UpMetrics

How to Make Data Actionable

Introduction

With digital transformation, a new era in philanthropy was launched where high volumes of data from multiple sources became available with the click of a mouse. The result is access to more data than ever before, but this newfound resource has come with expectations. With more access to data should come more prevalent data-driven decision making, higher accountability around the impact of your programs, and more efficient reporting processes. However, a recent survey showed that only 50% of organizations acknowledged using available information for decision-making.[1]

The challenge is with this abundance of data has been an absence of focus on capacity building and training philanthropic professionals on how to re-organize their organizations to be data-driven. Historically, data collection through reporting requirements has been in silos. That hasn't changed, but the expectation for impact organizations to use this data to offer a clear view of their overall impact has. Without resources, training and tools, how can philanthropic professionals shift from evaluating impact by singular programs to aggregating data across many sources and finding key drivers of change through analysis?

There are a few key steps that organizations can take to equip their organizations to be able to take action with their data, using the available information to make better decisions that drive their mission forward. In this paper we will review four of these key steps. Once your organization builds the necessary foundation to be able to use the wide amount of data available to you, there are four areas where we've seen our partners focus their efforts, driving action under these themes with support of data: equity, collaboration, optimization and storytelling.

At the conclusion of this paper, you will have learned key steps that will allow you to use the vast amount of data available to you, both from internal sources and public data, to drive strategic action. This data-informed strategic planning and action will result in accelerated progress toward goals and new opportunities to support your community. Take each use case presented from a variety of types of impact organizations and consider how the questions they asked their data can help your organization as you look to use your data to drive action.

1 BI-Survey, *14 Survey-Based Recommendations on How to Improve Data-Driven Decision Making*

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The Challenge Today: Connecting the Dots Across Multiple Sources of Data

BY CHANTAL FORSTER,
Technology Association of Grantmakers

We often hear the same frustration from our members at the Technology Association of Grantmakers (TAG): they want to utilize data to inform their decision-making, and they want insight from a wide range of sources. The advantages are clear— according to a survey from PwC, highly data-driven organizations are 3x more likely to report significant improvements in their decision-making[1]. Data instills confidence in your decisions by lending evidence to your impact strategy, identifies areas of improvement or opportunity, and opens the door for communication both internally and with external partners.

However, in actuality, the data needed for decision-making for most funders come from a wide variety of sources. Some data live with grantees. Other data reside in aggregated form in institutional databases such as school districts, health systems, or local service providers. In other instances, a funder's valuable knowledge or data may meet internal roadblocks when it is "owned" by different teams. For example, often within a foundation, the IT department may "own" and prepare dashboards of investment portfolio data, but the Evaluation department "owns" outcomes data. With these two teams storing information in different databases or data lakes, how can we connect the dots?

To truly understand social change requires an "ecosystem" view of data. The challenge is not a lack of data in itself, but the ability to integrate the knowledge of each department, each impact organization. Only then will we be able to translate this data into areas of opportunity, using each point to inform our future decisions. To reach a place where a data ecosystem is possible, each organization needs to make a commitment to opening up knowledge silos, developing methods for integrating across data stores, and building a culture of data-informed decision making.

When that occurs, knowledge is unlocked internally as well as **externally**. Funders working in a similar "change ecosystem"— on the same issue or in the same geographic area— will have greater knowledge of both progress as well as gaps. My hope is that this transparency will also drive more authentic partnership with community changemakers. As the challenges we share increase in complexity, we are increasingly asked to recognize our interdependency in solving them.

Ultimately, that is our goal as changemakers— knowing what it takes to realize big shifts together that have a positive impact on society. Having the data you need, when you need it, and in a form that enables insight primes your organization and your partners for realizing impact.

1 The Advantages of Data-Driven Decision Making, Tim Stobierski. HBS Online, 2019. https://online.hbs.edu/blog/post/data-driven-decision-making

Part I:
How to Make Data Actionable

Provide Resources & Training

BY KATHRYN L.S. PETTIT, Urban Institute

Several programs at the Urban Institute focus on building organizational and community data capacity. Data capacity in itself is a broad topic, and one that can mean many different things depending on the goals of your organization and where you are today. Put simply: data capacity is your ability to collect, analyze, protect and act on data. At a minimum, this includes data that you have internally, like reporting on progress and achievement of key performance indicators (KPIs). When evaluating the data capacity at your organization, it is crucial to first determine the questions you would like to answer to improve planning and implementation of your programs. Then, you can assess the tools, resources or skill sets that you currently have access to that would help answer your questions. This list of data capacity tools from Urban Institute is organized by the target of capacity-building—whether for individuals, organizations, or your area collectively. There are also many groups, besides Urban Institute, that are committed to supporting organizations like yours as they build out their capacity for data. These groups offer technical assistance, peer learning, and documentation of best practices for different sectors. In addition to setting a foundation internally, including identifying needed training or assistance and developing a playbook for improving and using the data you currently have , you can look outside your organization to using community-level data for planning or explore how responsible data sharing may improve the delivery or evaluation of your programs. Here are three ways you can take building data capacity a step further, setting your organization up for even deeper success with interpreting your data and identifying next steps.

Looking Local: The Importance of Local Data Capacity

Data is a tool that can fuel progress on ambitious community goals, like reducing poverty. However not every neighborhood or region has the same training or resources available to them to learn the skills needed to access and use data to their advantage. Take the time to not only evaluate your organization's capacity for data analysis, but consider how you can tap skillsets from other groups around you as well. Encourage your local philanthropy to get involved. From "Investing in Data Capacity for Community Change": To enhance a community's ability to achieve change, foundations can promote the use of data by grantees, champion community data resources and capacity, and invest directly in building community-wide capacity.

Advancing Equitable Data Practice

Researchers use data to shape conversations around topics like policy, programs and resource allocation[1] . Nonprofits and other impact organizations can be doing the same— using data to provide the context needed to

1 Principles for Advancing Equitable Data Practice, Gaddy, Marcus, Scott, Kassie, Urban Institute, 8 June 2020, https://www.urban.org/research/publication/principles-advancing-equitable-data-practice

2 Elements of Community Data Capacity, August 2020, Investing in Data Capacity for Community Change https://www.urban.org/file/data-capacity-handoutpdf/download?token=iK9D8EeQ interpret crucial areas of need in their communities or identify the root causes when a program fails to achieve its goals. Researchers use the Belmont Report's principles— beneficence, respect for persons, and justice— to ensure they are following the right practices given the potential harm their research can have on people's lives, particularly on communities of color. By using the same principles and training staff to do the same in data collection, use and reporting, the social sector can ensure an equitable lens is given to their data practice.

Community Capacity: Together, We're Stronger

When all stakeholders in your community, across sectors, are equipped to collect, share and use data effectively, there will be a support system that can provide unparalleled resources to your organization when it comes to analyzing your impact data. The foundation of community capacity is the availability of and access to resources that equip local stakeholders with the necessary skills to understand and take action on data. This framework from the Urban Institute can be used to identify an organization's strengths as well as where they're getting stuck (either with individual tasks or organizational practices). You can improve areas as needed through technical assistance programs, training workshops, or one-on-one coaching, as well as tutorial videos, written guidance, and file documentation[2]. You can also encourage or participate in community-wide support for using data, such as establishing learning communities or collective planning for better data infrastructure.

1 Principles for Advancing Equitable Data Practice, Gaddy, Marcus, Scott, Kassie, Urban Institute, 8 June 2020, https://www.urban.org/research/publication/principles-advancing-equitable-data-practice

2 Elements of Community Data Capacity, August 2020, Investing in Data Capacity for Community Change https://www.urban.org/file/data-capacity-handoutpdf/download?token=iK9D8EeQ

Transparency: Sharing What Matters

BY KIM LYNES, Upmetrics

Transparency is a loaded term in the philanthropic space. In my mind, it is most often associated with the idea of accountability. For you it may trigger thoughts of finance and governance, or a way to gain the trust of your community.

The Center for Effective Philanthropy committed to providing clarity around the term with a survey to funders in 2016. After examining the survey results and reviewing several foundation websites, they found consensus around the idea that transparency in philanthropy is focused on the substance of the work that nonprofits and foundations are doing[2].

The study also found that foundations are most transparent about their grantmaking processes and their goals and strategies, but are less transparent about how they define success and how they use reporting to improve moving forward. This is a critical point: they are less transparent about how they are taking the data they have and using it to inform their actions, eliminating the opportunity for learning amongst stakeholders. Foundations that were transparent in this area had one thing in common: a strong belief from their leadership that transparency in reporting will increase the foundation's effectiveness[2].

The lesson here is clear: **to truly be set up for data-driven decision making, the leadership at your organization needs to identify it as a priority, see it as a tool to increase success and invite others into the conversation.**

As CEP phrased it in their study, transparency means sharing what matters[2], and powers your ability to optimize your efforts, an area that is crucial for success. This is not limited to communication between grantee, funder and donor, either— it also applies to internal teams. As this article from Harvard Business School points out, knowledge sharing in organizations leads to "greater creativity, more innovation and better performance"[3]. However, not all environments are set up to encourage this sharing of knowledge.

Research cited in the article from HBS highlighted a few key reasons that employees hide knowledge from one another, illuminating ways organizations can proactively fight against this kind of an environment. **The best way to encourage information sharing among groups is to communicate the importance of the practice, and how it will directly influence progress toward goals.** When pressured to share knowledge, employees are less likely to do so.

2 Sharing What Matters: Foundation Transparency. The Center for Effective Philanthropy, 2016, http://cep.org/wp-content/uploads/2019/08/CEP_Sharing-What-Matters-Foundation-Transparency_2016.pdf.

3 Why Employees Don't Share Knowledge with Each Other, Marylène Gagné, Amy Wei Tian, Christine Soo, Bo Zhang, Khee Seng Benjamin Ho, and Katrina Hosszu, Harvard Business Review, 2019 https://hbr.org/2019/07/why-employees-dont-share-knowledge-with-each-other

4 How Funders Can Get Better At Getting Better, Lowell Weiss. Washington Monthly, 2020. https://washingtonmonthly.com/magazine/january-february-march-2020/how-funders-can-get-better-at-getting-better/

This can be seen in the funder-grantee relationship as well. When grantees are asked to submit static numbers as part of reporting requirements, requirements that only go one way, they don't feel that funders are committed to continuous improvement. This is shown in the Grantee Perception Report, also powered by CEP. CEP's vice president of research said "We see a strong and clear association between more positive grantee experiences and funders who receive regular feedback from their grantees."[4] The report also shows a clear association between funders that receive higher ratings from grantees around clarity of their communications and their responsiveness, and those that are perceived to be making the largest impact.[4]

When your organization establishes a culture of transparency, both with external stakeholders and internal teams, you will be better set up to act on the data you are collecting. Why? Because the people who will use the data, who can offer the context and lens needed to suggest solutions, will see it.

2 Sharing What Matters: Foundation Transparency. The Center for Effective Philanthropy, 2016, http://cep.org/wp-content/uploads/2019/08/CEP_Sharing-What-Matters-Foundation-Transparency_2016.pdf.
3 Why Employees Don't Share Knowledge with Each Other, Marylène Gagné, Amy Wei Tian, Christine Soo, Bo Zhang, Khee Seng Benjamin Ho, and Katrina Hosszu, Harvard Business Review, 2019 https://hbr.org/2019/07/why-employees-dont-share-knowledge-with-each-other
4 How Funders Can Get Better At Getting Better, Lowell Weiss. Washington Monthly, 2020. https://washingtonmonthly.com/magazine/january-february-march-2020/how-funders-can-get-better-at-getting-better/

Tools to Collect & Analyze Data

BY ANNIE RHODES, UpMetrics

Besides your staff, data is one of an organization's strongest assets. However, we often wait to look at our data for a rainy day and then, when we are ready to tackle it, we don't know where to start or what to do. What does your organization need in order to collect and analyze your data and communicate your impact story? You need to invest in your data capacity with dedicated resources to create a data strategy, identify the technology needed to capture and analyze your data, pinpoint the skills you need on your team and implement a strong data culture to ensure that your data strategy and learnings will be used to drive decision making and action from your data.

In order to create and implement a data strategy, you need to understand where your organization is on its data journey. Based on the data maturity process[1] outlined by Steve MacLaughlin in his book Data Driven Nonprofits, are you at the beginning of your journey where you have the data but only know what happened or are you in the middle of your journey where you understand what happened but need to move more into prescriptive and predictive analysis of your data? Most organizations are in the first or second buckets however the ones that have evolved towards diagnostic are able to "...provide a mechanism that aligns organizational staff and resources towards achieving organizational goals and programmatic outcomes" as shared by TechBridge in their Practical Guide to Defining and Implementing a Nonprofit Data Strategy.[2] Your data strategy will help you understand what data you have, what data you need and how to prioritize your data needs. This plan will provide data alignment and transparency across your organization and will help the organization stay on track towards your data goals.

Next you need resources in order to invest in the right data analytics tools. Without the right tools you and your team won't have a way to collect, analyze, visualize and turn your data into something actionable. There are a number of tools available to help organizations at all levels from Microsoft's Excel to Google's Sheets to help with the baseline capture and analysis of data. Tools such as UpMetrics, PowerBI and Tableau will help an organization understand what happened and will provide you with advanced data analytics in order to provide streamlined ways to share your data with shareholders and your community. Tools like Amazon Redshift, Microsoft Azure and Google BigQuery, among others will help your technical team warehouse and mine large volumes of data from different sources to perform various operations or tasks.

1 Data Driven Nonprofits, Steve MacLaughlin, https://www.merriganco.com/blog/2017/4/13/secrets-of-data-driven-nonprofts

2 TechBridge Practical Guide to Implementing a Nonprofit Data Strategy, https://www.techbridge.org/wp-content/uploads/2019/04/TechBridge-Practical-Guide-to-Defining-and-Implementing-a-Nonprofit-Data-Strategy-002.pdf

3 Stop Talking Big Data, Start Thinking Data Culture, Justin McCord, Forbes, https://www.forbes.com/sites/forbescommunicationscouncil/2019/06/04/stop-talking-big-data-start-thinking-data-culture/?sh=4c43e81a7eaf

4 Data Culture Project https://databasic.io/en/culture/

Now that your strategy and tools are in place you'll need to make sure you invest in team members who have the right skillset to look at and analyze your data in those tools. Does this mean you need to go out and hire a data scientist or analyst? Not necessarily. You may have the talent required already on your team or you may need to engage a consultant on an as needed basis. It all depends on what your data priorities are from your data strategy. Do you need an analyst to help with some data analysis or a developer to build a data warehouse, or a data scientist to build complex benchmarks and indices to compare to. All are different skill sets that can bring immense value to your organization.

The key across all of these themes is investing in resources. To truly embrace a data driven mindset is not only having the right data strategy, tools and people, it's ensuring that a data driven mindset becomes part of the culture of an organization. As Justin McCord shared in Stop Talking Big Data, Start Thinking Data Culture[4], "Forging a data culture is an iterative, behavioral commitment that requires constant collaboration and sharing." If you make data strategy the hero and invest in the tools and resources needed to implement your data strategy, your organization will move from collecting data to collaboratively collecting, analyzing, learning and taking action on your data.

1 Data Driven Nonprofits, Steve MacLaughlin, https://www.merriganco.com/blog/2017/4/13/secrets-of-data-driven-nonprofts

2 TechBridge Practical Guide to Implementing a Nonprofit Data Strategy, https://www.techbridge.org/wp-content/uploads/2019/04/TechBridge-Practical-Guide-to-Defining-and-Implementing-a-Nonprofit-Data-Strategy-002.pdf

3 Stop Talking Big Data, Start Thinking Data Culture, Justin McCord, Forbes, https://www.forbes.com/sites/forbescommunicationscouncil/2019/06/04/stop-talking-big-data-start-thinking-data-culture/?sh=4c43e81a7eaf

4 Data Culture Project https://databasic.io/en/culture/

A Commitment to Data: Reimagining Measurement During Turbulent Times

BY MARY KOPCZYNSKI WINKLER,
Independent Consultant

In my 25 years of working with nonprofit organizations and government agencies to design performance measurement systems, it wasn't uncommon for some leaders to abandon their costly and demanding approaches to data collection. Unfortunately, it simply wasn't a priority. It's understandable since these leaders were juggling multiple issues (e.g., providing relevant programming, losing a reliable funding source, or struggling to keep their lights on). But frankly more needs to be done and it doesn't have to be so costly or demanding. Technology is improving and helping to make data collection and reporting more turn-key.

A commitment to internal and external performance measurement is even harder now as nonprofit leaders contend with a health crisis, an economic crisis, and a social justice crisis. Yet, innovative measurement and evaluation strategies can provide insights about how well programs and strategies are working and give opportunities to engage and learn more about the people we serve.

Here are a few ideas on how to reimagine measurement to respond to what's happening in the here and now:

- Experiment with creative ways to connect with your clients to learn what they really need. Feedback Labs and Listen4Good's five questions may be helpful as you think through ways to connect with clients.

- Consider mobile technology as a way to connect with your clients. I worked on a Social Innovation Fund evaluation project to better understand how opportunity youth were faring with services they were receiving from local providers. We had a difficult time getting paper, in-person surveys completed, so we pushed out the survey to clients' cell phones. It wasn't perfect, but it helped improve our response rate and allowed us to engage clients in a way that was new to us but likely more fulfilling for them. Also check out 60 Decibels which has a lot of resources and a point of view that there is "a human voice behind every data point."

- Whenever possible, break out data by different demographic groups to explore differences in outcomes. Use data to explore questions of equity and inform your program approaches for those who may need services the most. Policy Link's Racial Equity Index is one such tool that provides disaggregated data at the local level to target solutions that address institutional and structural racism.

- Reach out to other nonprofits and service providers which may be experiencing similar circumstances and challenges. Perhaps there are ways you can partner to help "lighten the load" or simply learn from and support each other. And don't be afraid to adopt promising measurement and evaluation approaches that you observe in other places.

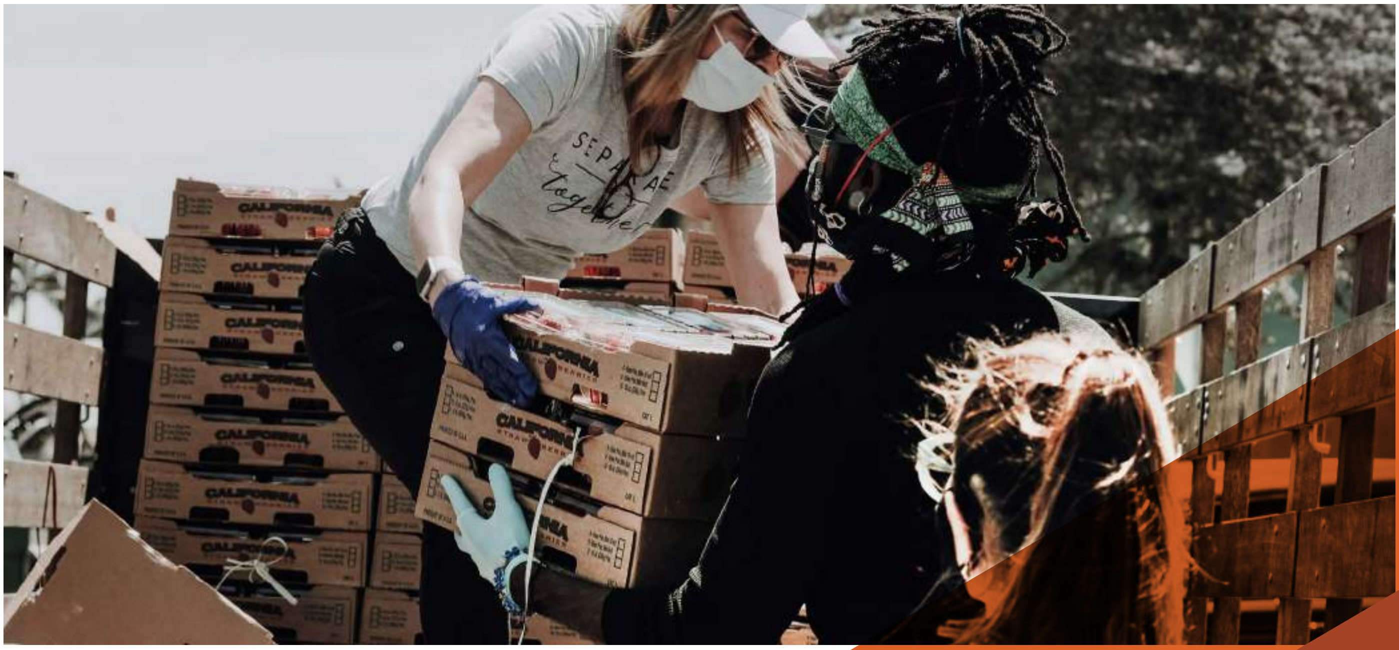
- Transparently share your needs and challenges around measurement and evaluation strategies that are no longer working with funders. These days, many are more than willing to listen, support, and work alongside you during these challenging times. The Leap Ambassadors Community offers a font of information including the Performance Practice that could be one useful resource to help grantees assess their needs and better discuss them with funders.

- Another fairly recent, but helpful strategy is to engage clients, constituents and stakeholders in data walks. This strategy provides an opportunity for conversation and learning.

- Last, but not least, consider ways you might be able to improve your organizational learning culture.

I hope these resources provide some optimism and assistance as you try to navigate these unprecedented times. While we will continue to navigate significant change, maintaining your commitment to data and the flexibility to pivot how you collect data will be key to success. Open lines of communication can serve as an excellent strategy and remain the guiding point to where your efforts will best be focused even in times of unknown.

Part II:
How You Can Be Using Data to Drive Action



Spotlight on: Equity

BY RACHEL C. OATIS, Black Equity at Work Certification, Management Leadership for Tomorrow

There are several ways for organizations to approach equitable access to data and technology, and it all starts with looking at the data. First and foremost, the journey to creating organizations who prioritize equitable access to tools and technology begins with a commitment to creating an anti-racist organization. This begins with the recognition of the history of systematic racism in industry, community, and workplace environments. Next, organizations can make change, turning recognition into action, by using data to unify, educate and get internal buy-in around racial equity as a strategic priority.

Using data to unify. Organizations should center around using technology to support or create networks where information and knowledge is shared. During my time working at foundations, there was a concerted effort to create robust ecosystems of current and past program participants. By connecting change agents through web-based platforms they can partner in their mission-based programming. A great example of this is the platform Virtual Braindates that connects like-minded individuals with similar interests through virtual and in person gatherings.

Using data to educate. Organizations who have made equitable access to data and technology a priority should also prioritize a communication strategy to reach the communities in which they serve. Most often, underserved communities do not have regular/reliable access to technology. Therefore, organizations have to be creative in collecting data and overcoming challenges like access to the internet, connectivity and the lack of access. Once that hurdle is addressed, organizations need to strategize on how they'll be putting that data to use: both internally and sharing data with community members in a way that is relevant for advancing their work and deepening interpretation. Organizations who use data strategically are better poised to work through complex problems—from identifying challenges in target audiences to redefining scope of work and funding necessary to accomplish benchmarks. Learning from the data is just as important as collecting the data.

Using data as an internal function. Organizations who are data justice driven include it as a priority in the day-to-day practice of all team members. During my work with organizations who meet the data justice bar, I have seen data training prioritized in the employee recruiting and onboarding experience. Data should not be a foreign object that gets in the way of work. Data should be used to enhance the work of employees at every level of the organization— human resources, marketing and communications, legal, office management, development, and strategic planning.

To ensure data is a tool that can be utilized effectively at your organization, there are a few key questions you need to ask yourself and/or others.

1. Can you access the data?
How is it presented or prioritized?
Is the data public information and how does the team plan to visualize the data? How does the organization plan to communicate data/trends externally? Is the role of the data collectors team to provide solutions or simply to collect data and report out to program managers? What is the purpose of the data for the organization?

2. Do you have an anti-racist approach to data?
In addition to internal policies to create an anti-racist organization, does the organization also conduct an independent audit of policies/procedures? If so, are the auditors independently and minority owned? How does the data collected externally vary with the experience of internal facing audience groups (ie. employees, junior level staff)? Based on the mission of the organization, are there large gaps in how the brand is perceived internally vs. externally? Are there any marginalized groups who should be included at the table who are not?

3. Who is represented in your data?
Is there a diversification in survey collection groups? Are organizations only surveying the same sample group of individuals to collect data?

4. Are you taking bias into consideration?
What is the makeup of the team collecting the data? Are data collectors trained in how biases represent itself in data? What is the capacity of the team? Does the team have enough bandwidth to support each of the internal programs?

5. Is there accountability associated with the data?
What is the teams' access to leadership and key decision makers? What is the frequency they share data with important stakeholders (board of directors, senior leadership team, donors, supporters)? How does the organization plan to be held accountable for the data? How is the organization allowing the data to inform strategic priorities? Are those who are being affected included, to whatever extent/degree, in the decision-making process?

In my experience, executive buy-in and organizational alignment on equity priorities are essential to creating a racial equity plan, tracking progress toward racial equity goals, and taking action on the data especially when you compare yourself to industry benchmarks. My work with the MLT Black at Work Equity Certification is centered around supporting employers and their work to center Black equity in their organizations. The Certification establishes a clear and comprehensive standard for what "good" looks like to achieve Black equity in internal and external practices. The Certification collects benchmarking data in five pillars: Black Representation at Every Level, Compensation Equity, Inclusive/Anti-racist Work Environment, Racially Just Business Practices, and Racial Justice Contributions and Investments. No matter where an employer is on their journey to Black equity, we remind employers that all progress begins with commitment.

Spotlight on: Collaboration

BY KACI Y. PATTERSON, MBA, Black Equity Collective

Data is not a prerequisite for collaboration— every day we see formal and informal projects across sectors where two (or more) organizations have joined together to work toward progress on a similar issue. My question for you is how often do you see a partnership between two entities and think: are they truly working toward the same goal? How do their two stories interweave?

I often see collaboration used effectively to work toward solutions for complex issues when available resources are scarce. However that circumstance alone is not enough to power effective collaboration that achieves the goals all parties set out to achieve. Collaboration needs to be rooted in data with clearly articulated goals and staff that can collect data connecting the dots for all parties and communicating out results. Then all stakeholders have the data needed to make informed decisions together, best utilizing their individual expertise and resources. **The data helps to form the trust that is the glue to any successful collaborative effort.**

Collaboration for me is about co-design. Everyone has to be bought into a shared goal and vision. To successfully moderate and gain buy-in from a diverse group of people, coming from different vantage points, requires me to engage all stakeholders and identify the threads we all agree on. This shared vision, pain, and progress aligns the group around a collective goal, and also encourages ownership across stakeholders. The collaborative project at this point holds the same level of priority and importance for each contributor, ensuring resources (including time) will be allocated to the effort of making progress toward these shared goals.

One crucial resource that is pivotal to the success of collaborative efforts: staff. I like to recognize the fact that when it comes to collaborative efforts, people always have other projects going on within their organizations. That means collaboration must be staffed with dedicated resources, weaving the network together through communication and connecting the dots. This communication must include the truth— whatever the data is telling us— so we maintain the trust needed to be successful in our collaborative effort. The data is needed to understand how we're doing and where we may need to pivot— but without the trust to share this information among stakeholders to drive action, it is useless.

A big point I like to consider when thinking about the perspective of each stakeholder is that each contributor has a different stake in collaborative initiatives. The simple fact is that ground level organizations have more at stake than funders when taking part in collective projects— the risk is much higher. Understanding and acknowledging your role in different collaborative efforts can add additional layers of trust within the group, ultimately benefiting both the end result and the speed at which the project can be completed. No one organization wins given a specific outcome— all stakeholders win as they progress toward their shared vision. Funders should focus on the process of trust-building as one important outcome of the work, which allows other, more tangible outcomes to flourish.

Collaboration is the key behind the success of many initiatives I have been a part of in the past, and is the primary ingredient for success in a newer initiative: the Black Equity Collective. Read more about this project on page 22.

Spotlight on: Optimization

BY JASON SHIM, Director of Digital Strategy and Transformation, Pathways to Education Canada

Data has significant potential to drive optimization within organizations. At Pathways to Education Canada, data is utilized across all teams to gain insight and help achieve different objectives. For example, engagement metrics around communication with youth can identify areas for improvement; clickstream data from our tools can help identify where and how students are experiencing challenges navigating an interface; and general feedback loops with staff and students can help inform how services are offered. The key to successful optimization efforts is that all of these serve our mission to provide youth in low-income communities with the resources and network of support they need to graduate from high school and build the foundation for a successful future.

At the Pathways to Education Learning Lab, where I dedicate my time, we create and share technology that directly improves the lives of young people. As we explore and build these tools, qualitative data is also an important consideration to ensure success. I find that a crucial piece to being able to optimize our efforts is listening to the voices of users and understanding their needs. Incorporating qualitative feedback loops allows us to gain a deeper understanding to make informed decisions and conclusions, rather than assumptions about why something is working (or not working). Defined parameters are essential when developing strategies for optimization in order to understand exactly what drove the desired change. When these insights are identified, the information can be shared across the organization and utilized by other teams and channels.

The process of exploring and understanding the underlying needs and pain points of staff and students using our tools involves the aggregation of data collected via focus groups, surveys, feature requests, and other feedback mechanisms. The qualitative data is examined for reoccurring themes and areas are identified where these insights can potentially enhance our understanding of the qualitative results. From there, hypotheses are formed that are then explored via additional focus groups and techniques employed to understand underlying needs, such as *five whys.* After conducting additional research and analysis, a new feature may be prototyped and subsequently introduced to a pilot group for ongoing and additional feedback. These regular and recurring feedback loops are critical to ensuring that the tools and processes that are introduced are useful and relevant.

Another key to successful optimization efforts is ensuring a culture that permits experimentation within your organization. This also includes making time to ask questions about your data and improve progress towards key performance metrics. Pathways to Education Canada has established that culture of innovation in many ways. In addition to a dedicated staff innovation committee, one example is the internal *Tiny Gains* initiative. *Tiny Gains* promotes the idea that improvement can come from anyone and can be small and incremental. After all, a simple 1% gain in efficiency every day for a year would result in 37x improvement annually— that's the exponential power of optimization.

Spotlight on: Storytelling

BY LISA DELPY NEIROTTI, Ph.D., George Washington University Sport Philanthropy Program

For decades, sports organizations have used storytelling as a way to drive a deeper engagement. Whether it's game recaps, cinderella seasons, or in-depth player profiles, this type of content has long been distributed in either written or video form. We know that effective storytelling humanizes a brand, breaks down barriers and builds bridges between an organization and its fan base or consumers. In turn, this deeper engagement leads to increased donations, program enrollment, volunteer engagement, merchandise sales, or ticket sales.

With new generations of fans caring more about player off-court passions as much as on-court performance, and purpose over profits, social good has become a differentiator for brands and properties as they look to engage with fans and donors. We know that the public is open to social good messaging, but also that it's a differentiator when it comes to the bottom line. So, what are best practices to maximize communication opportunities?

Every organization has qualitative and quantitative data that is unique to its audience. It is essential to disseminate this information in a consumer-friendly way. Gone are the days of the stodgy end of year annual reports. More regular sharing through social media platforms and e-newsletters in a visually appealing, clear and concise way is today's best practice. Avoid doing a data dump but rather divide up and focus on different segments of your data. Always be sure to include a call to action, like Donate, Volunteer or Sign Up Now in all messaging. The goal is to have the data tell the story and inspire consumer action.

It is also important to prepare snackable content (text, videos, infographics) and ask others in your circle— be it athlete ambassadors, board members, staff, volunteers, parents, sponsors and participants (where applicable)—to post on their respective websites and social media platforms and to share, like, comment on each other's posts. This will help expand your reach beyond those already familiar with your organization. Overtime, follow results to determine what content performs best on what platform. Not every piece of information should go on every platform. Below are general recommendations but do your homework and know your audience:

- **Website:** This is where your core audience can find you. Your most ardent donors will visit the site and can be updated on activities, events, data-driven impact, and annual reports. Links to social media and to a giving option should also be included.

- **Twitter:** This should be used for real-time occurrences like an event, a shared experience, an infographic, or testimonial.

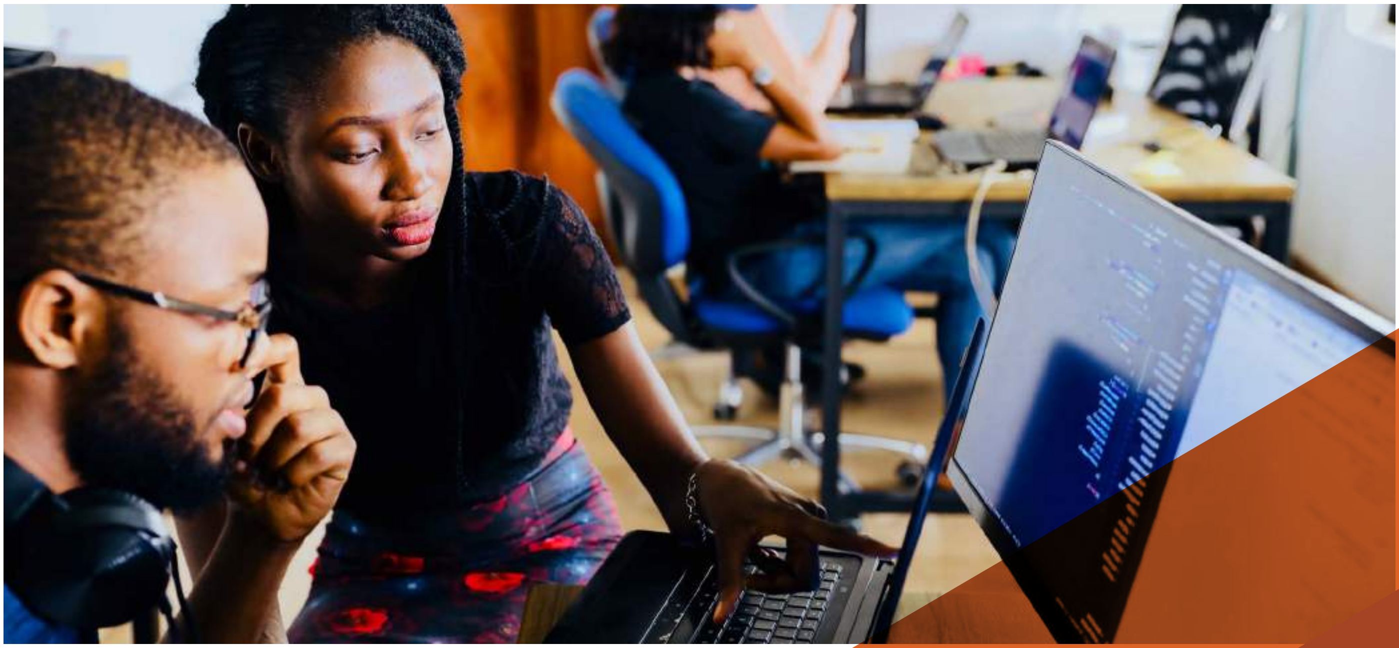
- **Instagram:** This is a storytelling platform. Visually appealing graphics and images will always win over text-based materials. A picture is worth a thousand words.

- **LinkedIn:** This is a professional platform, so text heavy content can live here.

- **TikTok:** This is where you can showcase program activity and creative work of participants.

In summary, with the increased interest on social causes, nonprofit organizations can benefit by regularly sharing stories that include data-driven graphics, photos, videos, and testimonials as well as prepare content that all stakeholders can share with their respective audiences. Continually monitor engagement on the different platforms and adjust to meet the interest of those following.

Part III:
Use Cases of Data Driving Action



Spotlight on: Equity & Collaboration

BY STEPHEN MINIX, Black Equity Collective

The Black Equity Collective is a community-public-private partnership with Black Equity as its central, unifying force. The primary focus of this ecosystem of funders and communities is strengthening the long-term capacity infrastructure of Black-led and Black-empowering social justice organizations in Southern California (Los Angeles County and the Inland Empire). As highlighted by the chief architect of the BEC Kaci Patterson earlier, a challenge this complex could not be solved without pooling the resources and expertise of local stakeholders, and the significance of this issue obvious when looking at the data.

The BEC was born out of the Black Equity Initiative (BEI) from work started in 2017. As quoted in a *Guide for Pursuing Black Equity and Racial Justice in Philanthropic Initiatives and Governments Systems* published by BEI: "Research, empirical data and anecdotal evidence are clear: racial injustice continues to serve as a destructive force in society…" The BEI was created by focusing on community-developed principles for Black Equity that can provide a guide and call to action for any funder or large organization looking to impact racial injustice[1]. They were informed by BEI grantees over a 12 month period, and are:

- **Truth:** Liberation requires an intentional and on-going analysis of the issues Black people face in Los Angeles that have been and continue to be rooted in systematic racism, and perpetuated through bias.
- **Strength:** emerges from the capacity of Black people to mobilize their individual, collective and community assets.
- **Strategic Disruption:** requires us to boldly confront conditions that perpetuate inequity, from narratives that justify racial difference, indignity and oppression to policies that reinforce the same.
- **Love:** means trusting our wisdom, giving us credit for our ideas and contributions, and, facilitating avenues by which Black people can pursue self-and community care to heal from the trauma of systemic racism.

Before the Black Equity Collective was formed, BEI was very intentional to call out steps funders can take now to help disrupt racial injustice. By clearly stating the key areas they were looking to improve through the principles and providing specific action items for funders, BEI put the tools for collective effort in place without having to place resources behind a strategy around collaboration (yet— we know the BEC was coming!). Some examples of action items shared are[1]:

- **Invest** in Black-led organizations and organizations with a history of cultivating Black leaders.
- **Examine** whether your current grantmaking portfolios embody the Principles for Black Equity.

1 A Guide for Pursuing Black Equity and Racial Justice in Philanthropic Initiatives and Governments Systems, Black Equity Initiative, https://5d3586ea-57ad-409b-a955-1b49d3f22052.filesusr.com/ugd/0d3e12_b128e5a7d29d421cb6c871ec6adbbaec.pdf

■ **Commit** to learning more about 2-3 organizations whose work embodies Black equity and racial justice with an intent to explore funding them.

■ **Share** what you've learned with your peers and invite them to learn more about the Black Equity Initiative.

When bringing groups together toward a common end goal, it is essential to have clarity and buy-in around what we're working toward and how we're going to get there or else you won't achieve the level of success collaboration can provide. This foundation was set in the Guide published by BEI, and expanded on when the time and resources were available to form the Black Equity Collective. After conversation and data analysis to identify the true potential drivers of change, BEC partners developed the following core competencies to further focus efforts and set clear goals:

■ **Broker trust and relationships** between public and private funders and Black-led social justice nonprofits to motivate and activate deeper investment in Black-led social change.

■ **Raise money** through a pooled fund and aligned giving to invest in the infrastructure building of Black-led social justice nonprofit organizations.

■ **Convene and connect Black leaders** across issue areas to foster and strengthen an interconnected ecosystem of Black talent, resources, and strategic partnerships.

With the research clear on racial injustice being a destructive force in society, progress on Black equity and racial justice must be a part of any forward movement in the United States, and will only be achieved when philanthropic investments, public policies, and institutional practices boldly confront racial injustice[1]. It will require a commitment from players across the public, private and social sectors, and guidance from leaders like Kaci and initiatives like the BEC. But with that guidance, a commitment to work collectively toward positive change and a level of accountability, steps are being taken in the right direction.

1 A Guide for Pursuing Black Equity and Racial Justice in Philanthropic Initiatives and Governments Systems, Black Equity Initiative, https://5d3586ea-57ad-409b-a955-1b49d3f22052.filesusr.com/ugd/0d3e12_b128e5a7d29d421cb6c871ec6adbbaec.pdf

Spotlight on: Collaboration

National Neighborhood Indicators Partnership, Atlanta

In Atlanta, Neighborhood Nexus, a Georgia-based organization that helps mission-driven organizations collect and utilize data, has created a measure that will help funders and nonprofit organizations understand the areas in the Atlanta region that require the most support for children and families. It is named the Child Well-Being Index, and is an incredible example of local collaboration around a single focus area. Crucial to the success of the project will be the ability to identify strategic goals and align regional mission-driven organizations and sectors to work and track progress toward those specific goals as a group[1].

The Child Well-Being Index was created in 2016 with the United Way of Greater Atlanta, providing data by zip code for 14 indicators on critical child, family and community issues[1]. United Way looked to their grantees as they developed these indicators, hoping to align activities across organizations. By asking for new data from grantees, United Way not only got updated information on the number of people they served by zip code, they also gained insight into which nonprofits need technical assistance around evaluation and measurement[1]. With the index, United Way has found data to show that place matters, and is now encouraging other local organizations to use the index[1].

The Junior League of Atlanta, Inc. has now worked with Neighborhood Nexus to understand if their volunteers were in the areas of greatest need, or if they needed to shift the location of their projects. Georgia CASA, a statewide network of foster youth-serving programs, is also using the index and community data to identify gaps and target volunteer recruitment[1]. As many other local organizations join this effort, utilizing available data to align their efforts, the progress toward outcomes supporting the children of Atlanta is more and more likely.

1 Aligning Investments with Needs of Atlanta's Children and Families, Kassie Scott, 7-13-2020, https://www.neighborhoodindicators.org/library/stories/aligning-investments-needs-atlanta%E2%80%99s-children-and-families

Spotlight on Optimization: Association for Supply Chain Management

BY GREG WOODBURN,
Association of Supply Chain Management

The Association for Supply Chain Management (ASCM) designed a supply chain maturity model for one simple reason: supply chain teams need insight into the many factors that drive overall supply chain performance. This intelligence provides the visibility needed to pinpoint exact areas for improvement in complex and interconnected supply chain processes. Though not all impact organizations have such a specific model, ASCM's approach to determining specific indicators of quality and then ensuring the information can be shared among stakeholders contains lessons for everyone on data-driven optimization best practices.

The Maturity Model assessment starts with a survey that focused on 20 dimensions of supply chain effectiveness. Supply chain teams receive an overall score along with a score for each of the 20 categories. Within each category, stakeholders can view detailed breakdowns of which questions impacted their score positively or negatively. The end result is a clear view of the items contributing to the strength or weakness of their supply chain, and next steps on where to improve.

To make it exceptionally easy for stakeholders to identify these areas of improvement and allocate resources accordingly, ASCM provides data visualizations of the results with dashboards powered by UpMetrics. Though each stakeholder can only see their results, ASCM county leaders are able to look at the maturity model responses in aggregate, over time, comparing one region or county with another and identifying patterns that could support optimizations across multiple regions.

The approach ASCM has taken to optimization with the development of a standardized, universal Maturity Model that uses the same indicators of success across all stakeholders has meant that teams can stay focused on areas that will have the largest impact and implement sustainable changes across the supply chain.

More information on the ASCM Maturity Model can be found here.

Spotlight on:
Data-Driven Storytelling

BY ED LYNES, Managing Partner, Woden

For as long as human beings have walked the Earth, we have been telling stories. Stories arose even before spoken language and have been long used to help communicate critical truths about, or make sense of, the world. The evolutionary root of storytelling— making the complex understandable and actionable— makes it well-suited for communication in the data-driven world.

Miro Kazakoff, a lecturer at the MIT Sloan School of Management, has observed: “If you want people to make the right decisions with data, you have to get in their head in a way they understand.” The rich insights provided by data mean nothing if they’re confined to an internal dashboard or opaque databases. To make data actionable, start with story.

Few organizations have effectively integrated data into their story as Spotify. The music-streaming behemoth has integrated its copious user listening data into its story from its launch in 2008— going so far as to maintain a specific publication, *Spotify Insights,* devoted to sharing its data practices and learning.

Perhaps paradoxically, Spotify’s success in this arena begins in a place completely independent from data. Despite increased competition from firms such as Apple and Amazon, Spotify has remained the dominant brand in streaming thanks to its commitment to a consistent core narrative: its drive to “unlock the potential of human creativity— by giving a million creative artists the opportunity to share the love of their art, and billions of fans the opportunity to enjoy and be inspired by it.”

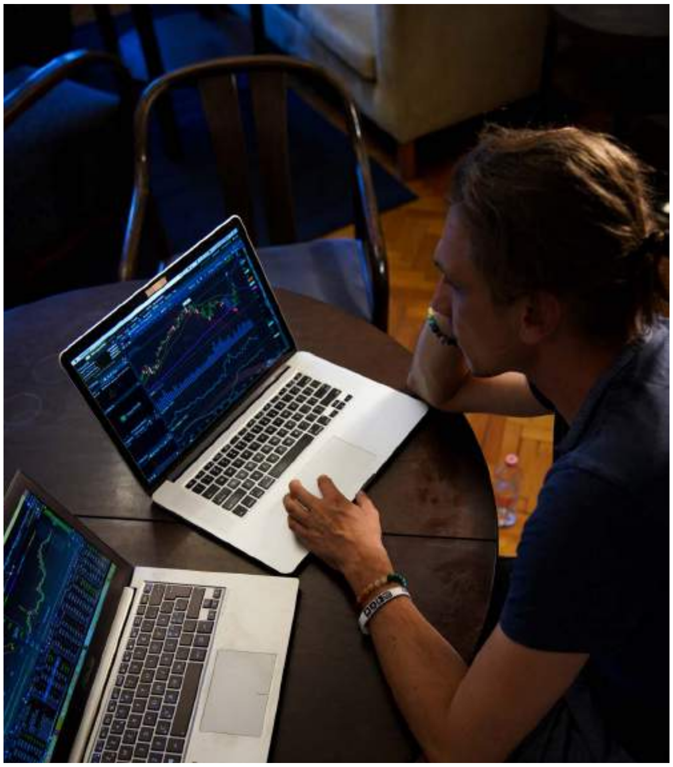
By any measure, Spotify is achieving this mission: the platform has more than 345 million monthly users and 3 million artists. The user experience— and recurring revenue— at Spotify depends on leveraging listener data to develop specific taste profiles, and in turn, serving up recommendations for new content that keeps users on the platform. Data is at the core of Spotify’s promise to unlock the potential of creativity. What separates it from other streaming platforms with a similar premise is how it uses that data to tell its story.

Anyone connected to a social media feed has become used to the annual tradition of Spotify Wrapped, a sharable data story where users are able to share their most-listened to music of the year. The genius of Spotify Wrapped is its ability to activate millions of users as brand evangelists: as they gleefully share their own listening history, they publicly reinforce the Spotify story— and the centrality of data to it.

Spotify uses its data to tell stories about the world through the lens of its users. Whether its something innocuous as what types of music college students run to, or deeper insights about how the pandemic has shaped listening habits, and what that says about people’s mental and emotional state, data is the conduit through which the Spotify story is told.

This works for one simple reason: data isn't the story at Spotify. Both the core brand story for Spotify, and the more specific pieces of content distributed across its website and Medium, tell stories powered by purpose. At Spotify, its purpose is the story— data is the reason to believe it.

Great data storytelling requires the same centrality of meaning that all great stories have. Stories that endure tell a universal truth about the world, and the narrative works to communicate that in a memorable, compelling manner. Organizations looking to leverage their data shouldn't share what they see in the data— they must share what they see in their people, and use data to add depth and context to those insights.



About the Authors

CHANTAL FORSTER

Chantal E. Forster is the executive director of the Technology Association of Grantmakers (TAG). Throughout her career in the private, public, and social sectors, Chantal has led community-driven technology initiatives and collaboration programs for data and knowledge sharing. Chantal holds a Master of Arts in Public Policy from the University of Chicago and serves on several nonprofit boards of directors. Chantal resides in Chicago with her husband, Michael, where she is passionate about building resilient, equitable communities, supporting urban arts and culture, and beekeeping.

ED LYNES

Ed Lynes is the managing partner of Woden, a strategic storytelling agency. More than 225 organizations have used Woden's propriety approach to craft a clear, compelling brand story— and align all they do behind it. A native Bostonian, Ed has called Philadelphia home since 2005 when he relocated to help launch the Sun Newspapers. He remains engaged in the newspaper business as one of the owners of Philadelphia Weekly, the city's alt-weekly. Outside of the office, Ed is a passionate supporter of the Boy Scouts of America, and serves as the chairman of the council in suburban Philadelphia, which has over 5,000 youth members. Ed resides in Center City with his wife, Kira, and wheaten terrier, Bailey.

KIM LYNES

Kim has over 10 years of experience leading marketing strategy across the public, private and social sectors. Prior to her current role leading marketing at UpMetrics, she led content marketing efforts for Blackbaud Corporate Solutions and Blackbaud Foundation Solutions and in the past also led marketing efforts at Foundation Center. Kim is passionate about building brand narratives for some of the most well known brands in the world, including PEOPLE Magazine, and is thrilled to be able to support impact organizations as they look to data to build meaningful narratives that inspire action in her current role.

STEPHEN MINIX

Stephen joined UpMetrics in 2015 for one reason: a unique opportunity to continue to uplift communities. In his role as Managing Director Stephen empowers partners to utilize their data to accelerate progress toward outcomes: informing all decisions, gaining new insights and telling their story to a wider audience. With data, impact organizations will unlock new opportunities and increase access to resources.

Stephen is passionate about building capacity at impact organizations as he has dedicated his life's work to the advancement of youth and communities through education and development. He began his career by serving young people and communities in Southern California as a public school and public charter school teacher, coach, athletic director, administrator, district coordinator for afterschool programs and adjunct professor. He was recognized as the CIF Los Angeles City Section Athletic Director of the Year in 2015. Today, Stephen continues to be active in the community, serving as a Green Dot Public Schools Ambassador, on the leadership council for Positive Coaching Alliance Los Angeles, and an inaugural advisory board member(board chair) for MENTOR California.

Stephen graduated from Pepperdine with a BS in Physical Education and a MA in Secondary Education. Stephen lives in San Diego, where he is married with three young daughters.

LISA DELPY NEIROTTI, PH.D

Lisa Delpy Neirotti is the director of the MS in Sport Management Program and an associate professor of Sport Management at the George Washington University School of Business (GWSB). She has been a professor of sport, event, and tourism management at the George Washington University for 30 years. Dr. Delpy Neirotti has established a strong academic program at both the undergraduate and graduate level and has also helped develop the Sport Philanthropy Executive Certificate, which serves to increase the efficiency and effectiveness of nonprofit organizations using sport for social good. She also directs the GW Green Sports Scorecard to help increase the sustainability of sport facilities, organizations and events, and serves on the faculty of the International Olympic Committee's Executive Master's In Management of Sports Organizations (MEMOS).

Prior to arriving at the George Washington University, Dr. Delpy Neirotti traveled to 56 countries around the world studying the development and organization of the Olympic Movement. Since 1984, she has attended 19 consecutive Olympic Games, 5 World Cups, and hundreds of other major sport events as a consultant, volunteer or researcher. In 2004, she served on the World Cup host committee in Washington, DC.

Born and raised in California, Dr. Delpy Neirotti received her undergraduate degree from California Polytechnic State University, San Luis Obispo; a MS in Sport Management from George Mason University, Fairfax, VA; and a Ph.D. in Sport Administration from the University of New Mexico in Albuquerque. Her doctoral dissertation was on the organizational structure and effectiveness of the U.S. national sport governing bodies.

RACHEL OATIS

Rachel Oatis is a proud graduate of Spelman College, where she earned her B.A. in Political Science receiving Phi Beta Kappa honors. Upon completion of her undergraduate studies, she then moved on to become a HBCU Fellow where she studied to obtain her M.S. in Nonprofit Management at Columbia University. At Columbia, Oatis served as a Curation Officer for TEDxColumbiaUniversity and host for the 2019 conference and was a committee member of the Columbia Graduate Inclusion Advisory Committee. She has held positions at the Obama Foundation, Andrew W. Mellon Foundation, Washington National Cathedral during her domestic exchange experience at American University, and the District Office of the honorable Congressman John Lewis and newly appointed White House official, Congressman Cedric Richmond. Currently, Rachel works at Management Leadership for Tomorrow (MLT) working on the Black Equity at Work Certification as a Senior Program Associate.

Outside of work, Rachel enjoys investing her time in the various communities she belongs to, writing for a local Louisiana blog on the millennial's perspective on politics, and building her collection of fashionable eyewear.

KACI PATTERSON

Kaci Patterson is owner and principal of Social Good Solutions, a boutique consulting practice working with foundations and donors to advance community-driven social change. She has pioneered social justice, organizational capacity building, and systems change efforts like the Families Improving Education and Black Equity Initiatives in greater Los Angeles. Kaci previously served as vice president for programs and administration for Families in Schools and assistant director for administration at the Center for Civic Education, where she served networks of over 1,000 civil society leaders, public officials, educators and nonprofit leaders. Kaci is a founding member of Communities for Los Angeles Student Success and co-founded the BLACC (Building Leaders and Cultivating Change) Fund, a giving circle at Liberty Hill Foundation supporting grassroots social activism. Kaci has received honors from the California Community Foundation as an Unsung Hero of Los Angeles and was named Wally Marks Changemaker of the Year by the Liberty Hill Foundation. She earned a Bachelor of Arts in Communication from Pepperdine University and Master of Business Administration from the University of LaVerne. Kaci is a Fellow of the inaugural class of the Civil Society Fellowship, A Partnership of ADL and The Aspen Institute, and a member of the Aspen Global Leadership Network.

KATHRYN L.S. PETTIT

Kathryn L.S. Pettit is a principal research associate in the Metropolitan Housing and Communities Policy Center at the Urban Institute, where her research focuses on neighborhood change and how communities use data for more effective and equitable decisionmaking. Pettit is a recognized expert on several small-area local and national data sources and on the use of neighborhood data in research, policymaking, and program development. She has conducted research on many topics, including neighborhood redevelopment, federally assisted housing, and local housing markets and conditions.

Pettit directs the National Neighborhood Indicators Partnership, a network of three dozen local organizations that collect, organize, and use neighborhood data to inform local advocacy and decisionmaking. She frequently presents the model and accomplishments of the network and local partners. She has produced two books on the role of data in community change: Strengthening Communities for Neighborhood Data and What Counts: Harnessing Data for America's Communities.

Before assuming her current position, Pettit worked in Urban's Center on Nonprofits and Philanthropy, where she analyzed Internal Revenue Service data on nonprofit organizations. Pettit earned her bachelor's degree in international affairs and humanities and her master's degree in public policy from Georgetown University.

ANNIE RHODES

Annie Rhodes has spent over 20 years in philanthropy helping foundations and their grant partners embrace data to drive impact. As a member of the leadership team at UpMetrics, Annie is working across teams to inspire organizations on their data journeys, empowering them and their grant partners to embrace their data and capture critical stories in order to better understand, accelerate and communicate their impact. Prior to joining UpMetrics, Annie was part of the Social Solutions Impact Partners team and managed the development of Blackbaud Grantmaking and Outcomes™ at Blackbaud, where she led roadmap planning and go-to-market execution. Preceding Blackbaud, Annie spent more than 10 years at the Ford Foundation where she managed grantmaking for the Women's Rights and International Human Rights portfolios. Annie teaches a Data Analytics & Metrics class as part of Columbia University's SPS Nonprofit Master's Program and is an active volunteer with Girls on the Run NYC and the Challenged Athletes Foundation.

JASON SHIM

How can we harness technology to make a difference in the world? That's the question Jason loves to explore with organizations. As Director of Digital Strategy and Transformation, Jason leads technology and innovation at Pathways to Education Canada, an organization dedicated to helping youth in low-income communities to graduate from high school and reach their full potential. With experience spanning the nonprofit and academic sectors both as an employee and a consultant, Jason has consistently helped organizations stay ahead of the technology curve. In 2013, he led Pathways to Education Canada to become one of the first charities to issue tax receipts for Bitcoin donations. Jason serves as an editor at Ledger, a peer-reviewed scholarly journal at the University of Pittsburgh that publishes full-length original research articles on the subjects of cryptocurrency and blockchain technology. In addition, Jason has also served on the board of NTEN, an organization dedicated to helping nonprofits fulfill their missions through the skillful and racially equitable use of technology.

MARY KOPCZYNSKI WINKLER

Mary Kopczynski Winkler is an independent consultant. Since 1995, she has worked as a researcher with the Center on Nonprofits and Philanthropy at the Urban Institute where she led the cross-center initiative on performance measurement and management. She has been involved in projects focused on strategic planning and assistance in developing performance measurement systems for government agencies and nonprofit programs. These projects cover a broad range of policy areas, including adolescents, at-risk youth, education reform and federal policy, performance measurement, and public management.

Mary is a founding member of the Leap of Reason Ambassadors Community. Before joining Urban, Kopczynski Winkler was a senior legislative analyst for the New York City Office of Management and Budget. She received her BA from Bryn Mawr College and her MPA from American University. She lives in Alexandria, Virginia with her husband Dave (a Naval historian) and daughters, Katherine and Carolyn.

GREG WOODBURN

Greg arrived at UpMetrics having worked with the Clinton Global Initiative, Right To Play, USC Athletics, and many other organizations dedicated to social impact through education, sports, community development, and partnerships. At Right To Play, Greg partnered with value-aligned early childhood leaders and community-based organizations in under-supported NYC neighborhoods to unlock their existing capacity and sustainably improve education program quality. At the Clinton Global Initiative, he managed CGI Commitments to Action development, participant recruitment, coalition building, and programming focused on early childhood education. Greg earned his M.B.A. with honors from the USC Marshall School of Business. Prior to that, he graduated summa cum laude from USC with a B.A. in History and double minor in Entrepreneurship and Painting, among other honors including the highest student-athlete GPA. Greg is excited to help our clients achieve their impact goals and become more data driven. A serious runner, Greg has competed in the Boston Marathon and the New York City Marathon.