



MORE THAN DATA

Data for Equity Initiative Year 1 Evaluation Report

APRIL 2024



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PROJECT BACKGROUND

INTRODUCTION

A Message From the Data For Equity Funding Collaborative

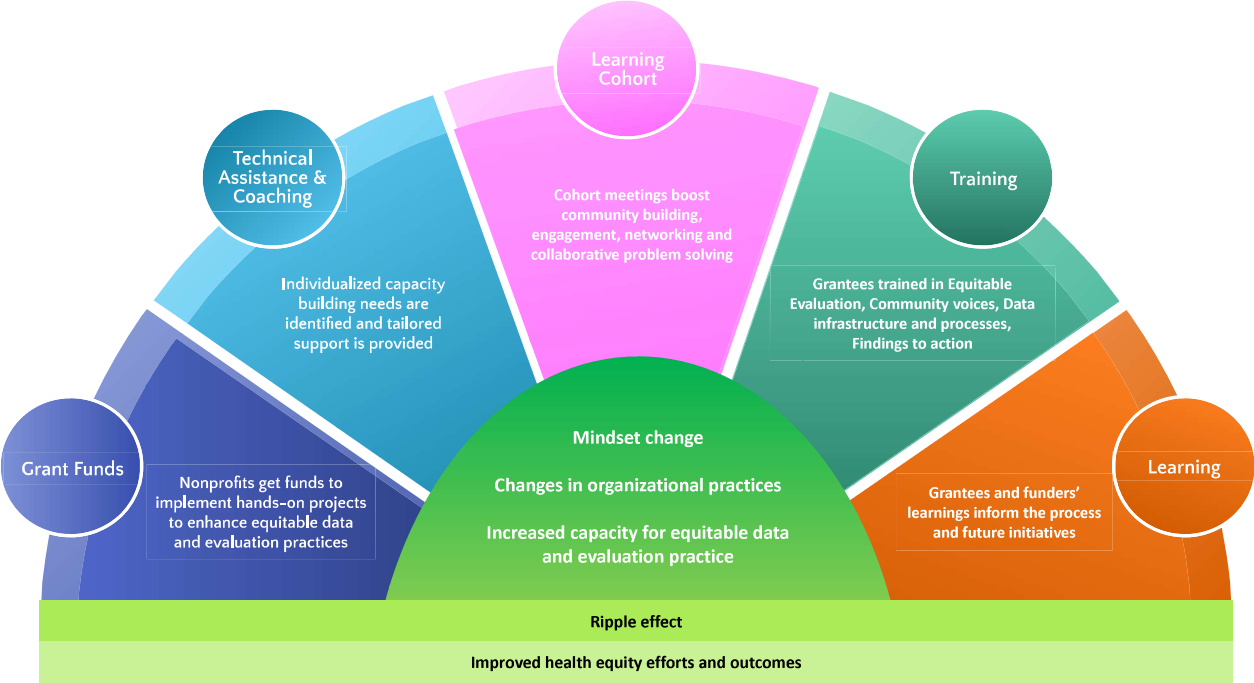
As the COVID-19 pandemic impacted our world and the nonprofit ecosystem responded to urgent community needs, three funders — bi3, HealthPath Foundation of Ohio, and Interact for Health — observed grantee partners' needs for organizational capacity evolve.

Instead of assuming what capacity needs were most important to nonprofits or how they wanted those needs met, we surveyed our grantees. Organizations prioritized several areas: **data/evaluation** and **equity through grant funding, training/technical assistance, and a learning cohort**. We responded directly to that request by creating the **Data for Equity Funding Collaborative**.

Data for Equity includes \$25,000 in flexible funding for each grantee, tailored training and technical assistance, and a learning cohort designed to strengthen organizational capacity for equitable data and evaluation practice. The initiative was also designed to align with trust-based philanthropy principles (see definitions) and center grantee voices in design and implementation.

INTRODUCTION

Theory of Change



EVALUATION FOCUS

bi3 and Interact for Health partnered with Design Impact to evaluate the inaugural Data for Equity cohort to understand its impact in the first year and opportunities to refine for subsequent cohorts. Our focuses for evaluation were:

- Which components of Data For Equity — flexible grant funds, technical assistance and training, and the learning cohort model — were most and least valuable to grantees?
- Which components most and least effectively changed grantees' mindsets and practices?
- How could the funding collaborative improve the grant program's co-creation process with grantees?

GLOSSARY

Capacity Building

The process of building and strengthening the systems, structures, culture, skills, resources and power that organizations need to serve their community. (Stanford Social Innovation Review. Transformational Capacity Building. Fall 2020.

Source: [Stanford Social Innovation Review](#)

Equitable Evaluation

An approach that addresses the dynamics and practices that have historically undervalued the voices, knowledge, expertise, capacity, and experiences of all evaluation participants and stakeholders, particularly people of color and other marginalized groups.

Source: Stern, Alexis, Guckenberg, Sarah, Sutherland, Hannah, Petrosino, Anthony, [“Reflections on Applying Principles of Equitable Evaluation”](#)

Trust-Based Philanthropy

Redistributing power from the philanthropic sector—systemically, organizationally, and interpersonally—in service of a healthier and more equitable nonprofit sector. This includes practices such as multi-year flexible funding, streamlined applications and reporting, and a commitment to building relationships based on transparency, dialogue, and mutual learning.

Source: [Trust-Based Philanthropy Project](#)



EVALUATION PROCESS

CONSIDERATIONS

- Grantees were asked to provide feedback about the funding collaborative. When grantees refer to the funders or funding collaborative in this report, they are referring to Interact for Health and bi3.
- The feedback in this report reflects responses from individuals with varying degrees of involvement, attendance, and participation in Data For Equity's grant and capacity-building offerings.
- Design Impact, as third party arbitrators, strived to elicit honest feedback from grantees and from funders, but recognize that funders have an inherent and unavoidable power dynamic over grantees that may make it difficult for some grantees to provide critical feedback.



WHAT WE LEARNED: EVALUATION FINDINGS

What's working in Data for Equity? What could be improved?

HOW TO READ THIS REPORT

What We Learned
The insight

Mindset & Action Shifts

WHAT WE LEARNED:

Data for Equity gave grantees the space and permission to change the way they work, think differently about social impact work, and refocus on their missions over sometimes arbitrary data collecting.

- DFE's dedicated time, space, and resources helped grantees see the **gaps between their practices** and equitable approaches.
- Grantees **shifted their data collection efforts to more equitable approaches** once they realized they might be participating in harmful practices as a result of the content delivery in the DFE cohort.
- Equitable data approaches that grantees mentioned included **inviting community into the research process as full participants** and **reexamining the intentions behind the questions** asked, so that organizations would gather more meaningful data.

"Data For Equity gives you permission to say 'it's okay to reconsider a lot of your practices.' It helps to have a group of people alongside us saying we are all changing our strategies." - Data For Equity 2023 Grantee

Data Points
What Design Impact heard or observed

Quote
What a grantee said during a focus group

HOW TO READ THIS REPORT

Opportunities

What possibilities the funding collaborative or others in similar positions might pursue now or in the future?

Mindset & Action Shifts

OPPORTUNITIES

How might we...

- ...support **organizations' ongoing journeys** toward equitable data practices?
- ...support a **holistic approach to equitable data approaches** where qualitative data is not at odds with quantitative data?

Recommendations

These are Design Impact's suggestions on how to further develop the Data for Equity offering based on learnings from the evaluation process.

Grant Components

RECOMMENDATIONS

- **Manage expectations.** Tell grantees up front, even session-by-session: *Who is this most valuable to? What will I get out of this? Why should I prioritize this engagement?*
- **Collaboration is transformative.** Grantees deeply appreciated the cohort experiences. Consider more ways to encourage cross-collaborative work and future partnerships amongst grantees.



CASE STUDY

I am **more than my data.**

Communities might be skeptical about data collection, especially if they've been harmed by it in the past. Data for Equity could offer space to acknowledge that harm.

A staff member from one of the grantee organizations said when they first joined the cohort, they were wary of data collection. They felt like the data that supposedly represented their own community flattened their humanity into metrics that could be used against them.

After participating in Data for Equity, they feel differently about data. Data is not objective or neutral; it can be weaponized, but it can also be used as a tool.

They said, **“I am more than my data. I am more than a metric or a checkbox.”**

MINDSET & ACTION SHIFTS

How did Data For Equity shift grantees' mindsets and actions?

Mindset & Action Shifts

WHAT WE LEARNED:

Data for Equity gave grantees the space and permission to change the way they work, think differently about social impact work, and refocus on their missions over sometimes arbitrary data collecting.

- Data For Equity’s flexibility, their approach to facilitation, and the technical financial assistance allowed grantees to see the **gaps between their existing evaluation practices** and equitable approaches to evaluation.
- Grantees said the support from Data For Equity helped them feel even more confident **shifting their data collection efforts to more equitable approaches** once they realized the potential harm their existing data practices could/had produced.
- Grantees reported several changes to their data practices, including **inviting the communities they supported into the research process as full participants** and **reexamining the intentions behind the questions** asked when gathering data.

“Data For Equity gives you permission to say ‘it’s okay to reconsider a lot of your practices.’ It helps to have a group of people alongside us saying we are all changing our strategies.” - Data For Equity 2023 Grantee



CASE STUDY

Data for Equity **gave grantees the space and permission to change the way they work.**

One organization **completely changed their intake process** through Data For Equity.

One organization used a collaborative approach with their staff to recreate their intake process. By focusing the intake process on building trust with families, they reduced many of the challenges with their existing internal procedures and changed their intake questions to reduce the depth of information they collected.

Changing their intake process has enabled them to collect thorough data on at least 80% of their population served compared to less than half with their previous intake process. They said their data is more meaningful to and for families, and helps them make better decisions on how to support communities.

Mindset & Action Shifts

WHAT WE LEARNED:

Data for Equity broadened grantees' definitions and perspectives on data. Now they want more skills and tools to deepen their practices.

- Grantees now see communities' **stories as valid data**, not just data from "validated quantitative instruments."
- Some grantees pointed out that the broader communities that their organizations serve still **largely don't know why their data is being collected or how it will be used and this is an opportunity for growth.**
- Some grantees requested **additional training on applying the equitable data principles, and more education on equitable quantitative practices**, such as deeper dives on tools that could support equitable data analysis and collection (e.g. NVIVO training).

Mindset & Action Shifts

RECOMMENDATIONS

- **Keep building community.** Data For Equity's strength is its community of practice. Don't deviate from offering opportunities to discuss and reflect. Find ways to maintain the cohort connections post-grant.
- **Invite grantees' communities.** Include the communities that grantees serve in capacity building opportunities. Explore how data collection can be mutually beneficial with communities? And, discuss what service providers ACTUALLY need to know to act?
- **Get technical.** Find opportunities for people to get into the weeds of data collection tools, technologies, and methodologies.

Mindset & Action Shifts

OPPORTUNITIES

How might we...

- ...as the data for equity collaborative invite the communities we serve to **learn about equitable data alongside us?**
- ... as the data for equity collaborative support and sustain grantee **organizations' ongoing journeys** toward equitable data practices?
- ...as the data for equity collaborative support a **holistic approach to equitable data approaches** where qualitative data is not at odds with quantitative data?

GRANT COMPONENTS

How did Data for Equity's different components support or hinder grantees' goals?



CASE STUDY

From **Researched** to **Researchers.**

Community researchers gave power back to the community and expanded one organization's capacity.

A grantee used their grant funds to hire and train community researchers, shifting community members' role to **the researchers instead of the researched.** While the organization had this goal for a long time, until Data for Equity, they didn't have the funding to build this organizational capacity.

The organization used the funds to pay for the training and time that they otherwise wouldn't have been able to do. Community members were formally trained in community-based research practices and equipped with new professional skill sets. They are now collecting meaningful data through focus groups and directly influencing the organization's strategic plan.

Grant Components

WHAT WE LEARNED:

Nonprofits are frequently strapped for time and resources, but Data For Equity's offerings allowed organizations an opportunity to invest in capacity-building even beyond equitable data practices.

- Grantees were able to **include a larger subset of their staff in Data For Equity programming**; staff who are typically excluded from similar capacity-building and professional development programs.
- The flexibility of the grant helped organizations **pursue capacity-building projects that are not typically funded** and offered the container, resources, and time to focus more pointedly on these projects.
- One grantee developed a data dashboard in the cohort, which helped them **win a grant** they had been applying to for four years.

Grant Components

WHAT WE LEARNED:

Time and staff are limited for grant-receiving organizations. To make the most of the of Data For Equity experience, grantees need more guidance from the Data For Equity Funding Collaborative on what to expect and recommendations on how to fully capitalize on the opportunity.

- The extensive grant offerings provided new challenges to grantees, who now had to prioritize these engagements in addition to their grant project and day-to-day work — especially for small organizations. This led many grantees to **miss out on the opportunity to utilize certain resources** (like coaching with Tanoma consulting or informal coffee connections).
- Grantees said they would be **more likely to utilize Data For Equity's additional offerings** if it was consolidated into the cohort meeting sessions, like incorporating informal connections into lunch or a post-session happy hour.
- Grantees needed to know **who benefited most** from specific content or support (e.g. coaching) so they could prioritize attendance and designate staff.
- When asked **which organizational roles might benefit most from Data For Equity**, grantees suggested that participating organizations send at least one program staff, executive leader, grant writer, and data analyst.
- Some grantees suggested **extending the grant cycle** to 18-24 months (e.g. year 1: learning; year 2: application and support)

Grant Components

WHAT WE LEARNED:

The cohort's intentional mix of organizations that varied by size, focus, geographic service area, and racial diversity pushed organizations into new spaces and mindsets centered on equity.

- Data for Equity's cohort model **fostered collaboration, not competition, between grantees.** Grantees had “safe spaces” to share stories, struggles, and exchange knowledge without feeling threatened or that they had to fight for resources.
- Grantees **mutually benefited** from exposure to other cohort members — this was exemplified in how grantees expressed that learning about the work of other cohort members lead to shifts in thinking on the ways they could benefit the communities they served.
- Multiple grantees reported developing **collaborations with organizations they wouldn't typically work with**, including cowriting grants and expanding their services through strategic partnerships.
- Grantees appreciated the exposure to other organizations who varied in size, composition, and focus. However, one challenge was that this sometimes **prevented opportunities to receive more tailored, specific content.**

Grant Components

RECOMMENDATIONS

- **Manage expectations.** Tell grantees up front, even session-by-session: *Who is this most valuable to? What will I get out of this? Why should I prioritize this engagement?*
- **Collaboration is transformative.** Grantees deeply appreciated the cohort experiences. Consider more ways to encourage cross-collaborative work and future partnerships amongst grantees.
- **Embrace diversity.** Keep the composition of the grantees receiving the grant diverse in size, focus, and even leadership. But find more ways to emphasize the value of this type of grouping. And, find opportunities to respond to more specific requests within existing session offerings (e.g. breakout discussions by sector).

Grant Components

OPPORTUNITIES

How might we...

- ...as the data for equity collaborative better **match grantees' needs with their capacities** so that they can take full advantage of the opportunities available through Data For Equity?
- ...as the data for equity collaborative **demonstrate the intention behind, and value of, a diverse cohort model** and sustained and intensive engagement approach to grantees?

TRUST-BASED PHILANTHROPY

What makes trust-based philanthropy an effective approach to grantmaking?



CASE STUDY

Disrupting **traditional philanthropy** models

Funders tested different practices that put trust in the grantees and disrupted status quo practices in philanthropy.

Data For Equity allowed the funders to explore different aspects of trust-based philanthropy. One significant change was asking grantees for verbal reporting instead of submitting the standard written report.

At the end of the grant, grantees met with the funders collaborative to talk about their project and the initiative overall. Grantees received a call transcript, which the collaborative used to evaluate the initiative's impact. Grantees revealed in focus groups and the final calls that they weren't sure what to think about oral reporting, and expected the funders to change their minds at some point during the year.

However, the oral report conversations with grantees led to fruitful conversations that shed light on evidence of impact and lessons learned that will help the funders improve and sustain Data for Equity.

The oral reporting proved so successful that **Interact for Health has now changed all grantee annual reports to oral reports.** bi3 is exploring how to leverage oral reports in addition to regular conversations with their grantees.

Trust-Based Philanthropy

WHAT WE LEARNED:

Grantees welcomed a different way of working with funders where they could define success together, but also grappled with the discomfort of a more emergent, responsive approach to grantmaking.

- Grantees appreciated the **trust and flexibility to design their own project** without strong funder oversight.
- Grantees shared multiple instances where the grant flexibility saved them time and/or energy: **ease of grant application, utilizing flexible funds, interviews and narratives for final grant reports**
- Grantees both **appreciated** and felt **uncomfortable** with the grant's openness and flexibility. Some weren't used to the grant's emergent style because of lingering feelings from past and other funding opportunities which felt much more cumbersome and arduous, such as the often required final report.

- All funders should operate this way. The funder should be open to knowing that things didn't go as planned. The people they are funding have the best pulse of the work.

- Data For Equity grantee

Trust-Based Philanthropy

WHAT WE LEARNED:

A more equitable way to approach evaluation and data collection was welcomed. But how do grantees and funders extend this culture beyond this grant?

- Grantees embraced Data For Equity's unconventional approach to data and evaluation, but acknowledged that **they still have to operate within conventional boundaries when collecting and reporting on data for other funders.**
- Grantees wanted more opportunities to share what they learned. Grantees believed **board member participation** was a valuable opportunity to build buy-in to this way of working with key decision makers, either through select participation or sessions specifically tailored to grantees' board members.
- Grantees requested that the funding collaborative **educate other funders** about trust-based philanthropy

How do we solidify these innovative changes [into our organizations]? And how do we share this with the rest of the organization?

– Data For Equity grantee

Trust Based Philanthropy

RECOMMENDATIONS

- **Use your voice.** Advocate for changes in the philanthropic field amongst your peers.
- **Offer assurance.** There is no report card. Assure grantees of the reporting process throughout the grant cycle — not just at the beginning or the end, to alleviate remaining uncertainties.
- **We're all on the same journey.** Remind grantees that funders are also figuring out equitable data practices while trying to model the same equitable data practices that grantees are learning and applying.
- **Continue to operate at the speed of trust.** Stay flexible and respond to grantees' needs while communicating expectations and expected outcomes.

How might we...

- ...as funders illuminate the **value of relationship building** to philanthropic institutions and their processes?
- ...as funders **shift the philanthropic landscape** toward trust-based philanthropy?
- ...as funders **communicate expectations** while maintaining our commitment to collaborative and flexible grant engagements?
- ...as funders help grantees **maintain equitable data practices** within the realities of conventional grantmaking?



APPENDIX

RECOMMENDATIONS SUMMARY

Mindset and Action Shifts

- **Keep building community.** Data For Equity's strength is its community of practice. Don't deviate from offering opportunities to discuss and reflect. Find ways to maintain the cohort connections post-grant.
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- **Get technical.** Find opportunities for people to get into the weeds of data collection tools, technologies, and methodologies.

Grant Components

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Trust-Based Philanthropy

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- **Continue to operate at the speed of trust.** Stay flexible and respond to grantees' needs while communicating expectations and expected outcomes.

OUR INPUTS



- Pre-Self-Reflection Tool
- Post-Self Reflection Tool
- Post-session evaluations



- Learning Session Interview
- Grantee Focus Group
- Post-grant 1:1



- Funder self-reflection



GRANTEE PROJECT DESCRIPTIONS

Organization	Project Title	Project Description
1n5	Collecting Data Through Community Conversations	To facilitate community conversations in diverse, underserved communities to gather data and assess the impact of mental health education on stigma reduction and help-seeking behaviors; execute equitable data collection to support community programming addressing racial disparities in mental health help-seeking behaviors
RefugeeConnect	Cultural Leaders as Co-Researchers in Data Equity	To analyze data to gauge the effectiveness of current programs and build the knowledge and capacity of Navigators as cultural leaders in understanding the research process; build a collaborative research foundation that values community-driven outcomes.
Catholic Charities Southwest Ohio	Utilizing Data to Increase Mental Health Services for Undocumented Hispanics/Latinos	To increase capacity to collect and analyze data to maximize our delivery of mental health services for undocumented Hispanics/Latino; will invest in Microsoft Power BI to bridge the gap between data collection, analysis, decisions and equitable program delivery
Leaming Grove	Delivering Equitable Services for Adults with Developmental Disabilities	To build the knowledge and capacity of organizational staff to collect, understand, and communicate data with an equity lens. We will do this through enhancing family surveys and providing equity coaching and training for staff.
Green Umbrella	Accelerating action for climate health in Greater Cincinnati through equitable data and evaluation	To form new Climate Health Impact Team through our Regional Climate Collaborative; facilitate cross-sector engagement on climate health equity; build our internal and programmatic capacity to analyze population and policy data; incorporate community voice into government plans; provide pathways for communities to address health disparities exacerbated by climate change.

Word Play	Community Voice & Youth Leadership to Drive Adolescent Wellbeing	To access data, best practices & training to integrate consistent community voice/input & youth leadership in strategic planning & programmatic evaluation. Goals: Increase adolescent agency, leadership, self-advocacy through community-based action research; activate Youth Leadership Council to co-lead biennial community voice project, liaison with our Board; inform/evolve strategic planning and deepen institutional equity leading to greater outcomes in adolescent mental health & wellbeing.
YMCA	Advancing Equitable Measurement Systems	While the YMCA has a wealth of data to lean on, it is scattered across program areas, decentralized, and does not center community voice. With ResultsLab, the YMCA is designing a new system of data collection and analysis that will allow us to: disaggregate data by all identities to understand how the YMCA experience differs for different identities; measure more fluid concepts such as joy and feelings of community; incorporate community voice into all aspects of data measurement; and more.
Cradle Cincinnati (Cincinnati Children's Hospital Medical Center)	Queens Village Advisory Board Community-Based Participatory Research training and evaluation	Deepen our understanding of the impact and opportunities for connection, empowerment and transformation of Black mothers at Cradle Cincinnati through a community-based participatory research evaluation project that engages a local Black researcher, Queens Village Community Advisory Board and Cradle Cincinnati Staff. The ultimate outcome of this work would be an actionable report shared through professional presentations and meetings with local and national organizations and funders.
Black Women Cultivating Change (BWCC)	Elevating Black Voices in Gauging Mental Health	BWCC will coalesce a working group to develop a mental health inventory for the local Black Community. This will be a collaborative effort to create a tool better to understand the state of mental health of Black residents, giving power to participating members to define issues and prioritize focus areas. BWCC will work with community partners to distribute the survey, collect responses, and report the findings. We will use the survey responses to inform our approach to providing our services.
Beech Acres	Equity-Centered Kinship Connections	To utilize improvement science, best practices and human-centered design – in partnership with kin caregivers – to drive equitable evaluation and demonstrate program impact

SELF REFLECTION TOOL

Data and evaluation efforts are not inherently objective, unbiased or equitable. Who decides and how decisions are made about evaluation questions, methodologies, the interpretation of results, and whose voices are and are not included present opportunities for values, biases, and worldviews to influence the process and the outcome of the evaluation effort. Intentionally taking an equitable approach strengthens transparency and rigor and works in service of advancing health equity.

The purpose of this tool is to support organizations in performing a self-assessment of their journey to use data and evaluation in pursuit of equitable programs and outcomes. It is recommended that the self-assessment is completed through a conversation between multiple staff members with evaluation and data responsibilities at the organization. The self-reflection tool is not a required element of the Data for Equity proposal but it can help identify strengths and potential areas of growth that could be supported through the Data for Equity capacity building program. The Data for Equity capacity building program aims to help organizations who have made some initial steps along this journey to continue to grow and learn.

- For each element listed in the table below, reflect on the extent to which your organization has considered, planned, or made progress carrying it out. Once completed, reflect on the following questions.
 - What are our strengths? What did it take for those to become our strengths?
 - What are our areas of opportunities? What specific steps can we take as an organization to move us further along in our journey in using data to advance equity?

SELF REFLECTION TOOL

For questions regarding the self-assessment tool, please contact Michelle Lydenberg at mlydenberg@interactforhealth.org.

Sources:

[Equitable Evaluation Guiding Questions](#),
Youth Development Executives of King County

[The Equitable Evaluation Framework Framing Paper](#),
The Equitable Evaluation Initiative

[Is My Evaluation Practice Culturally Responsive?](#),
Public Policy Associated, Incorporated

[The Data Equity Framework](#), We All Count

[Race Equity and Inclusion Action Guide](#), The Annie E. Casey Foundation

	<i>Have not considered yet</i>	<i>Has been identified as an opportunity</i>	<i>We have a plan to address</i>	<i>We have started making progress</i>	<i>Is a strength of our organization</i>
Equity is a central and explicit value of our organization					
Our organization has diversity, equity and inclusion (DEI) goals included in its strategic plan					
Our organization has identified metrics for measuring how it is working toward its DEI goals					
We have participated in cultural competency or equity training					
We examine the potential impact of cultural stereotypes and personal biases in our evaluation efforts					
Equity is an explicit value or goal in evaluation design					
We engage community members, consumers and stakeholders throughout the evaluation process (design, data collection, interpretation of results, applying findings)					
We consider the impact of structural and systemic inequities on our projects and evaluation					
We choose and assess data collection instruments and tools for cultural appropriateness					
We use evaluation data to assess how services or projects are delivered to different groups of consumers or stakeholders, as applicable					
We disaggregate outcome data along demographic lines to identify potential differences in impact of the program(s) or project(s)					
Our evaluation results are shared with community members, consumers and stakeholders					
Our evaluation results inform continuous improvement efforts to drive toward equity					

FOCUS GROUP RESPONSES



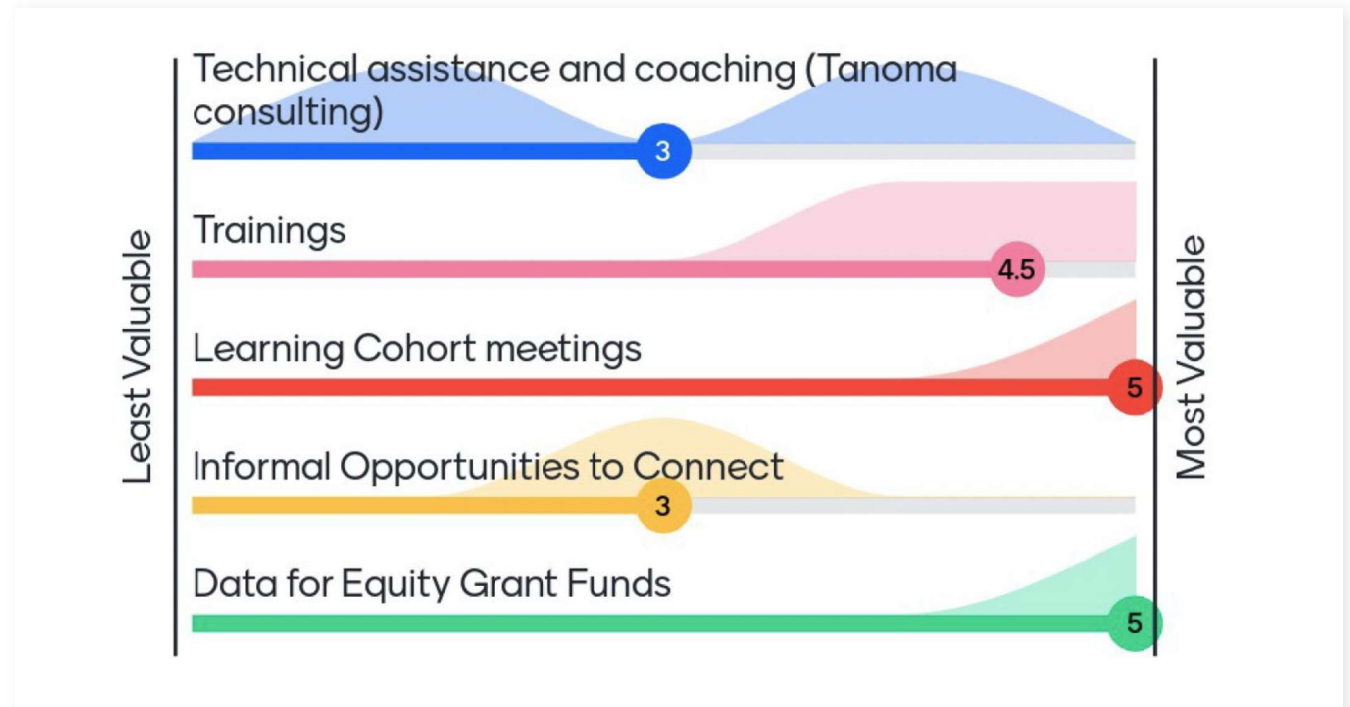
What's one word you would describe your experience with Data for Equity?



FOCUS GROUP RESPONSES



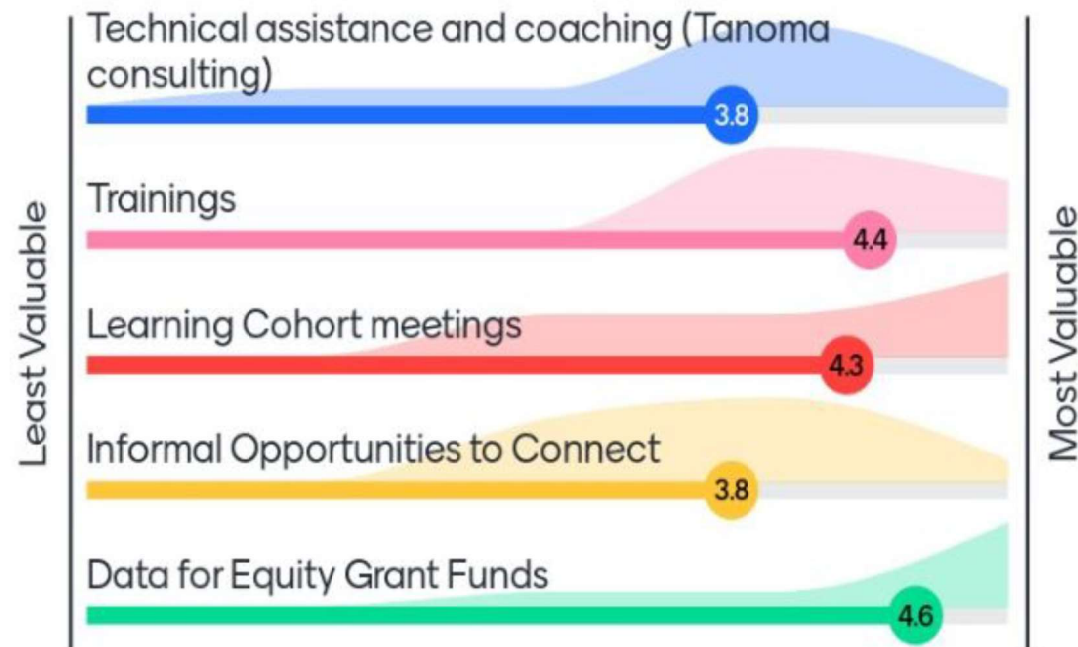
Which elements of Data for Equity were most valuable to your organization goals and growth?



FOCUS GROUP RESPONSES



Which elements of Data for Equity were most valuable to your organization goals and growth?



FOCUS GROUP: ADDITIONAL DATA POINTS

- Money is always good. The funding opens up the door to do the project. Without the flexible funding you may not be able to do the project. You also are able to focus more explicitly on the effort with the flexible funding.
- A lot of times, we are outside the box, and so if someone is asking me detailed the questions, she doesn't want to reveal the secret sauce. – Moving away from scarcity.
- Is there a one-pager from each session to like share with the full staff.--materials we could distribute.
- On the grant side of things, it was a very nice seamless process. They were very responsive. Their approach to why this is important and why this needed to be in a cohort was important context.
- They really are a totally different kind of funder. They are thoughtful about the ways they partner. They don't just want you to send a yearly report, and hide challenges. They also connected us with other partners.
- Can the funding collaborative continue to educate [other funders] in this space? This is meaningful and you should be shifting how we do fund.
- Sometimes we would have benefitted from more ongoing metrics and clear expectations. It was hard to track like if we were making progress. Granted, it worked out well. But we had no idea what was expected in the end.
- Grantees are thinking more intentionally about the questions they ask to gather meaningful data
- It is the first time we did an interview for a final report. We often feel like we have to prove what we did for funders at the end of a grant, but that didn't happen here.



THANK YOU!

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