



Funding a thriving region, together.



UpMetrics

Data-Driven Philanthropy

Activating Our Mindsets to Advance Our Missions



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**
- **10-12 pm with 10 min break**
- **12-1 lunch**
- **Restrooms are...**
- **We're so excited you're here, LET'S GO!**



Agenda

Part 1 (Introduction and Recap)

- Welcome, Intros, Icebreaker - 15 min
- Catalyst Programming - 5 min
- Recap of Where We've Been - 35 min
 - 1/25 Session on Impact Measurement
 - 3/7 Session on Power Dynamics, Ecosystems, "Date the Grantee"



Break - 10 min

Part 2 (From Talk to Action Re: Power Dynamics)

- Humility as a Funder - 20 min
 - Centering grantees in communications/asks
 - Exercise: Assumptions vs. Actions
- Integrity & Blind Spots - 20 min
 - Exploring gaps in our networks
 - Exercise: "Surprise & Delight" Grantees
- Conclusion, Q&A, Feedback - 15 min
 - Survey



Lunch - 12pm



Nice to meet you! 🖐️



Stephen

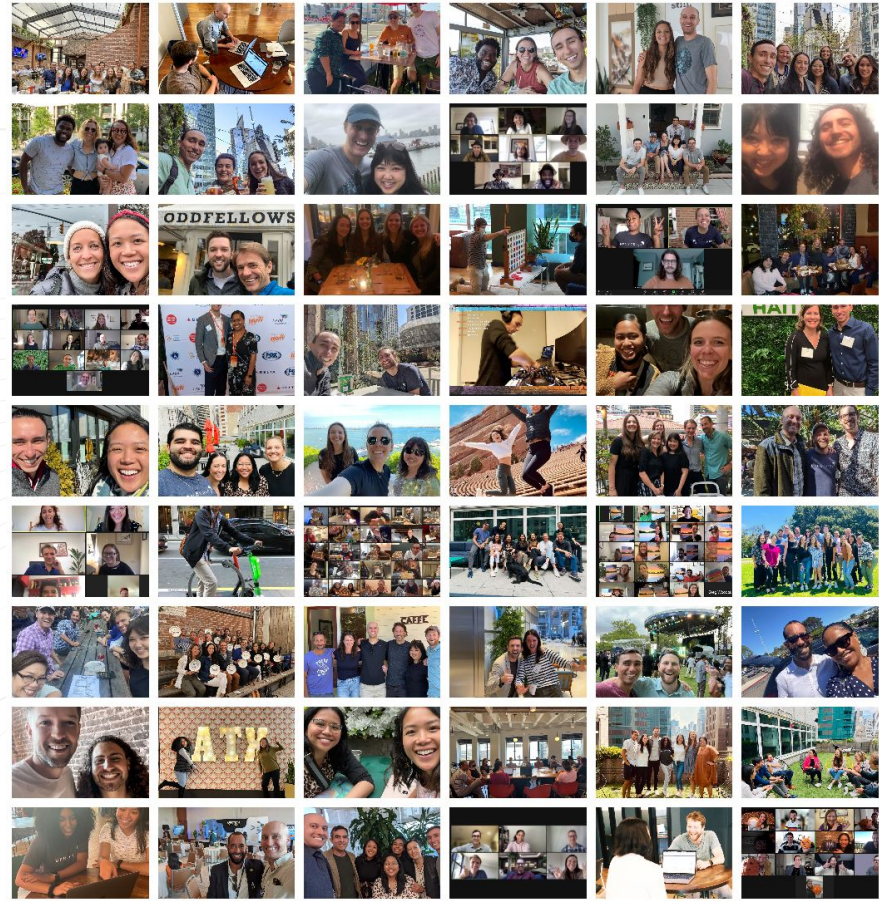


Greg



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.



Introduce yourself!

The ask... in 1-2 minutes:

- Please share your name & organization
- Tell us about someone who has changed your life but may not know they did?



Where we have been

- 1/25 - Impact Measurement, Relationships
- 3/7 - Power Dynamics, Ecosystems, “Date the Grantee”



Pulse Check

Why did you join this learning session?



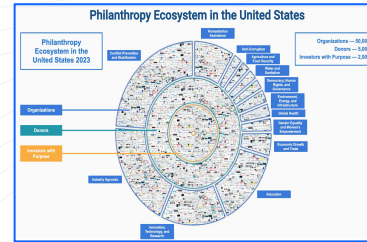
Solo reflection... or new thoughts!



1. Impact Measurement



2. Ecosystems/Relationships



3. Power Dynamics



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.



Who are you serving

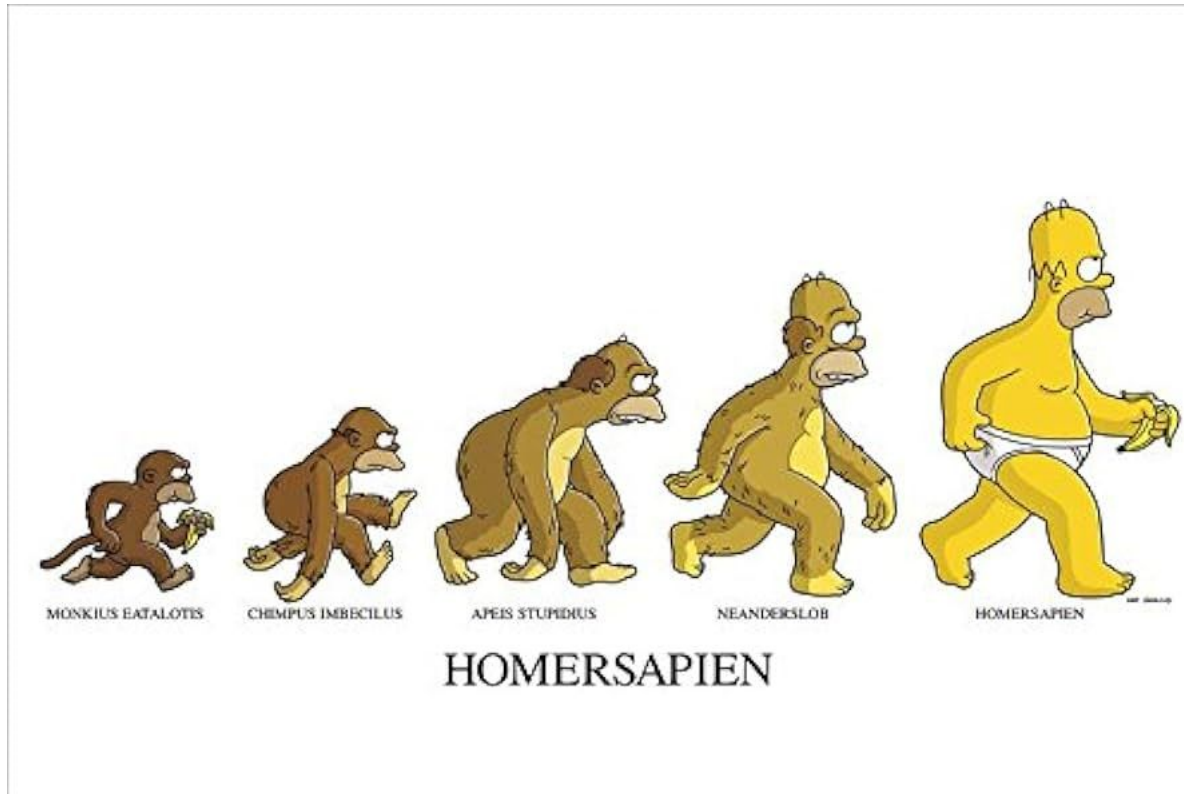
Example Objective: Support organizations that provide youth training opportunities

Example Indicator 1: % of programs with a STEM focus

Example Indicator 2: % of BIPOC-led nonprofit programs

Example Indicator 3: # of total grantee partners

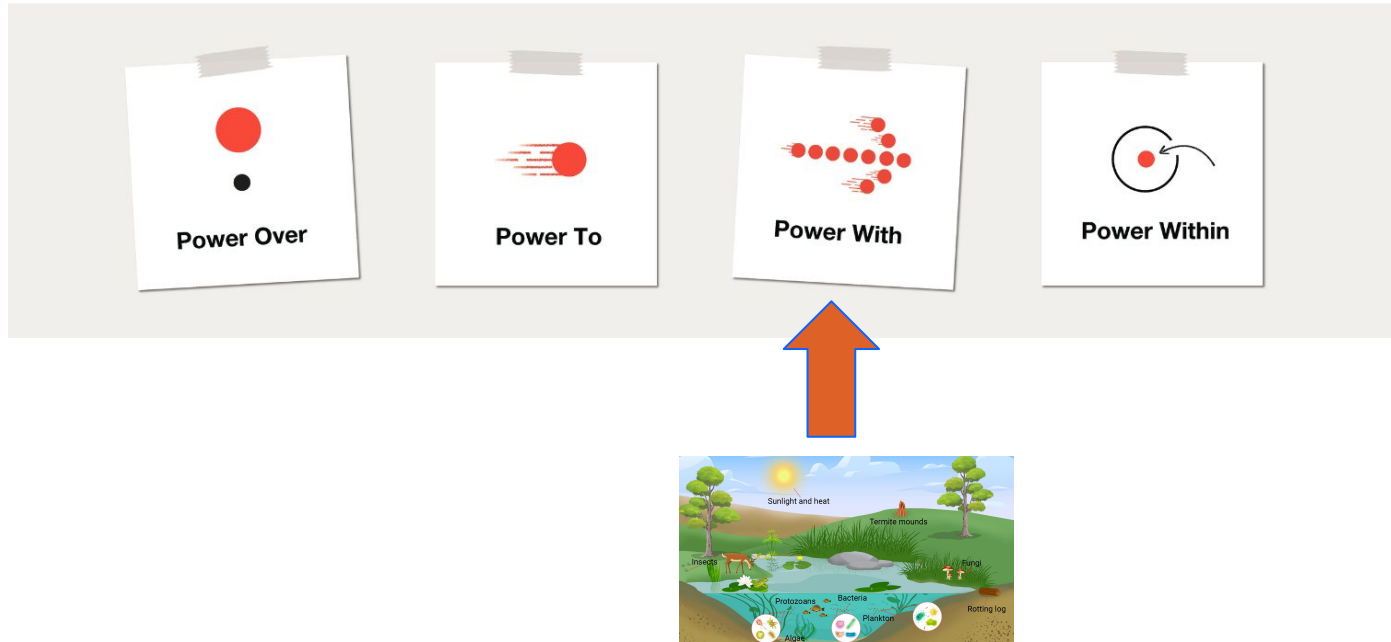
Philanthropic Practices Evolved Over Time



The Inherent Power Dynamic



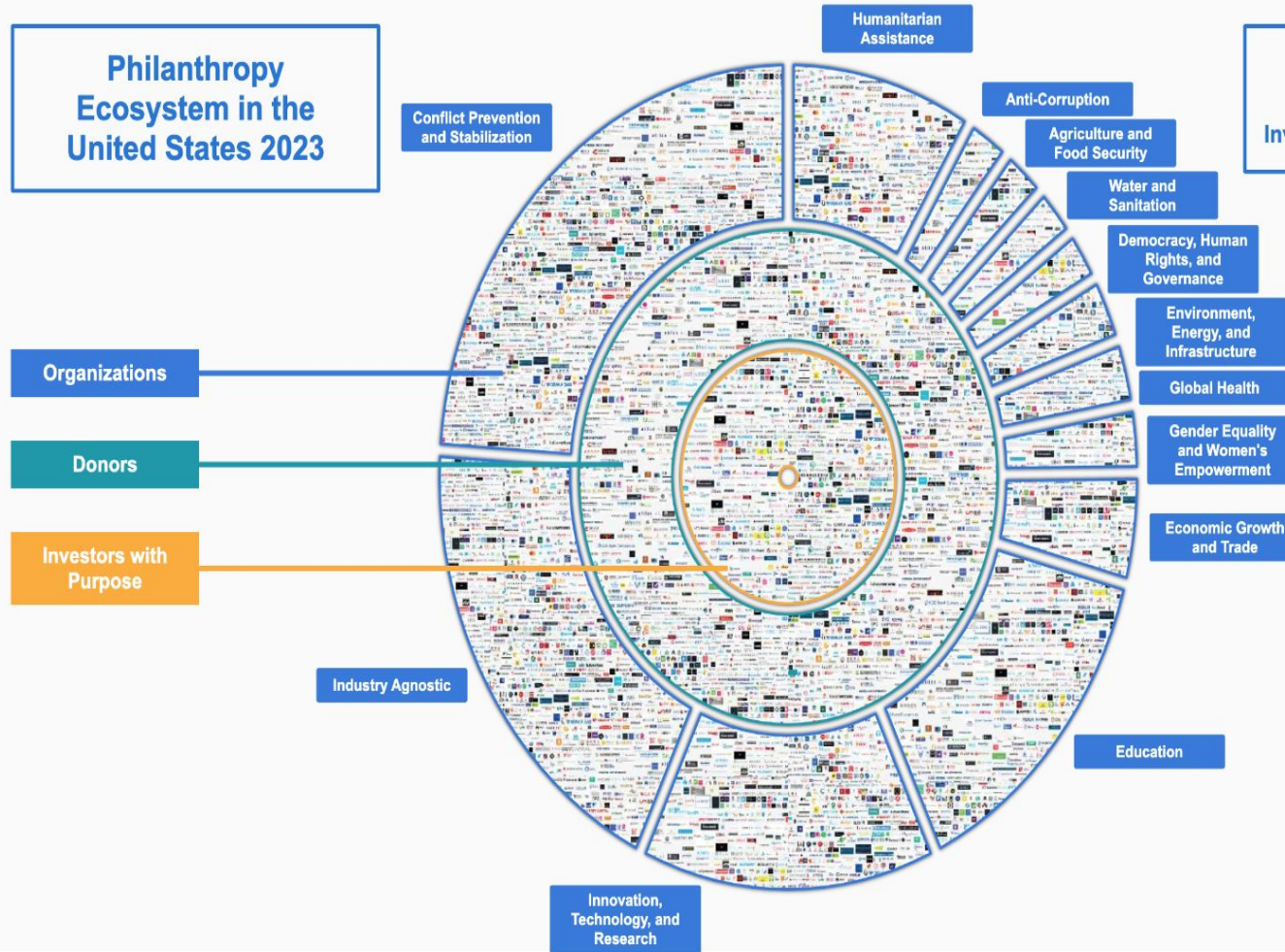
The Inherent Power Dynamic



Philanthropy Ecosystem in the United States

Philanthropy Ecosystem in the United States 2023

Organizations — 50,000+
Donors — 5,000+
Investors with Purpose — 2,000+





Social Entrepreneurs

Scot Chisholm (Classy);
Chuck or Aviva (Kitchens for Good);
Suman Kanuganti (Aira);
Michael Bronner (Dr. Bronner's)



Networks

Conscious Capitalism; B Corp;
Business for Good; Chamber of
Purpose; Gamechangers; Ashoka

Mentors

(Parker Pike; Ken Davenport)



Capacity Builders

Accelerators (Social Enterprise
Accelerator @ Mission Edge; Impact
Without Borders; TechStars); Incubators
(Collective Impact Center; Muse for
Good; Hera Hub)



Knowledge & Talent

Colleges & Universities (USD's Center
for Peace & Commerce; UCSD's
Center for Social Impact &
Innovation); News & job databases
(ImpactAlpha; Idealist.com)



Large Enterprises

Corporate CSR (Qualcomm) and
established Social Enterprises



Government

Small Business Development
& Regional Economic



Gatherings

Pitch Competitions (Global
Social Innovation Challenge
@ USD); Cause Conference;
San Diego Startup Week



Funding Sources

Impact Investment (Social Venture
Partners; Mission Driven Finance); San
Diego Foundation-Social Enterprise Fund;
Grants; Angel Investors; Venture Capital;
Corporate philanthropy



Service Providers

Funding platforms (Classy;
GoFundMe; DonationMatch);
Lawyers; Accountants; Branding
& communication (thinkParallax)

Social Enterprise Ecosystem - San Diego -

Discussion & Share Time

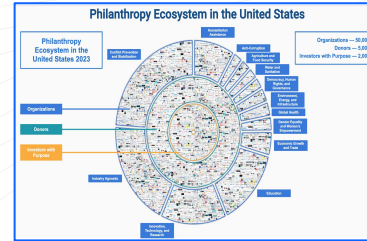


Breakout groups

1. Impact Measurement

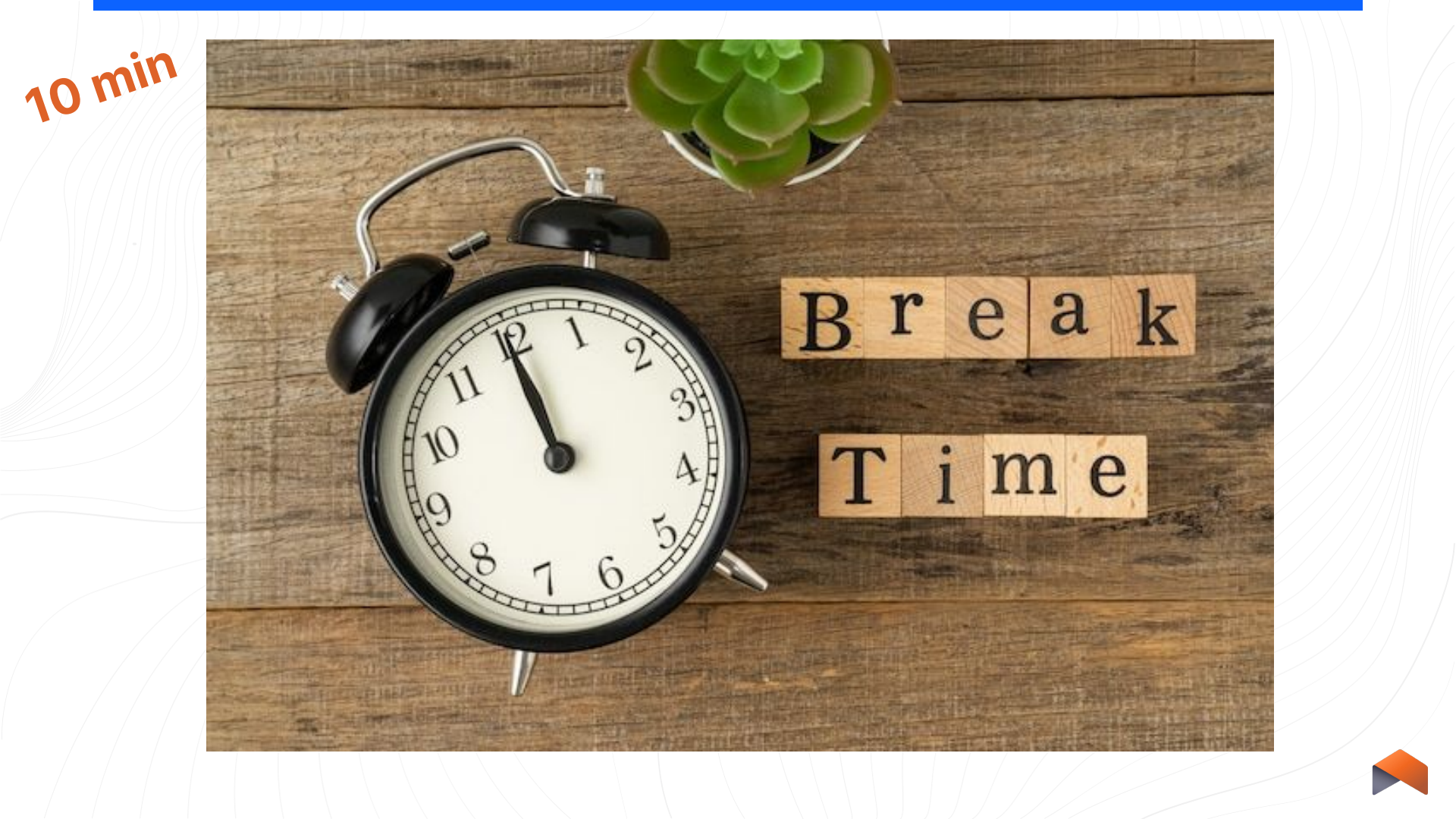


2. Ecosystems/Relationships



3. Power Dynamics





10 min



Agenda

Part 1 (Introduction and Re

- Welcome, Intros, Icebre
- Catalyst Programming
- Recap of Where We've
 - 1/25 Session on
 - 3/7 Session on F

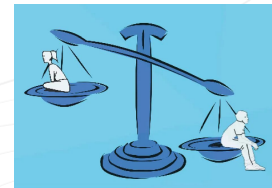


'stems, "Date the Grantee"

Break - 10 min

Part 2 (From Talk to Action Re: Power Dynamics)

- Humility as a Funder - 20 min
 - Centering grantees in communications/asks
 - Exercise: Assumptions vs. Actions
- Integrity & Blind Spots - 20 min
 - Exploring gaps in our networks
 - Exercise: "Surprise & Delight" Grantees
- Conclusion, Q&A, Feedback - 15 min
 - Survey via QR Code in deck



Lunch - 12pm



Assumptions vs. Actions



Humility as a funder

How to put what we've been talking about in practice:

- **Become a student again**
 - Self inquiry, what are your goals?
 - What are you not the expert in? And who is?
- **Do your homework**
 - Research the area, the issues, the players, the organizations doing similar work, etc.
- **Learn from the experts**
 - Ask honest questions, visit folks to build connections (go to them)
 - Consider the costs associated with asks



Where do I make assumptions vs. take action?

Relationships

Relationships

**Where I make assumptions and likely
see only the “tip of the iceberg”**

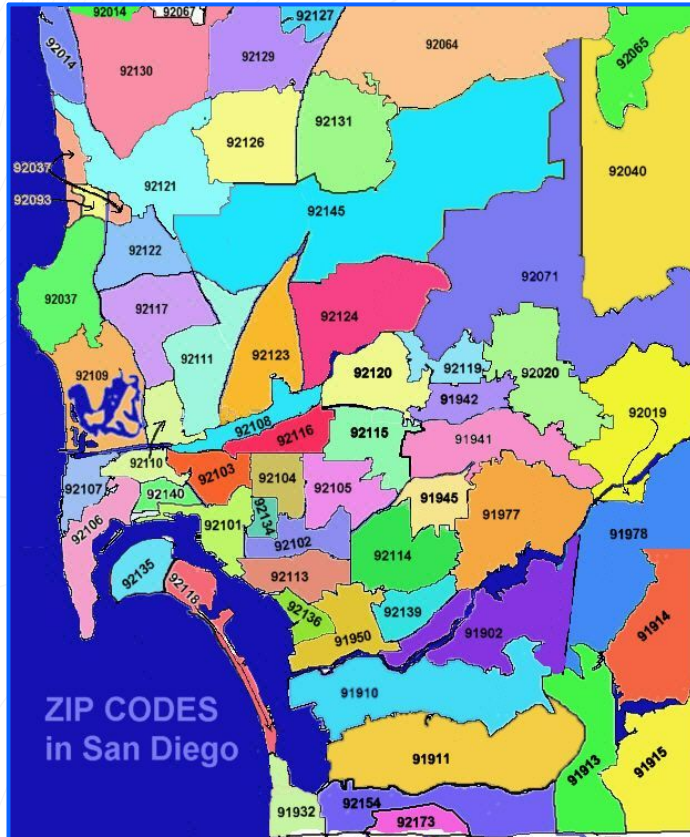
(write with non-dominant hand)

**Where I take action to help me see
the “entire iceberg”**

(write with dominant hand)



Where am I spending my time?



| | |
|--|--|
| | Stephen d/o kids at School 7:30 – 8:15am |
| | Logan's wizard of Oz play 9am, Hearst Elementary School (623 |
| Leadership - Monday Meeting 10am, https://us02web.zoom.us/j/87 | Community Engagement & Events Mana all notes from references in Lever, 10 |
| UpMetrics and SHF, 11am | Using D Using D Impactful Func 11am, h 11am, h 11am, h Stephen |
| Logan play, 11:50am | DEI Monthly Check-ins 12pm, https://us02web.zoom.us/j/60 |
| Catalyst deck/session work 1 – 2pm | Stephen and Peter 1pm, https://us02web.zoom.us/j/834 |
| Community Engagement & Events Mana | SM // GW, 2pm, https://us02web.zoo |
| Community Engagement & Events Mana | Chat with Celete, 2:30pm, https://us0 |
| Aline/ Stephen - final prep, 3pm, http | Catalyst final run through, 3pm |
| | Send Rob Faulk email about ILC - rea |



Integrity as a funder

Get out of the "reality distortion field" that can easily happen as a funder! Questions to consider:

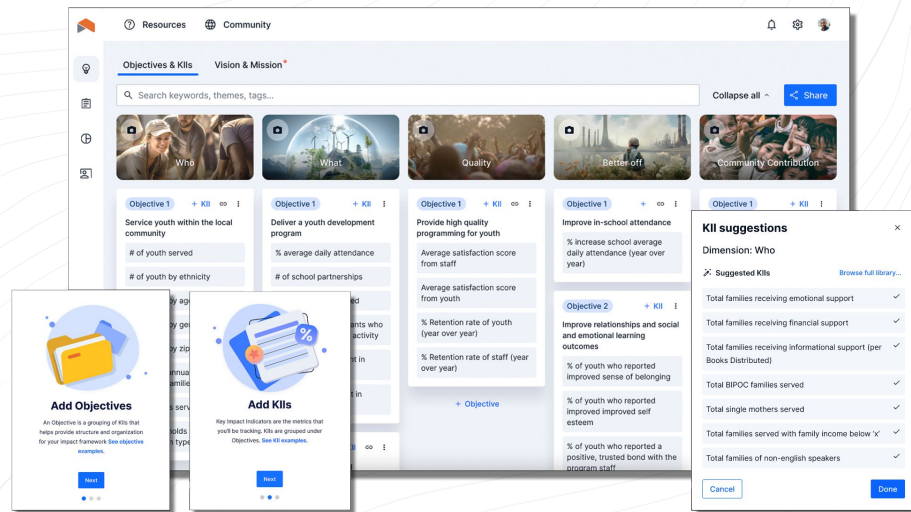
- **What steps can you take to address the blind spots?**
 - Gaps in your network?
 - What you spend your time doing?
 - Where (geographically) you spend your time?
- **How much time does it take from when you make decision to fund a grantee, to when the money hits that grantee's bank account?**
 - Do you know the answer? Who at your organization knows / could help you find the answer?



Free resource to share with grantee networks

UpMetrics' Impact Accelerator Initiative provides the nonprofits with **FREE** access to our platform and resources to develop their impact frameworks (no credit card, no time limit, no gimmicks).

Nonprofits can then share their impact frameworks with other organizations to support collective learning and impact on a larger scale.



Closing thoughts

- **With stronger relationships and access/use of the right information, what do you imagine would be different:**
 - In your own philanthropic work?
 - In the lives of people working at grantee organizations?
 - In the communities being served?
- **Next steps to continue building relationships with grantees:**
 - “Fund The People Initiative” funder-grantee listening session - date TBD
 - Upcoming Catalyst “Deep Dive” programming focused on Reporting, and Evaluations - July 30th
 - Potential UpMetrics cohort in 2025?



Catalyst survey

Lets Connect!

[Alex Jackson](#), alex@upmetrics.com

[Stephen Minix](#), stephen@upmetrics.com

[Greg Woodburn](#), greg@upmetrics.com

Thank
You

