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PhiLab

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À propos du PhiLab | About PhiLab

Le Réseau canadien de recherche partenariale sur la philanthropie (PhiLab), anciennement Laboratoire montréalais de recherche sur la philanthropie canadienne, a été pensé en 2014 dans le cadre de la conception de la demande de financement du projet développement de partenariat CRSH intitulé « Innovation sociale, changement sociétal et Fondations subventionnaires canadiennes ». Ce financement a été reconduit en 2018 sous le nom d'« Évaluation du rôle et des actions de fondations subventionnaires canadiennes en réponse à l'enjeu des inégalités sociales et des défis environnementaux ». Depuis ses débuts, le Réseau constitue un lieu de recherche, de partage d'information et de mobilisation des connaissances des fondations canadiennes. Des recherches conduites en partenariat permettent la coproduction de nouvelles connaissances dédiées à une diversité d'acteurs : des représentants gouvernementaux, des chercheurs universitaires, des représentants du secteur philanthropique et leurs organisations affiliées ou des partenaires.

Le Réseau regroupe des chercheurs, des décideurs et des membres de la communauté philanthropique à travers le monde afin de partager des informations, des ressources et des idées.

The Canadian network of partnership-oriented research on philanthropy (PhiLab), previously called the Montreal Research Laboratory on Canadian philanthropy, was thought up in 2014 as part of the conception of a funding request by the NRCC partnership development project called “Social innovation, social change, and Canadian Grantmaking Foundations”. From its beginning, the Network was a place for research, information exchange and mobilization of Canadian foundations’ knowledge. Research conducted in partnership allows for the co-production of new knowledge dedicated to a diversity of actors: government representatives, university researchers, representatives of the philanthropic sector and their affiliate organizations or partners.

The Network brings together researchers, decision-makers and members of the philanthropic community from around the world in order to share information, resources, and ideas.



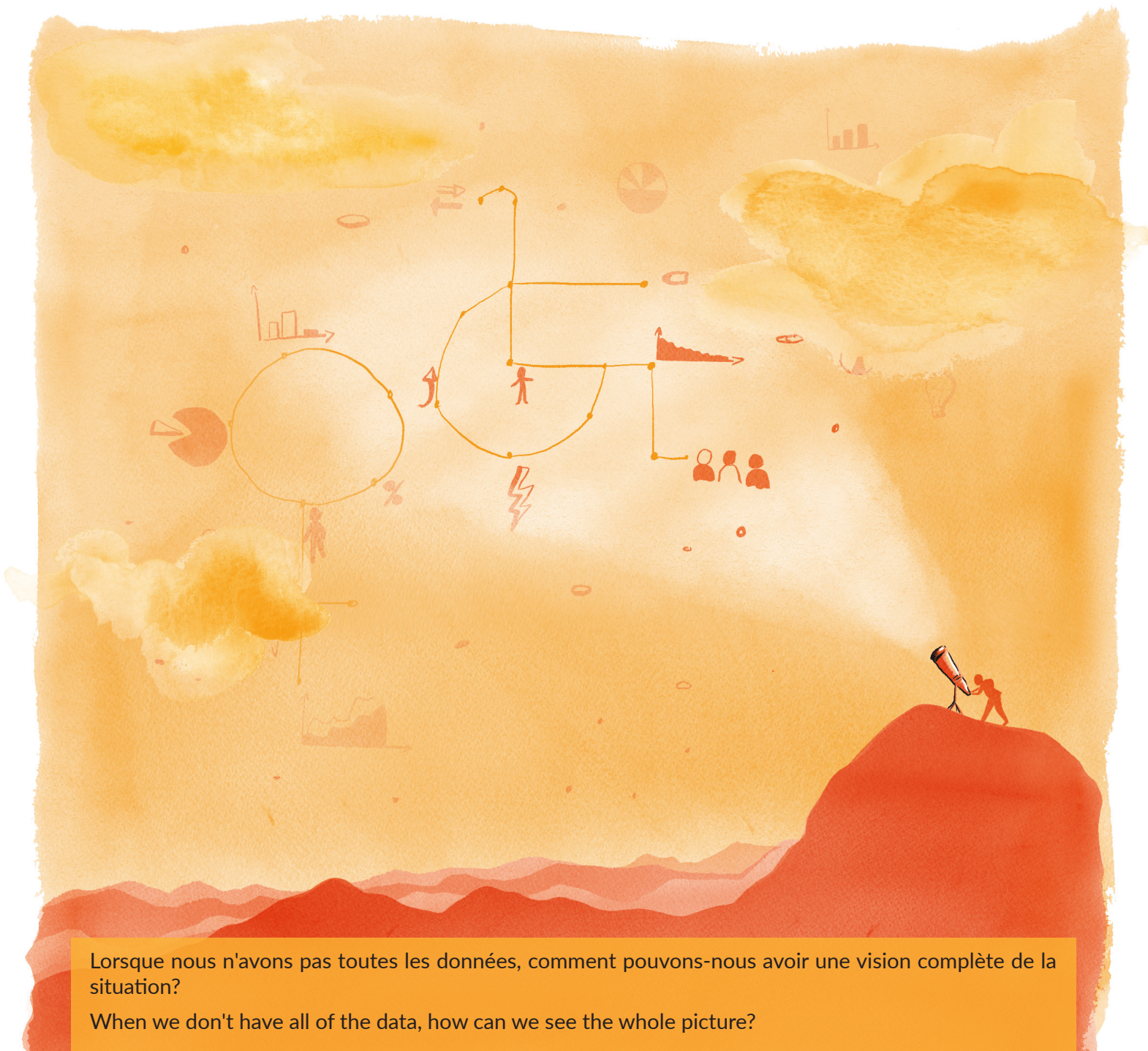
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TEXTES D'INVITÉS | GUEST CONTRIBUTORS

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Lorsque nous n'avons pas toutes les données, comment pouvons-nous avoir une vision complète de la situation?

When we don't have all of the data, how can we see the whole picture?



Tensions and Opportunities for Increased Data Transparency in the Nonprofit Sector

By Neemarie Alam & John Saunders, Ontario Nonprofit Network



Neemarie Alam (she/her) started in the nonprofit sector nearly 20 years ago. Her previous positions have included working in social housing, mental health, and with children and youth. She has also supported the development and growth of two nonprofit networks, and worked on several research and evaluation initiatives. A self-professed geek, Neemarie loves using data, information, and research to explore the depths of the nonprofit sector and the people it serves. She is passionate about infusing an intersectional and equity lens to her work. She can be reached at neemarie@theonnc.ca.

John Saunders (he/him) joined Ontario Nonprofit Network in 2018 as Communications Coordinator on the Decent Work Initiative. He now leads the ONN's initiative to engage Ontario nonprofits in sharing knowledge and building organizational capacity. He brings with him more than 20 years of experience in journalism, teaching, research and communications work. John has worked with advocacy campaigns on a range of issues, including public transportation, community health, and workers' rights.

Nonprofit organizations work hard to establish trust with multiple stakeholders as part of their missions, including clients, participants, communities, funders, and government. This requires nonprofits to be open

and transparent about their operations, programs and services, funding- and their data. Data transparency, however, can be difficult for a sector where data is fragmented, disorganized, and inequitably held.

Current State of Nonprofit Data and The Data Ecosystem

With more data being collected and available than ever before, nonprofits are eager to use data as a tool in bringing diverse stakeholders together in tackling complex systemic issues. As a critical part of our social fabric, nonprofits provide vital insights for and about the communities in which they work, as well as collectively, as they are a sector of 170,000 nonprofit organizations and charities nationally. Like most sectors, nonprofits have varied and complex relationships to data- even the definition of "data" varies across individuals and organizations. Data is often used to mean organizational information, which can range from internal operations, such as fundraising and human resources, to program development and impact measurement and broader advocacy work. Once collected, this data can be used by nonprofits to understand service gaps, make strategic decisions, determine and measure progress, and advocate for change.

While many nonprofits recognize the need for a

concerted data and learning strategy, organizational capacity to collect, store, share, and utilize data is on a spectrum. Commitment to data transparency depends on a variety of factors, including organizational size, capacity, funding, and subsectors (ie. housing, youth work, mental health, etc.). Some nonprofits have dedicated resources towards developing a culture invested in learning and utilizing data, such as staffing and internal or external organizational policies. Other nonprofits may only access or use data for specific operations, such as fundraising or as a reporting tool. These individual organizational limitations can act as a barrier to sectoral data sharing, collaboration, and advocacy at a time when nonprofit organizations are being tasked increasingly to prove their value and publicly showcase their data as evidence.

Additionally, nonprofit data is part of a larger ecosystem with other key stakeholders, mainly academia/researchers, funders, and government. The key stakeholders are not always mutually exclusive. The ecosystem is only healthy when each member is aware of the others and can provide continual input and feedback. Much like more “natural” ecosystems, these relationships are often complex, sometimes overlap, and evolve over time. In some instances, the stakeholders are dependent on each other. For example, academia and researchers produce reports and papers that influence thinking about evaluation and evidence and funders may work in concert with government (and nonprofits) to highlight needs and trends. Conversely, the ecosystem is not always interdependent; overlapping or redundant data collection and a lack of coordination between the stakeholders contributes to the scarcity of useful information on the nonprofit sector and its overall impact.

Nonprofit organizations may not be able to access their data once it has been collected and shared with funders, control their data use externally, or receive back information about a funded program or project. Program data is often disconnected from the collective impact of nonprofit work, and collected organizational data may be disconnected from the operations of nonprofits.

Data is not shared equitably across the ecosystem. Historically, nonprofits have produced and provided data, but have seldom created and managed their own relationships with other members of the ecosystem. For example, nonprofit organizations often do not set

the terms for data sharing with funders or government agencies. They cannot specify what data needs to be collected, how often, or determine its relevance to their work. In particular, nonprofits' relationships with both funders, government agencies, and research and academia are often unilateral, with nonprofits providing information and rarely receiving it back.

There are also long histories of [exploitative data practices](#), particularly in Indigenous communities and racialized communities. Many nonprofits are increasingly mindful of these inequities and do not want to replicate them. Nonprofits want to clarify the intent and use of collected data, but they may not have access to this information from their funders.

More recently, nonprofits are recognizing and advocating for more equitable relationships between the various players in the ecosystem. They want to harness data that is free, open, and readily usable to be able to identify creative solutions to complex challenges. Nonprofits are exploring their own data needs, creating shared data systems, and figuring out how to extract needed data from other stakeholders, while being mindful of data equity principles.



DEAL: An opportunity for sector-driven transparency

Acknowledging the challenges and the tensions of providing open, transparent data is key to recognizing that there is a unique opportunity for the nonprofit sector and its supporters.

Through its Data, Evaluation, and Learning (DEAL) Strategy, the Ontario Nonprofit Network is engaging stakeholders to develop a framework for a sector-driven strategy to support learning and data-driven decision-making. While the strategy will focus on the nonprofit sector as a whole, individual organizations will be encouraged to adopt the tools or practices for their own organizational or subsector needs.

Inspired by work in other jurisdictions, including the Alberta Nonprofit Data Strategy, the DEAL Strategy incorporates the belief that good data practices are people-centered and rooted in equity, transparency, and accountability. The DEAL Strategy is stewarded by a Steering Committee of four nonprofit organizations: Ontario Federation of Indigenous Friendship Centres (OFIFC), Peacebuilders International, Network for the Advancement of Black Communities (NABC), and Social Planning and Research Council of Hamilton (SPRCH).

To effectively develop a data strategy, the initiative interacts with all members of the data ecosystem. Its main focus is convening the nonprofit sector on data issues, challenges, and innovations. The convenings allow participants to learn more about how different nonprofits are using data and to reflect (or create) their own organizational data practices. DEAL is creating knowledge mobilization tools, curating resources by the sector, and amplifying through its information hub, to familiarize and demystify data for nonprofits, and encouraging them to participate in the development of the strategy.

Advocating for better - and more - data on the sector requires working with government and nonprofit funders, as well as championing a nonprofit presence at data projects administered by provincial and federal governments. When government ministries create data projects without nonprofit participation or input, they may be unaware of how the data project impacts the nonprofit sector. Nonprofits may be asked to produce additional reporting, administrative processes, or even create new internal infrastructure without additional funding. The tension between producing more data and lessening administrative burden on the sector

can only be met if there is open and constant dialogue between these stakeholders. Being involved means new opportunities. By participating in data working groups, learning from other provinces, and delving into data issues with people and organizations who have long been advocates for open data, nonprofits have opportunities to be informed and influence various data projects.



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The relationship between nonprofits and academics and researchers is both a source of tension and an unrealized opportunity. Some nonprofit organizations describe the relationship as being unequal and extractive. Nonprofits provide the data requested or access to certain communities of interest, but do not always receive the research report or results upon completion. There is also a misalignment with nonprofit and research goals; some nonprofits express frustration with research limitations and timelines.

For many nonprofits, collaboration with researchers and academics, particularly when it is built on mutual interest and a strong partnership, can support and even enhance their work. Increasingly, nonprofit organizations look at the research and academic world to operationalize evaluation or impact measurement, and to better understand research methodologies.

The Pillars of DEAL

The foundational pillars of DEAL, (Governance, Equity, Privacy, Standards, and Capacity), will be used to organize the data strategy. These pillars help ensure that the nonprofit sector's data and knowledge are ethically used and appropriately leveraged, ultimately supporting better programs and services, public policy development, and outcomes for communities across Ontario. The implementation of the strategy will encourage greater transparency across the sector.

1. Data Governance

At its core, data governance seeks to clarify who is responsible for data in an organization or collective. It requires nonprofit organizations to establish practices or policies for every stage of the data lifecycle, from collection to storage to deletion. Data governance frameworks cannot be created without leadership that prioritizes good data practices. Creating a data culture that focuses on shared learning and experimentation, for both individual organizations and the nonprofit sector, can give nonprofits the tools and ability to review and address data integrity issues.

The desire to make data more transparent is often offset by the lack of time, financial resources, and staff that can act as data stewards or data "ambassadors". In most organizations, the responsibilities of governance are split over various roles. Dedicated staff resources can help facilitate a positive data culture, create organizational practices or policies, and support organizations in making their data transparent and accessible. They can also help shape data sharing protocols and agreements, so there is greater collective use of the data.

Some nonprofit organizations are incorporating data governance into their strategic plans. They are developing harmonization processes that examine their data sources, try to minimize inefficiencies between data entry systems, and provide support and training to encourage staff uptake. Following and learning from their data journeys can greatly enhance the DEAL strategy development.

2. Data Equity

As nonprofits consider their roles and work towards Indigenous sovereignty and racial justice, organizations are questioning how they obtain, use, and hold data. This is in acknowledgement of how data has been

used against equity deserving groups throughout history. The ethics of data collection, governance, and sharing- particularly when the specifics of the collected data or its limitations are not known- may be at odds with organizational values. Thus, some nonprofits may choose not to share their data at all, or may choose to share only certain data sets, or with certain partners.

The tension between needing data and using it responsibly requires the nonprofit sector to both learn about data equity and to continually contextualize the data they collect and display. They also need to clarify why they need certain data and communicate clearly how data is being collected, used, and stored.

People-centred data practices allow nonprofits to work with data in various communities as a narrative tool. Nonprofits are sharing data with communities to ensure it accurately reflects their nuanced experiences, and that it is relevant to these communities. Here, data is a mechanism to understand or make meaning in a moment; it is not an absolute, timeless depiction of an entire community or population.

There are increasing examples of nonprofits improving their data equity approaches. Nonprofits are creating reciprocal relationships with communities, learning more about how to work with communities to collect meaningful data and create open data practices that are rooted in equity. They are also supporting communities in collecting and sharing data, shaping data governance, and allowing data to be retained by communities.

3. Data Privacy

Data privacy is intertwined with data equity: communities that continue to face marginalization often have concerns about data access and portability. At the same time, lack of data may contribute to misrepresentation or diminished resources. Nonprofits sometimes grapple with both creating human-centric data systems and demonstrating or determining the need for specific interventions.

Collaborative systems with several built-in anonymization features, coupled with strong policies, training, and ongoing maintenance would allow nonprofits to collect and review information without compromising individual privacy. They could have access to data that is collectively governed, monitored, and used for both just-in-time program development

and to spot potential service need gaps.

Several internal factors limit nonprofit commitment to open and transparent data. Nonprofits may refrain from sharing their data because they are still developing their internal policies, processes, and best practices that allow the data to be anonymized and safely shared. Privacy is often a major concern (and barrier) to nonprofit data sharing. Organizations work hard to establish trusting relationships with communities, which can easily be broken through data breaches and mishandling. The lack of clarity around legislative requirements and specific protections and exceptions for nonprofit organizations can limit nonprofit capacity to share their data. Lessons from government and industries make nonprofits cautious about sharing information that potentially jeopardizes themselves or their communities. With funding and support of costs for developing proper policies and practices and implementing appropriate infrastructure, along with accessing legal and technical expertise, nonprofits would be better equipped to address data privacy issues.

4. Data Standards

Data transparency depends on data quality. Unclear data does not generate useful insights. Nonprofit organizations are starting to consider data standards. However, very few have developed a process for ensuring, and therefore distributing, data that is reported consistently, is timely, and of good quality.

For many nonprofits, data is not collected or entered regularly or in a timely fashion. There is little to no funding support for data collection and analysis. Nonprofits are expected to carry out these operations on their own. Additionally, nonprofit organizations are focused on their programs and services as first priority, and maintaining data standards can easily fall to the wayside. Staff rarely receive training, support, or dedicated time to enter, review, and make sense of organizational data.

Talking with nonprofit organizations on their information systems, supporting the development of data infrastructure, creating practices around data maintenance can help nonprofits produce better data. Funders and other decision makers can support and resource the creation and adoption of data standards that meet the organization's goals and mission.



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5. Data Capacity

Data transparency also relies on internal organizational capacity. Throughout the nonprofit sector, there has been a rapidly intensifying human resource crisis, exacerbated by the COVID-19 pandemic. Organizations are struggling to hire, train, and retain staff, which means their programs, services, and work to support communities are being greatly impacted. In addition, many nonprofits do not have the digital infrastructure to support data capacity. They cannot simply purchase specialized software that would facilitate data transparency.

Growing internal capacity will require involvement from the philanthropic sector and governments, knowledge sharing across the nonprofit sector, and support from research and academic communities.

Creating a network of engaged nonprofits, some of whom are data champions, as well as communities

of practice, can help nonprofits assess their data capacity. Individual organizations can decide their connection to data and where it is most meaningful to their work- and how to meet the data requirements of funders.

Data capacity challenges are exacerbated by the increasing complexity of data and the rapid rate of technological change. Nonprofit organizations require more time, specialized expertise and resources to understand how data can be used to tackle increasingly complex social issues, such as climate change and poverty.

Opportunity to support data transparency in the nonprofit sector

In order to make data transparency a reality, we need the nonprofits and their supporters, including governments, philanthropists and private charitable foundations, and academia, to get involved. There is an opportunity to build relationships with other members of the ecosystem, deepen our understanding of the needs and gaps, map the work already underway, and decipher which lessons can be applied throughout the nonprofit sector.

The Ontario Nonprofit Network has several opportunities for nonprofits to participate in developing the data strategy and to learn more about various data topics. We host regular events, including webinars and conference sessions, and have an e-newsletter for interested stakeholders to receive regular updates. More opportunities will be available as the strategy is developed. We invite nonprofits to connect and [learn more](#).

At the core of our work, we believe that nonprofit organizations can harness the power of data to better serve their missions. There are many ways to address tensions and opportunities for increased data transparency in the nonprofit sector. Nonprofits can develop opportunities to actively collaborate on and create data sets, and have them be open and available. They understand the needs of their communities, and are in a unique position to balance the rights and interests of the people they serve, with legislation and policies that may serve other priorities. A sector wide data strategy will outline a path to action, increasing our sector's confidence and capacity as a tool to better serve communities across the country.

KEY TERMS

Social fabric: How individuals, communities, and all three sectors (government, business, and nonprofit) come together as a society.

Data transparency: Ability to access and work with data that has been ethically collected, is traceable to its original source(s), and can be easily understood

Data culture: Collective behaviors and beliefs of people who value, practice, and encourage the use of data to improve decision-making
[Tableau](#)

Human-centric data systems (or People-centric data systems): This terminology refers to a specific approach to data that promotes individuals are the key stakeholder of data, often above governments, businesses, and nonprofits. Individuals are empowered to supply or extract their data from the system.

Data champions: Someone who has expertise and history in nonprofit data work, and can offer insight into the nonprofit data strategy



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Canadian Philanthropy Partnership
Research Network



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