



Bay Area Cohort

Year in Review - 2024

Goals of the Cohort



To create a more connected and collaborative ecosystem between funders and nonprofits in the Bay Area



Through increased funder and nonprofit collaboration, improve the quality of life of Bay Area residents



Bay Area Cohort by the numbers...


5
Grantees

An orange line-art icon depicting five stylized human figures arranged in a group, with three in the front row and two behind them, all enclosed within a dotted orange semi-circle.

5
Funders

An orange line-art icon showing five stylized human figures standing in a row, holding hands, with their arms raised in a celebratory gesture.

4
Data & Leadership Sessions

An orange line-art icon of a laptop. On the screen is a stylized human figure. To the right of the screen is a speech bubble containing an equals sign (=).

70+
Hours dedicated to 1:1 DeCAL support



5
Cohort Community Building Events (virtual & in-person)



UpMetrics Dedicated Team



Alyssa Wing
Senior Client Manager



Darcey Altschwager
Solutions Specialist



Cohort Funders

The Walther Foundation



Christy Tripp



Jad Dunning

Quest Foundation



Derek Jernstedt

O'Brien Family Foundation



Susan O'Brien-Frimel

Morgan Charitable Foundation

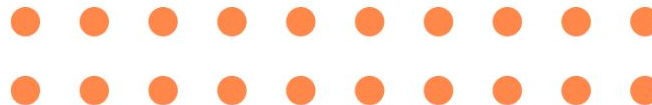


Linda Verhulp

Payne Family Foundation



Roslyn Payne





Grantees

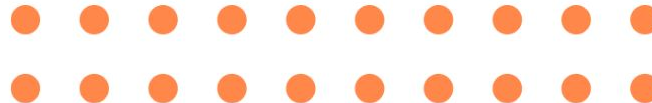
For our inaugural **Bay Area Cohort**, we selected **5 nonprofit Grantees** serving the Bay Area community to participate in a collaborative learning space with the goal of learning in partnership with our cohort Funders.

The cohort is a **3-year program** designed to support each nonprofit with their **impact measurement and management** journey through monthly 1:1 meetings and in-person and virtual learning opportunities.



Managed Services Cohort Model

Year 1	Year 2	Year 3
Build	Operate	Transfer
<p>We build your impact and learning system in partnership together.</p> <ul style="list-style-type: none">• Define key impact metrics by creating an organizational wide impact framework• Build a version one of dashboard aligned to your organization's impact framework• Staff onboarding and training tailored to use case• Build capacity and knowledge through 1:1 monthly meetings and quarterly learning sessions with the cohort	<p>We operate the fully functional system and make iterations as an extension of your team.</p> <ul style="list-style-type: none">• Refine data gathering processes and transformation of new data• Regular updates to data collection and import tools• Iterate on dashboard organization• Ongoing training and support as needed	<p>We can transfer over the system for you to manage yourself, or we can continue to operate it on your behalf.</p> <ul style="list-style-type: none">• Transition of dashboard creation and maintenance• Transition of data gathering and maintenance operations• Transition of platform administration and training



The Arc San Francisco

www.thearcsf.org

Disability Justice

About

Founded in 1951, The Arc San Francisco is a collaborative community of participants, families, and Circles of Support working together to provide accessible, inclusive services, and advocating for disability justice.

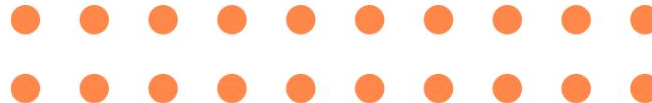
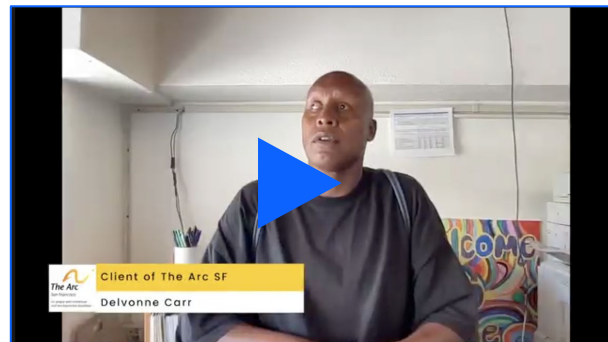
Mission

To partner with adults with developmental disabilities as they design their futures and transform their communities through lifelong learning and self-determination.



Social Impact
Showcase
Submission

[See Impact
Framework](#)



The Arc San Francisco

www.thearcsf.org

Disability Justice



“ We are huge fans of this UpMetrics project. One thing that’s so exciting is that we’re able to conceptualize how to use the data that we already have and also teasing out and understanding ways that we can create and adapt data that’s person-centered and participant led... **I also want to shout out our colleagues in the cohort, it’s a brilliant group of people and we’re learning a lot from them** .”



- Esther Landau, Senior Director of Advancement,



FACES SF

www.facesf.org

Child Development

Family Support

Workforce Development

About

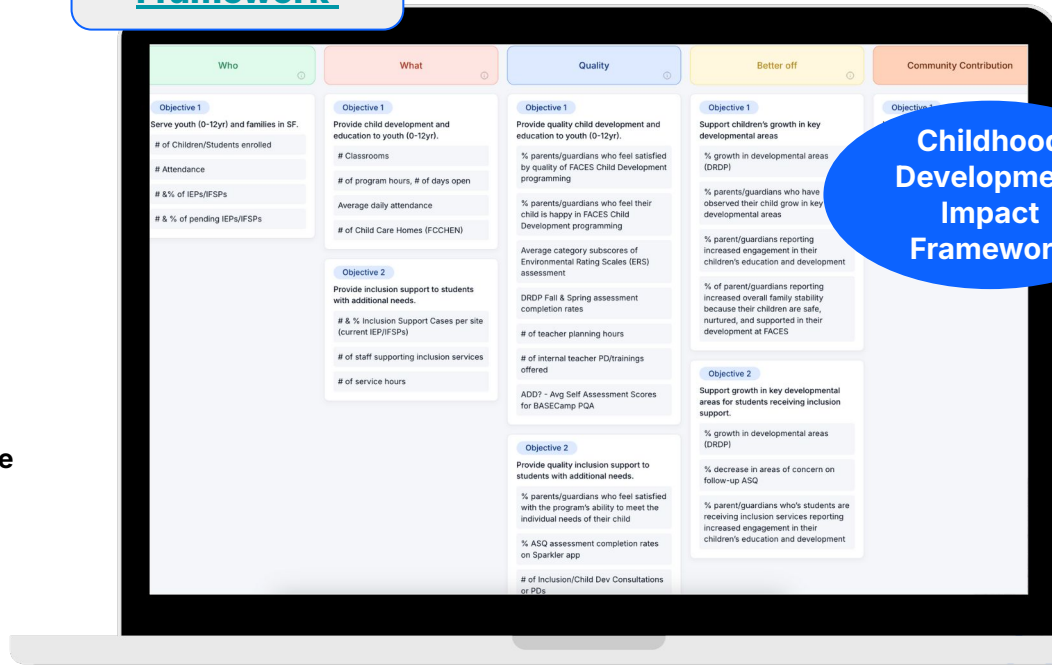
FACES envisions a future where all families have what they need to live, grow, and thrive in San Francisco. FACES' '2Gen' whole family model includes three interconnected programs: Child Development (ECE + Afterschool K-6), Family Support & Wellness, and Workforce Development.

Mission

For every child to reach their unique potential within a safe and joyful learning environment and every family to access a network of support that promotes well-being, opportunity, and community.



See Full Impact Framework



Childhood Development Impact Framework

“ One of the biggest benefits of the cohort is having connections with other community based organizations in the Bay who are also learning how to measure impact through their work. I am **looking forward to learning more from our collective insights** , as well as the quarterly data and leadership sessions. I feel lucky to be a part of a cohort that offers this type of shared learning.”



- Laura Preuss, Manager, Evaluation and Learning



Holy Family Day Home

www.holyfamilydayhome.org

Early Education

About

Holy Family Day Home envisions a future where more Bay Area children and families have the opportunity and skills to maintain stable, healthy lives, realize their potential, and better contribute to their community.

Mission

To support this, they provide: Childcare for children aged 3 months to 5 years; Reggio Emilia-inspired Early Childhood Education; and Wraparound family services.



HOLY FAMILY
DAY HOME

Educate • Empower • Enrich



Social Impact
Showcase
Submission

[See Impact
Framework](#)



Holy Family Day Home

www.holyfamilydayhome.org

Early Education



HOLY FAMILY
DAY HOME

Educate · Empower · Enrich

“ It is a very positive experience working with UpMetrics, and the UpMetrics team has always been very helpful and supportive with us through our 1-on-1 meetings. Attending in-person event to meet with UpMetrics team and other like-minded organizations has been my favorite part of the cohort. We have also **shared the importance of data within our organization** , and are putting more effort to **collect impactful data** across different departments. **We have learned a lot from this cohort and 1-on-1 sessions.** We’ve learned the DeCAL methodology, importance of trust and inclusivity while collecting data, and the impact measurement tools. We are also look forward to attending more of these quarterly data and leadership courses.”

- Zaw Ye Naing, Development Associate



ROCK SF

www.rocksf.org

Youth Enrichment

About

Real Options for City Kids (R.O.C.K.) is the largest provider of academic and social support for at-risk youth in Visitation Valley. R.O.C.K. addresses the needs of at-risk youth through an innovative combination of learning enrichment, sports and fitness, leadership training, and outdoor adventure programs.

Mission

R.O.C.K.'s Programs are based on Three Following Goals: Learning to be productive by engaging in positive experiences; Learning to connect by building positive relationships with adults and peers; and Learning to navigate through life circumstances by participating in responsible, meaningful activities.



Social Impact
Showcase
Submission

[See Impact
Framework](#)



“ For R.O.C.K., the best part about the cohort learning that we’re doing is **hearing about challenges other organizations are facing around metrics and data gathering** , but also hearing about the solutions they’ve found for themselves. I feel like **I’m learning something new to bring back to R.O.C.K. after each session** , and I really hope I’m leading others with some of our lessons learned as well.”



- Hanna Doer, Deputy Director

Peer Health Exchange

www.peerhealthexchange.org

Health Education

About As an organization committed to advancing health equity, Peer Health Exchange works with under-resourced high schools where the majority of students are living in poverty. These schools partner with Peer Health Exchange to supplement or provide their health education program.

Mission Peer Health Exchange's mission is to build healthier communities with young people.

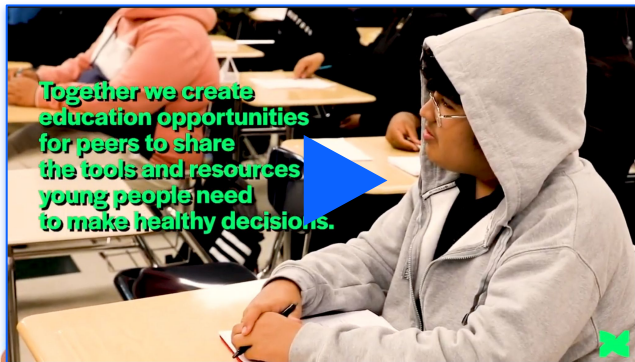


peerhealth



Social Impact
Showcase
Submission

[See Impact
Framework](#)



Peer Health Exchange

www.peerhealthexchange.org

Health Education

peerhealthX

“UpMetrics is amazing! The collaborative approach to building better impact management and measurement is a unique and valuable experience. The **networking and peer learning activities have been my favorite** and I think these opportunities are vital in **building successful** and **cohesive communities of practice** that transcend organizational walls... I'm really excited about where our work is going now that we're in a partnership with UpMetrics. I know we will continue to deepen our impact and expand the breadth of our work in this partnership.”



- Eko Canillas, Vice President of Learning and Strategy



2024 Program Highlights

- **Monthly 1:1 meetings** with each nonprofit to **operationalize their impact**
- In 1 year of partnership, we've **created customized impact frameworks** for each grantee, helping them determine their north star impact metrics in alignment with the mission and vision of their organization.
- **Quarterly Data and Leadership Sessions** to build capacity and cultivate community within a dedicated shared learning space. Topics in year 1 included:
 - Data & Fostering Trust & Inclusivity
 - Capacity Building & Prioritizing Org Infrastructure
 - Leveraging Quantitative & Qualitative Data
 - Data Visualization Best Practices



Inaugural Funder Workshop



Recap Video

A Day of Accelerating Community-Driven Social Impact

Earlier this year, UpMetrics hosted a workshop to commemorate the very first Bay Area Cohort, gathering funders for a day of shared learning and collaboration.

Check out the video to see UpMetrics team members and cohort funders discuss the importance of impact measurement in accelerating positive social impact for the local communities they serve.



August Convening Workshop + Happy Hour

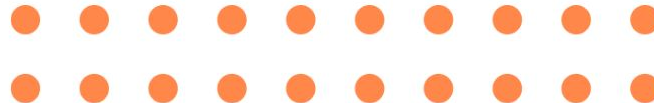


As a follow-up to the cohort's inaugural workshop, UpMetrics set to gather funders and grantees together in person for the first time, providing them with a rare chance to make connections and collaborate in the same space. The night ended with a lively networking and happy hour session attended by various individuals across the Bay Area social impact scene.



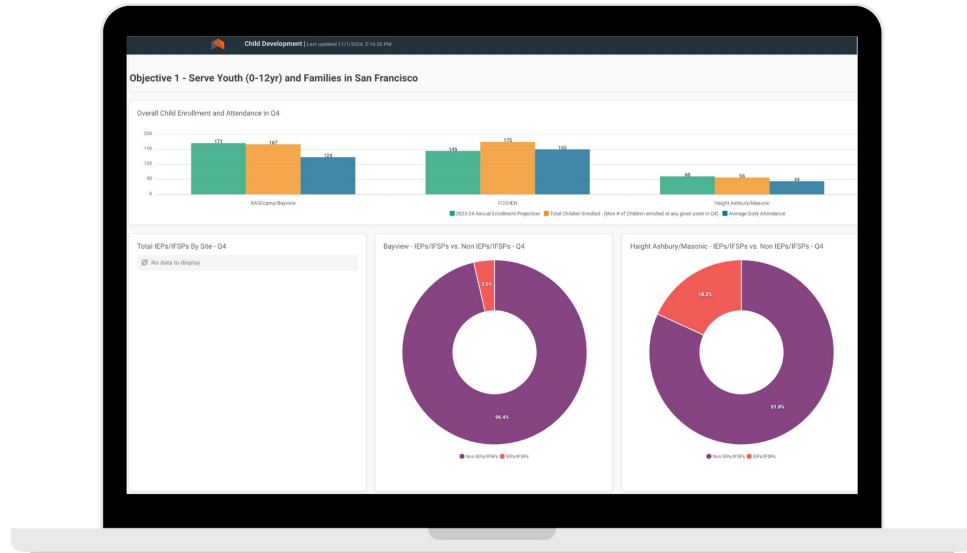
During the collaborative session, cohort members were able to:

- Showcase their impact framework and share learnings from the last eight months of working with the UpMetrics team.
- Engage in a "Case Study" activity where funders practiced the "Leverage" stage of our DeCAL process.



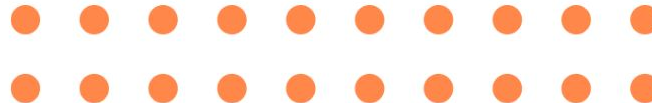
What's next for Year 2?

- With an impact framework in place for each grantee, we'll be focusing on creating a **strong data collection infrastructure** to be able to ultimately pull their impact data into the platform
- We will focus on refining their **organizational impact dashboards** so that they can be **leveraged both internally and externally**



[Here](#) is an example of an impact dashboard from FACES.

This is still a work in a progress and will continue to be developed in year 2!



Thank you for your partnership!

The Walther Foundation

O'Brien Family Foundation

Quest Foundation

Payne Family Foundation

Morgan Charitable Foundation



peerhealth



Alyssa Wing
Senior Client Manager
alyssa@upmetrics.com



Darcey Altschwager
Solutions Specialist
darcey@upmetrics.com

