



Change is brewing: How nonprofits are turning data into action

Robiel Abraha: Hi, and welcome to Upstream. I'm Robiel Abraha, evaluation officer at Houston Endowment, and I'll be your host. Today we're talking about Coffee and Quality, which is a program that helps nonprofits in the Houston area use data to learn, make better decisions, and strengthen their impact. Today I'm joined by four terrific guests.

First, we have Jessica Davison, who is our assistant vice president of strategy, learning, and analytics at the United Way of Greater Houston. Jessica's a data enthusiast and the brains behind Coffee and Quality. We're also joined by Dan Potter, who is the director of the Houston Population Research Center at Rice University's Kinder Institute, and a data and evaluation partner for Coffee and Quality.

We also have Lindsay White, who's the executive director at the United Way of Galveston. One of the exciting developments that's happened recently is that Coffee and Quality has expanded into the Galveston area, and Lindsay is leading that work, so we're excited to hear how that's going. And last we have Sarah, who is the director of institutional giving at DACAMERA.

Sarah wears multiple hats. She is a fundraising professional, an arts champion, and as well as a local podcaster, but she's here today as a past and current participant of Coffee and Quality, so she's sharing her perspective from that. So I wanted to thank you all for being here, and I also wanted to thank the more than 170 of you all who are joining us live.

We're excited to have you join this conversation. If at any point in the discussion you have some questions, please feel free to use the Q&A function to submit your questions, and we'll dedicate some time at the very end to make sure we answer as many questions as possible. With that, I'd like to let us jump into a quick icebreaker.

So I want to ask you all to tell me about a time when data has changed-- made you change your mind on an issue, or you saw data change someone else's mind. And we'll start off with you, Jessica.

Jessica Davison: Thank you. Thanks, Robiel thank you so much to you, to Houston Endowment for all the support of Coffee and Quality.



It really is amazing to be here today to share more about it. So for me, moment came early on in my career. So I was working at a nonprofit that was focused on behavioral health. I was the data person, and so that meant going into the different program teams to share about their data, help them understand their data, and use it for continuous quality improvement.

I learned very quickly that not everybody is as excited as I am to talk about data. Imagine that. You know, the organization was really focused on mindfulness and recovery, and so I would bring these coloring sheets to them where they had outcomes on 'em, and they could color, I could talk about the results, we could talk about ways they could use this data to improve their work.

And it really helped break down the barrier to data as this conte- this complex for them that was really hard to grasp and bring it back into their work. So I was preparing an outcome report for a substance abuse treatment program. So they use an assessment tool to measure progress from beginning to end of treatment and think of this assessment tool as a Swiss Army knife.

We just used the one blade of outcome measurement. But it was, like, this super cool assessment tool that had all this really advanced methodology that you could dig into different features, different profile analysis. Oh, it was like the data geek's dream. And so I decided, okay I wanna try another blade from this Swiss Army knife.

And so rather than sharing their overall outcome results, I broke out the distress impairment for them. And so I looked at each group, each clinical team, and what distress looked like within their group. I created this really simple visual to show, like, how that was showing up for their different groups.

And I'll never forget it. I was sharing this result, and the lead clinician perked up, and she was like, "Oh my gosh, that is my group. This is their group dynamic. This is how they're showing up." And that was really the first time I'd ever seen the light bulb turn on for somebody when they saw [00:04:00] data, understood the context, and understood what that meant for their work, and she was off to the races after that.

She had a laundry list of ideas of ways she wanted to adjust, improve their work. It was really incredible. And so for me, that was such a formative moment of what does it mean when you really connect data to work, to folks doing the work, and then what that means for impact and change. It was incredible.

Robiel Abraha: Awesome. Thank you. I want to pass it off to Dan to share his story.



Dan Potter: Sure. I'm going to hop in a time machine and go back to the 1990s and actually share one of the first experiences I ever had with data. So I grew up in rural Virginia and had the privilege of going to middle school at Elkton Middle School.

Okay. And this school served sixth through eighth graders, and in the seventh grade the principal approached the class I was in and said, "We want to understand people's book bag weights," W-E-I-G-H-T. And the reason for that was that at that point, kids were putting all of their books in their book bags and walking around with them, and middle school is this massive developmental time period.

And so there was this concern that was emerging that kids were slouching. They had their shoulders getting curved in. And so he was like, "I want to get some data and information to actually understand how much weight is in people's book bags." And so one morning before school started I went, got to school early, and we had it was me and, gosh, it was probably like three or four of us in total, and we had three scales set up.

And we just asked people as they came into school that morning to step on the scale, write down their weight, step off, take off their book bag, step back on. What we ended up learning was that people were carrying about 22% of their body weight in their book bag on average, which was ridiculously high, and much higher than what someone should be carrying at that time.

And that's because what we were learning from kids as well was they never used their locker. And so that information we shared with the principal. The principal took the information and implemented policies within the school that extended the time in between classes to allow kids to move in between their classrooms without having to...there was still some rushing involved, but extended it a little bit. But it also just helped create a healthier environment by having that information and knowledge. And so there was this very much, And again, we're talking early formative. I wasn't a researcher back then, I was just a little middle schooler.

But watching data be collected and then not just, collected for the sake of having it, but using it, was a very interesting and informative time. And yeah. Middle school, 1990s, Elkton Middle School.

Robiel Abraha: All right. Okay, I'll pass it off to Lindsay. These are both great examples.

Jessica Davison: Thank you, Robiel. My example of when data changed my own mind is a little more personal. In my weight loss journey, I recently added a glucometer to my toolkit, and my glucometer tells me way more accurately what foods are good for me, giving me fuel, giving me energy, or doing the opposite, better than I personally can do.



So I might make my own assumptions about whether or not this is a good time to eat that thing, but the glucometer doesn't lie. It tells the truth every time, all the time, and it has changed my behavior. So this idea that there are bits of information all around us all the time, every day, what can we do with them?

I've been trying to think about how can I use these bits of information to shape my own health. But also that was just a fun example for this one. I wanted to give y'all a peek into my own ... How am I using it inside?

Robiel Abraha: Awesome. Nice. And we'll finish off with Sarah.

Sarah Brown: Yeah, great. My story takes place in the early aughts, so you can get back in Dan's time machine.

Yeah. I was a sophomore in college at the University of Louisiana at Lafayette, and I was in a biology class, and it was one of those huge lecture auditoriums, with just tons of students. And so we're having our biology lecture and at the end, our professor kinda takes a step forward and he's having a different tone with us.

He's "Hey, I wanna talk to you guys about something that's not involved in our coursework." Now, again, it's the early aughts, okay? It's like 2000. He was talking about, he's "If you quit smoking today, in 10 years, your lungs will be like someone who hasn't smoked. And I want all of you guys to know that, because just because you smoke today doesn't mean that it's a lost cause. You can recover." And so my confession is that I was a pack-a-day smoker in college. Again, it was, like, the '90s, early aughts. It was way more of a thing back then. But that really struck me and stuck with me, and it did take me a few more years after to quit, but it was just such an impactful moment that he shared that with us.

And I think it's such an interesting way to think of the sunk cost fallacy sometimes that we all get stuck in for multiple reasons. But yeah, that professor made a big impact on me that day.

Robiel Abraha: Awesome. And, my example is very similar to Sarah's. My background is in public health, and so as someone who works in public health, you're often always trying to change people's behavior with data and evaluation, and you're always trying to combat misinformation.

So I think early on in my career, I had this assumption that if I had really good data and I just showed people that they're wrong and browbeat them with the data, it would change their behavior. One of the things I learned as I started, researching about human psychology and the research out there, you realize that, research and data alone



doesn't always change people's behaviors and mindsets, and a lot of time it involves recognizing that there are patterns and behaviors and identities and cultural things that form people's opinions.

And so part of that is how do you translate research and data in a way that's accessible to folks, that reaches folks, that creates a dialogue rather than to lecture them or to say that they're wrong? And so there's a finesse to how to improve your data communication, so that's something that I've worked on throughout my career is like, how do you get better at, translating data and research into something that kind of changes human behavior, recognizing it, it requires a dialogue and conversation oftentimes.

And just really appreciated hearing all of you all's examples of how you got into data and evaluation. As we mentioned at the beginning of the discussion, this is really about helping nonprofits use data, and we want to keep the nonprofit voice kind of front and center in this discussion.

So I wanted to start off with you, Sarah to talk about, a little bit about Da Camera for folks who might not be familiar with the organization, and also talk about how, an arts organization, which a lot of folks might not always associate with data, got involved into this project around data.

Sarah Brown: DACAMERA is a chamber music and jazz presenter here in Houston. We present downtown in the Houston Theater District. We also have shows at the Menil, and sometimes we pop up all around town. We've got free concerts happening all the time. We also have a wonderful professional development program for emerging professional musicians called The Young Artists, and they're representing us.

They're going into schools and doing arts integrated education and a whole host of other things. We have announced our season check that out for next year. So my quick Coffee and Quality story, which is a mea culpa also was that as director of institutional giving, a lot of my role does involve grant writing. The first year that Coffee and Quality did the fellows program, which I know we'll talk more about they put out the application, and they mentioned there will be a grant associated with this program.

And I was like, "I'm applying for it," because I apply for all the grants, and I did not know what I was getting into. Of course, I was like, "Oh, yeah, this seems interesting to explore," but going through the 15-month fellows program, it really completely opened up my eyes and shifted our organization.

Prior to that, I was really director of institutional giving, but now I also have an additional aspect to my role at DACAMERA, which is the data team lead. So we have a data team. I



was always handling data as a grant writer, because our funders want to know how we're doing.

They want to know about our metrics. But after going through Coffee and Quality, it's a much more holistic understanding of all these concepts, which I'm excited to get into today.

Robiel Abraha: We got a little bit of a teaser about Coffee and Quality and the fellows program, but I wanted to give Jessica a chance to tell us about the origins of Coffee and Quality. What made you all decide to focus on data? And also, where did this name come from as well?

Jessica Davison: Let's jump back into that time machine, why don't we? because United Way of Greater Houston, since the early aught, since 2000, has been focused on outcome management. We really were focused on that, especially for the organizations that we funded, our grantees at the time.

And we would do these rinse-and-repeat trainings, these basic trainings of what's an output, what's an outcome, how do you make a logic model? And we did that from really 2000s into 2019, and it was at that moment, around that time, in the 2012s, 2013s, I was, at another nonprofit who would come to these trainings that United Way would have.

And so every time I would come, I would sit at a different table, meet another nonprofit, and talk and listen to them talk about their outputs and outcomes and what that looked like in their organization. In all kinds of orgs too, like it wasn't just behavioral health. There were basic needs. There were other healthcare kind of focused organizations. And so that was really incredible for me to have that exposure because I was a one-woman show, and I was like, "Anybody else doing this? Anybody? Anybody?" And I remember, too, a little while later, as I kept coming to these basic trainings, program manager at the time, he was like, "Jessica, why do you keep coming to these? Why are you here? You know this already." And I was like I sit next to somebody new every time, and I hear about what they do, what their data looks like in their organization." And so when I had the opportunity to join United Way in 2019, I was like, "Hey, there's a group of folks who are looking for something more than just the basics."

And so hats off, applaud to United Way's leadership. They really let you dream courageously. And so they were like, "All right. If you wanna try it." And so Coffee and Quality started as a pilot in 2019.

Robiel Abraha: And can you tell us a little bit about how that program has evolved since then?



Jessica Davison: It started in 2019 with we go wide on a variety of topics, and so that's really the OG of Coffee and Quality. It's now quarterly virtual sessions, but back in 2019, we had people come in, and that is the origin story of the name, too. So back in 2019, the coffee around United Way when you would come to a meeting was just not the best. And so it wasn't a hidden secret. If you were coming around in those early aughts, early 2000s, you knew. You were like, "Oh, no. Bring your own coffee. This is not the one." And I was like if we do this coffee and quality thing, we can have good coffee. We can have real creamer." And so that was part of the name, right? Coffee and then focus on quality. We started with these quarterly sessions, let's go wide on a variety of topics. And then we were like we also need to bring back those individual, recordings of those basics," and so we stood those up as this, YouTube series so people can catch that. But really, at the core of Coffee and Quality is something for individuals and something for organizations.

And our kind of mirror into both is the data practice survey. We do that annually, so we really get a sense of what's happening for individuals and what's happening with organizations for their data practices. The other two components we have for individuals are we have the Data Leaders Learning Circle, and so that is for the folks that are, like, the one in their organization.

The data leaders, come together as a support group. They talk about different topics that are really top of mind for them, to hear what others are doing, share prac- best practices. Sometimes they read an article and talk about that. They're a really passionate group that comes together probably every other month. And then we have the learning cohort.

Jessica Davison: And so the learning cohort, if the original Coffee and Quality started let's go wide on a variety of topics, around that 2020 time period, we're like, "What else could we do?" We're like, "Oh, let's go really deep on one topic." And that topic is storytelling with data through data visualization.

Jessica Davison: Everybody wants to talk about storytelling. What's the story behind your data? What's this visualization mean, right? There's all of that. There is an art and a science to that. There is a lot that goes into that when you have data, narrative, and visual. We package that together for the learning cohort in this three-month, some folks call it a mini college course, where they get to really learn some best practices, some research behind what makes a data visual easy for someone to interpret, and how do you make the complex simple. There's a lot of learning, but also a lot of doing. They have a lot of practical application within the learning cohort. Earlier in the year, we finished our 10th learning cohort, and so now we have over 100 participants.



They come together quarterly to really continue to strengthen that muscle of storytelling, data visualization. So we do that for individuals, and then we have organizational focus, because we want to be there for both individuals. Regardless of if you're the data person or not, we really want to meet you where you're at, and so we take the same approach for organizations.

Some organizations have amazing data practices. They have sound things that are happening. They're collecting data regularly, looking at it, improving it, and so they have a treasure trove of data available to them. And in partnership with Kinder Institute, we do the case study. And so that's a six-month experience for one nonprofit where we take some data that they've got, help them answer questions that they're not able to answer with their own analytical know-how, do-how internally.

What's really incredible about the case study, and while it draws back to the whole essence of copying quality, is being able to learn from others. The nonprofit, at the center of the stage is taking these results in, improving their work, strengthening what they're doing, finding amazing insights and aha moments from their data.

And then we carve out key takeaways that other nonprofits can learn from them. And so that's just this treasure trove as well of ways we can reference back when one nonprofit's "Hey, I'm struggling with data dictionaries. What should I be doing? What does that look like?" We can go, "have you seen the Hamm Social Services case study? Let me walk you through that one." And so we have these to reference back.

And then we have the fellows program. And so the fellows program, as Sarah mentioned, is a 15-month-long program. And if we think of individuals as we want to meet you where you're at, we think of organizations the same way.

And sustainability of data practices looks different in every organization's environment. What it looks like in DACAMERA should look like it should look for DACAMERA compared to an organization like DePelchin Children's Center. It should look like it looks like for them based on their mission, their scope, their size.

We really meet organizations where they're at to help support them in sustaining those. And so that's the fellows program. But Sarah, do you want to share a little bit more about all the bells and whistles to it?

Sarah Brown: Yes. I really enjoyed my experience with the fellows program. And just in case we don't get a chance to shout it out there, accepting applications right now for the third cohort. So I highly recommend any org that hasn't done it yet to take a look at that.



Like I said earlier, going into it, I really did not know what to expect, I'll be honest. So it was me and my general manager who was there which I'm really glad that our general manager was a part of it because, he's one of our top executive leaders, and he was really able to see the value in this work and help us implement these ideas as we got going.

And I would say that my state at first was extremely overwhelmed. Because there were, quite a few, I think it was seven different concepts that we were working through. So some of them I was complete- completely new to new to me. Some of them I understood a little better.

We did a little SWOT analysis of DACAMERA to start with. We got this great poster board, which is in my office now, so I constantly look back at it and be like, wow, we had some goals that we set out to do when we started that program, and we did them. The advice that I give people with this work in data is it is very overwhelming, and it's infinite.

And what we'll talk about CQI, I think, a little bit later, but it really is like a continuous process to be where you're at and keep growing. You don't have to do it all right away. You can do it piece by piece and slowly improve. And since we've done Coffee and Quality, as I referenced earlier, we now have a data team, which is basically, we have a pretty small staff.

So it's basically everyone on the staff. But, we get together and we wear our data hats. We meet quarterly. We're working on a really nice streamlined data dashboard where anyone can go and figure out our stats, like how many audience members are coming, how many children did we see in the schools?

And, these are always things that I had to go look for in the grant reporting stage, but now it'll be a little more accessible for us. We really have revamped our audience surveying, which has been really cool to see. We do a survey after every concert we do, and then we review the survey results as a full staff.

And it's not that we weren't doing any of these things, but I feel like Coffee and Quality really gave us the framework to really understand this work on a deeper level. And it also honestly made us so pumped up about it. I think it might seem like, oh, data, it's so boring, but, like it's not. It's cool. It's fun. I'm, like, the words, a huge joke at the office, like, how excited I am about data. Every time there's a data team meeting coming up, I'm like, "Guys, the data team meeting is this week." I'm excited about it.

Robiel Abraha: One key takeaway that I'm getting is that, this program is not a one-size-fits-all model. You all have a lot of different tactics that you take to build kind of data and evaluation capacity in nonprofits, just because there's so much need, and there's



so much different ways that folks learn. So I appreciate the variety of options that are available. And you mentioned earlier that this partnership with Kinder Institute so I want to invite Dan to talk a little bit more about, you've been a partner with Coffee and Quality for some years now, and I know that you all do some survey work alongside United Way to understand the impact of this program. So I wanted to see if you can talk through some of what you're finding about what impact that this program is having on nonprofits, and where there might be still areas of growth.

Dan Potter: Yeah, absolutely. Jessica mentioned earlier the data practices survey that we've been doing now since 2024. And what's been phenomenal about that is that over that time we've grown the number of respondents we've heard from, and I think one of the things that's very impressive with the work you've done, Jessica, is you've grown the number of organizations. We're hearing from with each of those surveys, which has allowed for us to make sure that as that information is coming in, sure, we're hearing from folks that are engaged in Coffee and Quality and perhaps your greatest hits kind of organizations, but we're hearing from folks who've never heard of Coffee and Quality or set foot in Coffee and Quality. But regardless of, and again, this just goes back to the beauty of Coffee and Quality, wherever you're coming in from, the survey gives that opportunity as well to come in wherever you are at and just talk with us about, when we think about things like logic models, data dictionaries, measuring outcomes outputs the data visualization stuff that was mentioned earlier how are you doing? How are you personally feeling about those things? How is your organization doing and feeling about those things? And then using that information, again, it's the beauty of it.

It's not information for information's sake. It's immediately getting folded back in so that as Jessica's thinking about okay, what do we want to target for next year? What are things we seem to be doing really well? What are things that people are still wanting for us to dig down into more depth into? It's guiding that, and then I think for me, one of the things that's been so impressive beyond just the technical material, and maybe that's not quite the right framing, but beyond the training itself is the beauty of the community that's been created, is that when we are hearing from people that have participated in Coffee and Quality, whether it's the fellows program, the data leaders learning circle, case studies, or just simply the quarterly sessions that folks are coming in to be a part of They're feeling like they're part of a community.

They're getting what they need, they're getting connected to others. And to me, I think wow you're bringing folks into a space where even if I'm showing up and you're going like do you know what a data dictionary is?" I'm like, "I don't know what a da..Great, get in here. Let's talk about that." It's not this like I have to pass a test to get admitted. It's just literally show up and bring the right attitude into the space. But once there, there's that welcoming element to it. And so all of this is stuff that we're learning through the survey work. And again, I think like the continuing to see it grow, continuing to see it diversify.



This year really, and through with Lindsay's help was able to move it into hearing from additional Galveston organizations, which honestly like prior to this year would've had no reason to really engage, but we were still already starting to hear some degree to which people were aware of the programming that was going on.

But also, again, like better understanding how Galveston [00:25:00] organizations are thinking about their data practices and how they're using that information to guide what they're doing as a nonprofit. And so the survey's a very powerful tool. And so it, again, it's further ways in which data are helping to inform the data work that, that United Way is up to.

Robiel Ahraha: And that's a really great segue, as you mentioned, with the Galveston work. One of the most exciting developments that's happened this year is that Coffee and Quality has now expanded from Houston into Galveston, and I want to invite Lindsey to talk about the origin story of that, because it's pretty fitting, because as I'm understand, it all started from an impromptu conversation that happened at a coffee shop in Galveston with you, Lindsey, as well as Brita Blessie, our director of learning and evaluation, and Lauren Scott over at the Kempner Fund. So wanted to give you a chance to talk about how did a chance conversation at a coffee shop turn into Coffee and Quality moving to Galveston?

Lindsey White: I've got my keys, so let's jump back into the time machine. And we're going to go to this time last summer. We are at Freckleberry, which is a tea house in Galveston on Market Street. It's newer. It's not brand new, but it's been around for a minute. And I was invited to a meeting there by Dr. Shannon Rios from the Permanent Endowment Fund and Dr. Kelly Grace from UTMB. They both had an interest in more formal data collection and evaluation happening in Galveston.

They heard about this program called Coffee and Quality, and said, "Lindsey from United Way of Galveston, I think you should come and hear about this program." So I came to Freckleberry, and we started talking about Coffee and Quality and what it means and what it could look like in Galveston were it to ever become a thing.

This is way before I even knew your name, Jessica. So way back in the time machine. So we're sitting there, the three of us, me from United Way and then Dr. Rios from Permanent Endowment Fund, and Dr. Grace from UTMB. So we're talking about data. All of a sudden, our data table got bigger because next to us, Lauren Scott from the Harrison and Eliza Kempner Fund, and then Brita Blesi from Houston Endowment, they're having their own meeting at Freckleberry very near to ours. So what do you do when that happens but scoot the tables together, connect your meetings, get bigger, and get real serious? And it was right after that meeting that we all got in your email box because during our conversation about how could this be possible in Galveston, it was



immediately clear that we could not continue this conversation without the very very famous Jessica Davison herself.

Robiel Abraha: And from what I hear, Lindsey one of the things that you all... You're early in your development, but I know one thing you said is you didn't want this to be a copy and paste of what's happening in Houston, and so you wanted to make this something that is true to Galveston. So talk to us about how that adaptation has looked like and how you wanted to make sure Galveston was front and center in this.

Lindsey White: Two parts to that. Galveston, we are stubborn. We don't wanna do anything like anyone else, so it has to be special for Galveston. And then the other part of this is that it was important to me and United Way of Galveston that we treat the model you created at United Way of Greater Houston with fidelity.

So we approached this how could this look with very intentional conversations and planning that centered Galveston nonprofits. What constraints are real on the island? Okay, one is we have a smaller group of nonprofits, and they have smaller teams. So we had to think about what would we offer first from the Coffee and Quality menu that Jessica already described? So at first it was, how are we going to bring Coffee and Quality into Galveston? What does our community need most? Driving forward in our time machine from the June meeting at Freckleberry into December at Moody Gardens, which is another very Galveston place to be, we had a lunch and learn about Coffee and Quality and asked island nonprofits, "Where are you in your data and evaluation journey? What do you need from a program like this? Are you interested in a program like this?" And they all said yes. They said, "Heck yes," maybe even. And so we used the information from Galveston nonprofits themselves to inform how we would roll out Coffee and Quality in Galveston when it was time.

We started with the fellows program in April. I'm sorry, in April we had an open house. We started with the fellows program right after that, beginning in June 1st, and we're on a break today, but we would typically be on our fourth session of the fellows program, and our participants are probably happy to be at their offices doing the work they do every day but looking forward to seeing us next week because we've 11 nonprofits from Galveston in our first cohort of the fellows program. We had a lunch and learn for Coffee and Quality last week that was sold out, wait list. We don't sell tickets, but I wanted to use one of your phrases. We were waitlisted with a crowd of 60 in the room and still a wait list. So there is appetite for Coffee and Quality in Galveston. Yeah. And the intentionality around the partnership between our two United Ways and our community is what I think is making this interesting and exciting to people on the island. They're showing up because of that intentionality.



Jessica Davison: Yeah. And I really wanna add, too, that I think as Lindsay was like, "Okay, this has to be a ... What does Galveston need?" That was really top of mind for us, too. It's okay, we can't be greater Houston coming into Galveston and be like, "This is what all your nonprofits need." That's not even the vibe of Coffee and Quality, but we didn't even wanna let that be something that people were, like, thinking they were gonna experience with this. And so we did. We had that December session, and we had this interactive activity about, like, where are you in, with your data practices. They got and did little dots on is it a straw house? Is it a brick house? Like, all the ... there was another one, too. But it was just this great way to get that information from them. And then, yeah, we launched the 2025 data practice survey, and we were like, "Lindsay, send it out." It was the beginning of the year.

And I remember I was like, "Dan, I need to know all the Galveston results for this." Because we were, at that time, getting ready to okay, what's this gonna look like in Galveston? What's top of mind for them? So that way we could really come in and honor what's happening and, like, where do they want to be with their data practices, and what's needed there.

Robiel Abraha: Awesome. So that's exciting to see this program kind of start in Houston and branch out into Galveston, and seeing a whole host of new nonprofits being able to enjoy this. So we've talked about the program at a very high level, macro level, and I want to get into some real world examples of how that looks like in a nonprofit setting.

So I actually wanna invite Sarah to talk about, you mentioned earlier this concept of continuous quality improvement and some of the survey work that you've started implementing. So talk to us about how that's actually looked like in practice. I hear that there's a funny story with a popsicle stick that this involves.

Sarah Brown: First I just want to talk about continuous quality improvement a little bit. That was a big concept that we were taught about in the fellows program, CQI. And so the spirit of CQI has totally taken over DACAMERA's office like wildfire.

So it's just this idea of, you're constantly making small steps, incremental at some times, just to make that next step forward. And, anytime we see something that we're like, "Oh, maybe that could be improved," instead of being like, "Ugh," "That wasn't great," or being negative about it, we're like, "Oh," this right here, this is a CQI opportunity," yeah. It's kinda reframed it in this really positive way, and I think our whole staff feels hopefully empowered to be a part of that conversation that we're all looking for CQI opportunities. But yes, so the popsicle stick we have really double doubled down on our audience surveying. So we do send out a survey after every concert that we do. We get the survey results back, I do a quick report, and I pull out some notable comments, because there's also some place where people can just make a comment,



and so this one comment was like, "In my seat," and he, the gentleman told us which seat he was in "I saw this popsicle stick."

And these venues, some of the venues we're presenting in are these giant venues with lots of nooks and crannies and, thousands of seats. So he's "There was a popsicle stick in front of me," and so we were actually able to go into to double-check with the venue, make sure it was cleaned up, verify it wasn't there, leave a note on his seat for the next concert he went to, because he was a subscriber.

And so then in another survey we get "Thank you for the note on my seat." Obviously it's sometimes much more macro than micro like that, but that was a fun thing that we all get a kick out of in our audience surveying work.

Robiel Abraha: No, I think it's a really great example of how even just the small little things you do to respond to the survey data can improve an experience because he probably had no idea that his small comment could have led to that.

So just wanted to say it's exciting to hear all these big and small examples of how you all are using data to improve the work. And I know that there are multiple other organizations that are involved as well in Coffee and Quality, so wanted to and I know you all do a really great job of documenting that.

You mentioned the case study. So wanted to give, Jessica and Dan some time to talk about some of the other kind of non-profits that have gone through Coffee and Quality, and what they've learned, and what practices they've also changed through this program.

Jessica Davison: What's really great about these case studies is I think what Sarah's really highlighting too is this is where we're at with our data practices. How can we grow? What questions are we trying to answer? What are we trying to see? And so for the case studies, we started with Angel Reach, and hats off to them and their leadership because we were like, "We don't know what this is gonna be about, and we just need you to go on a limb with us, and let's hold hands together."

And so thank you very much to Corinne for joining us in that journey, because it really set off this amazing trajectory for organizations where they get to draw out an insight from the data they're already collecting. They had two tools they were using. They had this self-sufficiency matrix they'd looked at.

They also had some housing steps that they were looking at. And so they were trying to really make sense of that and what does success look like for their organization. And it



really boiled down to it's success for each individual. Every youth we serve is different, and so what does that mean for them?

And so in order to do that, we maybe need to have some standardized boxes where people can put what that looks like for them, so there's ways to track and look at that. But they recognize that it's a journey. And so what is it we're trying to measure and see, and where are we now, and how can we improve that?

And so whenever anybody asks me we're trying to understand and measure success," I'm like what does success mean for you?" And I reference back Angel Reach's case study, because I'm like, this is their journey documented. And you can watch a webinar to hear Corinne talk all about it, Corinne and Gene.

it was just really helpful to hear that, because it's the big and small. And I think sometimes we can get in our heads a little bit about is this data enough? Is this good enough? Is this what funders wanna hear? Is this what our board wants to hear? But really, it's what is at the core of our mission? What are we trying to do in our community? And applying your data practices in that area as a way to learn and improve from there, because it can be big things, it can be small things. And so that's really the case study. I know Wesley had some really cool insights as well from here.

Dan Potter: Yeah with all of our case studies, we've had this fantastic opportunity of organizations coming in. And again to Jessica's point, when we first began, there was no example. There was no "Oh, hey, here's what we're here's what we're about." And so it really did take a leap of faith on the part of Angel Reach to join us on that journey. And I think for me, a big takeaway was also that as we were sharing information with them, it was the receptivity of it.

It was not this "Oh no that's not right," or, "That's not really what our data show," or, "Thanks. That's cute. Goodbye." It was very much this "Oh, talk to us a little bit more about that, and help us understand what we are trying to understand." And it was that embracing of the process that I think really has helped set the tone as well for other case studies, that it's not just simply, what's the report I get at the end that gives me the special number? It's the process we're going through together to be learning through that. And so again, just wanting to shout out AngelReach there as helping us to figure out what this process is even gonna look like. And, and I think with each of the nonprofits, we're learning something new, we're learning something different, and some of it's very unique to the nonprofit.

And Wesley's was this really fascinating finding, because Wesley, what they wanted us to..they do so many different things, right? So there was not the ability for us to look at all of the programming that they're up to, but they wanted us to prioritize financial



FOCs, right? Financial opportunity. The FOCs ... Opportunity Center. And so we went in, we started looking at their data, and one of the outcomes again, metrics of success that they were interested in knowing was around savings practices.

And so what we ended up finding was this kind of interesting narrative that it was both this oh, there's still work to be done. And one of that was that something like 30% of their clients were opening savings accounts. And so okay, we can get that number up, cool. Of those clients that were opening savings accounts, the majority of them were putting \$100 away.

Okay, cool, that's great. But then what was really fascinating was that if you got to that point, I open an account, I get \$100 in savings, I am more likely than not to achieve \$500 in savings. And so it offered this really exciting narrative for them where because part of what they were thinking about was how do I translate this for clients?

How do I talk with them when they're coming through the door? Some of them in the midst of crisis, some of them thinking like \$500 in savings, yeah, we can all dream, no, okay, let's talk through that though. It's not that you have to have \$500 tomorrow, but like how do we move ourselves along the way?

And starting with that opening, getting that first 100 in there, and then recognizing the behavioral change that sort of sets in motion, is that you start by setting aside that little amount, and before you know it, you've got that \$500 in there. And to, to me, like that was this very fascinating finding that was both on the one hand okay, we can do, we, we can get these numbers up in terms of the 30%, but wow, look at that story that I can start talking to my clients about.

Helping them understand, here's what this journey is likely gonna look like. It's gonna be tough. There's gonna be some ups and downs, but if you keep with it and you keep going and we can get past some of these important mile markers, here's where we're headed. And so that's awesome, and that's exciting, and that's helping to begin that establishment of financial security for people that may have never known it in their lives.

And so again, like that's one of those that has like a nice hook to it. But every single case study has something coming out of it.

Jessica Davison: Yeah, it really does. And it is a motivator for clients to have that data insight that they can share. But I remember talking to Kelly and Sam about that when y'all, when the team found that insight, and it was like, wow, what a motivator for the coaches too to know like. Oh, great point-look at your impact. Yes. The work you're doing, look at what that can do for folks that you're serving. And because they, they had



10 years of data. They were..Yes ... a lot of data. Yeah. And I mean, their data jumped in that time machine. It did, yeah ...the, it's been wild. Yeah. And so it was just really incredible.

So I think there's both sides that can really learn from it, and part of the case study too is like culling out all that low-hanging fruit for them that you're just having a conversation about your data. You're just having we just are here as supporters. What questions do you have? It's their agenda, and so then we can just as different perspectives, we're not in their day-to-day drinking their Kool-Aid. We can help them find out some cool CQI moments that they have for themselves.

Dan Potter: And Jessica, I think that the example you offer, that connection to the staff, is something that we have heard so many times. But is also a light bulb moment for a lot of organizations of going we're trying to get this data. We've asked our staff to get these data over and over again. Why don't we see the data the way we expected it to?" Or, "Wow, I've got this information. Cool, we should totally share that amongst all of the staff."

And it's that closing the loop component that we have just seen over and over again of I can now go back to why do I ask you to collect the data? I'm asking you to collect that data because it's going help us to understand what's going on and we're going to be able to see this journey with our clients. A lot of times organizations, folks a little bit on the higher up might be just really just drowning in data. They're just constantly embedded in it. But for some of those folks that might be at the front line who are actually doing that data gathering- Oftentimes it seems as if they're just shoving data and information into a void, and I don't know.

And so this case study was really just this awesome crystallizing moment of look at the power of being able to learn about yourself as an organization, but then also, again, that closing the loop with frontline staff.

Jessica Davison: Yeah. One more thing on the case study, then we can end scene on it. But I really applaud Houston Endowment's learning and evaluation team with the case study. I remember what was the first research brief, and yes, we want to share the findings. We want to document what the nonprofit's gonna do with this information, and then here are some key takeaways for the other nonprofits, right?

Transferable use, transferable knowledge to other nonprofits, and we shared it with y'all, and it was, like, one of the notes coming back was like, "Hey, how about you move that key recommendations. Oh, Lord for other nonprofits to the front?" Yep. And I was like, "Good note. Thank you." Yeah. And so yeah, so now that's at the front.



Folks can see that. Because, it's like I'm reading this as somebody not in that organization. What can I get out of this? What does this mean for me? It's right there. What can I use? Yeah. And so it's right there. So thank you to the learning and evaluation team for that.

Robiel Abraha: No, thank you all. This has been a, such an amazing conversation. There are so many different ways this conversation could keep going but I also wanna make sure we dedicate some time to answer some questions that we've gotten from the audience. And so wanted to first start off with this question around when participants go through the Coffee and Quality program, what changes do you hope to see in the first six to 12 months to let you know that this program has been successful?

So I want to open this up to anyone. Jessica, Lindsay, kinda what do you hope to see in the first six months of this kind of program?

Jessica Davison: Yeah. I'll start us off. And s- Sarah was actually talking about one of them. She just didn't put the name on it, and it's confidence. We really want folks to you're doing it. You're doing it well. Let's just maybe give it the name, like the technical name of it, though I tend to name things their own name, so you know, maybe it's just the spirit of that. But I, it's really, it's building that confidence, yes, increasing some knowledge, and then applying it back into your organization.

That's really, like six months, 12 months, like, where is it starting to trickle back into your organization, and then building that confidence. And that we look at across all the different program components. Even if it's learning cohort, how are you able to create visuals for different audiences? How confident are you in that?

Learning fellows program, how confident are you in creating a logic model for your organization and an evaluation and CQI plan? We're measuring that, tracking that all along the way.

Lindsey Brown: I wrote down confidence because it goes together with this. But also I would say curiosity from our participants. Yeah. Like curious about if they think this is not for me, be curious because it might be for anybody.

Robiel Abraha: We also have another question that I think might be good for Sarah about, some nonprofits are more like human and experiential in the work that they do. They're not as like data-driven as they might be. So how do you build data practices that honor that qualitative and that mission-driven base, but also recognizing that you want to be able to like measure outcomes?



Sarah Brown: Yeah, I think that balance is important and, with surveying, talking to your program participants, there's a lot of ways that you can find the qualitative data. You can translate qualitative data a little bit into a number. If you'd say, "On this scale, like how would you rate your experience?" I'm definitely a big fan of allowing people to say it in their own words too. Any kind of survey that I'm doing, I want to be able to capture just free-thinking thoughts, whether I ask the question or not. Is there anything else you wanna tell us? Because a lot of times you're gonna find your best feedback that way. So I do think that this is important, and I think there are ways, like... And as I continue to grow in my data journey, I'll learn about ways to visualize some of these things and tell the story. I think it's very possible.

Dan Potter: And I so I just wanted to throw out, like it doesn't matter what your nonprofit is doing, there is some sort of information or data that you can bring in, and Sara's brought up a couple of fantastic examples of how that can be done. You can also get super creative. If you're working with children, this is gonna shock you. As a survey lover myself, I don't understand, but children apparently do not like answering surveys. And okay but they love drawing. And they love being able to express themselves through other forms. And so it's not a survey, but there's other ways of getting that information that might look like art to some people, but it's data, it's information.

And so like I just, I appreciate you lifting up ways that, no matter what your organization is doing. Go get that information, go get the story, go get the narrative, but then even just thinking, like if I'm working in a space that maybe I don't have somebody but more than for five minutes, or I have respondents that are young, and they're not really in that space of, okay, cool, you know your audience, you know your clients.

You also can now help pull information that allows for you to be able to go tell that story to others and share with others what you're doing. It doesn't always require a regression model to be meaningful and important. Yeah.

Jessica Davison: And I was going to add about a participatory approach and style to it. And Dan gave the a beautiful example of that, and it was a conversation I was having recently with a small grassroots organization up in the northeast side of Harris County. And yeah, they have five minutes, food pantry, coming in, coming out, but they wanna know, "What else should we be doing?"

What else should we be offering?" And so it... I asked her, I was like, "Why do you have to do a survey? Can you do something else? What if you had jars, and they had marbles, and they could vote? Or you could do stickers, and they could vote. You can make it interactive. You can bring participatory approach to this with rigor, with consistency that then, wow, look, you share with that like group of funders, your board of like how you're listening and responding to community need based on them. There really is so



many options for folks when it comes to being creative and using and collecting qualitative data.

Dan Potter: And I'll just throw out there, one of the things in talking with other nonprofits, normalizing the process is something that's very critical. No, no matter what data you're gonna collect, if you can start building in that expectation with folks, all of a sudden it, it does not feel invasive. It doesn't feel like you're asking for the firstborn or the blood type or the whatever. It's just literally "Hey, we talked about..." I don't know, do you phrase it like, "We talked, we were gonna do this," but it's the we're expecting to collect data. We're expecting to get that information. And all of a sudden it just becomes a natural part of the way that organization is functioning and people are interacting with the organization. Yeah. Which really does not make it feel intrusive, but part of the process and part of the service even that's being provided.

Robiel Abraha: Awesome. Then we also have a question about the importance of building relationships throughout this process. So I wanted to talk to you, Lindsay, to talk about what are you doing early on now to start building these relationships among nonprofits to be able to develop that trust then? Because it sounds like from Jessica and what Dana's sharing, what Sarah's sharing, like that partnership is gonna be really critical.

Lindsey White: When we started recruiting for the fellows program in April, we were having conversations with the partners that might be interested about, this is for you no matter where you're at. It's not punitive. It's not evaluative. And it doesn't relate to your funding. Yeah. It doesn't relate to anything other than we know you're doing good work. We want to help you do more of that and get funded for more of it.

Dan Potter: And we have this conversation regularly with Kinder, we are not partners with any of the organizations we've worked with. They're wonderful organizations. It's United Way. Yeah. It's Jessica that has that connection. And so we've talked often about the borrowed trust, that we are working towards earned trust, but we have to start from a space of borrowing trust. And that's where... And again, Lindsay, the same thing with what's going on down in Galveston right now. You're building this trust that will allow for Dr. Grace to come in and be working with nonprofits- Exactly ... in a way where she doesn't have to have. That- her team doesn't have to have the relationship per se. We're borrowing that trust. Now, that is a heck of a relationship that that we've got between the United Way and Kinder Institute, between UTMB and what's going on with Galveston, United Way of Galveston. But just wanting to call out that trust is sometimes gonna be borrowed, but has to be at the forefront of the thinking within the partnership to be able to make sure it's working and that organizations are being cared for.

Lindsey White: It's so critical. We're asking people to be very vulnerable.



Dan Potter: Incredibly vulnerable.

Robiel Abraha: I wish this conversation could continue on for longer, but, we wanna wrap up 'cause we're close to the end of our time. But just wanted to say thank you all for joining us. This has been such an insightful conversation. I think from the funder's perspective, one of my biggest takeaways is that, as you said, there's a lot of enthusiasm among, momentum among nonprofits for this work, and I think that if we want nonprofits to be learning organizations that can adapt, that can innovate, and can maximize their impact, we as funders have to invest in that capacity as much as possible.

And I think Coffee and Quality kind of demonstrates how when you give nonprofits the space and the tools and the resources and the support to build those skills, they will take that charge on and strengthen their work. And so just wanted to say, excited for this. And before we close, I wanna give Jessica and Lindsay an opportunity to share that if folks are interested in learning more about Coffee and Quality, whether in Houston or Galveston, where should they go?

Jessica Davison: For, if you wanna learn more about Coffee and Quality, and thank you for the plug, that we have our Houston Fellows Program application open right now. You can go to unitedwayhouston.org/coffee. Thank you to our marketing team for making that easy for me to say. And it is where you can go, you can learn more about the Fellows program coming up.

You can register for some of the upcoming quarterly virtual sessions. We actually have the two case studies we're running right now in parallel. If you didn't get enough of Sarah, you can get more of her in August at our DACAMERA case study share-out. And then we have Collective Action for Youth their case study share-out as well happening in August.

And so all of that can be found at unitedwayhouston.org/coffee.

Lindsey White: Wow. And we copied what United Way of Greater Houston did very well and made uwgulf.org/coffee.

Robiel Abraha: Awesome. Jessica, Dan, Sarah, Lindsay, thank you again for being here today. And to everyone watching, we want to also, in the spirit of continuous quality improvement, get some feedback from you all.

So after every episode of Upstream, we send out a survey, and we encourage you to fill it out so that way we can make this programming better and make future episodes even stronger. And so until next time, I'm Rubel Abraha, and this is Upstream