

# Bay Area Cohort 2024 - 2026

*Year 2: 2025 in Review*





# Shared Goals for our Bay Area Cohort



## Capacity Building

Nonprofits learn practical, data-driven skills & strategies to leverage information to inform their work.



## Community Connection

Nonprofits learn from each other, share ideas, and build relationships with peers and funders.



## Impact Storytelling

Nonprofits learn to tell data-backed stories about their work that resonate with funders and the people they serve.

# Bay Area Cohort: 2025 By The Numbers



5

Funders



5

Grantees

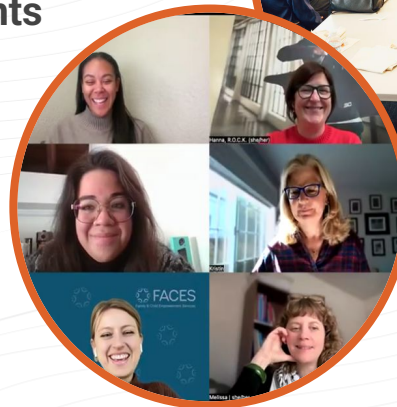
80+

Hours Dedicated to 1:1  
Impact Data Support



2

In-Person Cohort  
Community Building  
Events



4

Virtual Collaborative  
Learning Sessions



# UpMetrics Dedicated Team



**Alyssa Wing**  
Senior Client Manager



**Ashley Reed**  
Customer Success Engineer





# Cohort Funders

## Morgan Charitable Foundation



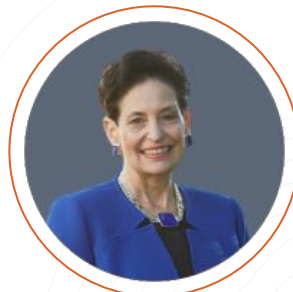
Linda Verhulp

## O'Brien Family Foundation



Susan O'Brien-Frimel

## Payne Family Foundation



Rosyln Payne

## Quest Foundation



Derek Jernstedt

## The Walther Foundation



Christy Tripp



Jad Dunning



# Cohort Grantees



# Welcoming a New Cohort Partner: Women's Coaching Alliance



*Women's Coaching Alliance joined the Bay Area Cohort in June 2025 after Peer Health Exchange was unable to continue in the cohort.*



WCA is delivering a deep pipeline of confident female leaders so together we can close the leadership gap. WCA's signature training and development program **"Coach Today, Lead for Life"** serves young women athletes in their formative years (ages 15-26) and builds their foundational leadership skills and confidence through coaching youth sports. Even better, by increasing representation of female coaches in youth sports, a virtuous cycle begins, inspiring the next generation.





# Women's Coaching Alliance

[www.womenscoachingalliance.org](http://www.womenscoachingalliance.org)



As a newer member of the UpMetrics Bay Area Cohort, we've valued having space to learn, experiment, and grow. In just six months, the cohort has **clarified where we want to focus our data and impact storytelling, accelerating our learning** and deepening our understanding of how to present our work. We're still a work in progress, but **we feel confident about the meaningful strides ahead thanks to the support and shared learning in this community**. We appreciate how this experience has been a springboard for our progress, helping us gain momentum much faster.

- Kristin Jerome, Manager of Events and Operations







## Year 2 Highlights

- **1:1 Meetings:** Continued monthly with each grantee
- **100% Data Visualization Operationalized:** Every grantee's impact framework is now a working dashboard on the UpMetrics Platform, enabling internal program teams to visualize and utilize their data. This process is iterative and ever-evolving, but every grantee now has a portion of their data visualized in dashboards.
- **Robust Capacity Building & Community:** Executed four Quarterly Collaborative Learning Sessions and two in-person sessions to build data capacity and foster community within the cohort.
  - **Key Topics Covered:** Data Collection Best Practice (Q1), Upload, Explore, Empower: Data and the UpMetrics Platform (Q2), Your Data, Your Dashboard: An Interactive Dashboard Building Session (Q3), From Manual to Magical: Automating Insights with Generated Columns (Q4)
- **Streamlined Data Governance:** Defined and began developing internal data processes to ensure grantees have a clear, streamlined avenue for ongoing data updates and uploads.
- **Audience-Specific Reporting:** Successfully identified additional ways grantee data can be leveraged to serve various internal and external reporting audiences.



# Grantee Spotlight

During the in-person community building session in September 2025, The Arc shared a grantee spotlight with the full cohort. Esther, Melissa & Arturo reviewed The Arc's service offerings and programs before delivering a highly engaging presentation focused on participant data, survey design, and data collection challenges.



**Esther Landau**  
Senior Director of  
Advancement



**Melissa Crisp-Cooper**  
Associate Director of  
Participant Experience



**Arturo Guillen**  
Director of  
Communications

## Key Insights

The Arc addressed **participant accessibility needs** for survey completion and strategically mapped survey data back to the organization's strategic goals. The Arc shared successes and challenges with this.

The Arc's presentation sparked an insightful and collaborative discussion among the cohort. Grantees shared **survey collection best practices**, identified **new methodologies**, and outlined **ideas for improving data quality** that others hadn't considered.

A key discussion point was how grantees have **successfully identified and leveraged their data** for advocacy. This topic led to strong collaboration, highlighting the potential for data-driven storytelling across the cohort.

# What's Next in 2026? Final year of the cohort!

## Dashboard Optimization & Expansion

- Refine and finetune existing impact framework dashboards.
- Build new dashboards to be leveraged for both internal program management and external reporting.



## Grantee Independence & Empowerment

- Train and equip grantees with the tools and knowledge to autonomously manage and operate their own data and dashboards.



## Advanced Data Utilization & Storytelling

- Build advanced analytical skills within the cohort (e.g., Advanced Analytics sessions) to effectively use their new data and insights.
- Support grantees in translating complex data and impact metrics into effective, compelling stories for various audiences.



## Internal Capacity Building

- Conduct targeted training and learning sessions to build the data capacity of specific internal teams.





# THANK YOU FOR YOUR PARTNERSHIP!

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