
Building a Foundation for an Alberta Nonprofit Data Strategy – Final Report

MARCH 2019

PREPARED BY GEOFF ZAKAIB

FOREWORD

Building a Foundation for an Alberta Nonprofit Data Strategy

This is the final report of an important project providing a tangible first step toward advancing the development of an Alberta nonprofit data strategy. The report summarizes a body of work completed from June 2018 to March 2019, including the formation of an Advisory Committee and development of a whitepaper, background research, stakeholder engagement, development of a Roadmap for possible next stages, and finalizing recommendations.

The goal of this project was not to create a provincial strategy; rather, it was to build a framework for such a strategy. I'm pleased to note that through our consultations and stakeholder engagement across the province, we have determined that there is significant interest and support for developing such a strategy. In this sense, our report should be seen as a start, with a significant opportunity to build on this work.

We would like to express our sincere thanks to the Government of Alberta for providing the resources necessary to complete this project.

I would also like to note, with appreciation, the leadership of members of the project's Advisory Committee, which I had the pleasure to Chair, including:

Arden Casault, Service Alberta

Russ Dahms, ECVO

Anne Davidson, Culture and Tourism

Bill Hodgins, Culture and Tourism

Eileen Joly, Service Alberta

Karen Link, Volunteer Alberta

Karen Whiteman, CCVO

And I would like to especially thank our project consultant, Geoff Zakaib, who so expertly assisted us, drafting this report and managing this project to a successful conclusion.



David Mitchell
President & CEO
CCVO

BUILDING A FOUNDATION FOR AN ALBERTA NONPROFIT DATA STRATEGY

Project Overview

The objective of this project was 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 engaged nonprofit and public sector leaders, determined sector priorities, and developed a roadmap that will serve as a foundation for an Alberta Nonprofit Data Strategy.

The project included the following phases:

- Formation of an Advisory Committee and development of a whitepaper (June – July)
- Stakeholder engagement and background research (August – November)
- Development of a roadmap (December – January)
- Finalization of recommendations and preparation of final report (February – March)

The scope of the project considered the following:

- The objective was to build a foundation, not create an actual strategy
- The focus was on the perspective and data related to Alberta
- Categories of nonprofit data were addressed in this order of priority:
 1. Data about the sector
 2. Data held by the sector
 3. Data external to the sector

Formation of an Advisory Committee and Development of Project Whitepaper

An Advisory Committee was formed with representatives from the following organizations:

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

The Advisory Committee met a number of times throughout the course of the project by conference call and in person. CCVO chaired the Advisory Committee and served as the fiscal agent for the project.

A [project whitepaper](#) was developed to help raise awareness of the key issues and to guide the stakeholder engagement process.¹

Stakeholder Engagement

A series of stakeholder roundtable sessions were organized to receive feedback from nonprofit organizations and the government. The stakeholder engagement process was designed to get input on the:

- 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, and
- desired future state utilization of nonprofit data in Alberta.

Five roundtable sessions were held with nonprofits and government stakeholders in 2018 on the following dates:

- Calgary (nonprofits) – September 25
- Edmonton (government) – October 3, AM
- Edmonton (nonprofits) – October 3, PM
- Red Deer (nonprofits) – October 30
- Lethbridge (nonprofits) – November 6

In total, over 100 individuals from nonprofit organizations participated in the stakeholder roundtables. Over 20 individuals, representing approximately 10 different ministries/departments, participated from the Government of Alberta. Statistics Canada also attended the government session.

Feedback from the roundtables has been compiled into two documents.

- ANDS stakeholder roundtables - [compiled by question and location](#)²
 - o All responses were organized by question and retain the location of responses
- ANDS stakeholder roundtables - merged by [question with responses grouped](#)³
 - o All responses were organized by question, but merged together and grouped according to type/theme

These documents are a valuable resource that will inform the development of the Alberta Nonprofit Data Strategy. The feedback provides insight on the datasets that are important to the nonprofit sector, as well as the key challenges and opportunities.

A high-level summary of the feedback from the stakeholder roundtable sessions is shown below. Detailed feedback that retains all individual responses is available in the documents referenced above, with links in this report's endnotes.

Data About the Sector – Datasets

- Statistics Canada
- Canada Revenue Agency
- Service Alberta/Registries
- Nonprofit/umbrella/surveys/research
- Labour/workforce/staff
- Funders/grants/funding
- Agricultural societies
- Alberta tax/OSI
- Alberta Gaming, Liquor and Cannabis
- Municipal/city/neighbourhood
- Alberta Health/Alberta Health Services
- Social issues
 - Housing/homelessness
 - Children's services
 - 211/community services

Data External to the Sector - Datasets

- Statistics Canada/census
- Government sources
- Nonprofit/umbrella/surveys/research
- Economic/financial
- Canada Revenue Agency/tax
- Municipal/city/neighbourhood
- Health
- Social issues
- Funders/grants/funding
- Private sector

Data Held by the Sector – Datasets

- Clients/services
- Evaluation/outcomes/impact
- Nonprofit/umbrella/surveys/research
- Government sources
- Funders/grants/funding
- Labour/workforce/staff
- Volunteers
- Financial/billing
- Social issues
 - Health/mental health
 - Housing/homelessness
 - Violence
 - Children's services
 - 211/community services
 - Education
 - Food

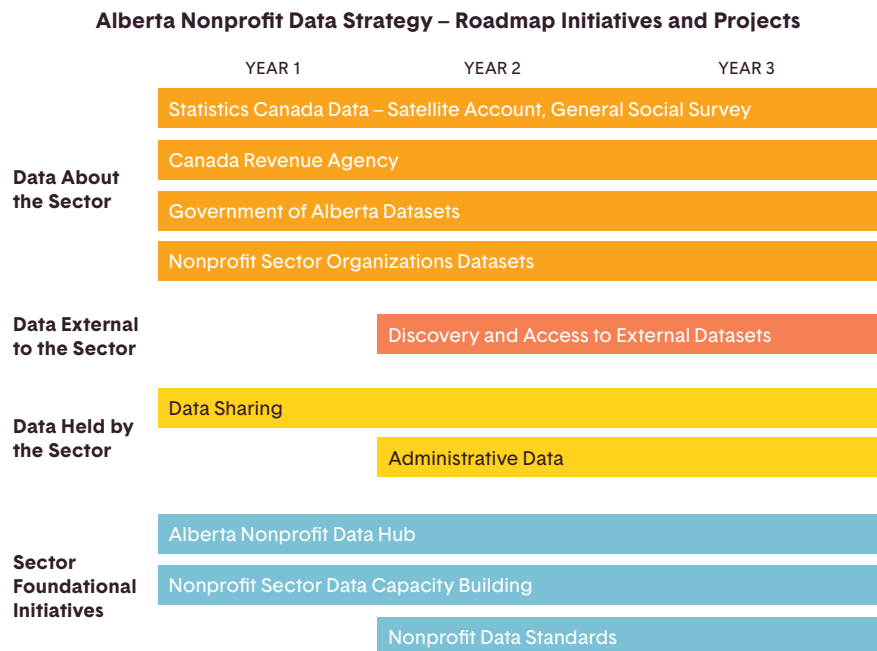
Challenges and Opportunities

- Capacity/resources/skills
- Data collection/types of data
- Standards/data quality
- Privacy/regulations/data sharing
- Accessibility
- Technical/infrastructure/repository
- Culture/mindset
- Sector coordination/collaboration
- Rural issues

Roadmap

Based on input from the stakeholder roundtables, a roadmap was developed to represent the logical steps required to move from the current to future state, according to sector priorities.⁴

The roadmap presents the recommended initiatives that, over time, would lead to the curation of important datasets and enable progress on addressing the key challenges and opportunities.



Data About and External to the Sector

The initiatives below relate to datasets about, and external to, the sector that have been identified as being important.

- Statistics Canada and Canada Revenue Agency datasets
- Government of Alberta datasets
- Nonprofit sector organizations datasets
- Discovery and access to external datasets

In many cases, work is already being done to collect and analyze these datasets. The recommended initiatives would provide for better coordination of effort and would address the following challenges and opportunities:

- Data collection/types of data
- Accessibility
- Sector coordination/collaboration

Data Held by the Sector

The effective sharing and utilization of data held by the nonprofit sector (and government) is a huge opportunity. The initiatives below are proposed to increase the ability of the sector to capture these opportunities.

- Data sharing
- Administrative data

The focus of these initiatives is understanding the people, process, and technology issues, and would address the following challenges and opportunities:

- Privacy/regulations/data sharing
- Culture/mindset
- Sector coordination/collaboration
- Rural issues

Sector Foundational Initiatives

The initiatives below relate to issues that are foundational for enhancing the use of data in the nonprofit sector.

- Alberta Nonprofit Data Hub
- Nonprofit Sector Data Capacity Building
- Nonprofit Data Standards

Together these initiatives are fundamental to the development of capacity in the sector, having a central point of efficient access to data, and also improving the quality of the data. The initiatives would address the following challenges and opportunities:

- Capacity/resources/skills
- Standards/data quality
- Accessibility
- Technical/infrastructure/repository
- Sector coordination/collaboration

Observations

There was significant interest in the project and a very high level of engagement with the nonprofit sector and government. This reflects recognition of the importance of data in the nonprofit sector and a willingness of individuals and organizations to devote time and energy to enhance the utilization of data.

In a number of the Stakeholder Roundtables, a desire was expressed to have additional opportunities to connect and share experiences related to nonprofit data. Thus the development of Communities of Practice on the local and sub-sector level are seen to be an important part of the strategy going forward.

The Roundtable session for government brought together, for the first time, a wide variety of ministries/departments to discuss data related to the nonprofit sector. It was characterized by a high level of engagement, and a strong desire to work towards building the capacity to collaborate and share the data held by government.

There is a general feeling that the central issue is not a lack of data in the nonprofit sector, but a need to build capacity to use data effectively. In this context, capacity includes the skills, time and resources needed across the data lifecycle. There is a strong desire to make better use of the data that already exists by improving access and avoiding data silos. This could be achieved by moving towards developing a central point of access, such as the proposed Alberta Nonprofit Data Hub.

Culture and mindset emerged as both key challenges and opportunities. A general lack of trust related to data is seen as one of the primary issues that must be addressed. There is often a fear of sharing data and an uneasy feeling about how data will be used due to the 'competitive' environment that is pervasive in the nonprofit sector. This

highlights the importance of collaboration and coordination as mechanisms to improve trust and reduce barriers to data sharing in the sector.

Rural issues that are having a negative impact on data utilization also surfaced in some of the stakeholder roundtables. Examples of these issues include the fact that some data is not being collected in rural settings, and the presence of an infrastructure deficit (internet access and speed). As the data strategy is being developed, ways to address these issues should be considered.

Recommendations

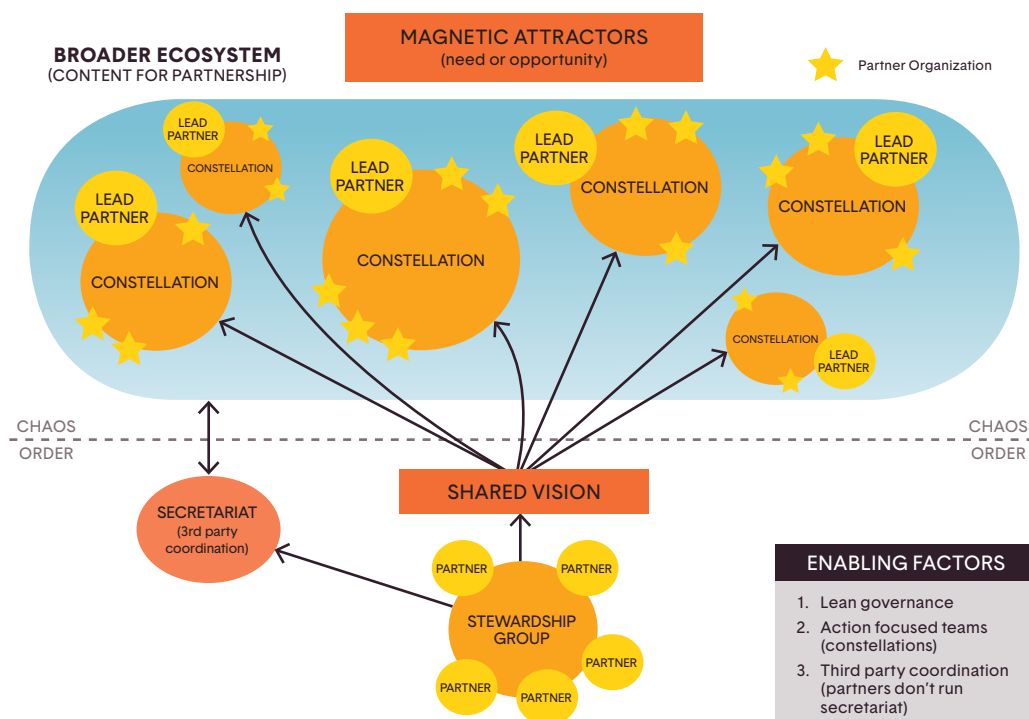
Implement Initiatives Based on Sector Priorities

The roadmap as outlined above is ambitious. High-level priorities are suggested in the relative timing of the various initiatives (Year 1 vs Year 2), based on feedback from the stakeholder consultations.

The number of initiatives that can be launched and carried out simultaneously will ultimately be determined by sector priorities, level of interest, and capacity of stakeholder organizations – as well as the resources available to the sector. This will require more detailed discussions with stakeholders in the next phase of the project. The initiatives outlined in the roadmap can be considered as building blocks that can be assembled in a variety of ways, to best meet the needs of the nonprofit sector.

Implementation Through a Constellation Model

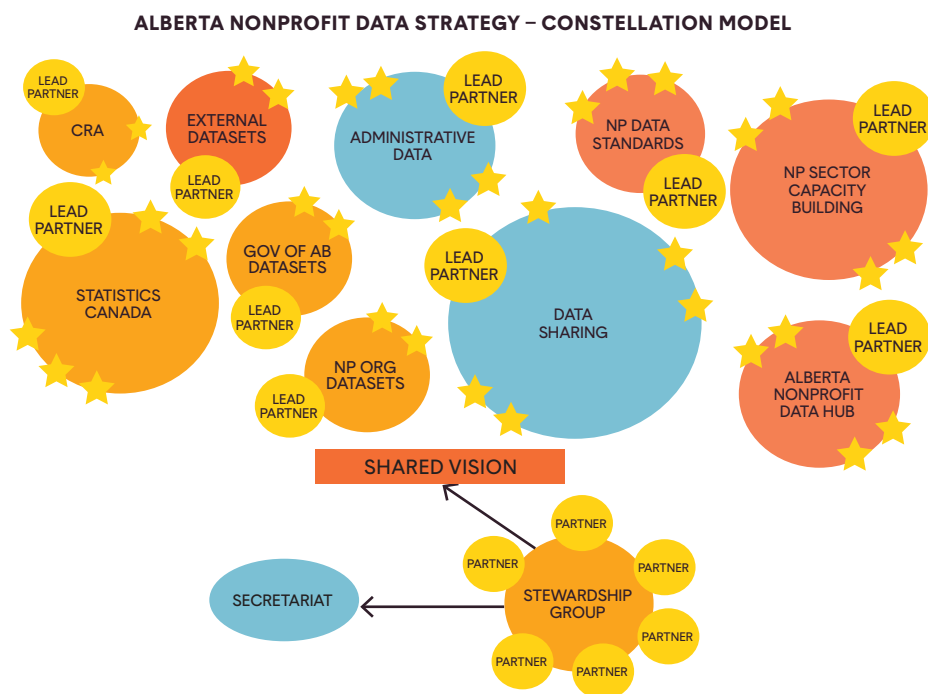
The roadmap recommends that the initiatives be implemented through a [Constellation Model](#) that is characterized by lean governance with a bias for action;⁵



Additional characteristics of this model include the following:⁶

1. Lean governance where:
 - partnerships are created to respond to specific needs or opportunities,
 - partnerships are governed by lean agreements (no legal entities created),
 - a stewardship group provides overall strategy and terms of reference,
 - the prevailing rule-of-thumb is to have “as little process as possible”, and
 - most authority and decision making resides at the working (team) level.
2. Action-focused teams (constellations) who:
 - are small and self-organizing;
 - “flow” towards the need or opportunity;
 - “build on energetic leadership”, leveraging self-interest; and
 - “are loosely coupled”, forming and dissolving, creating a rough and chaotic whole.
3. Third-party coordination that:
 - “manages day-to-day coordination of the partnership”,
 - “resides outside of the core partners” (freeing partner resources for action),
 - ensures all partners have opportunity to lead (a team),
 - facilitates coordinated (cross-partner) fundraising, and
 - troubleshoots problems e.g. conflict resolution.

Implementation of this model in context of the Alberta Nonprofit Data Strategy would appear as follows:



Initiatives outlined in the roadmap could be considered to be Constellations that would attract organizations as partners based their motivation to participate. One of the partners with the necessary capacity would become the Lead Partner. The Constellation would decide on the objectives and scope of work. Funding would be pursued if necessary, supported by the Stewardship Group and Secretariat.

Next Steps

The final report and interim documents of the Building a Foundation for an Alberta Nonprofit Data Strategy project should be widely distributed among stakeholders.

Development of plans for the next phase of the Alberta Nonprofit Data Strategy should begin immediately in order to maintain momentum and further expand the stakeholder engagement that has already been started. This effort should bring stakeholders together with a greater level of coordination and should be seen as a shared responsibility of the nonprofit sector and government.

A Stewardship Group should be assembled that will serve to provide strategic direction and governance related to future phases. A Secretariat should then be engaged to provide overall coordination of future phases. The Secretariat would provide support as necessary for cross-partner fundraising and would leverage advice from the Stewardship Group and Lead Partners.

Engagement with stakeholders should continue in order to reach consensus on nonprofit sector priorities, determine the level of interest in specific initiatives, and gather information on the capacity of participating organizations. Based on these discussions, the number and type of initiatives to be implemented in future phases can be decided. Funding and the availability of additional resources will also be factors in determining the scope of future phases.

Endnotes and Project Documents

¹ Building a Foundation for an Alberta Nonprofit Data Strategy – Whitepaper – July 2018 - <https://bit.ly/2wYmoRw>

² Building a Foundation for an Alberta Nonprofit Data Strategy – Stakeholder Roundtables – compiled by question and location – December 2018 – <https://bit.ly/2tBwgzy>

³ Building a Foundation for an Alberta Nonprofit Data Strategy – Stakeholder Roundtables – merged by question with responses grouped – December 2018 – <https://bit.ly/2SrQ3PY>

⁴ Alberta Nonprofit Data Strategy – Roadmap – February 2019 – <https://bit.ly/2tBwaab>

⁵ Listening to the Stars: The Constellation Model of Collaborative Social Change – Tonya and Mark Surman - http://tonyasurman.commons.ca/wp-content/uploads/sites/3/Surman_2008_Constellation-Model_SocialSpace.pdf and Open Sourcing Social Change: Inside the Constellation Model - Tonya and Mark Surman - <http://timreview.ca/article/183>

⁶ Constellation Collaboration: an inspired model for multi-organizational collaboration – Ben Ziegler - <http://collaborativejourneys.com/constellation-collaboration-an-inspired-model-for-multi-organizational-collaboration/>

In the spirit of our efforts to promote reconciliation, we acknowledge the traditional territories in Alberta of the many First Nations, Métis, and Inuit whose footsteps have marked these lands for centuries.

