BUILDING A FOUNDATION FOR AN ALBERTA NONPROFIT DATA STRATEGY

PROJECT WHITEPAPER

July 2018

1. Background

It is well recognized that a coordinated, multipronged effort is required to enhance the use of data in the nonprofit sector. This project arose out of a meeting held in November 2016, where representatives from Volunteer Alberta, the Edmonton Chamber of Voluntary Organizations ECVO), Calgary Chamber of Voluntary Organizations (CCVO) and Alberta Culture & Tourism arrived at consensus around a tangible first step toward advancing the goal of developing a provincial nonprofit data strategy.

In March 2018 funding was announced by Alberta Culture & Tourism and the project was launched with CCVO serving as the fiscal agent. An Advisory Committee chaired by CCVO has been formed with representatives from the following organizations;

- Alberta Culture & Tourism (Community Engagement)
- Calgary Chamber of Voluntary Organizations
- Edmonton Chamber of Voluntary Organizations
- Service Alberta
- Volunteer Alberta

Through a process of stakeholder engagement and review of existing data sources, this project will serve as the foundation for a provincial strategy. Within the context of ever-advancing technology, an opportunity exists to support stronger community outcomes through enhanced utilization and sharing of data. While there are countless examples of the private sector leveraging advanced technology and realizing the benefits of using data effectively, the same cannot be said of the nonprofit sector. The possibilities opened by technology in the last decade are groundbreaking. We can use data differently now, sharing and combining it to get deeper insights. A huge opportunity exists for the nonprofit sector to make much better use of data for the betterment of our communities.

The benefits of enhanced data use and sharing have been summarized by the Ontario Nonprofit Network in their 2015 publication entitled *Towards a Data Strategy for the Ontario Nonprofit Sector* (1). These include using evidence to inform more responsive programs and service, learning and communicating about impact, and collaborating more effectively. This project will leverage existing work related to nonprofit data that has been done by a wide variety of organizations and initiatives.

The objective of this project is to build awareness and engagement amongst a broad range of stakeholders in Alberta and to move towards expanding the acquisition, analysis, and utilization of data within the nonprofit sector. The project will engage nonprofit and public sector leaders, determine sector priorities, and develop a roadmap that will serve as a foundation for the development of an Alberta Nonprofit Data Strategy.

2. Project Overview

An overview of the project includes the following phases;

- Formation of Advisory Committee and development of whitepaper (June – July)
- Stakeholder engagement and background research (August – October)
- Development of roadmap and initial draft report (November – December)

- Finalize recommendations and prepare final report (January – March)

The scope of the project will take the following into consideration;

- Objective is to build a foundation not create the actual strategy
- Focus is on the provincial perspective and data related to Alberta
- Categories of nonprofit data will be addressed in this order of priority;
    1. Data about the sector
    2. Data held by the sector
    3. Data external to the sector

3. Stakeholder Engagement

The objectives of the stakeholder engagement process will be to get input on;

- Current state utilization of nonprofit data in Alberta
- Partial inventory of datasets that are of interest to the sector
- Prioritization of datasets, resource availability and areas for capacity building
- Desired future state utilization of nonprofit data in Alberta

From this input a roadmap will be developed that represents the logical phases to move from current state to future state according to sector priorities.

Observations will be made in the areas below related to the data strategy but will not be studied in detail in this project;

- Policies
- Standards
- Platforms and Technologies

4. Areas for Discussion

The following themes and questions will be used as a basis for discussion and stakeholder engagement.

4.1 Data about the sector

This is sector-wide data from multiple sources that provides insight related to attributes of the nonprofit sector in Alberta (i.e. how many, how much, labour market, etc.). Generated primarily through surveys this data is often compiled by government departments and nonprofit sector umbrella organizations. Funders also have valuable data about the sector when aggregation is done on the portfolio of their grants.

To address data about the sector at the national level a Sector-Wide Data Working Group has been organized through Imagine Canada (2) and background information is available on the need for a Sector-Wide Data Strategy (3). This is important work and there is no intention to duplicate effort. This project will focus on discovering and prioritizing sector-wide data from the Alberta perspective.

Research will be performed on this category of nonprofit data as part of this project with the objective to develop the following;

- Ecosystem map of the data providers (funders, nonprofits, governments, etc.)
- Partial inventory of the available data sets (with characterization such as mandatory, frequency, best practice, etc.)

Questions for discussion;

1. What are the most important datasets about the sector that you are currently using?
2. What are the limitations of those datasets?
3. What datasets do you wish you had access to?
4. What capacity limitations do you have that restricts effective utilization of these datasets?

4.2 Data held by the sector

This is the largest and most diversified category of nonprofit data. It includes the many types of data generated by organizations in the course of their operations and delivery of their programs & services. The personal records of client services held by organizations and governments are sometimes called administrative data. One way of viewing the variety of data in this category is through the Data Spectrum (4) that introduces the concepts of Closed, Shared and Open data.
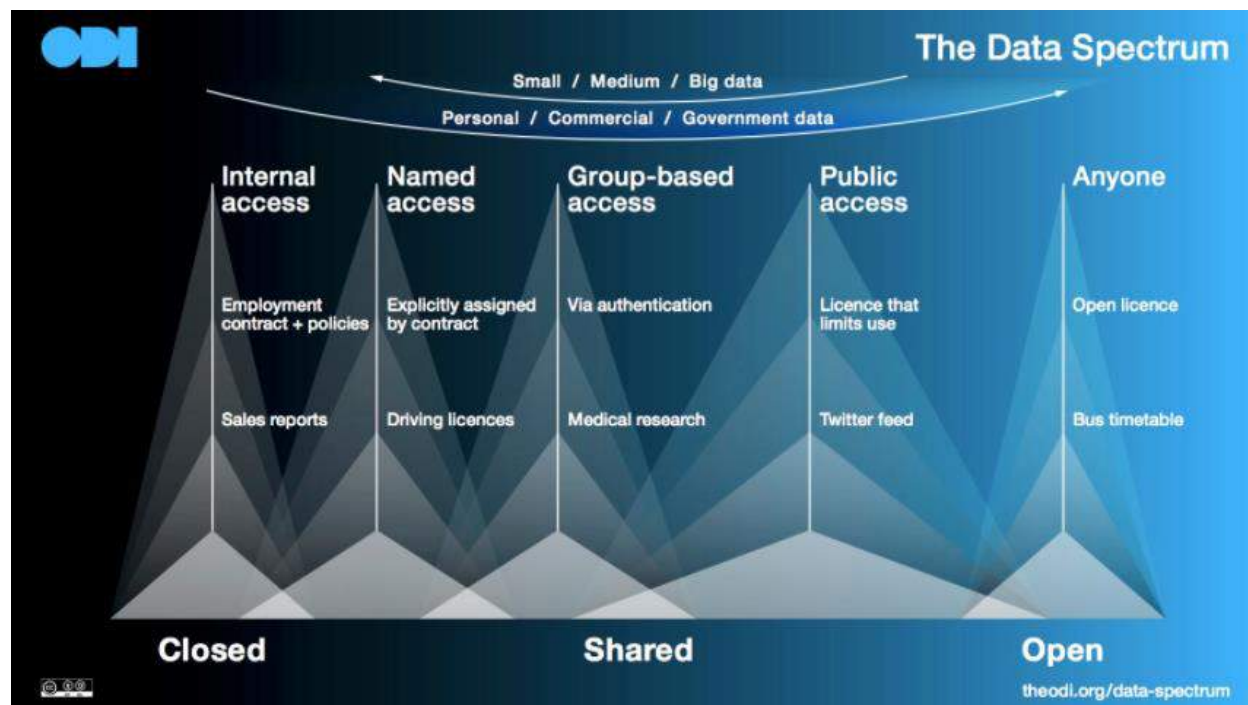
The value of data held by the sector can be dramatically increased when it is shared. Through data sharing we can see patterns and gain insights that would not be apparent if data remained closed in organizational silos. While the profile of data sharing has risen recently there are numerous examples where it has been happening in communities for many years. There are a variety of projects and initiatives (see Section 3.2 in (5)) that can be used to identify resources and to help inform what is possible in the nonprofit sector. Data sharing can be challenging due to requirements related to the protection of personal information but there are a variety of ways

that these challenges can be overcome. There are multiple 'levels of data sharing' that can be considered (see Section 3.3 in (5));

- Level 1 – Publicly available / Aggregated / Open
- Level 2 – De-identified
- Level 3 – Anonymized and Linked
- Level 4 – Personal attributes

Data sharing can be valuable at each of the above levels and it is important that the applicable rules & regulations be carefully understood and implemented. In Alberta, PolicyWise for Children & Families (6) has significant experience with data sharing and the Secondary Analysis to Generate Evidence (SAGE) initiative (7) includes opportunities for sharing of nonprofit data.

A new national initiative has been launched to build a civil society coalition to design a policy agenda on administrative data-sharing (8). Insights generated from this initiative will be leveraged in this project with a special focus on the Alberta perspective.

Questions for discussion;
5. Do you see opportunities for data sharing in the work that you are doing in the nonprofit sector? What level(s) of data sharing would be involved?
6. What are the most significant barriers to data sharing? How could they be overcome?
7. Does your organization or community initiative have the resources and capacity to participate in data sharing? What would you need to get started?
8. Are you aware of examples of data sharing in the nonprofit sector that have been particularly effective (local, provincial or national)?
9. What policies, resources or technologies at the provincial level would be most beneficial to data sharing?

4.3 Data external to the sector
The third category is related to data external to the nonprofit sector that can be used to provide broad societal context, allow sense making and help to inform strategies (i.e. demographics, economics, oil price, income, housing, immigration, etc.). These datasets come from a wide variety of sources in the public, private and nonprofit sectors. They are too numerous to be fully identified within the scope of this project but input will be gathered on high priority datasets from an Alberta perspective.

Questions for discussion;
10. Do you make use of external data to help inform decisions?
11. What are some examples of external datasets that have been especially valuable?
12. What challenges have you had in finding, accessing and managing external data?
13. Would a central data hub for commonly used external datasets at the provincial level help address some of the challenges?

5. Contact information
This whitepaper will be used for stakeholder engagement and as a foundation for additional research. Comments and questions are welcome at any time and should be directed to the consultant engaged for this project (Geoff Zakaib – geoff@lumina.ca).

6. Endnotes

(1) Towards a Data Strategy for the Ontario Nonprofit Sector - Ontario Nonprofit Network - http://theonn.ca/wp-content/uploads/2015/07/Towards-a-Data-Strategy-for-Ontario-Nonprofit-Sector_ONN_Final_2015-07-13.pdf

(2) Sector-Wide Data Working Group – Imagine Canada - http://www.imaginecanada.ca/who-we-are/whats-new/news/new-policy-working-group-data-about-charitable-and-nonprofit-sector

(3) Sector-Wide Data Strategy – Imagine Canada - http://www.imaginecanada.ca/our-programs/public-policy/policy-priorities/sector-wide-data-strategy

(4) Data Spectrum – Open Data Institute - https://theodi.org/about-the-odi/the-data-spectrum/

(5) Enabling Community Data Sharing for the E4A Strategy and Collective Impact Evaluation Framework - http://enoughforall.ca/wp-content/uploads/2018/03/Catalyst-Data-Sharing-Project-Final-Report.pdf

(6) PolicyWise for Children & Families - https://policywise.com/

(7) Secondary Analysis to Generate Evidence – PolicyWise - https://policywise.com/sage/

(8) Building a civil society coalition to design a policy agenda on administrative data-sharing – Powered by Data - https://poweredbydata.org/administrative-data/