

LEARNING and EVALUATION Touchpoints

A guide and resources for Caring for
Denver Foundation grantee partners.

WE DO EVALUATION DIFFERENTLY.

*We are on a mission to measure what matters
to communities and provide meaningful
data for the City of Denver.*



Our evaluation approach prioritizes shared understanding and collaborative learning. This approach helps put community insights and experiences at the center of our grant making.

We support each grantee in co-designing a unique evaluation and learning plan that reflects what they feel is most important for telling the story of their work in alignment with Caring for Denver's [Shared Impact Plan](#).

We recognize the time and expertise of our grantees is a valuable resource. We provide [Learning Partnership Compensation funds](#) and tailored evaluation support as a way to respect grantees' investment in this work with us.

The following pages explain our evaluation and learning requirements, with links to resources so grantees know what is expected each year.

The resources in this document are regularly updated using the same URLs. When you are ready to use templates or examples, ensure you have the most accurate information by re-clicking the links.

 This work is licensed under the Creative Commons Attribution 4.0 International License.
 To view a copy of this license, visit <http://creativecommons.org/licenses/by/4.0/>.

MONTHS 1-3 OF GRANT YEAR

Touchpoint 1: Start of grant call & project framework building

Each grant begins with a start of grant call with your program officer and evaluation and learning partner.

On this call we'll confirm your budget, finalize grant objectives, review the terms of the grant, and the logistics of our partnership. We'll also develop a **project framework** specifically for your grant that includes a reporting plan.

This call typically lasts 1.5 hours, and you may need a follow-up call with your evaluation and learning partner to finalize your reporting plan.

Your Action Items

- ☐ Complete your reporting plan (section 3 of your project framework) with your evaluation and learning partner by the 3rd month of the grant.
- ☐ If you have any questions or concerns about implementing your reporting plan, connect with your evaluation and learning partner to discuss options and resources.

PROJECT FRAMEWORK

[Template](#) | [Example](#) | [Video](#)

The **project framework** is first drafted from your application and site visit, then finalized together. It is used as the guide for each grant year, and summarizes your grant-funded strategies, intended results, and what you will report.

It usually takes 1-3 hours to finalize the **project framework's** reporting plan with your evaluation and learning partner after the start of grant call. Grants with multiple partners, complex projects, and grants without evaluations in place take more time.

SHARED IMPACT PLAN (SIP)

[SIP Visual](#) | [Video](#)

The Shared Impact Plan is the Foundation's visual guide for grantmaking and demonstrating results.

Your program officer and evaluation and learning partner will work with you to align intended outcomes in your **project framework** with Caring for Denver's Shared Impact Plan.

REPORTING EXAMPLES

[Examples](#)

Our approach has flexibility in what grantees report, which may be new to you.

This document shows example measures from other grantees to help you get started. Beyond numbers, there will also be time to share stories about your work's impact during your end of grant year learning call (see page 5.)

MONTHS 5-7 OF GRANT YEAR

Touchpoint 2: Mid-year check-in

Your program officer will schedule a check-in with you mid-way through each grant year (if applicable to your grant).

The goal of the check-in is to review program progress and expenditures, discuss goals for next 6 months, and establish a plan if you need to address any challenges.

This call is about 1 hour and preparing for the check-in typically takes grantees less than 1 hour.

Your Action Items

- ☐ Prepare for the check in by reviewing your **project framework** and budget.
- ☐ Think through your responses to the mid-year check-in guide (see below). You do not need to complete a report for the mid-year check-in. Your program officer will do it for you.
- ☐ Complete this touchpoint by the end of month 7 of your grant year.



MID-YEAR CHECK-IN

[Guide](#)

These questions are provided as a guide to help you and your team reflect on your grant progress to date and prepare for your call.

MONTHS 11-12 OF GRANT YEAR

Touchpoint 3: End of Grant Year Report and learning call

At the end of each grant year, you will complete a report in the grantee portal, and participate in a learning call with your program officer and evaluation and learning partner. Both of these must be completed and accepted before any next payment can be released.

During the learning call, we'll review progress on your funded activities and budget. Then, we'll review your End of Grant Year Report and get your perspective on what the data tells you about your grant's progress and challenges for the year. You'll also use this call to share stories and insights beyond the numbers in the report.

If you have another year in your grant, we'll update your **project framework** and review any budgeting or operational needs for the next year. If this is the last year of your grant, we hope to hear about your future plans and next steps for this work.

This call typically lasts 1.5 hours, and you may need a follow-up call with your evaluation and learning partner to update your reporting plan for next year.

END OF GRANT YEAR REPORT INSTRUCTIONS

[2-Page Summary](#) | [Video](#) | [Grantee Report Examples](#)

These documents walk you through the End of Grant Year report step by step.

LEARNING CALL [Guide](#)

These questions are similar to those from the mid-year check-in. Use this guide to help you and your team reflect on your grant progress to date and prepare for your call. You do not need to write your responses—we'll take progress notes when we meet and upload these for you in the grant portal.

Your Action Items

☐ Complete your End of Grant Year Report using the reporting plan of your **project framework** as a guide. With a complete framework and ready data, this typically takes less than an hour.

- ▶ Ensure whoever is completing the report understands our process and uses this guide.
- ▶ Reach out to your evaluation and learning partner if you need additional help. Please email them at least three weeks before your report due date.
- ▶ Schedule your learning call for a day that is at least 3 business days after your End of Grant Year Report will be submitted.

☐ Prepare for the learning call by reviewing your **project framework** and the learning call guide. (See text box to the left)

☐ Update your reporting plan with your evaluation and learning partner within 3 months of the start of the new grant year.

**Note: Your End of Grant Year report also requires a budget expenditure form and a balance sheet. These must be correct and approved by your Program Officer before any additional grant funds can be released.*

Connect with us.



*It is our honor and privilege to work with you.
Don't hesitate to reach out any time!*



Akila Copeland

Program Officer
akila@caring4denver.org



Haley Sammen

Lead Evaluation and Learning
Partner
haley@caring4denver.org



Hillie Teller

Evaluation and Learning Partner
hillie@caring4denver.org



Jacquie Esquibel

Program Officer
jacquie@caring4denver.org



Juan Escobedo

Program Officer
juan@caring4denver.org



Raymael Blackwell

Senior Program Officer
raymael@caring4denver.org



Rebecca Ochtera

Director of Evaluation and
Learning
rebecca@caring4denver.org



Sydney Chaves

Evaluation and Learning Partner
sydney@caring4denver.org



Tim Cortez

Program Officer
tim@caring4denver.org

For help accessing the grantee portal, contact Tish Gonzales, grants and operations manager at tish@caring4denver.org.

MAILING ADDRESS:

Caring for Denver Foundation | Kaleidoscope Collaborative Center
1035 Osage Street, 8th Floor, Denver, CO 80204
MAIN NUMBER: 720.647.6380