Alberto V. Espinoza

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Core Competencies

Leading Change | Leading People | Results Driven |Business Acumen | Building Coalitions |Client Oriented | Equity-centered Grantmaking |Oral and Written Communication | Equitable Evaluation | Analytical

Experience

PEAK Grantmaking, Remote
Knowledge and Learning Manager, February 2024 to Present

Lead the design, delivery, and evaluation of programs and services to advance equitable, effective grantmaking practices across PEAK's national member network of over 500 grantmakers and 8,000+ grants professionals. Manage data and knowledge strategies to inform decision-making and learning across the organization.

Community Engagement and Knowledge-sharing
› Developed strategy for engaging volunteer advisors, presenters, and program participants in program co-design and continuous improvement to meet the professional development needs of members.
› Managed relationships with cohort advisors, ensuring they were well-informed, supported, and prepared to effectively lead their cohort convenings.
› Collaborated with the Membership and Community Engagement team to deepen cross-functional learning and align programming with member needs.
› Engaged directly with members to gather insights and better understand their evolving needs and field-level trends shaping their work.

Program Management and Evaluation
› Led the design and management of Asana project workflows for key initiatives and projects, establishing milestones, responsibilities (RASCI), and timelines to ensure cross-functional alignment.
› Developed system to track staff time on key projects, leading to improved staff efficiency and staff time savings.
› Evaluated the impact of PEAK's programs and resources on practice change in philanthropy, using qualitative and quantitative methods to inform continuous improvement.
› Managed the contract lifecycle of assigned projects, including drafting and reviewing requests for proposals (RFPs), developing contract terms, negotiating agreements, and overseeing contract execution and compliance.
› Developed work plans, logic models, evaluation plans, and reports to track progress towards programmatic and organizational goals and objectives.
› Designed and managed process and outcome evaluations for flagship annual PEAK Convening leading to an increased response rate and net promoter score year-over-year.
› Created evaluation tools and protocols, including pre- and post-tests, surveys, focus group scripts, and observation protocols to evaluate workshops and webinar series, GM101, and annual PEAK Convening.
› Provided training and guidance to cross-functional staff on evaluation methods and best practices to support organization-wide learning and impact measurement.

⟩ Led the implementation of the Equitable Evaluation Framework across organizational programs and initiatives and served as liaison between PEAK Grantmaking and the Equitable Evaluation Initiative.

Data Management and Analysis
⟩ Led the data collection, cleaning, and management of quantitative and qualitative data to inform program planning, evaluation, and improvement.
⟩ Created internal systems and processes to collect output, outcome, and impact data from various sources including CRM, surveys, and learning management system (LMS).
⟩ Developed and deployed surveys on Survey Monkey to inform outcome and impact evaluation.
⟩ Analyzed and interpreted quantitative and qualitative data to inform organizational strategy and planning, program planning, and program evaluation and improvement.
⟩ Synthesized complex findings into meaningful results and recommendations utilizing data visualizations to prepare reports and presentations for internal leadership, staff, and external stakeholders.
⟩ Led the adoption of key process and outcome metrics such as attendance and completion rates, participant demographics, Net Promoter Score (NPS), satisfaction rate, knowledge gain, and confidence / self-efficacy leading to informed planning and decision-making for various programs and events.
⟩ Introduced GitHub, R, and R Markdown workflows to ensure data reproducibility, improve reporting efficiency, and reduce time spent on manual data analysis, leading to reduced staff time cleaning data and time-to-report.
⟩ Supported testing of a new Salesforce-based association management system (CRM) to ensure the Knowledge and Learning team's data needs were accurately represented and integrated during implementation, in collaboration with the Community and Membership Engagement team.
⟩ Conducted cost analysis based on historical financial and usage data of the EducateMe platform to guide future investment in PEAK's learning management system infrastructure leading to cost reductions and increased revenue generation.
⟩ Implemented the use of R Markdown to streamline internal and external evaluation reporting.

Educational Content Development and Delivery
⟩ Co-developed and executed a content strategy to advance equitable grantmaking practices and support the professional development of grants professionals.
⟩ Designed and implemented learning strategies for adoption of the Principles for Peak Grantmaking through advanced learning tools, public-facing workshops and webinars, and PEAK's annual convening.
⟩ Delivered monthly trainings to an average audience of 120 grants professionals on topics such as:
   o Reducing Bias and Advancing Equity with Demographic Data
   o Narrowing the Power Gap between Funders and Nonprofit Organizations
   o Understanding the Grantmaking Lifecycle
   o Strategic Change Management for Grants Professionals
⟩ Partnered with external consultants to develop specialized trainings for grants professionals on topics such as financial vetting and assessment for grantmakers, data visualization, and fiscal sponsorship leading to increased member and non-member engagement and revenue goal attainment.
⟩ Curated content on latest philanthropic trends on topics such as legal issues, equitable grantmaking, trust-based philanthropy, and knowledge management.

〉 Led the planning and design of the Grants Management 101 self-paced course, outlining learning objectives, designing the course structure, identifying the learning management system, and coordinating timelines for content creation and delivery.

Healthier Texas (formerly It's Time Texas), Remote
Director of Grants and Evaluation, March 2023 to February 2024

Lead the management and execution of organization-wide grants administration, evaluation, and data efforts. Strengthened internal systems for grants and contract administration processes, ensuring compliance with funder requirements and government regulations. Developed and implemented comprehensive evaluation plans and instruments for continuous learning and improvement. Developed data governance and management systems and processes to support organization-wide strategic, data-driven decision-making.

Grants and Contracts Administration
〉 Oversee the management of over $3.1 million in Federal and private funding, ensuring regulatory compliance and communicating grantor requirements, updates, and expectations with Programs, Finance, and Executive leadership.
〉 Supported the management of over $750,000 in private foundation grants ensuring timely submission of grant applications, progress reports, and budget amendments requests.
〉 Improved and streamlined internal grant and contract administration systems and processes.
〉 Led grant and contract management related projects, such as post-award grant kick-off meetings, coordinating cross-department staff assigned to various grant projects, funder reporting, and budget amendments requests.

Monitoring, Evaluation, and Learning
〉 Designed and implemented organization's evaluation framework and plan, ensuring all programmatic pillars aligned with strategic priorities.
〉 Developed common outcomes framework to ensure alignment between programmatic pillars and organization's strategic priorities.
〉 Facilitated the development of theories of change, logic models, and evaluation plans for 8 programmatic initiatives.
〉 Designed and managed process and outcome evaluations for flagship annual Healthier Texas Summit.
〉 Trained staff on evaluation methods and processes to ensure evaluative activities were implemented throughout program and project delivery.

Data Governance, Management, and Analysis
〉 Led the quantitative and qualitative data collection, management, and analysis to support reporting for various grants and contracts.
〉 Designed evaluation instruments such as pre- and post-tests, surveys, focus group scripts, and observation protocols in English and Spanish.
〉 Conducted an internal data strategy audit leading to improved organizational data governance, management, and analysis practices.
〉 Conducted a regional needs assessment utilizing publicly available, community-level data to support regional expansion into North Texas.
〉 Implemented the use of GitHub to manage data projects and version control.
〉 Implemented the use of R Programming language to ensure data analysis and visualization was reproducible and replicable, leading to decreased staff time wrangling and cleaning data, and more time focused on analysis and implementation of data-driven recommendations.

〉 Implemented the use of R Markdown to streamline internal and external evaluation reporting.
〉 Implemented the use of Tableau for internal evaluation reporting.
〉 Trained staff on the use of various technologies, including GitHub, R Studio, Survey Monkey, Survey Monkey API, R Markdown, and the Tidyverse.

Team Leadership
〉 Set strategic direction and oversee goal-setting for the Grants & Evaluation Department, ensuring alignment with the needs of the Programs, Operations, and Marketing & Development Divisions.
〉 Design and implement annual and quarterly departmental goals, aligning Grants & Evaluation initiatives with the organization's mission, vision, and long-term strategic priorities.
〉 Provide leadership, coaching, and performance guidance to Grants and Evaluation Manager by developing annual work plan and professional development plan to guide responsibilities and growth, ensuring individual contributions help achieve departmental goals and objectives.
〉 Delivered cross-departmental training and support to staff on data and evaluation methods and processes to ensure proper data collection and evaluation implementation.
〉 Serve as a thought partner to the Executive Team, advising the CEO, VP of Impact, VP of Operations, and VP of Marketing & Development on strategy, grants, evaluation, and data-driven decision-making.
〉 Lead cross-departmental efforts to develop organization-wide data management system that improves data accessibility, integrity, and strategic use.

Valley Baptist Legacy Foundation, Harlingen, Texas
Evaluation Specialist, August 2017 to March 2023

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.
〉 Formulated core theories of change, logic models, and outcome goals to monitor and evaluate progress toward the foundation's strategic objectives.
〉 Developed organizational learning and evaluation strategies for grantmaking programs to assess effectiveness and strategic alignment.
〉 Advised the Executive Director and Grants Team on emerging trends and best practices in grantmaking to inform strategic direction.
〉 Supported Grants Committee funding decisions by presenting data-driven insights, research, and grant summaries during board meetings.
〉 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.

Grants Management
⟩ Streamlined and formalized grantmaking policies and procedures to ensure consistent, reproducible workflows to increase efficiency and effectiveness.
⟩ Revised, restructured, and streamlined letter of intent (LOI) and grant application forms to ensure the Foundation obtained the necessary information to make informed approval decisions.
⟩ Reviewed and made recommendations to Executive Team and Grants Committee on over 270 LOI's and over 550 grant applications from various applicants from 2017 to 2023.
⟩ Offered tailored feedback and support to approximately 113 LOI-approved applicants to strengthen their proposals for the full grant application stage.
⟩ Formalized grant application financial guidelines to ensure applicants submitted complete grant budgets, financial summaries, financial statements, and other financial documents that assisted the Financial Team in grant application review and recommendations.
⟩ 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 submitted 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 had 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.
⟩ Cultivated and maintained relationships and partnerships with nonprofit organizations, community members, and local and regional stakeholders to leverage resources for increased impact.
⟩ Developed a grant portfolio system for the Grants Team to maximize efficiency and reduce duplication of efforts.
⟩ Developed learning opportunities for Foundation staff and grantees related to grant writing and management, evaluation, and data analysis. Delivered presentations at annual Funding Forums, Grant and Financial Workshops, and as guest speaker at local and regional events.

Project Management
⟩ Managed a $74 million active grant portfolio awarded to an average of 40 non-profit and other tax-exempt organizations. Actively managed the grant portfolio throughout the grant lifecycle, from LOI stage to grant closeout.
⟩ Built and maintained relationships with funded stakeholders and provided grant technical assistance to ensure grant goals and objectives were met.
⟩ In collaboration with internal and external stakeholders, created long- and short-term project plans, including setting targets, goals, and milestones and adhering to deadlines.
⟩ Delegated tasks to staff best positioned to complete them based on their skill set and job duties and responsibilities.
⟩ Led and managed special projects such as:
   o Designing and implementing a grantee organizational assessment and capacity development portfolio
   o Led and represented the Foundation's Census 2020 efforts
   o Conducted a regional social determinants of health needs assessment

- o Represented the Foundation in regional collaboratives and collective impact projects

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.
- ⟩ Managed the Foundation's Grant Lifecycle evaluation process. Supported 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.
- ⟩ Designed grant evaluation plans in collaboration with funded stakeholders.
- ⟩ Planned and conducted funded stakeholders monitoring site visits.

Research
- ⟩ Developed a reproducible research framework and protocol to streamline the Foundation's research and learning process.
- ⟩ Identified and developed research questions and plans to create new or inform existing organizational priorities.
- ⟩ Developed and deployed surveys to internal and external stakeholders.
- ⟩ Identified, reviewed, and synthesized 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.
- ⟩ Led 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).
- ⟩ Identified organizational data needs and developed plans for collecting, cleaning, analyzing, and utilizing data to answer organizational questions and make informed strategic decisions.
- ⟩ Managed the quantitative and qualitative data collection lifecycle from primary and secondary sources to inform foundation strategy and grantmaking processes.
- ⟩ Collaborated with external stakeholders on data-related projects and initiatives intended to improve population health.

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 16 new businesses leading to the creation of 29 full-time and 24 part-time jobs. Businesses included:
  o Papa John's Franchise
  o Microbrewery and tap room
  o Limousine service
  o Local pizza chain
  o Logistics transportation company
  o Personal beauty product line
  o Property management company
  o Hair and nail salon and spa
〉 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 in English and Spanish on various business topics to an average audience of 15 attendees per training.

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.

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: Spring 2026

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
Program Associate Intern at Osgood Center for International Studies, Washington, D.C.
Summer 2014

The University of Texas – Pan American
Bachelor of Arts, Double Major, Political Science and History
Received: December 2012

Professional Service & Memberships

Texas Evaluation Network
Board Member, July 2023 to February 2025

American Evaluation Association
Member, September 2017 to Present

Unidos Contra la Diabetes (UCD)
Data Workgroup Co-chair, December 2019 to June 2022

Provided strategic vision, leadership, and coordination to Backbone Staff and Data Workgroup members to ensure successful execution of workgroup goals while serving as liaison to the Steering and Executive Committees.

〉 Defined and communicated the workgroup's vision and goals, aligning efforts across staff and members.
〉 Collaborated with staff to develop meeting agendas and co-chaired workgroup meetings.
〉 Represented the Data Workgroup in Steering Committee and Executive Committee discussions on relevant topics.

- ⟩ Led the revision of the UCD cross-cutting indicators to ensure alignment with strategic priorities.
- ⟩ Advised staff on strategies for partner organizations to contribute data related to cross-cutting indicators.
- ⟩ Provided direction and feedback on the data collection plan.
- ⟩ Guided early implementation efforts of the RGV Health Connect website to support shared data infrastructure.

Invited Panels and Presentations

- ⟩ Navigating the Complexities of Building Evaluation and Data Analysis Capacity in Nonprofit Organizations, April 2024 for the Texas Evaluation Network Virtual Institute.
- ⟩ Planning for Success: Program Evaluation and Data Analysis for Nonprofit Executives, April 2024 for the 2023 – 2024 Nonprofit Leaders for Excellence cohort hosted by CIELO Strategy Group.
- ⟩ Sustainability in Funding, Community Lab hosted by It's Time Texas, August 2022.
- ⟩ 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.

Professional Skills

- ⟩ Grants Management
- ⟩ Values-drive philanthropy
- ⟩ Program Management
- ⟩ Program Planning, Implementation, Monitoring, and Evaluation
- ⟩ Strategic Planning
- ⟩ Qualitative and Quantitative Research
- ⟩ Survey Design and Analysis
- ⟩ Data Collection, Wrangling, Management, and Analysis
- ⟩ Business Planning
- ⟩ Spanish Proficient, advanced listening, conversation, and reading; intermediate writing

Software

- ⟩ Microsoft Office 365 (Intermediate)
- ⟩ Foundant Grant Lifecycle Management (Intermediate)
- ⟩ Asana
- ⟩ Slack
- ⟩ Zoom
- ⟩ Nimble Association Management System (Salesforce based)
- ⟩ CVENT Event Management Software
- ⟩ R Programming Language (Intermediate)
  - o R Studio, tidyverse, Shiny
- ⟩ GitHub (Intermediate)
- ⟩ Tableau (Intermediate)
- ⟩ Excel (Intermediate)
- ⟩ SurveyMonkey (Intermediate)
- ⟩ SPSS (Beginner)
- ⟩ EducateMe Learning Management System

Professional Development

Evergreen Data
⟩ Data Visualization Academy, currently enrolled

R for the Rest of Us
⟩ Data Cleaning in R, currently enrolled
⟩ Going Deeper with R, June 2025
⟩ 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.