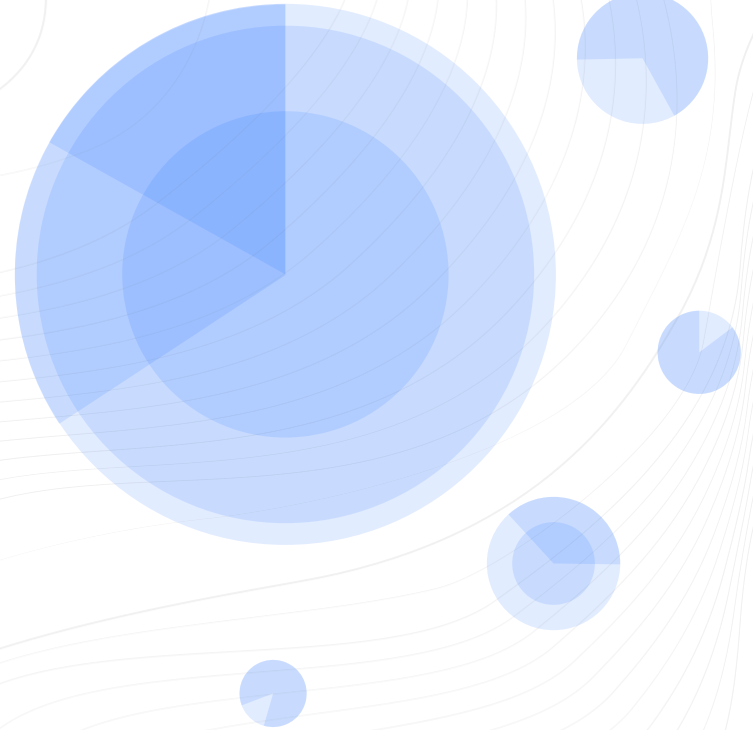
How does the information you learn from your grantee partners inform the work at the Foundation?
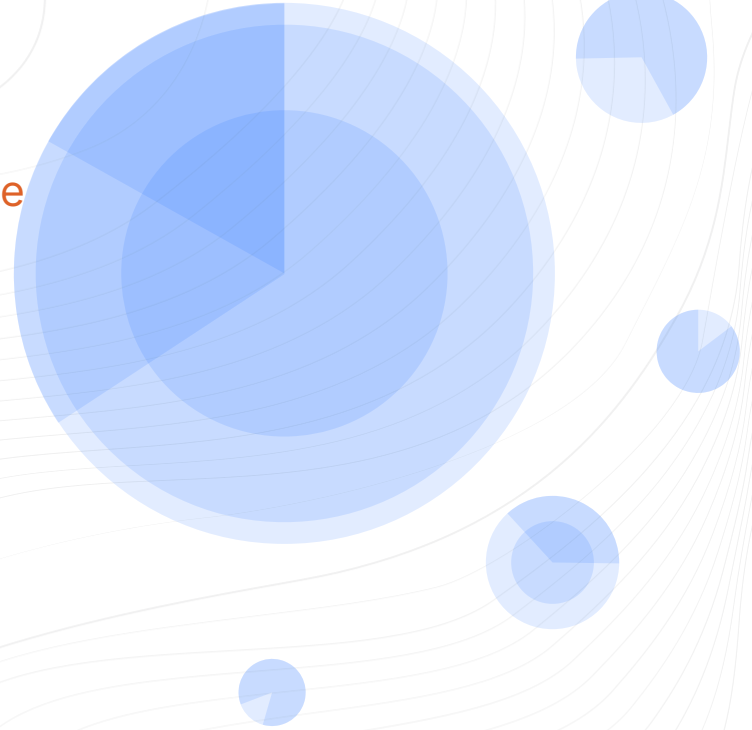
Waive the magic wand… what is one thing you would solve to improve the impact ecosystem? Why that?
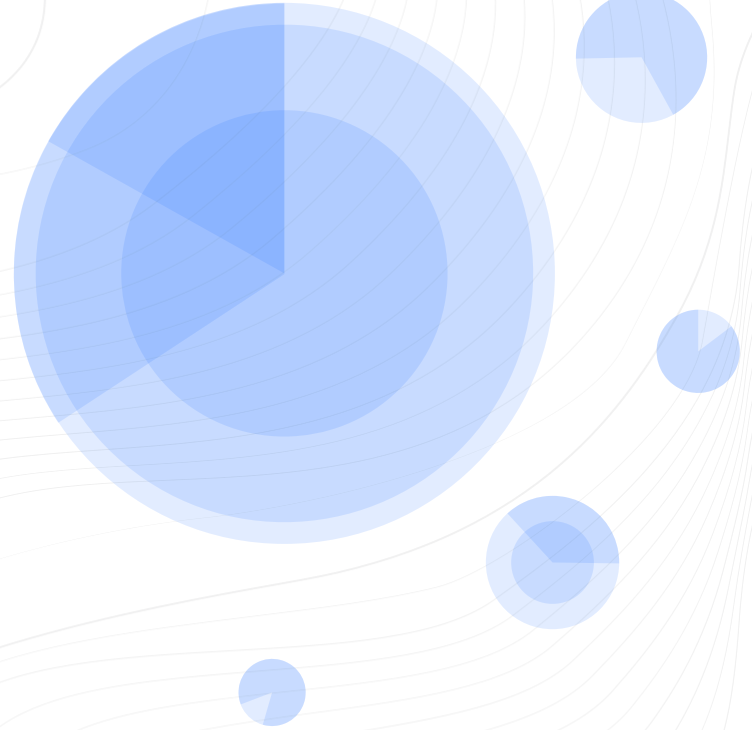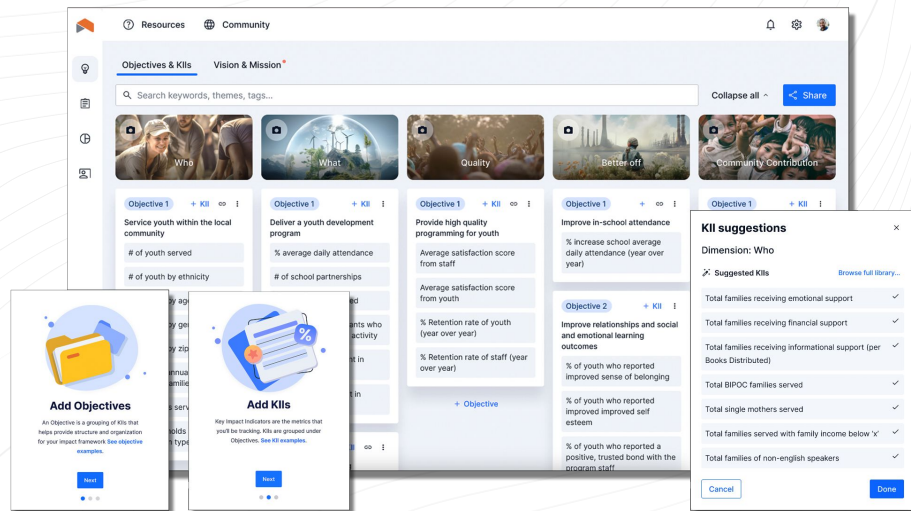
Catalyst survey

BONUS: Early access to UpMetrics' Impact Framework Builder

UpMetrics' free Impact Framework building tool is launching Spring 2024

Scan the QR code and sign up via the form to be one of the first to receive access when we launch!

Lets Connect!

Alex Jackson, alex@upmetrics.com

Stephen Minix, Stephen@upmetrics.com

Greg Woodburn, Greg@upmetrics.com