

# Supporting Nonprofit Partners Through Equitable Data + Learning Practices

COMMUNITY FOUNDATION OPPORTUNITY NETWORK  
August 18, 2025



COMMUNITY FOUNDATION  
OPPORTUNITY NETWORK



# Agenda



Share your name, organization, & location.



**Investments in Data and Learning:** How to support nonprofits in data and learning.



**Equitable Reporting:** How to reimagine data collection and reporting in support of our partners and community.



**Elevating Partner Voices:** How to position grantees as thought partners to inform foundation strategy and support

# Meet Your Facilitators



**Kenzie Strong [she/her]**  
VP, QUALITY + INNOVATION  
ResultsLab



**Cassidy Smith [she/her]**  
Executive Director, Colorado Access  
Foundation



# RESULTS LAB

ACCELERATING IMPACT

We **bring data to life** with cutting edge, simplified, actionable tools and practices to people working for social good, giving them the mindset and skillset they need **to catalyze change** for those they serve.





Consider our three areas of equitable and inclusive practice: what feels most important to your work, now? **Drop a 1,2,3 in chat.**



1. **Investments in Data and Learning:** How to support nonprofits in data and learning.



2. **Equitable Reporting:** How to reimagine data collection and reporting in support of our partners and community.



3. **Elevating Partner Voices:** How to position grantees as thought partners to inform foundation strategy and support

# Investments in Data + Learning

## Evaluation Capacity & Practice

- **44%** nonprofits were deemed as “Developing/Mastering” stages (up from 29%). Skills, analysis, and data quality remain weak: **57%** said their data isn’t complete/accurate/up to date; **58%** said staff aren’t data literate. (*Data Orchard*)
- Other large-scale trend work finds ongoing strategy gaps—most nonprofits lack a formal data strategy. (*Salesforce.org*)
- In a national survey, **99%** of nonprofits tracked some metrics, but only ~**50%** tracked client outcomes, and far fewer used data for program decisions. Common barriers: lack of time, expertise, and issues with data quality/process. (*NTEN/Idealware*)

## Staffing & Roles

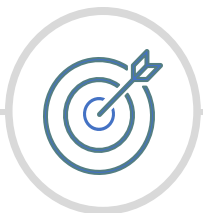
- Only **6%** of nonprofits have internal evaluation staff; responsibility most often sits with executives or program staff (**63%**). (*Innovation Network*)

## Funding for Evaluation

- **84%** spent <**5%** of their organizational budget on evaluation; only **12%** spent ≥**5%**. The share spending nothing rose to **16%**. (*Innovation Network*)
- **63%** of foundations fund evaluation for <**10%** of individual grants, constraining grantee evaluation resources and ambition. (*Center for Effective Philanthropy*)



# Ways to Invest in Data + Learning



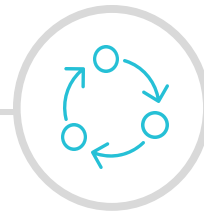
- Capacity Grants
- General Operating Grants
- Capacity Add-On to Program Grants,
- Match/Challenge Grants

Financial Support



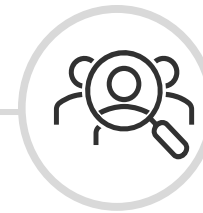
- Structured Cohorts
- Technical Assistance Packages

Curated Learning +  
Development



- Shared Services  
Equipment/Technology Grants
- Capacity Building  
Market Place
- Peer Networks

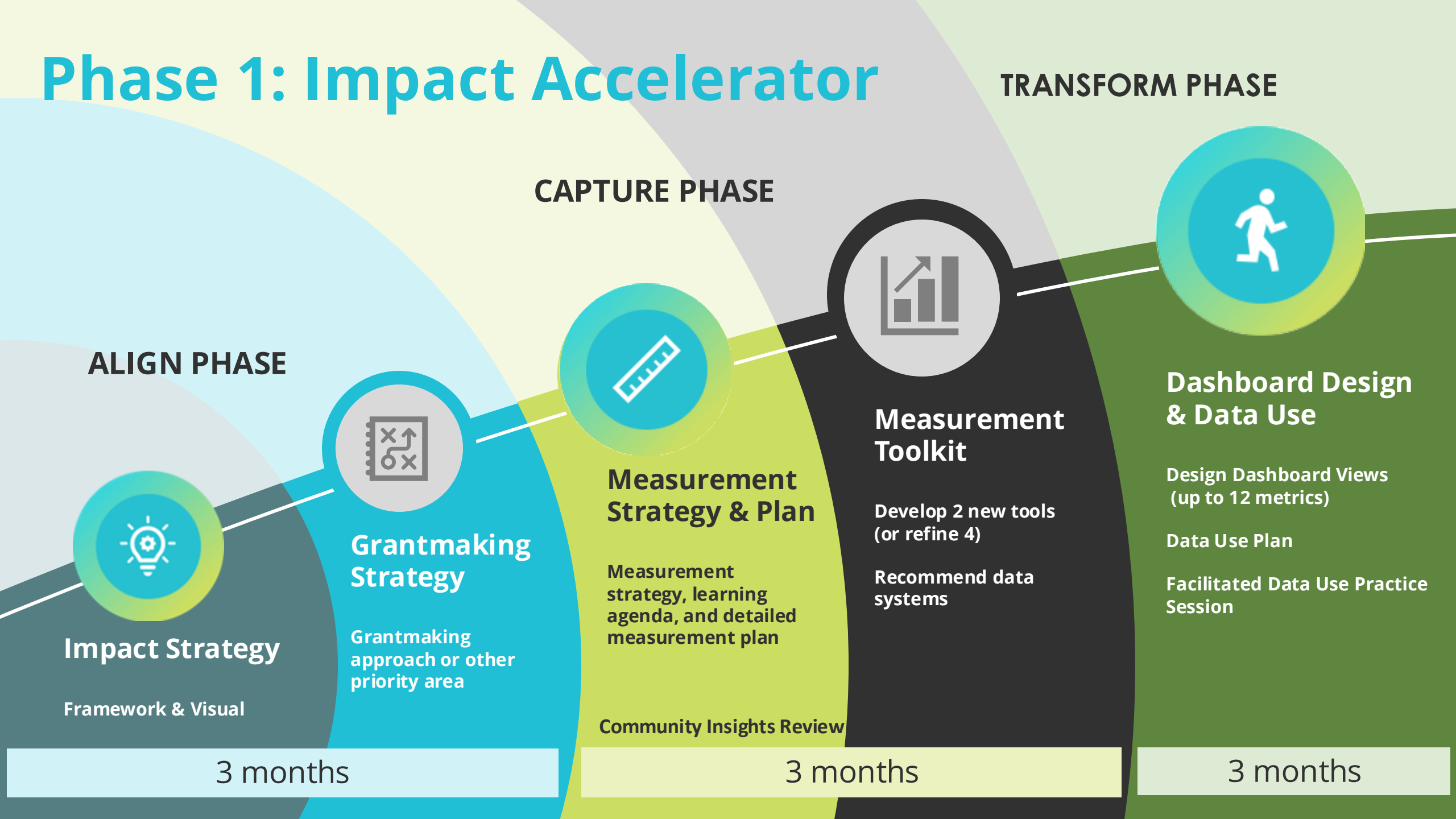
Shared Resources +  
Infrastructure



- Endowment/  
Reserve  
Contributions,
- Multi-Year  
Partnerships

Long-term  
supports

# Phase 1: Impact Accelerator



## ALIGN PHASE



### Impact Strategy

Framework & Visual

3 months

## CAPTURE PHASE



### Measurement Strategy & Plan

Measurement strategy, learning agenda, and detailed measurement plan

Community Insights Review

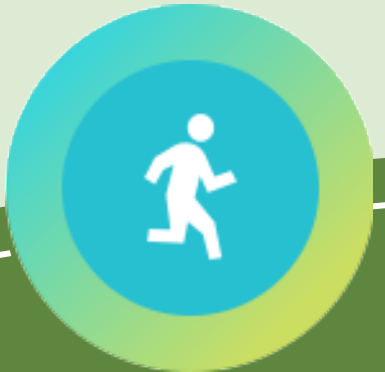
3 months



### Measurement Toolkit

Develop 2 new tools (or refine 4)

Recommend data systems



### Dashboard Design & Data Use

Design Dashboard Views (up to 12 metrics)

Data Use Plan

Facilitated Data Use Practice Session

3 months

## TRANSFORM PHASE



# Phase 2: Capacity Building for Funded Partners

## ACT Learning Series

### Objectives:

- Engagement with content and language
- Increased **knowledge/awareness** on how to build a data/outcome-oriented practice

## 1:1 Coaching

### Objectives:

- **Applied learnings**, changes implemented
- Increased **ability and practice** to communicate impact

## Workshops & Tools

### Objective:

- Increased **knowledge, skills and tools** for highly relevant data + impact practices (driven by participant needs)

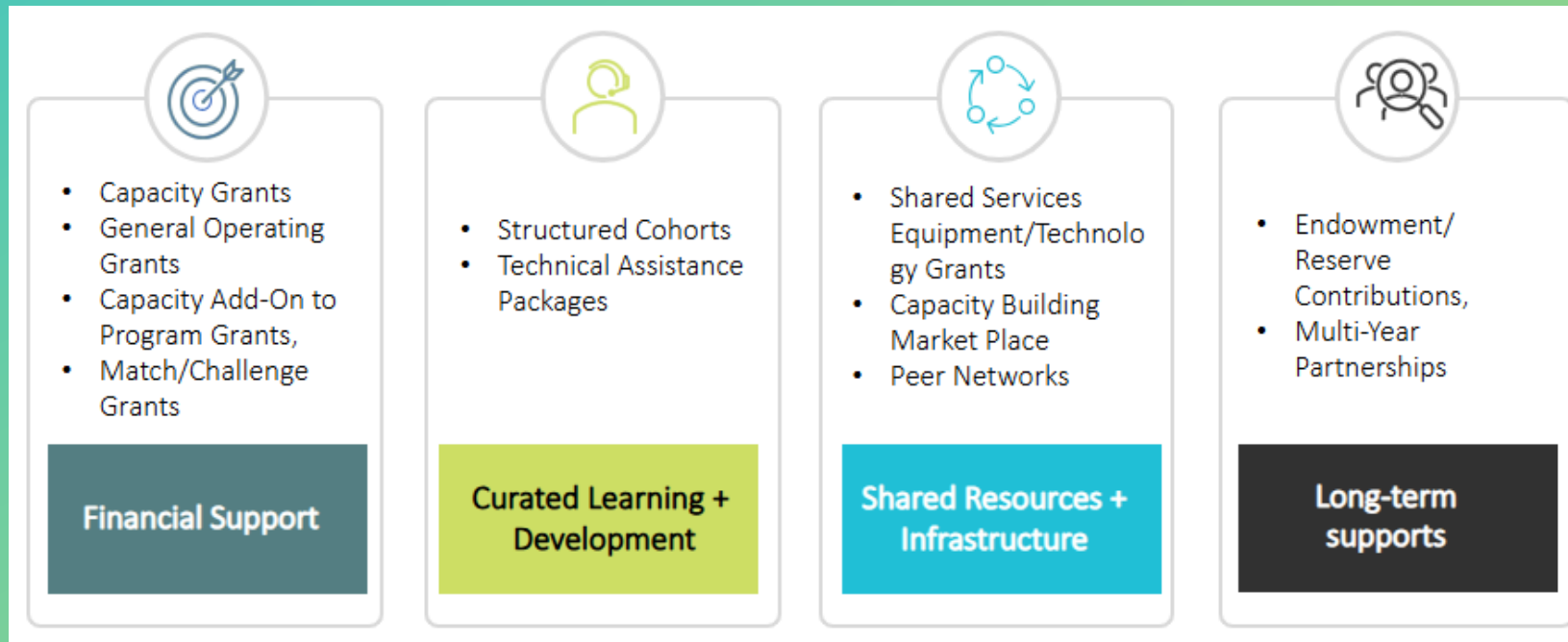
## CoLab

### Objective:

- Increased **connection** to COAF organizations as a Community of Practice for shared, applied learnings and problem solving



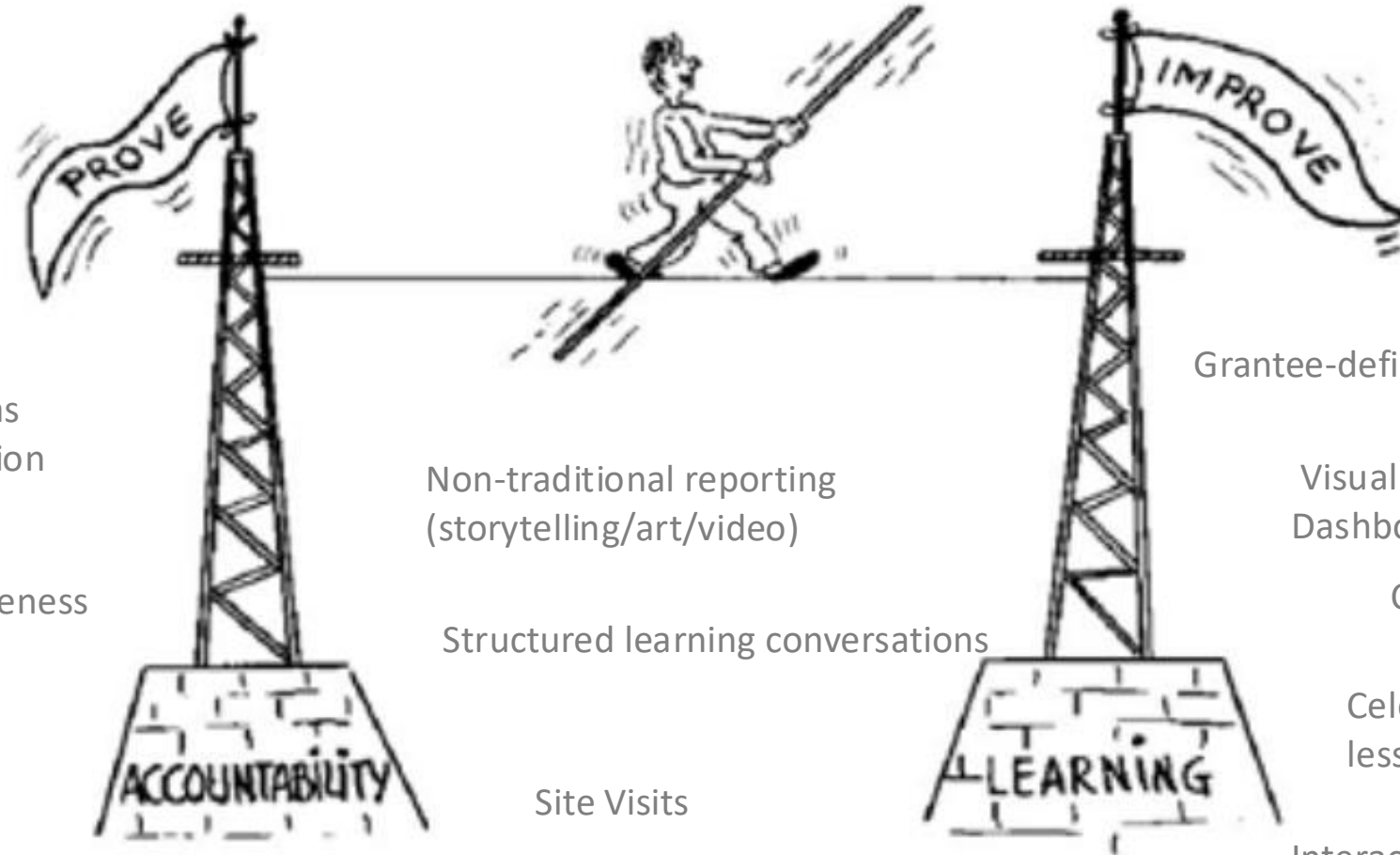
What types of data and learning investments are you most interested in here? Or are you doing already?



# Equitable data and evaluation practices

- **Co-Design** – Engage grantees/community in defining success and key questions.
- **Data Ownership** – Ensure grantees retain rights; share results back in accessible formats.
- **Right-Size Reporting** – Match requirements to grant size; accept existing reports or alternative formats.
- **Learning Over Compliance** – Use data for mutual learning; interpret findings together.
- **Value Multiple Evidence Types** – Include lived experience, stories, and culturally relevant indicators.
- **Transparency & Reciprocity** – Explain why data is collected; share funder data and insights.

# Funding Partner “Reporting” Continuum



Track all activities in written form

Submit data points as required by foundation

Elevate points of intervention ineffectiveness

Share activity sign-in sheets with funder

Show extensive data/evidence about reaching outcomes

Non-traditional reporting (storytelling/art/video)

Structured learning conversations

Site Visits

Share some data/evidence about reaching goals

Grantee-defined report or metrics shared

Visual Impact Reports: Dashboards, Posters

Community-Led Presentations

Celebration of achievements or lessons learned

Interactive Workshops for Data Sharing

No data or grant reports required / Limited contact w/ grantee

Source: Terry Smutyle & Daniel Morales-Gomez

# COAF Practices

MAKING CHANGES TO ANCHOR IN EQUITY + INCLUSIVE PRACTICE

- Choice reporting ways (i.e. video, other funder report, audio, written)
- Right-sized reporting
- Flexible yet aligned reporting
- Realignment on demographic reporting (to reduce burden and protect community)

## Measurement Goals



### Learning & Improvement

COAF is accountable to the populations it supports, demonstrating measurable impact in focus areas and transparency in stewardship of funding to COA and COAF leadership, to policy makers, and to the general public.



### Prove Impact

COAF will leverage more rigorous data collection from Impact Investments to demonstrate ROI and to broker broader learning for the field.



### Accountability

COAF is accountable to the populations it supports, demonstrating measurable impact in focus areas and transparency in stewardship of funding to policymakers and COA.



### Knowledge Generation

Funding research and projects to generate knowledge, inform strategies, and support innovative solutions in areas like transportation and funding emerging and best practices.

## Measurement Focus

Measurement will be anchored to COAF's impact strategy and learning agenda. COAF will capture and elevate data to answer learning questions. We will take a phased approach, starting with 1) Core data practice and then moving into 2) Learning deep dives, and 3) Collaborative data practice.

## Measurement Approach

Our measurement practice will be responsive to and **feasible** for the contextual needs of the community, grant partners, and COAF's small staff. It seamlessly **integrates** with Colorado Access, ensuring practicality and efficiency in implementation while providing valuable insights for both the organization and its key partners.

### Guiding Values for our Measurement Practice:



### Equitable

Adapting application and reporting requirements so that are an equitable lift for grant partners, dependent on organization size and capacity.



### Inclusive

Allowing grant partners to capture and share data in a way that works well for them.



### Transparent

Providing open communication about what data is being asked for, why, and how it will be used.



### Actionable

Committing to acting on the data collected, using them to inform decision making and program enhancements.



## **Chat/open mic prompt:**

If you could change one thing about your current reporting structure to make it more equitable, what would it be and why?



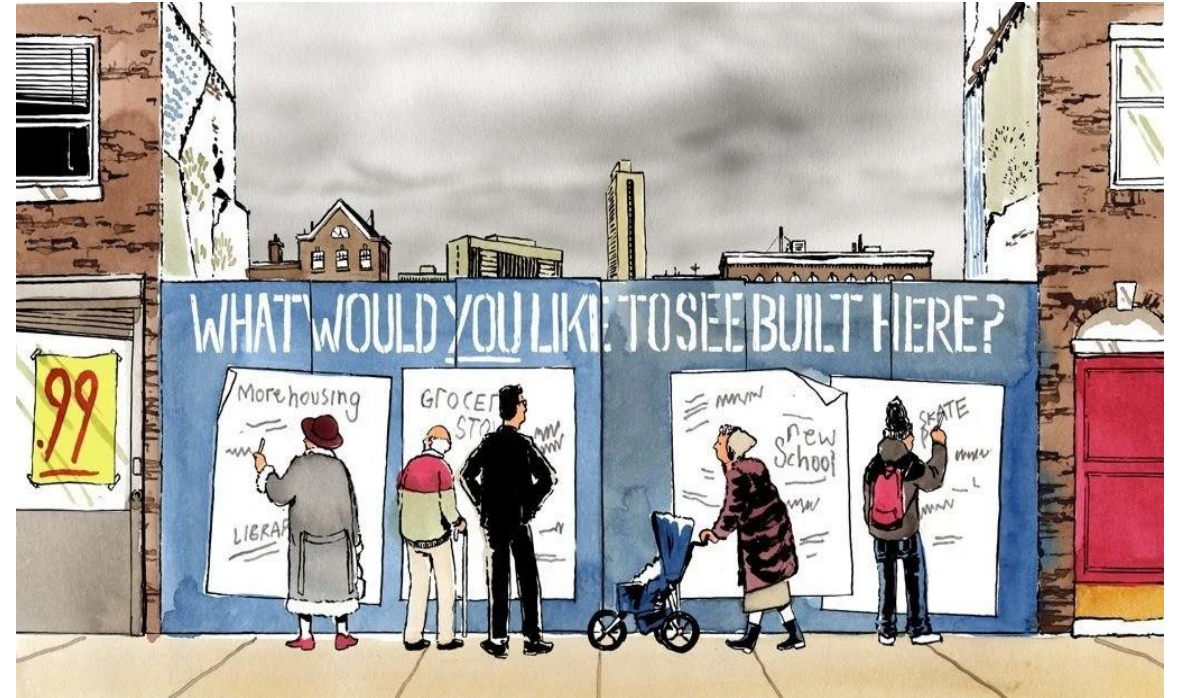
# Why Prioritize Community Voice?



**Community Voice** allows organizations to better understand the needs, priorities, values, and ideas of those closest to a problem or experience.



Listening to community voice can help elevate solutions that are **responsive, culturally affirming**, and have a more **equitable impact**.



*Image Source: Nextcity.org*

**Reflection:** If a vacant lot were to open up in your neighborhood, how could community insights be used to inform its redevelopment?



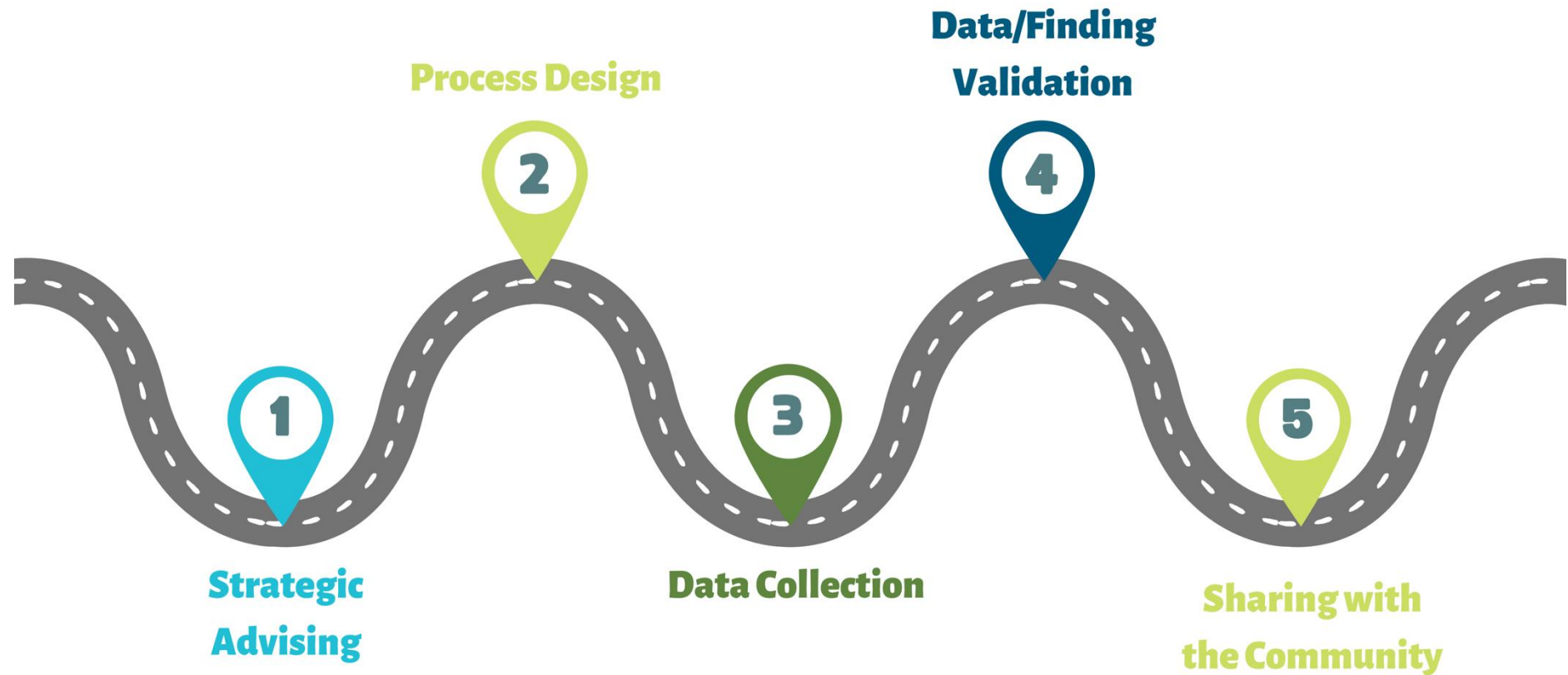
# When to Incorporate Voice?

HOW COMMUNITY INSIGHTS FITS INTO PHILANTHROPIC CONTEXTS

trust-based  
philanthropy  
project

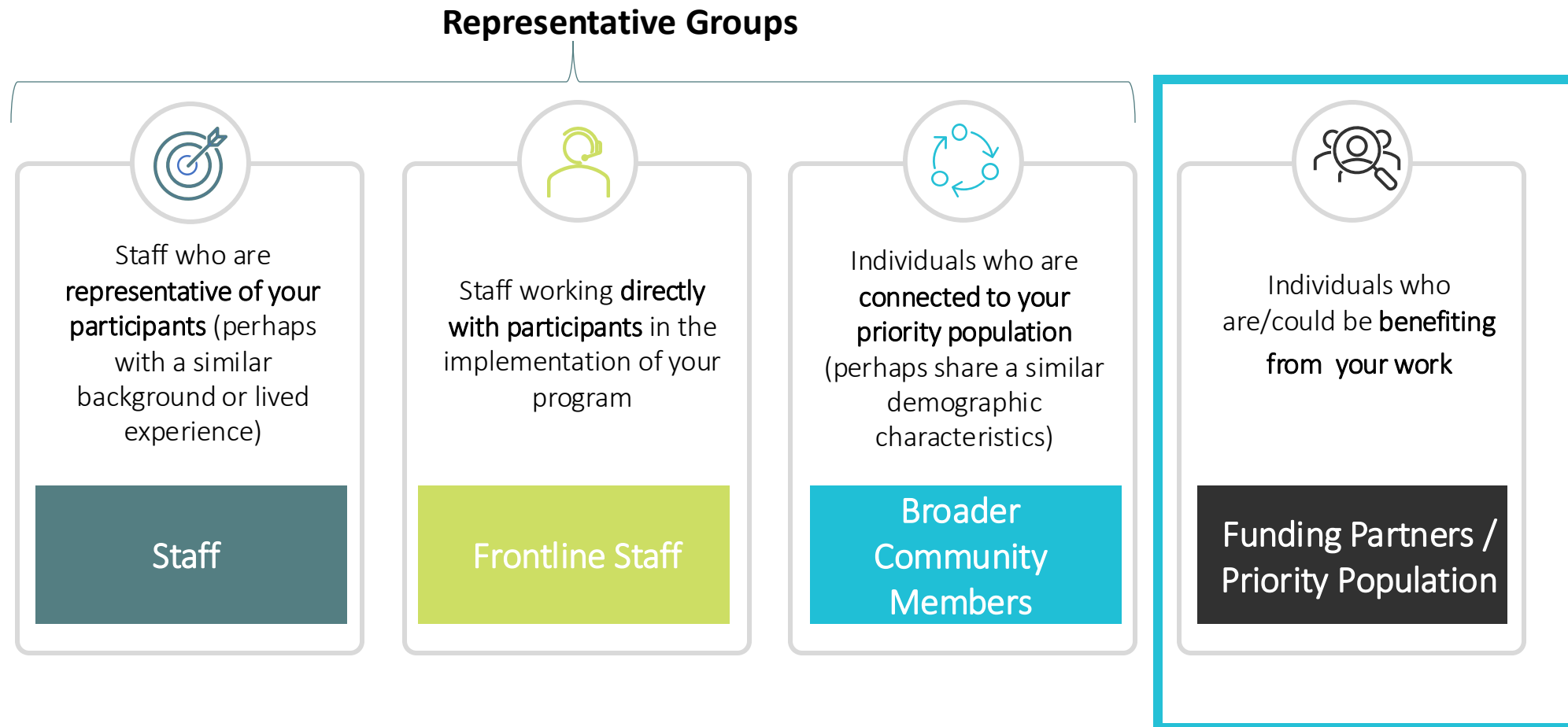
## TBP Values

- Lead with trust
- Center relationships
- Collaborate with humility and curiosity
- Redistribute power
- Work for systemic equity



# Whose Voice?

To be inclusive with your data practices is to meaningfully engage the people who are **most directly** impacted by your work. This can happen on a **continuum**:



# COAF Practices

## SEEK GRANTEE VOICE TO INFORM REPORTING PROCESS

- Facilitated a series of focus group discussions, 60-minutes each
- Predominantly prospective Participants and a few current COAF grant partners. This means most perspectives shared are about **experiences with other funders**.
- Healthy **mix of roles** among participants:
  - CEOs, founders, other senior leadership: mostly able to speak more holistically, less able to speak to specifics about grant experiences
  - Grant writers and grant managers: provided richer perspectives about the realities of writing grant applications and reports
- Provided \$75 incentives
- Discussion Topics:
  - Unpacking Funder/Participant Power Dynamics & Experiences (5 – 15 min)
  - Tactical Discussion about Application, Reporting Processes (15 – 45 min)
  - Visioning Future Evaluation and Learning Supports for Participants (45 – 55 min)

# COAF Practices

TYPES OF INSIGHTS WE GAINED



"I really think it has to do with trust in relationships. And if you build those, then you become kind of a coalition together, knowing that you're moving forward for the same kind of end degree in terms of serving community."

## Evolve Relationship into partnership:

Provide feedback + demonstrate how you used the data you asked for.

"I'm always looking to find balance. Respecting that an entity and philanthropists is deciding to give their own money and donations to an organization, and so they deserve to know what it's going towards and how it's spent. [This] while also believing that we nonprofits would like to be trusted that we we're experts. We've been doing this for years. It is about finding the balance of respect."

**Invest in Trust:** Invest in trust and demonstrate commitment + action to providing an equitable, inclusive, and trust-based funding experience.

# COAF Practices

## TYPES OF INSIGHTS WE GAINED



"When I have to do quarterly reports on gen ops stuff, I'm like I have to re-invent that we are doing our work, its going well. I have to try to spin a story. Love the idea of letting us be a bit more creative. Maybe don't ask us to do a quarterly report unless its a massive grant where you need more dynamic reports. I'm saying the same stuff."

Participants were passionate about a more innovative approaches to grant applications and reports. Participants were especially energized by ideas of application and report options that could offer **mutual value**, where they could create and share a product that could also serve their own needs.

To that end, we have opened our processes to accept audio and video formats, in addition to written. This allows participants the flexibility and opportunity to be creative and express their story in a way that works well for them.



## **Open Mic/Chat:**

How are you incorporating voice to support decision-making or strategy?

How has this impacted your direction?






# Resource | Inclusive Data Practices Action Plan

## INCLUSIVE DATA PRACTICES

### ACTION PLAN



PHASE	ITEM	SCAN		ACTION			
		CURRENT RATING	PRIORITY LEVEL	WHAT?	HOW?	WHO?	WHEN?
ALIGN 	Explore <b>why</b> you are collecting the data: what do you need to know versus what is nice to have	<i>Rating for your current organizational practice: 1=not at all, 2=somewhat, 3=completely</i>	<i>Level of priority for your organization: 1=not now/not crucial, 2=would be helpful, 3=vital focus for our organization</i>	<i>What actions need to occur to make this item successful</i>	<i>What methods might you employ to make this item successful</i>	<i>Who can take this item forward</i>	<i>What is the ideal timing for this item</i>
	Participants/Priority Populations review and validate or challenge how your program is currently designed						
	Participants/Priority Populations co-design new programs with you, defining what and how services will be delivered						
CAPTURE 	Participants/Priority Populations inform the program or organization's evaluation plan: what information to collect, from whom, how, when, and <b>why</b>						
	Participants/Priority Populations co-design or review and provide input on data collection tools such as surveys and intake forms						
	Participants/Priority Populations are trained in and support the data collection process						
TRANSFORM 	Participants/Priority Populations collaborate with staff in making sense of trends and themes in the data						
	Participants/Priority Populations support making programmatic decisions based on the data						
	Participants/Priority Populations engage in communicating data findings with stakeholders						

Priority Populations will include those individuals or groups most aligned with issues/problem your work is addressing. This may include community members, program participants, staff or funding partners.



**Share Out.**  
Just one action.





**ACT** Align  
Capture  
Transform

## LEARNING SERIES

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### ALIGN PHASE

12 Hours + Resources  
(4) 1-hour Guided Sessions  
ACT Model Workbook  
Dedicated ACT Coach  
8 Hours Coaching / Technical Assistance

### ACT Workbook

Impact Strategy + Program Model

**\$3,750**

REGISTER BY JULY 11<sup>th</sup>  
RECEIVE 10% OFF!

PROMO CODE: ALIGN25



**RESULTSLAB**

ACCELERATING IMPACT



# Stay Connected

- [Sign-up for Lab Notes](#) on our website. A monthly round-up of tips, useful tools, and other resources delivered to your inbox.
- [Watch](#) our latest *Accelerate Speaker Series* webinar – Investing in Nonprofit Effectiveness.

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