

# Alberto V. Espinoza

## Summary

Experienced social impact professional with a strong record of strategic and business planning, grant and program management, evaluation, and data analysis within the philanthropic and nonprofit sectors. Skilled at developing policies, processes, and procedures leading to increased organizational effectiveness and efficiency.

## Core Competencies

Leading Change | Leading People | Results Driven | Business Acumen | Building Coalitions | Client Oriented | Oral and Written Communication

## Experience

### **Valley Baptist Legacy Foundation, Harlingen, Texas** **Evaluation Specialist, August 2017 to Present**

Serve as a strategy, evaluation, and data thought leader to Executive Team, Grants Team, and external funded stakeholders. Plan, implement, monitor, and evaluate internal organizational performance measures and external population health measures informing the Foundation's strategic priorities. Contribute to the funding decision-making process and manage a grant portfolio.

#### *Strategy*

- › Assist in strategy development and implementation process by ensuring evaluation and data analysis are incorporated at each stage of the strategic cycle.
- › Formulate core theories of change, logic models, and outcome goals to monitor and evaluate progress toward organizational strategic objectives.
- › Developed organizational learning and evaluation strategies related to grant funding programs.
- › Lead knowledge and learning activities, including synthesizing and sharing grant programs insights, lessons learned, and industry knowledge with Grants Team, leading to continuous learning, improvement, and informed strategic decision-making.
- › Deliver training opportunities to Grants Team related to program planning and implementation, evaluation, and data literacy.

#### *Evaluation and Learning*

- › Developed an evaluation framework to monitor and evaluate progress towards Foundation's strategic objectives.
- › Developed internal and external outputs, outcomes, and key performance indicators (KPI's) to monitor organizational performance measures and regional population health measures.
- › Manage Foundation's Grant Lifecycle evaluation process. Support Grants Team in reviewing letters of intent (LOI's), grant applications, and progress reports, conducting site visits to determine applicant and grantee alignment with the Foundation's strategic priorities, and evaluate performance towards grant objectives.

- › Design grant evaluation plans in collaboration with funded stakeholders.
- › Plan and conduct funded stakeholders monitoring site visits.

### *Research*

- › Developed a reproducible research framework and protocol to streamline the Foundation's research and learning process.
- › Identify and develop research questions and plans to create new or inform existing organizational priorities.
- › Design, write, and deploy surveys to internal and external stakeholders.
- › Identify, review, and synthesize academic and industry literature and other research relevant to Foundation's strategic priorities.
- › Lead the development and dissemination of research findings and learning outcomes, including research summaries, reports, presentations, and dashboards to internal and external stakeholders.

### *Data*

- › Developed system to collect, analyze, and manage local, regional, and national population health indicators to track trends and assess population health change over time.
- › Lead the Foundation's Data Lifecycle process, developing tools and establishing processes to collect, analyze, manage, and report organizational data utilizing the Foundation's grants management system and other Business Intelligence and data analysis software.
- › Developed active grants dashboard to track grant portfolio workload and other key performance indicators (KPI's).
- › Identify organizational data needs and develop plans for collecting, cleaning, analyzing, and utilizing data to answer organizational questions and make informed strategic decisions.
- › Collect, clean, analyze quantitative and qualitative data from primary and secondary sources.
- › Collaborate with external stakeholders on data-related projects and initiatives intended to improve population health.

### *Project Management*

- › Manage a \$74 million active grant portfolio awarded to an average of 40 non-profit and other tax-exempt organizations. Actively manage grant portfolio throughout the grant lifecycle, from LOI stage to grant closeout.
- › Built and maintain relationships with funded stakeholders and provide grant technical assistance to ensure grant goals and objectives are met.
- › In collaboration with internal and external stakeholders, create long- and short-term project plans, including setting targets, goals, and milestones and adhering to deadlines.
- › Delegating tasks to staff best positioned to complete them based on their skill set and job duties and responsibilities.
- › Making effective decisions when presented with multiple options for how to progress with the project.
- › Lead and manage special projects such as:
  - Designing and implementing a grantee organizational assessment and capacity development portfolio
  - Lead the Foundation's Census 2020 efforts
  - Conducted a social determinants of health needs assessment
  - Represent the Foundation in regional collaboratives and collective impact projects

### *Grants Management*

- › Streamlined and formalized Grantmaking Policies and Procedures to ensure consistent, reproducible workflows to increase efficiency and effectiveness.
- › Revised and restructured LOI forms to ensure the Foundation obtained the necessary information to make informed approval decisions.
- › Reviewed and made recommendations to Executive Team on over 270 LOI's from various applicants since 2017.
- › Provided feedback and guidance to approximately 113 LOI approved applicants to move into the full grant application stage.
- › Revised and restructured grant application to streamline various application processes and versions. Application streamlining ensures applicants have all necessary information to submit a competitive application and led to capturing quality information from applicants the Foundation uses to make grant funding decisions.
- › Formalized grant application financial guidelines to ensure applicants submit complete grant budgets, financial summaries, financial statements, and other financial documents that assist the Financial Team in grant application review and recommendations.
- › Reviewed and made funding recommendations to Executive Team on over 550 grant applications from various applicants since 2017.
- › Developed and presented post-award guidelines for funded partners, including reviewing grant agreements, grant amendment process, site visits expectations, progress report process, and project close out.
- › Developed grant amendment process and guidelines to facilitate activities, no-cost extensions, and budget amendment requests for funded stakeholders.
- › Reviewed grant amendment requests on a rolling basis, ensuring funded stakeholders submit all required information to make an informed approval decision. Provided technical assistance to funded stakeholders in completing grant amendment requests.
- › Created a progress report scheduling system, ensuring each funded project has progress reports assigned based on grant activities, tasks, and timeline. This led to a reduction of assigned progress reports and reading load for the Grants Team and increased the turnaround time for closing reports.
- › Developed a grant portfolio system for Grants Team to maximize efficiency and reduce duplication of efforts.
- › Develop learning opportunities for Foundation staff and grantees related to grant writing and management, evaluation, and data analysis. Deliver presentations at annual Funding Forums, Grant and Financial Workshops, and as guest speaker at local and regional events.

### **Small Business Development Center, University of Texas – Rio Grande Valley, Edinburg, Texas Business Outreach Specialist, August 2015 to July 2017**

Provided technical assistance to startups, including strategic, operational, and financial planning. Developed and delivered trainings on relevant business topics. Collaborated with resource partners to promote center services through outreach, training, and relationship building.

### *Business Planning*

- › Assisted in starting up 16 new businesses leading to the creation of 29 full-time and 24 part-time jobs.
- › Helped small businesses obtain a total of \$3 million in capital funding, including third-party financing and grants for small businesses.

- › Assisted small business owners in developing, implementing, and evaluating strategic marketing, branding, sales, management, and financial plans.
- › Identified needs, problems, and challenges small business owners faced to determine alternative opportunities and solutions leading to reduced operating expenses, sales growth, and customer retention and acquisition.
- › Prepared business plans and financial projections for small business owners seeking commercial loans, revolving loan funds, local economic development grants, and immigration visas.

#### *Business Training*

- › Developed and delivered business training curriculum to increase capacity of local small business owners. Topics included latest trends related to Starting a Business, Social Media for Small Businesses, Branding Strategies, and Market Research.
- › Delivered over 50 trainings on various business topics to an average audience of 15 attendees.

#### *Outreach*

- › Contributed articles to local business magazines to increase awareness of latest business trends and awareness of services provided by the Center.
- › Collaborated with local CDFI's, Small Business Administration, commercial lenders, municipalities, and Economic Development Corporation's to develop business development opportunities for local small businesses.

### **Business Research Assistant, August 2014 to July 2015**

Supported Business Advisors with research projects in support of business planning, grant proposals, and training and curriculum development.

- › Gathered, compiled, and analyzed data to inform business owners of local, regional, state, and national economic trends.
- › Gathered and interpreted quantitative and qualitative data, driving insights, and supporting business decisions.

### **Osgood Center for International Studies, Washington, D.C. Program Associate, May 2014 to August 2014**

Summer internship as part of the UT System Graduate Archer Program.

- › Drafted reports, policy memos, and policy research papers for Executive Director.
- › Assisted in planning and coordinating Summer Foreign Policy Symposium.

### **Center for Survey Research, University of Texas – Pan American, Edinburg, Texas Research Assistant, May 2013 to December 2013**

- › Designed, translated, and deployed surveys, ensuring Institutional Review Board guidelines, protocols, and procedures were followed.
- › Analyzed survey results and summarized complex information for internal and external stakeholders.
- › Drafted executive summaries and reports based on survey findings.
- › Conducted primary and secondary data collection and analysis to support survey research projects.

## Education

### **The Evaluator's Institute, Claremont Graduate University**

Certificate in Evaluation Practice

Anticipated graduation: Summer 2023

### **The University of Texas – Rio Grande Valley**

Master in Public Administration (MPA), concentration in Public Policy

Received: May 2016

### **The Archer Center, The University of Texas System**

Fellow, Graduate Program in Public Policy

Summer 2014

### **The University of Texas – Pan American**

Bachelor of Arts, Double Major, Political Science and History

Received: December 2012

## Professional Service

### **Unidos Contra la Diabetes (UCD)**

#### **Data Workgroup Co-chair, December 2019 to June 2022**

Provided vision, leadership, and direction to Backbone Staff and Data Workgroup members to ensure workgroup goals are met. Report workgroup progress to the Steering Committee.

- › Set and communicated vision and goals to staff and workgroup members.
- › Worked with staff to plan and develop meeting agendas.
- › Co-chair meetings.
- › Represented the workgroup when relevant topics were discussed during Steering Committee and Executive Committee meetings.
- › Led the revision of the UCD cross-cutting indicators.
- › Provided guidance to staff in determining how partner organizations could share data related to the cross-cutting indicators.
- › Provided direction and feedback on the data collection plan.
- › Provided guidance in the early implementation of the RGV Health Connect website.

## Invited Panels and Presentations

- › Weaving Together a Collective Story, RGV Regional Workshop hosted by It's Time Texas, September 2021.
- › RGV Regional Summit, 2020 Census Discussion hosted by Methodist Healthcare Ministries, June 2020.
- › Sustainability in Funding, Community Lab hosted by It's Time Texas, August 2022.

## Professional Skills

- › Qualitative and Quantitative Research

- › Data Collection, Wrangling, Management, and Analysis
- › Program Planning, Implementation, Monitoring, and Evaluation
- › Grant Management
- › Strategic Planning and Implementation
- › Business Planning
- › Spanish Proficient, advanced listening and conversation; intermediate reading and writing

## **Software**

- › Microsoft Office 365 (Intermediate)
- › Foundant Grant Lifecycle Management (Intermediate)
- › R Studio (Beginner)
- › Tableau (Beginner)
- › Excel (Intermediate)
- › SurveyMonkey (Intermediate)
- › SPSS (Beginner)

## **Professional Development**

### **R for the Rest of Us**

- › Fundamentals of R, September 2022
- › Getting Started with R, October 2019

### **University of Texas – Rio Grande Valley, Continuing Education**

- › Certificate in Social Media Management, May 2017

### **Risk Management Association**

- › Lending Academy I, June 2016

## **Professional References**

Available upon request.