Alberto V. Espinoza

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Summary

Experienced social impact professional with a strong record of strategic and business planning, grant and program management, evaluation, and data management and analysis within the philanthropic and nonprofit sectors. Proven track record of building capacity of both internal and external teams, fostering a culture of continuous learning and improvement within organizations.

Core Competencies

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

Experience

PEAK Grantmaking
Knowledge and Learning Manager, February 2024 to Present

Develop educational content to support an emergent learning network of organizations committed to change and advancing equitable, effective grantmaking practices in philanthropy. Lead content creation, group facilitation, development and delivery of educational content and programming, data management and evaluation in support of programming and service delivery.

Community Engagement and Knowledge-sharing
› Develop and execute a plan for PEAK's communities of practice and working groups.
› Support peer-to-peer conversations and problem-solving related to operationalizing equity in grants management.
› Support organization-wide listening, surveying, and research strategies that collect and share information about membership and the philanthropic sector.
› Utilize community data to drive member engagement efforts and education content development.

Content Development
› Support the development and execution of a content plan that advances the grants management profession.
› Design and implement strategies for adoption of the Principles for Peak Grantmaking through advanced learning tools, public-facing workshops and webinars, and PEAK's annual convening.

Program Management and Evaluation
› Evaluate the impact of PEAK's programs and resources on practice change in philanthropy.
› Develop 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.

⟩ Designed evaluation instruments such as pre- and post-tests, surveys, focus group scripts, and observation protocols.
⟩ Trained staff on evaluation methods and processes to ensure evaluative activities were implemented throughout program and project delivery.

Data Management and Analysis
⟩ Implemented the use of GitHub to manage data projects and version control.
⟩ Implemented the use of R Programming language to ensure data analysis 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.

It's Time Texas, Austin, 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. Strengthen 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.

Team Leadership
⟩ Oversee and set goals for the Grants & Evaluation Department in support of the Programs, Operations, and Marketing and Development Divisions.
⟩ Develop annual and quarterly goals and objectives for the Grants & Evaluation Department, ensuring the department contributes to achieving organizational goals and objectives.
⟩ Provide leadership and guidance to Grants and Evaluation Manager by developing annual work plan and professional development plan, ensuring individual contributions help achieve departmental goals and objectives.
⟩ Provided training and guidance to staff on data and evaluation methods and processes to ensure proper data collection and evaluation implementation.
⟩ Serve as strategy, grants, evaluation, and data thought leader to Executive Team, including CEO, VP of Impact, VP of Operations, and VP of Marketing and Development.
⟩ Lead cross-departmental efforts to develop organization-wide data management system.

Grants and Contracts Administration
⟩ Oversee the management of over $3.1 million in Federal and private funding.
⟩ Improved and streamlined internal grant and contract administration systems and processes.
⟩ Led grant and contract management related projects, such as post-award grant kick-offs, funder reporting, and budget amendments requests.

Monitoring, Evaluation, and Learning
⟩ Designed and implemented organization's evaluation framework and plan, ensuring all programmatic pillars align 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.
⟩ Designed evaluation instruments such as pre- and post-tests, surveys, focus group scripts, and observation protocols in English and Spanish.
⟩ Trained staff on evaluation methods and processes to ensure evaluative activities were implemented throughout program and project delivery.
⟩ Conducted a regional needs assessment utilized by the Executive Team to decide on a regional expansion.

Data Governance, Management, and Analysis
⟩ Conducted an internal data strategy audit leading to improved organizational data governance, management, and analysis.
⟩ Implemented the use of GitHub to manage data projects and version control.
⟩ Implemented the use of R Programming language to ensure data analysis 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.

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.
⟩ 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:
  o Designing and implementing a grantee organizational assessment and capacity development portfolio
  o Lead the Foundation's Census 2020 efforts
  o Conducted a social determinants of health needs assessment
  o 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: Spring 2025

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 & Memberships

Texas Evaluation Network
Board Member, July 2023 to Present

American Evaluation Association
Member, September 2017 to Present

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

⟩ 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

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

Software

⟩ Microsoft Office 365 (Intermediate)
⟩ Foundant Grant Lifecycle Management (Intermediate)
⟩ R Programming Language (Intermediate)
  ○ R Studio, tidyverse, Shiny
⟩ GitHub (Intermediate)
⟩ Tableau (Intermediate)
⟩ Excel (Intermediate)
⟩ SurveyMonkey (Intermediate)
⟩ SPSS (Beginner)
⟩ Asana
⟩ Slack

Professional Development

Evergreen Data
⟩ Data Visualization Academy, currently enrolled

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