

TOWARDS A SHARED DATA STRATEGY FOR THE PHILANTHROPIC SECTOR

November 2021



ABOUT	4
Call to Action - Participate in the Consultation	5
EXECUTIVE SUMMARY	6
Why a data strategy?	6
Key challenges and opportunities for funders	6
The Roadmap	7
1) Creating enabling conditions	7
2) Developing an understanding of the various risk factors	7
3) Multi-level actions that will lead to a shared data strategy	7
4) A Shared Data Strategy for the Philanthropic Sector	8
What would a shared data strategy help the philanthropic sector achieve?	8
How would the sector achieve it?	8
Plan to move ahead	11
BACKGROUND	13
INTRODUCTION	15
Why data matters	15
What is a shared data strategy?	15
Figure 1: Model for an intentional and strategic process for a data strategy	15
STEP 1: CURRENT STATE ASSESSMENT	17
Why a shared data strategy for funders?	17
Opportunities	18
Figure 2: Transforming the evidence ecosystem - A people-centered, integrated, systems-wide approach	18
Table A: Examples for the opportunities for the use of a data strategy from Canadian philanthropic foundations and their stakeholder	20
Key Challenges	21
Momentum Is Building	21
STEP 2: PLANNING AND DISCOVERY	23
Process summary	23
Figure 3: The timeline for the first phase of the project	24
General Observations	24
STEP 3: ANALYSIS AND PRIORITIZATION	26
Key takeaways from the engagement process:	26
STEP 4: THE ROADMAP	28
Figure 4: The roadmap towards the creation of a shared philanthropic data strategy	28

Enabling Conditions	29
Table B: Areas for change management and suggestions for enabling conditions needed for a shared data strategy	30
Understanding Risk Factors	30
Multi-level Actions	31
A Shared Data Strategy for the Philanthropic Sector	33
Table C: Goals of a shared data strategy and how to make it happen	37
NEXT STEPS	38
NOW	39
NEXT	39
LATER	39
Table D: The infrastructure needed for the development and implementation of the shared data strategy roadmap	39
CONCLUSION	41
RESOURCES FOR FURTHER READING	42
ANNEX A	43

ABOUT

ABOUT PFC

Philanthropic Foundations Canada (PFC) strengthens the role of private philanthropy — in all of its diversity — as partners for a just, equitable and sustainable world. Through its 140+ members (private, public, and corporate foundations), PFC is an enabler for the public good working in collaboration with civil society, the private sector and governments.

To learn more, visit: <https://pfc.ca/>

ABOUT OTF

The Ontario Trillium Foundation (OTF) is an agency of the Government of Ontario and one of Canada's leading granting foundations. Its investments in communities across the province help build healthy and vibrant communities. For more than 30 years, OTF grants have made an impact on the social, cultural and economic well-being of the people of Ontario.

To learn more, visit: <https://otf.ca/>

THE PARTNERSHIP

Ontario Trillium Foundation (OTF) and Philanthropic Foundations Canada (PFC) have initiated a partnership to conduct research and create the space needed to convene key stakeholders, increase capacity, and discuss the technical work required to lead towards a Data Strategy for the Philanthropic sector. Powered by Data has been contracted to help implement the first phase of the initiative.

This partnership aimed to set the foundation for developing a funders' data strategy in Canada, focusing on the engagement of funders and stakeholders to build commitment, identify opportunities, and prioritize steps toward building a funders data strategy. This first phase aims to develop a shared interest and understanding of what a data strategy for the philanthropic sector is and develop a roadmap to guide the next steps.

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Call to Action - Participate in the Consultation

This report has been drafted for consultation with key stakeholders in the philanthropic sector, including philanthropic foundations, their partners, and organizations and academia operating in the philanthropic ecosystem.

As part of the consultation process, you are invited to provide your feedback and input by February 4, 2022 (Deadline extended.). We have created several ways of contributing to make it easier for you.

Your feedback is important and will be incorporated into the report and inform next steps to which you will be invited to participate!

First, we ask you to please fill in this consultation questionnaire, which you can complete [here](#).

Then, you can provide your more specific comments by choosing one of two ways:

- Comment on the report directly: please create a personal copy of the document, add your comments and send it back to us via email at datastrategy@pfc.ca
- Send us your comments directly by email at datastrategy@pfc.ca

EXECUTIVE SUMMARY

As we enter a digital era of exponential data growth – coupled with a pandemic that has severely impacted the global economy and harmed certain communities more than others – questions over the collection, use and ownership of all sorts of data have come to the forefront of the national discussion on philanthropy. In the midst of such uncertain times, there seems to be more demand for data to help guide our work, and yet much of that needed data wasn't readily available when it was needed most.

How can the sector handle and share data more openly, responsibly, efficiently, and for greater impact?

In 2020, Philanthropic Foundations of Canada (PFC) and the Ontario Trillium Foundation (OTF) – with the support of Powered by Data (PbD), engaged in a consultative process with foundations and key stakeholders that has led to a set of recommended actions towards a data strategy for the philanthropic sector, enclosed in this report. Inspired by past and ongoing data-driven initiatives, the process has included a desktop review, interviews with funders and stakeholders, a group sensemaking meeting and a survey of PFC members to:

- identify opportunities for foundations to use data to address common challenges,
- explore what actions are required to create a shared data strategy for foundations and partners, and
- develop a roadmap to start learning together to benefit from data and reduce the associated harmful risks ¹

The rising tide of conversations pertaining to data use within the social sector highlights an opportunity to build on this momentum to generate deeper collective interest, shared ownership, and a clear path forward to a collaborative data strategy.

Why a data strategy?

Data matters. It is used to tell stories, answer questions, and understand change over time. It has the power to enable individuals and organizations to make better decisions, design better programs and deliver more effective services. Collecting, understanding, and using data for any purposes, however, are incredibly challenging processes with major practical and ethical considerations. Although data can be used in many positive ways, there is a long history that continues to this day of data being used for harm, perpetuating systemic racism and other oppressions.² A modernized, strategic, and empathic approach is needed to allow society to use data effectively and equitably.

Key challenges and opportunities for funders

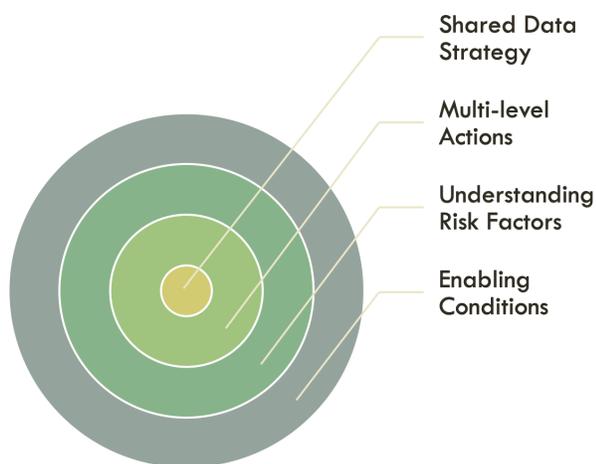
¹ Details on the consultation process in Step 2: Planning and Discovery of this report

² Hawn Nelson, A., Jenkins, D., Zanti, S., Katz, M., Berkowitz, E., et al. (2020). *A Toolkit for Centering Racial Equity Throughout Data Integration*. Actionable Intelligence for Social Policy, University of Pennsylvania.
https://www.aisp.upenn.edu/wp-content/uploads/2020/08/AISP-Toolkit_5.27.20.pdf

This report highlights the main challenges and learnings that have come out of the consultation process and are intended to be fine-tuned, revised and updated through an iterative method that allows the sector to learn together. The challenges to developing a shared data strategy include limited data literacy and capacity in social sector organizations, regulatory frameworks that hinder data sharing, finding consensus on which data and tools are used to measure outcomes and targets. Some of the key opportunities for a shared data strategy outlined in this report are: smarter grantmaking, inspiring innovation solutions, answering new questions faster, better collaboration between funders, improved understanding of impact, access to data, increased transparency and accountability, and diversity, equity and inclusion (DEI) strategies to address systemic exclusion.

The Roadmap

A roadmap towards a shared data strategy (see figure below) is outlined in this report based on some common themes that emerged from the research and what was heard during the engagement process. This roadmap includes:



1) Creating enabling conditions

A shared data strategy will require shifts in the status quo of the current funder landscape to develop a more open, collaborative and transparent way of operating. The different areas of change management and the enabling conditions that are required to support these shifts towards a collective learning culture are outlined in this report. These include changes in the social-cultural landscape, at the organizational level, in the technology used and in the operations and processes within foundations.

2) Developing an understanding of the various risk factors

Through the engagement process and research, several barriers were identified which could pose a risk to the development of a shared data strategy such as the limited capacity of the sector, implementation in silos, and limited consultation with grantees and equity-seeking organizations. However, the real question as outlined in this report might be *what is the risk of not doing this important work?*

3) Multi-level actions that will lead to a shared data strategy

This report highlights suggested actions that can be taken by individual foundations, by collective work and at a sector-wide level that can be pursued as part of a collective learning culture.

4) A Shared Data Strategy for the Philanthropic Sector

Creating a shared data strategy will require continued development and collaboration. The roadmap in this report highlights some key guiding questions that have surfaced throughout the consultation process thus far, including:

What would a shared data strategy help the philanthropic sector achieve?

- have a set of common goals for the data strategy, articulating a shared strategic vision, common principles and shared values, for the philanthropic sector, encompassing all funding areas of participating foundations.
- Create a better understanding of the philanthropic sector
- Help funders be more accountable and transparent towards the public, the communities they serve and their donors enable funders to understand the communities they serve much better
- Improve grantmaking practices
- Help to establish better partners and collaborators for positive impact

How would the sector achieve it?

A clear set of values will allow for a better understanding of a shared data strategy's purpose and desired outcomes. A set of principles associated with the following values are outlined in this report to help guide foundations in their commitment to working together, to invest better and more strategically to realize a vision of a more equitable and resilient future for all. These values include:



Value #1: Hold diversity, equity and inclusion (DEI) at the centre



Value #2: Adopt a learning mindset



Value #3: Listen then act



Value #4: Collaboration

What are the goals of a shared data strategy and how can the sector make it happen?

There are several reasons why the philanthropic sector and the individual partners involved want to create a shared data strategy, as outlined in the report in this chart:

GOALS	WHAT TYPE OF DATA?	WHAT'S NEEDED TO MAKE IT HAPPEN?
Better understand the philanthropic sector	Funding focus, target populations, \$ awarded, geography, funding mechanisms, type of funding (capacity building, general operating, project, ongoing support), HR data, governance data, length of grants, disbursement quota, assessment criteria	Comparable, standardized data (i.e. use same population categories)
Better accountability and transparency		Share data publicly in an accessible, open format Benchmarking
Better understand communities	Disaggregated community data (census data, community health data, etc), administrative data, charity leadership data (leadership reflects community served)	Identify and address data gaps and deficits. Work with communities to better collect data that is relevant to communities served.
Improve grantmaking practice	Grant process & decision-making data, application data (organization, mission, description, financial data, populations served, etc.), assessment data, grants data, hours spent on application, applicant and grantee feedback	Shared data collection & use of common forms/fields to lower application burden. Better understanding of different funding models. Trust & opportunities for shared learning.

<p>Better understand the impact of investments</p>	<p>Grant outcome data (quantitative & qualitative), grant activities, program typology, population served, administrative data, disaggregated community data (census, community health, etc.)</p>	<p>Common “language”: Impact data standards, measurement frameworks & program typologies to facilitate cross-program learning.</p> <p>Transparency & open impact data</p> <p>Infrastructure to do analysis, develop insights, share learning, including mechanisms (platforms, tools) to share or aggregate data.</p> <p>Models of community engagement in sensemaking.</p>
<p>Better collaboration to increase impact</p>	<p>Funding priorities, granting programs, target populations, communities served</p>	<p>A backbone organization to help facilitate collaboration amongst funders</p> <p>Mapping of funding priorities</p>

Plan to move ahead

A collective learning culture will be the keystone of the arch formed by the other recommendations in this report to gather and scale the expected goals and outcomes. PFC, OTF and partners will develop an ongoing collective learning strategy in support of the data strategy development process, including for the implementation of these recommendations.

NOW	NEXT	LATER
<p>Confirm a backbone organization to support and advance the data strategy through a coalition of champions</p>	<p>Create a collaborative governance structure to help guide the road map</p>	<p>Launch data strategy following the iterative process and circulate it amongst the community of participating foundations for validation</p>
<p>Put in place a community of practice and create space for the recommended activities³</p>	<p>Expand the partnership base with organizations and key stakeholders that are already doing this work and foundations interested in engaging in the data strategy process</p>	<p>Finalize the Data Strategy for the philanthropic sector and develop a Monitoring and Evaluation Plan, and define a clear governance structure</p>
<p>Develop a collective learning strategy to be disseminated more effectively and widely and to scale the lessons learned so that others may join in the development of a shared data strategy.</p>	<p>Engage in Doing to demonstrate the value-added of the data strategy, engage foundations and build the data strategy</p>	<p>Start implementation of the data strategy: Engage In Trying and share the learnings</p>
<p>Gather feedback from partners, the advisory group, participants, and other philanthropic stakeholders on the recommendations</p>	<p>Engage in Learning to build capacity of the philanthropic sector on Data</p>	<p>Monitor the data strategy and adjust if necessary continuously</p>

³ A community of practice will be created to align similar data initiatives led by umbrella organizations.

<p>Iterate the current recommendations based on the feedback</p>		<p>Evaluation periodically and adjust, if necessary</p>
<p>Identify which organizations are already involved in data practices and sharing and identify potential opportunities for synergies</p>		

BACKGROUND

As we enter a digital era of exponential data growth – coupled with a pandemic that has severely impacted the global economy and harmed certain communities more than others – questions over the collection, use and ownership of all sorts of data have come to the forefront of the national discussion on philanthropy. How can the sector handle data more openly, responsibly, efficiently, and for greater impact?

Starting in 2020, Philanthropic Foundations of Canada (PFC) and the Ontario Trillium Foundation (OTF) – with the support of Powered by Data (PbD), engaged in a consultative process with foundations and key stakeholders that has led to a set of recommended actions towards a data strategy for the philanthropic sector, enclosed in this report. Inspired by past and ongoing data-driven initiatives, the process has included a desktop review, interviews with funders and stakeholders, a group sensemaking meeting and a survey of PFC members to:

- identify opportunities for foundations to use data to address common challenges,
- explore what actions are required to create a shared data strategy for foundations and partners, and
- develop a roadmap to start learning together to benefit from data and reduce associated harmful risks⁴.

This initiative seeks to build on a number of data-driven initiatives, including research led by:

- the work led by Mowat NFP and the series of reports published: [Committing to Action: Next Steps for Canada's Evidence Ecosystem](#)⁵, [Collaborating for Greater Impact: Building an Integrated Data System](#), and [Measuring Outcomes in Practice: Fostering an enabling environment for measurement in Canada](#), which recommends the development of a charitable data policy framework and identifies key elements of an enabling environment for the charitable sector to engage more effectively in measurement activities,
- The space created by PFC for philanthropic foundations to share knowledge and build capacity on data. A few examples include webinars on [Data for Equity: Ensuring Inclusive Philanthropy](#) and [COVID-19, Data and Learning](#), and the 2018 PFC conference plenary on [The Possibilities and Pitfalls of Evidence-Based Philanthropy](#).
- PFC's collaboration with Powered by Data to produce three issue briefs on data and why it matters to philanthropy. The briefs cover a diversity of topics, including [Effective Giving: Using Data to inform Philanthropy](#), [Understanding the philanthropic landscape: How grants can inform philanthropic decision-making](#), and [Measuring Outcomes: An Introduction for Funders](#).

⁴ Details on the consultation process is found in Step 2 of this report

⁵ Recommendation 10 [for Social Sector Umbrella and Intermediary Organizations]: Work at the sub-sector level to align against a shared standard of evidence, where possible

- Community Foundation of Canada's (CFC) [Vital Signs program](#) uses local and national data to measure community vitality and support shared actions that improve collective quality of life. In the last few years, many community foundations have been aligning their data sets with the [UN's Sustainable Development Goals](#) framework to measure local Canadian data against these shared global indicators.
- The work of the [Data Policy Coalition](#), that brings together non-profit advocacy groups, service providers, and funders to develop and pursue a shared agenda for the social sector's access to and responsible use of government-held administrative data.
- the [Common Approach to Impact Measurement project](#) which aims to develop a flexible impact measurement standard for social purpose organizations,
- the Ontario Nonprofit Network's ongoing interest in building a sector-wide [data strategy](#) and [evaluation strategy](#),
- The open data movement to make data freely available and usable by anyone, including grants data, as OTF is doing with its [open grants data](#).
- [360giving](#), a platform that helps funder organizations in the UK publish open, standardized grants data,
- [Fund for Shared Insight](#), a US National funder collaborative working to improve philanthropy, improved by insights from the organizations and people they serve, and
- International initiatives pursuing open data standards in other domains, such as [IATI](#), the International Aid Transparency Initiative, a global initiative to improve the transparency of development and humanitarian resources and their results to address poverty and crises,

The rising tide of initiatives pertaining to data use within the social sector highlights an opportunity to build on this momentum to generate deeper collective interest, shared ownership, and a clear path forward to a collaborative data strategy.

INTRODUCTION

Why data matters

Data matters. It is used to tell stories, answer questions, and understand change over time. It has the power to enable individuals and organizations to make better decisions, design better programs and deliver more effective services. Collecting, understanding, and using data for any purposes, however, are incredibly challenging processes with major practical and ethical considerations. Although data can be used in many positive ways, there is a long history that continues to this day of data being used for harm, perpetuating systemic racism and other oppressions⁶. A modernized, strategic, and empathic approach is needed to allow society to use data effectively and equitably.

What is a shared data strategy?

There is significant scholarship on developing a data strategy, but one excerpt that effectively summarizes this pursuit comes from the Statistical Analysis System (SAS) Institute (2018):

“The idea behind developing a data strategy is to make sure all data resources are positioned in such a way that they can be used, shared and moved easily and efficiently...A data strategy establishes common methods, practices and processes to manage, manipulate and share data...in a repeatable manner.”⁷

In addition to the raw information, there are also many other factors that influence data’s potential impacts, such as how it is collected and analyzed, whether it is consulted frequently or left at the back of a filing cabinet, who has access to it, how it is used to influence decisions and much more. These processes need to be done intentionally and strategically to maximize their potential utility. A data strategy encompasses all of these processes in a comprehensive plan that can be summarized as in the figure below:



Figure 1: Model for an intentional and strategic process for a data strategy

When one looks outside the Canadian philanthropic sector, one can see that shared approaches to data collection, management, and use (i.e. data strategies) are much more common. Private

⁶ Hawn Nelson, A., Jenkins, D., Zanti, S., Katz, M., Berkowitz, E., et al. (2020). A Toolkit for Centering Racial Equity Throughout Data Integration. Actionable Intelligence for Social Policy, University of Pennsylvania.

https://www.aisp.upenn.edu/wp-content/uploads/2020/08/AISP-Toolkit_5.27.20.pdf

⁷ SAS. (2018). Five Essential Components of a Data Strategy. P.4

https://www.sas.com/content/dam/SAS/en_us/doc/whitepaper1/5-essential-components-of-data-strategy-108109.pdf

financial managers (like the New York Stock Exchange), public health experts, climate change advocates and many other groups develop data strategies to address common problems or to advance their field strategically. The 2030 Agenda for Sustainable Development is an action plan with 17 Sustainable Development Goals (SDGs) aimed at being implemented by all countries and stakeholders, in a collaborative manner, to end poverty and other deprivations, improve health and education, reduce inequality, and spur economic growth – all while tackling climate change and working to preserve oceans and forests⁸.

As outlined in a government-driven data strategy for the Public Service of Canada:

“[A data strategy] would enable governments and others to unlock the value of data and provide better services, support evidence-informed decisions, create internal efficiencies and better understand the real impact of programs so that funds can be directed towards those interventions that have the greatest impact.”⁹

Within the sector, many community foundations in Canada participate in a shared data strategy with CFC called [Vital Signs](#). Over the past few years, several community foundations have restructured their data indicators to align with the global efforts around the SDGs. The goals of using a shared set of data points are to measure how communities are doing, inform granting priorities, and to better facilitate partnerships with other organizations using the same framework.

A data strategy specifically tailored for philanthropic funders has the potential of providing access and analysis of all relevant types of data, including:

- sector-wide data – an accessible dashboard for aggregated data,
- operational data – data produced from an organization’s daily operations (ie. productivity and development data),
- governance data,
- grantmaking/programmatic data,
- investment data,
- external/internal relations data, and
- administrative data.

A fully integrated approach will work to facilitate sharing and collaboration, standardize and harmonize a cohesive set of metrics for the sector, and ensure all stakeholders are accountable for the communities they serve.

⁸ <https://sdgs.un.org/fr/goals>

⁹ <https://www.canada.ca/en/privy-council/corporate/clerk/publications/data-strategy.html>

STEP 1: CURRENT STATE ASSESSMENT

“Collective strategy and transformative action are needed to tackle complex community issues and create lasting change. Harnessing the power of data to learn and generate new insights allows us to be strategic, focused and adaptive, course-correcting in real time.” Blair Dimock, The Ontario Trillium Foundation.¹⁰

Why a shared data strategy for funders?

The central motivation for developing a data strategy for the philanthropic sector is *to do philanthropy better*. As previously alluded, “*better*” philanthropy entails more strategic funding for greater impact and service delivery, increased accountability to all stakeholders, more collaboration, and a commitment to transparency.

Traditionally, grantmaking foundations have operated in silos, collecting and using data differently. When the collected data is misaligned with goals and objectives, it is not easy to know if certain investments are actually working toward achieving those goals and objectives. Relevant data means that they are appropriate and accessible to the people who are intended to benefit from the investments and the partners that provide the services and programs.

Collecting and using data for outcomes measurement in the charitable and nonprofit sector in Canada is largely underdeveloped and under-resourced.¹¹ For many years, data on grantmaking in Canada has mostly been leveraged through the Canada Revenue Agency (CRA) T3010 annual charity tax returns. However, this data is restrictive as it only collects the name of the grantee and the dollar amount which limits the number of questions that can be answered using the data.¹²

Despite being underdeveloped, several philanthropic organizations in Canada and around the world are advancing the use of evidence-based practices to achieve social and environmental outcomes. For example, Environment Funders Canada (EFC) has been a leader in data collection and developed an interactive platform that visualizes how over 100 grantmakers are funding Canadian environmental issues such as energy, environment and social justice, biodiversity, and sustainable cities.¹³ The Ontario Trillium Foundation (OTF) has created a [public inventory](#) of data sets to improve their transparency, accountability, and openness of their operations and impact. Philanthropic Foundations Canada and colleague organizations have developed [Philanthropy Responds](#), an interactive data mapping tool designed to identify initiatives and encourage collaboration within the Canadian grantmaking community to better serve Canadians impacted by this crisis.

¹⁰ https://munkschool.utoronto.ca/mowatcentre/wp-content/uploads/publications/161_EE_collaborating_for_greater_impact.pdf pg. 7

¹¹ https://munkschool.utoronto.ca/mowatcentre/wp-content/uploads/publications/157_EE_measuring_outcomes_in_practice.pdf

¹² <https://static1.squarespace.com/static/5623f0e8e4b0126254053337/t/5be451d24ae2376d37f5b90c/1541689811146/Understanding+the+Philanthropic+Landscape+-+Brief+2+-+English+-+October+10.pdf>, pg. 3-4

¹³ <https://static1.squarespace.com/static/5623f0e8e4b0126254053337/t/5be451d24ae2376d37f5b90c/1541689811146/Understanding+the+Philanthropic+Landscape+-+Brief+2+-+English+-+October+10.pdf>

This section of the report highlights some of the key challenges, opportunities and learnings from research and various initiatives that can help to inform the development of a Canadian philanthropic shared data strategy.

1) Opportunities

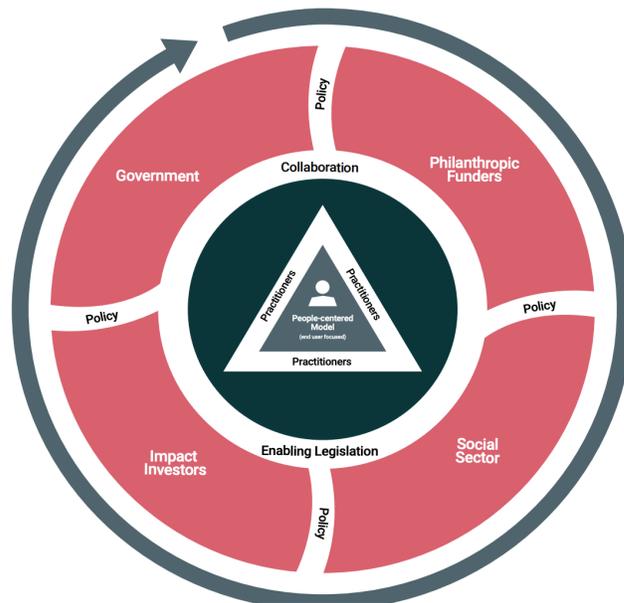


Figure 2: Transforming the evidence ecosystem - A people-centered, integrated, systems-wide approach¹⁴

As represented in figure 2, each sector has an important role to play in creating change, increasing collaboration and supporting the practitioners and people at the heart of social change¹⁵. There is a tremendous amount of opportunity for the philanthropic sector to create and contribute to a shared data strategy to support the growing need for evidence-based practices.

¹⁴ https://munkschool.utoronto.ca/mowatcentre/wp-content/uploads/publications/188_linE_committing_to_action.pdf, pg. 28

¹⁵ https://munkschool.utoronto.ca/mowatcentre/wp-content/uploads/publications/188_linE_committing_to_action.pdf

Table A outlines 8 key opportunities for funders that have been identified through a review of relevant research and qualitative data collected through the consultations process described above by engaging several stakeholders.

OPPORTUNITY	DESCRIPTION
Smarter grantmaking	Collecting, analyzing and sharing data can provide a clearer and more accurate picture of the social issues that communities are trying to address. Data strategies can provide funders information to examine their grantmaking to identify what is needed, which organizations need support if the interventions are effective and to help develop improvements/adjustments as needed.
Inspires innovative solutions	The philanthropic sector already has a wealth of data on a wide range of issues. When this data is used in a meaningful way, it can unlock better solutions that focus on local needs, identify gaps and trends, shift decision-making practices, support public policy changes, and evaluate the impact of programs to provide better solutions and outcomes. ¹⁶
Answers new questions faster	The Ontario NonProfit Network highlights how important it is for funders to promote data strategies in order to create “a stronger, more informed, and more adaptive sector”. ¹⁷ A data strategy can help funders be more nimble and make quicker decisions.
Better collaboration between funders	Funders are an important part of the data ecosystem. A siloed approach to collecting and using data can result in missed opportunities. Collaboration across sectors is essential to addressing complex social issues that transcend sectoral boundaries. Mowat suggests that “the best collaborations emphasize co-creation and co-ownership and engage beneficiaries directly in the design of research and evaluation projects or the design of new types of evidence institutions”. ¹⁸

¹⁶ https://munkschool.utoronto.ca/mowatcentre/wp-content/uploads/publications/161_EE_collaborating_for_greater_impact.pdf

¹⁷ <https://theonnc.ca/wp-content/uploads/2017/07/ONN-Making-Evaluation-Work-in-the-Nonprofit-Sector.pdf>

¹⁸ https://munkschool.utoronto.ca/mowatcentre/wp-content/uploads/publications/188_jinE_committing_to_action.pdf pg. 25

<p>Improved understanding of impact</p>	<p>As mentioned above, easily accessing data used in grantmaking can create a better understanding of the impact foundations and organizations are trying to achieve. The Circle on Philanthropy and Aboriginal Peoples in Canada has highlighted how a “lack of information leads to funding gaps, inefficiencies, and other barriers required to fully realizing the potential impact of Philanthropy and to add strength to Indigenous communities”.¹⁹</p>
<p>Access to data</p>	<p>Having more accessible data can help individual organizations improve their services and allow collaborators to compare results. Foundation grantmaking data such as what programs and communities foundations are investing in could help consolidate any duplication of efforts and identify gaps in funding.</p>
<p>Increased transparency and accountability</p>	<p>There are increasing expectations for nonprofits and funders for transparency, accountability and good governance.²⁰ As governments and funders face greater scrutiny from the public, building trust amongst funders, organizations and other sectors through a more open decision-making process will help improve the perception and understanding of the role of philanthropy in society.²¹</p>
<p>DEI Strategy to address systemic exclusion</p>	<p>The development of a shared data strategy will require an awareness of historic and ongoing inequality in the way data is collected, interpreted, used and shared. With this in mind, a shared data strategy can provide the sector with insights into systemic gaps and inequalities that need to be addressed and improved on and incorporate diversity, equity and inclusion (DEI) strategies.</p>

Table A: Examples for the opportunities for the use of a data strategy from Canadian philanthropic foundations and their stakeholder

¹⁹<https://static1.squarespace.com/static/5623f0e8e4b0126254053337/t/5be451d24ae2376d37f5b90c/1541689811146/Understanding+the+Philanthropic+Landscape+-+Brief+2+-+English+-+October+10.pdf>

²⁰ https://philab.uqam.ca/wp-content/uploads/2015/11/Brouard__Glass_Info_Sharing__Transparency_-_Draft_Discussion_Paper.pdf

²¹ https://munkschool.utoronto.ca/mowatcentre/wp-content/uploads/publications/157_EE_measuring_outcomes_in_practice.pdf

2) Key Challenges

“We are all striving for the best possible outcomes. Yet sometimes the decisions that are made by policymakers are rooted more in experience, anecdote or political considerations than in research and the best available evidence.”²²

Developing a shared data strategy

While funders are an important part of the data landscape, researchers have identified several barriers that the philanthropic sector will need to be aware of when developing a shared data strategy. Several challenges have been outlined in Mowat NFP’s 2017 and 2018 reports, including:

- Limited data literacy and capacity in social sector organizations
- Privacy legislative and regulatory frameworks that hinder data-sharing and cross-organizational collaboration that often requires compliance expertise
- The Canadian legislative and regulatory environment doesn’t keep up with the innovative approaches that the sector is exploring
- Lack of standardization in processes and methods (e.g. standards or hierarchies of evidence) to allow for comparability

Measuring impact

Finding collective ways to measure impact can also be challenging. For example²³:

- It is very difficult to measure data if that data is collected in isolation
- Finding consensus on which outcomes, targets and measurement tools to use
- Funding cycles that don’t line up with the amount of time and resources needed to measure outcomes
- Assessing the quality of data in terms of inconsistency and using unreliable data that has a potential bias

3) Momentum Is Building

Despite these challenges, several organizations, research institutions and governments are creating significant impact using data strategies. In both Canada and the UK, there are many examples of how cross-sector collaborations are advancing data practices and identifying innovative solutions to the challenges previously mentioned. See Annex A of this report in order to read more about several promising initiatives underway. A key question to explore is ‘*what*

²² https://munkschool.utoronto.ca/mowatcentre/wp-content/uploads/publications/188_linE_committing_to_action.pdf pg. 26

²³ https://munkschool.utoronto.ca/mowatcentre/wp-content/uploads/publications/157_EE_measuring_outcomes_in_practice.pdf

*can the philanthropic sector learn from these practices and how can they be scaled up within the broader ecosystem”?*²⁴

More and more the Canadian philanthropic sector and other funders are recognizing the importance of having a shared data strategy. In November 2018, Mowat NFP hosted an international conference called ‘Innovation in Evidence’ to engage Canadian organizations and governments to learn from evidence-informed policymaking and service delivery in Canada, the US and the UK. Highlighted at the conference was the importance for the sector to have strategic and system-wide engagement that creates connections between evidence institutions, academic researchers, policymakers and practitioners.²⁵

Mowat NFP states that “while the evidence ecosystem is growing significantly in Canada, it still remains very fragmented. To move forward on transforming Canada’s evidence ecosystem, all stakeholders must be invited to the table. Beneficiaries, frontline workers and social sector leaders have a particularly important role to play in bringing an on-the-ground perspective to this work.”²⁶

With all of this in-depth research and case studies available, the development of a shared data strategy for the philanthropic sector can be built on strong evidence and a collaborative way forward. The next section highlights the work underway through a collaboration between PbD, PFC and OTF to develop the philanthropic sector’s approach to a collaborative data strategy.

²⁴ https://munkschool.utoronto.ca/mowatcentre/wp-content/uploads/publications/161_EE_collaborating_for_greater_impact.pdf

²⁵ https://munkschool.utoronto.ca/mowatcentre/wp-content/uploads/publications/188_linE_committing_to_action.pdf

²⁶ https://tspace.library.utoronto.ca/bitstream/1807/99439/1/Lalande_Cave_Jog_2019_Committing_to_Action.pdf pg. 26

STEP 2: PLANNING AND DISCOVERY

As mentioned in the introduction, as part of the [Philanthropic Foundations Canada](#) (PFC), [Ontario Trillium Foundation](#) (OTF) collaboration, [Powered by Data](#) was recruited to support conducting an engagement process that took place over several months. The authors would like to thank PFC members and key informants who participated in the process through interviews, the sensemaking meeting and the online survey.

Process summary

The project plan originally included background research on data strategies, identifying potential project advisors from the philanthropic sector and collaborative consultation and visioning activities. Due to the COVID-19 pandemic, the project activities were adjusted across all phases to respond to the evolving situation.

The objectives of the engagement process were to:

- Gather and interpret insight from stakeholders
- Discuss and prioritize challenges and opportunities for foundations to use data to address common challenges and to advance the sector
- Explore ways of moving forward towards a data strategy for funders

The first phase of this project illustrated below began in January 2020:



Figure 3: The timeline for the first phase of the project

The purpose of the first phase of the project was to gather information and engage with stakeholders to identify the needs, challenges and opportunities for a future data strategy for foundations and stakeholders. The 3 engagement tools used were:

1. Interviews

Powered by Data held two rounds of one-hour interviews in the Summer of 2020 by phone and via video conference of foundations and key stakeholders. Participants were provided with introductory documents explaining the project and data strategies. The questions pertained to participants' individual and organizational experiences with data to identify initial challenges, interests and priorities for the data strategy.

2. Sensemaking Meeting

After the interviews were completed, Powered by Data synthesized the information collected from the interviews. On September 24, 2020, around 15 participants attended the sensemaking meeting facilitated by PFC and OTF. PBD presented a summary of comments from the interviews. The participants provided their feedback on this summary and their visions for the data strategy project's next steps.

3. Survey

OTF developed an online survey with feedback from PFC and PbD to collect broader input from the PFC network. Participants from the sensemaking meeting and interviews were invited to provide feedback on the survey to ensure that relevant questions were included. The survey was published after the sensemaking meeting, with a total of 34 responses.

General Observations

In general, there was a high level of interest in discussing how the philanthropic sector uses data, but respondents had no clear expectations of who should move a sector-wide data strategy forward. Major themes include:

- COVID-19 and growing social movements calling for equity are increasing the need for more information on where investments are being made and where there are gaps to make better granting decisions.
- Participants of the interviews and the sensemaking meeting say that foundations are learning valuable lessons. Still, there are limited opportunities and capacity to regularly share and learn. One exception was that they reported that significant sharing happens through organizational affinity and other working groups.
- Of the survey respondents, 41% said they used data a moderate amount within their organizations to inform decisions. Another 41% said they used data a lot or a great deal. None of the respondents said that they did not use data to inform decisions. Survey

respondents said that they use data from other projects, data about grantees from external sources, and data generated from grant input or evaluations. None of the respondents were totally satisfied with their organization's data capacity, but the majority were somewhat or very satisfied.

- Participants from the interviews, a sensemaking meeting and surveys were generally interested in strengthening the individual and collective capacity to use data more strategically. When survey respondents were asked how excited they were about the development of a shared strategy, about 66% said that they were somewhat excited, about 28% said that they were very excited or extremely excited. In comparison, about 6% said they were not excited at all.
- When surveyed, about 70% of survey respondents *somewhat agreed* or *completely agreed* that their organization had appropriate resourcing; about 56% *somewhat* or *completely agreed* that their organization had appropriate tools and systems for data; and, about 73% *somewhat* or *completely agreed* that their organization had the appropriate staff knowledge and skills when it came to data.

STEP 3: ANALYSIS AND PRIORITIZATION

Key takeaways from the engagement process:

The main barriers identified to developing a shared data strategy for funders and stakeholders were:

- The siloed nature of foundations
- The capacity and willingness of grantees, foundations, and partners to collect and share data
- Limited time and resources of foundations and grantees
- Disconnections between knowledge, power and interests between board, staff, grantees and communities served
- Lack of data in the sector
- Creating the ability and time to build trust and accountability in order to collect, use and share data
- Involving other stakeholders, including government funders and other nonprofits, when there was not already a culture of collaboration
- “Paralysis by analysis”: Over consulting stakeholders without building on existing projects, creating opportunities for learning from other groups, and ignoring the resources required to participate in new projects.

The main drivers identified for developing a shared data strategy were:

- The desire to better align investments with the mission of organizations
- The need to identify gaps in funding
- The interest in understanding and improving the impact of investments
- The interest in building capacity and knowing what others have learned and done.
- Diversity, equity and inclusion are a growing focus for foundations and there is a common desire to understand the power imbalance between grantees and foundations as it relates to a data strategy

Areas of support for foundations to develop a shared data strategy:

Overall, survey respondents reported the following as the top three areas where their organization needs support :

1. Collecting higher quality data from grantees (50%),
2. Learning more from grantee data (47%),
3. Improving the use of external data to inform decisions or strategy (i.e. StatsCan, vital signs, sector survey results, etc.) (38%).

The survey respondents placed more emphasis on the need to collect data and less on sharing data. However, survey respondents were interested in knowing about improving data quality

and practices. A few respondents were interested in improving their data practices, as they related specifically to equity.

Considerations identified for potential next steps:

- Create more opportunities for foundations to build capacities to use and share data
- Develop a learning environment for foundations to support a data-sharing culture
- Centre DEI practices in how data is incorporated
- Centre BIPOC leadership and voices to learn how to build capacity with and for Indigenous, Black and Racialized communities. Participate, witness and engage in Indigenous-led data practices as part of the engagement approach
- Host a skill-sharing workshop to help improve data practices, such as collecting higher quality data, analyzing and learning from data, and better using external data
- Include stakeholders and partners/grantees in this learning process
- Develop principles and objectives for the strategy
- Connect with existing efforts of collaborations and organizations (for example, the opportunity to learn from the Circle's Declaration of Calls to Action and accountability mechanisms)

STEP 4: THE ROADMAP

In this section, several steps are outlined to help pave the road towards a data strategy for funders. The roadmap in figure 4 has been developed based on some common themes that emerged from the research and what was heard during the engagement process. Particularly, foundations and stakeholders discussed the importance of building capacities to use data and create spaces to learn and share through a collective learning culture. This roadmap, described in more detail below, includes 1) the enabling conditions, 2) developing an understanding of the various risk factors, and 3) outlining multi-level actions that will lead to a shared data strategy.

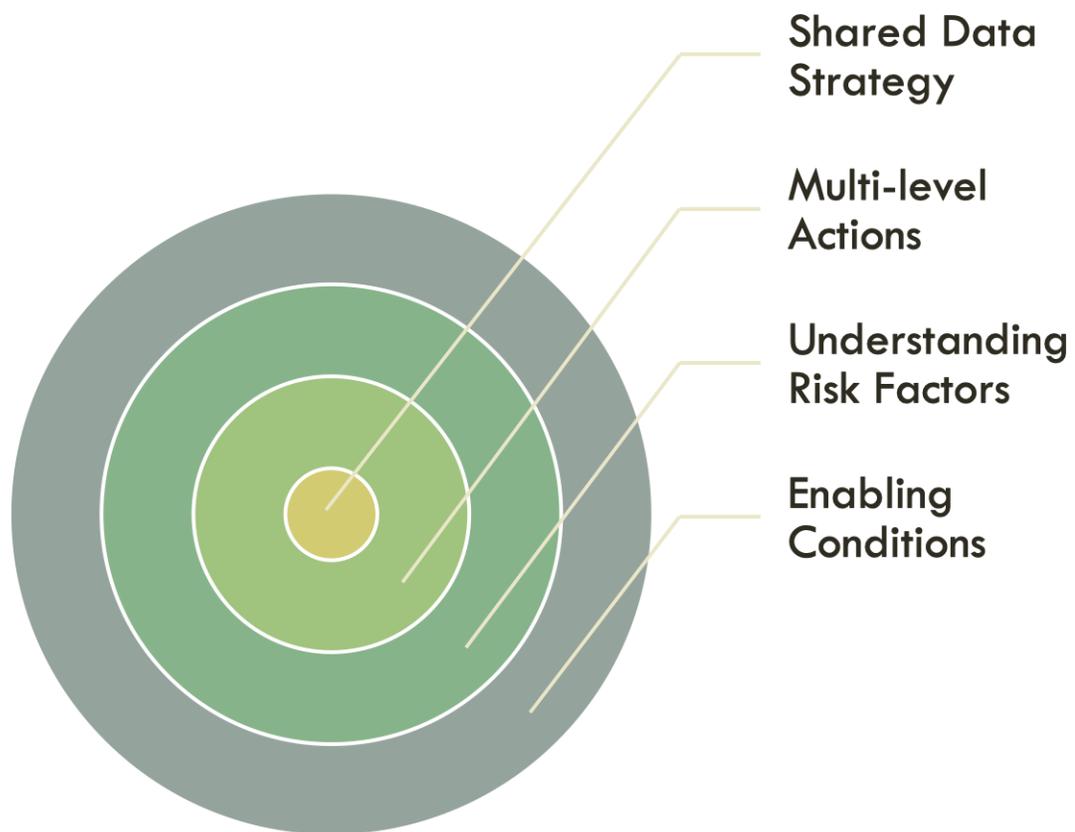


Figure 4: The roadmap towards the creation of a shared philanthropic data strategy

1) Enabling Conditions

“Measuring outcomes reflects a shift to solving social problems, rather than managing them.”²⁷

A shared data strategy will require shifts in the status quo of the current funder landscape to develop a more open, collaborative and transparent way of operating. Below, table B describes the different areas of change management and the enabling conditions required to help support these shifts towards a collective learning culture.

CHANGE MANAGEMENT ²⁸	ENABLING CONDITIONS FOR A PHILANTHROPIC SECTOR DATA STRATEGY
Social/Cultural Change	<ul style="list-style-type: none"> - Following guiding values and principles (below) - Trust building and new ways of working - Centring diversity, equity and inclusion (DEI) and addressing power dynamics - Developing appropriate incentives and metrics - Knowledge sharing within the sector and with partners (government, community, research institutions, private sector) - Nurturing a learning & questioning culture - Understanding that there is no end state, but a learning journey
Organizational Change	<ul style="list-style-type: none"> - Internal data strategy development - Staff and board skill development - Encouraging data champions - Systems for knowledge sharing within the organization - Shared value strategies (cross-sector collaboration and dialogue)
Technological Change	<ul style="list-style-type: none"> - Collaboration platforms for information sharing and data collection within an organization and externally - Ability to share measurement and evaluation - Data governance strategies (availability, security, integrity)
Foundation Operational/Process Change	<ul style="list-style-type: none"> - Adopting participatory grantmaking strategies - Reviewing investment strategies - Collaborative leadership

²⁷https://www.google.com/url?q=https://munkschool.utoronto.ca/mowatcentre/wp-content/uploads/publications/157_FF_measuring_outcomes_in_practice.pdf&sa=D&source=docs&ust=1635008518374000&usg=AOvVaw0JLSyEV3sF9OmnaMie1WTe pg. 27

²⁸ <https://dataconomy.com/2017/01/data-strategy-part-ii/>

	- Shifting to evidence-based practices and measuring outcomes costs money and will require funding
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Table B: Areas for change management and suggestions for enabling conditions needed for a shared data strategy

This shift towards a collective learning culture will seek to enhance:

- Quality data – How to increase the quality of data collected and used. Funders can learn together about different ways to collect data to have more confidence in findings, what data to collect, who is expected to participate, and who is engaged in the design process so that it is appropriate for users.
- Practices and tools – Learn about promising practices or useful tools to help improve the ability to collect, use and share data. As well as using and accessing external data sources.
- Financial resources- financing of strategies will be required at all levels
- Equity in data that will:
 - Enhance understanding of different perspectives of and experiences with data, and seek to understand the potential and power in data²⁹
 - Support different perspectives on the use of data and seek to work with others to use data in more culturally relevant ways (e.g. Indigenous data sovereignty like OCAP™)
 - Develop strategies for data to address representation, inclusion, power, and equity in grant-making practices
- Evaluation and Impact - Improve the sector’s ability to use data to better measure impact. The sector can build on some existing work, including a 2020 Salesforce white paper, [Impact Measurement Today](#), that recommends a *Capacity Building Framework for Impact Management* that suggests building capacity in 6 areas: skills, awareness, impact data and tech solutions, greater standardization, policy, and ethical use of data.
- Data for improvement – How to use data for learning and improving grantmaking practices
- Increase transparency and accountability – How to foster an environment of transparency and accountability through data-sharing between foundations, along with partners.
- Build the sector’s skills around data

2) Understanding Risk Factors

Through the engagement process and research, several barriers were identified which could pose a risk to the development of a shared data strategy, including:

²⁹ Data can be used for harm to perpetuate systemic racism of Indigenous, Black and Racialized communities, oppressions of marginalized people, such as disability and 2SLGBTQIA+ populations and intersectional oppressions.

- Limited time and capacity of the sector
- No or low interest from foundations or difficulties engaging foundation governance
- Implementation happens in silos
- Limited consultation with grantees and equity-seeking organizations
- Seeking uniformity (the Common Approach suggests that a flexible approach is more informative, more widely adopted and lasts longer).³⁰
- Results are not immediate and momentum is lost

As seen above, there are several risks to developing a data strategy however, the real question might be *what is the risk of not doing* this important work? If there isn't the development of a data strategy, the risks could be:

- A declining perception of philanthropy and funders who are out of touch and potentially contributing to the very problems they are trying to solve
- Grantees may lose trust in foundations that are not demonstrating accountability and transparency
- Foundations could fall behind in the development of strategies needed to create social change
- Foundations are ill-prepared to act swiftly and with confidence in the face of crises due to a lack of information
- Underutilized learning that leads to lost opportunities to make more meaningful changes in communities

3) Multi-level Actions

The following recommended actions are to be pursued as part of a collective learning strategy that will help to develop a data strategy, shared by grantmaking foundations, their partners and stakeholders, in a collaborative learning process that builds on each action and interaction.

The actions described below aim to develop the funders' and partners' capacities, provide opportunities for learning and discussion, and then provide space to explore ideas and build on work that has shown promising results. These can happen simultaneously and be taken up by different actors. Actions can also feed into one another in a cycle for a shared strategy that learns and grows from collective actions. These actions fit into a larger collective learning strategy to develop knowledge and capacity in order to use data strategically, collaborate and share what is learned. Wherever a foundation or stakeholder is on their learning journey or whatever their level of experience is with using data, there is always an opportunity to learn more, share with others, and try new things. These skills, experiences and knowledge can be shared to strengthen the sector as well as throughout philanthropic networks.

³⁰ <https://www.commonapproach.org/wp-content/uploads/2020/07/FlexibleStandardsBriefing.pdf>

Here are some suggested actions that can be taken at the various levels:

INDIVIDUAL FOUNDATIONS	FUNDER COLLECTIVES	PHILANTHROPIC SECTOR
<ul style="list-style-type: none"> - Review what data is collected, why it is collected, and if it's meeting its intended needs - Share and publish grant application data - Research and learn (see the resources section) - Engage foundation governance by discussing the importance of a data strategy with board and staff members - Host or join a meeting about data with community stakeholders - Support collective and sector-wide actions - Implement the Common Approach's 4 standards for impact measurement³¹ - Develop an organizational data governance strategy 	<ul style="list-style-type: none"> - Build on the existing affinity groups, subsector communities of practice, and local funder collaborations - Develop a community of practice to provide a space for organizations involved in data-driven initiatives to discuss collaboration opportunities and create synergies - Find common areas with other foundations (homelessness, food security, etc) and develop a data strategy together - Co-design data practices with partners, stakeholders, and especially equity-seeking groups - Discuss the use and role of data within your current networks, partnerships or affinity groups 	<ul style="list-style-type: none"> - Funder champions need to emerge to lead the way, and provide resources to support existing backbone organizations, or create new ones - Backbone organization(s) to create inclusive and collaborative spaces to build better relationships that support sharing data and experiences - National organizations raise awareness about the benefits of a data strategy through social media, blogs, etc - Build and learn from existing efforts in Canada and internationally to help improve the ability to collect, use and share data - Work in partnership with other like-minded organizations like CFC, the Circle, ONN, Carleton University

³¹Common foundation: <https://www.commonapproach.org/common-foundations/>; common standard: <https://www.commonapproach.org/common-form/>; common impact data standard: <https://www.commonapproach.org/common-impact-data-standard/>; common framework: <https://www.commonapproach.org/common-framework/>

4) A Shared Data Strategy for the Philanthropic Sector

Creating a shared data strategy will require continued development and collaboration. However, there are some key guiding questions that have surfaced throughout the consultation process thus far as outlined below.

What would a shared data strategy help the philanthropic sector achieve?

A Data Strategy for the philanthropic sector would:

- have a set of common goals articulating a shared strategic vision, common principles and shared values, for the sector, encompassing all funding areas of participating foundations and identified promising practices (i.e. trust-based philanthropy, partnership, collaboration, equity, etc).
- create a better understanding of the sector and make funders more accountable and transparent towards the public with shared metrics and measurement of success
- enable funders to understand the communities they serve much better
- improve grantmaking practices and investment practices
- help to establish better partners and collaborators for positive impact

How would the sector achieve it?

A clear set of principles and values will allow for a better understanding of a shared data strategy's purpose and desired outcomes. A set of principles and values will guide foundations in their commitment to working together to invest better and more strategically to realize a vision of a more equitable and resilient future.

The project partners developed values and principles below based on what was heard in the interviews, sensemaking meetings, online surveys, and from project advisors. Additionally, the calls to action for more equitable funding practices have been incorporated from the webinar on [Data for Equity: Ensuring Inclusive Philanthropy](#) hosted by PFC³² and an accompanying [blog post](#) by OTF on [The Path Ahead for Funders When it Comes to Data for Equity: Listen, Engage, and Then Act](#)³³. The values and principles also draw from PFC's tools developed as part of their Learning Series, including [COVID-19, social inequalities and foundations' response](#) and [Learning And Evaluation In A Time Of Crisis](#).

³² The speakers on the panel included: Kris Archie (The Circle/Le Cercle, Orville Wallace (Laidlaw Foundation), Tasha Lackman (Foundation of Greater Montreal/Fondation du Grand Montreal), and Srividya Iyer, PhD (ACCESS Open Minds/Esprits Ouverts). *Facilitation by Ines Chaalala (Philanthropic Foundations Canada)* <https://www.youtube.com/watch?v=vD05clki0I&feature=youtu.be>

³³ [The Path Ahead for Funders When it Comes to Data for Equity: Listen, Engage, and Then Act](https://pfc.ca/data-for-equity-listen-engage-act/) by Stacey McDonald, OTF

The following recommended values and principles are based on the qualitative research of the first phase of this project to help guide the development of a data strategy.

Value #1 - HOLD DIVERSITY, EQUITY AND INCLUSION AT THE CENTRE	Associated Principles
	<ul style="list-style-type: none"> ● Share data with community stakeholders to contribute to increasing transparency and accountability. ● Enhance understanding of different perspectives of and experiences with data, and the potential and power in data. ● Work to identify and address data gaps and deficits and collect the data that is relevant to communities served. ● Enhance understanding of different perspectives on the use of data and seek to work with others to use data in more culturally relevant ways ● Make long term investments to support limited resources and capacity
Value #2 - ADOPT A LEARNING MINDSET	Associated Principles
	<ul style="list-style-type: none"> ● Support learning together and continuously adjust. ● Seek to identify and address gaps in understanding. ● Build and learn from the existing efforts to avoid duplication and repetition. ● Understand that there is no end state, but a learning journey.

Value #3 - LISTEN THEN ACT	Associated Principles
	<ul style="list-style-type: none"> ● Focus on the process as much as getting to the answer. ● Acting on current knowledge while using data as a tool to help make better evidence-informed decisions. ● Avoid waiting for perfect data or conditions to act
Value #4 - COLLABORATION	Associated Principles
	<ul style="list-style-type: none"> ● Co-design data practices with partners, stakeholders, and, in particular, equity-seeking groups. ● Respect partners - meet people where they are and build capacity together. ● Share data, information and lessons learned with other foundations and stakeholders. ● Build long-term relationships with stakeholders based on trust

What are the goals of a shared data strategy and how can the sector make it happen?

There are several reasons why the philanthropic sector and the individual partners involved want to create a shared data strategy. The research done so far indicates that this work is not easy or straightforward as individual funders often have different reasons why they want to collect and use data. A shared approach will require clear collective goals, guidelines, strong collaboration between funders and the sharing of resources (time, financial, information and more). Table C below provides some guidance on the types of shared goals for the sector, what types of data can be used to achieve these goals and what is needed to make them happen.

GOALS	WHAT TYPE OF DATA?	WHAT'S NEEDED TO MAKE IT HAPPEN?
Better understand the philanthropic sector	Funding focus, target populations, \$ awarded, geography, funding mechanisms, type of funding (capacity building, general operating, project, ongoing support), HR data, governance data, length of grants, disbursement quota	Comparable, standardized data (i.e. use same population categories)
Better accountability and transparency		Share data publicly in an accessible, open format Benchmarking
Better understand communities	Disaggregated community data (census data, community health data, etc), administrative data, charity leadership data (leadership reflects community served)	Identify and address data gaps and deficits. Work with communities to better collect data that is relevant to communities served.
Improve grantmaking practice	Grant process & decision-making data, application data (organization, mission, description, financial data, populations served, etc.), assessment data, grants data, hours spent on application, applicant and grantee feedback	Shared data collection & use of common forms/fields to lower application burden. Better understanding of different funding models.

		Trust & opportunities for shared learning.
Better understand the impact of investments	Grant outcome data (quantitative & qualitative), grant activities, program typology, population served, administrative data, disaggregated community data (census, community health, etc.)	<p>Common “language” : Impact data standards, measurement frameworks & program typologies to facilitate cross-program learning.</p> <p>Transparency & open impact data</p> <p>Infrastructure to do analysis, develop insights, share learning, including mechanisms (platforms, tools) to share or aggregate data.</p> <p>Models of community engagement in sensemaking.</p>
Better collaboration to increase impact	Funding priorities, granting programs, target populations, communities served	<p>A backbone organization to help facilitate collaboration amongst funders</p> <p>Mapping of funding priorities</p>

Table C: Goals of a shared data strategy and how to make it happen

NEXT STEPS

The roadmap described above will help create opportunities and hold space to create a shared data strategy. The cycle of actions recommended for the initial phases to build the strategy will need to be repeated and built on as the strategy develops.

Overarching the three main types of actions, described in detail above, is an iterative framework that would allow for gathering and scaling the expected learning outcomes, adapting and adjusting the journey towards a data strategy as learnings are distilled, and creating incrementally the data strategy. It is hoped that at the end of this process, the ownership of a data strategy for the philanthropic sector is shared by philanthropic foundations.

A collective learning culture will be the keystone of the arch formed by the other recommendations in this report to gather and scale the expected goals and outcomes. PFC, OTF and partners will develop an ongoing collective learning strategy in support of the data strategy development process, including for the implementation of these recommendations. Table D below identifies the key infrastructure needed to support the roadmap towards a shared data strategy based on the immediate, short and long-term needs.

NOW	NEXT	LATER
Confirm a backbone organization to support and advance the data strategy through a coalition of champions	Create a collaborative governance structure to help guide the road map	Launch data strategy following the iterative process and circulate it amongst the community of participating foundations for validation
Put in place a community of practice and create space for the recommended activities ³⁴	Expand the partnership base with organizations and key stakeholders that are already doing this work and foundations interested in engaging in the data strategy process	Finalize the Data Strategy for the philanthropic sector and develop a Monitoring and Evaluation plan, and define a clear governance structure
Develop a collective learning culture strategy to be disseminated more effectively and widely and to scale the lessons learned so that others may join in the development of a shared data strategy.	Engage in Doing to demonstrate the value-added of the data strategy, engage foundations and build the data strategy	Start implementation of the data strategy: Engage In Trying and make the learnings visible
Gather feedback from partners, the advisory group, participants, and other philanthropic stakeholders on the recommendations	Engage in Learning to build capacity of the philanthropic sector on Data	Monitor the data strategy and adjust if necessary continuously
Iterate the current recommendations based on the feedback		Evaluation periodically and adjust, when necessary
Identify which organizations are already involved in data practices and sharing and identify potential opportunities for synergies		

Table D: The infrastructure needed for the development and implementation of the shared data strategy roadmap

³⁴ A community of practice will be created to align similar data initiatives led by umbrella organizations.

N.B.: These recommendations are part of an ongoing process of developing a collaborative data strategy that will change and adapt over time. The development of a shared data strategy aims to use evidence-informed grantmaking for a more equitable and sustainable future

CONCLUSION

Canadian funders and the charitable sector at large are grappling with very complex and urgent social issues. A shared data strategy is not only about creating a better world, it is an opportunity for foundations to improve their internal operations, communicate their value and contribute towards collective strategies to better understand the communities they serve. Often the problems that foundations are trying to address are interconnected and interdependent and require collective and evidence-informed solutions to make meaningful and lasting change.

Through the research in this report and the consultations with many partners, it is clear that a shared data strategy for the philanthropic sector is an important piece to a collective way forward. While a shared approach is not easy, several key recommendations have been made in this report including creating an enabling environment, understanding risk factors and suggested actions for individual funders, collectives and the sector at large. This document was meant to ground the research and create the way forward to develop the next steps of a collective learning journey and support an iterative process going forward.

RESOURCES FOR FURTHER READING

- Mowat NFP:
 - [Committing to Action: Next Steps for Canada’s Evidence Ecosystem](#)
 - [Collaborating for Greater Impact: Building an Integrated Data System](#)
 - [Measuring Outcomes in Practice: Fostering an enabling environment for measurement in Canada](#)
- PFC’s collaboration with PbD:
 - [Effective Giving: Using Data to Inform Philanthropy](#)
 - [Understanding the philanthropic landscape: How grants can inform philanthropic decision-making](#)
 - [Measuring Outcomes: An Introduction for Funders](#)
- [Data Policy Coalition](#)
- The [Common Approach to Impact Measurement project](#)
- Ontario Nonprofit Network:
 - [Towards a Data Strategy for the Ontario Nonprofit Sector](#)
 - [Making Evaluation Work in the Nonprofit Sector](#)
- OTF’s [Open Data](#)
- [360giving](#)
- [Fund for Shared Insight](#)
- The [International Aid Transparency Initiative](#)
- [Public Information Sharing and Transparency among Grantmaking Foundations: A preliminary Discussion in a Canadian Context](#)

ANNEX A

Case Studies-Building on current initiatives

Foundations and partners can learn from and begin to participate in existing initiatives. There is no need to completely start from the ground up as the Canadian philanthropic sector can leverage existing resources and knowledge from other sectors and countries. There are also several Canadian foundations and others innovating and experimenting with shared data platforms. Here are some examples of learning projects already underway.

1. [Philanthropy Responds](#) - COVID-19 Mapping Project³⁵

The COVID-19 Mapping Project is led by PFC, Community Foundations of Canada, Environment Funders Canada and the Circle on Philanthropy and Aboriginal Peoples. The project was launched in response to the COVID-19 pandemic and aims to gather data about where and how the Canadian philanthropic sector is responding to the crisis. Philanthropy Responds is an interactive data mapping tool designed to identify initiatives and encourage collaboration within the Canadian grantmaking community to better serve Canadians impacted by this crisis. By sharing data and providing a platform to engage funders, along with a timely snapshot of activities and critical gaps in funding, Philanthropy Responds is a useful data tool to build knowledge, encourage collaboration and help funders make decisions.

The COVID-19 Mapping project is being used to support the development of funder collaboratives in response to the pandemic. Organizations have also used it to understand where funds are being granted and who is leading the recipient organizations. For instance, The Circle uses the project's data to track support to Indigenous communities and Indigenous-led organizations. Research groups from Carleton University and the Philab are using the data to support their work in documenting trends in philanthropic practices. The mapping exercise will continue to develop throughout the COVID-19 pandemic.

Canadian Philanthropic Sector Engagement Outcome:

Many funders are contributing to a collaborative data-sharing project that will provide insights into grantmaking during the pandemic. The data collected and the process could act as a model and basis for the foundations and stakeholders' data strategy.

2. [360 Giving](#)³⁶

360Giving is an initiative that encourages UK grantmakers to share their grants data as open data: data that is free and publicly accessed online in a machine-readable format and licensed for reuse to improve charitable giving. Since 2015, funders have been able to share information openly about who, what and where they fund using the [360Giving Data Standard](#). There are 3 main users of the data. Funders publish and use the data to see how they fit in the wider social sector. Charities use the data and tools to better understand funders and build out their

³⁵ <https://philanthropyresponds.ca/en/>

³⁶ <https://www.threesixtygiving.org/>

strategy. Planners and researchers use the information to better understand what is being funded and delivered across the UK.

[GrantNav](#) is the search engine to show where money has been directed and by which funder and the [Data Registry](#) lists the close to 200 funders who publish their data on the platform. 360Giving also has several free tools to help funders upload their data and for anyone to use the data for free.

Canadian Philanthropic Sector Engagement Outcome:

360Giving serves as a very good model for the Canadian context. Since it has been running for several years, there are some solid learnings to gather from their experience. Collaboration with this organization could bring insight into the development of the shared data strategy.

3. Community Foundations of Canada- [Vital Signs](#)

Since 2014, communities have used Vital Signs to gather local knowledge in order to measure the vitality of their community. This is done by collecting information on local indicators and using this data to support evidence-based, locally relevant solutions to improve the quality of life at the community level. Vital Signs is an initiative led by Community Foundations of Canada (CFC) that engages more than 65 Canadian and 41 international community foundations. CFC's key role is to provide Canadian community foundations with access to national data sets. Foundations then typically mobilize community knowledge with local surveys, public programming and events to help identify local priorities. Since 2017, CFC has aligned their national data sets with Agenda 2030, the [UN's Sustainable Development Goals](#) (SDGs). The SDG framework allows community foundations to measure local Canadian data against common global indicators and that of communities around the world.

Canadian Philanthropic Sector Engagement Outcome:

Vital Signs is an excellent way for partners and other funders to engage in data mobilization and sharing that is already underway at a local, national and international level.

4. SDG Philanthropy Platform

On September 25, 2015, the United Nations and its 193 Member States, including Canada, formally adopted the [17 Sustainable Development Goals \(SDGs\)](#), also known as the 2030 Agenda. The SDGs recognize that ending poverty must go hand-in-hand with strategies that enhance economic growth and address a range of social needs, including education, health, social protection and employment opportunities while combatting climate change and safeguarding the environment. The [SDG Philanthropy Platform](#) is a global and national facilitator that helps optimize resources and efforts to achieve SDGs through supporting collaboration. Their online platform provides information on what partners are doing, real-time data on relevant SDGs, and events and solutions that funders and others are supporting.

Canadian Philanthropic Sector Engagement Outcome:

Many Canadian foundations (including those using Vital Sign as described above) are aligning their community data collection and collaboration with these international indicators. The SDGs

provide guidance and an international framework for measuring data to achieve a more sustainable future for everyone.

