Building a Knowledge-Driven Nonprofit Sector

2019-2020 Alberta Nonprofit Data Strategy Final Report and Project Plans

ABNN | Alberta Nonprofit Network | PolicyWise for Children & Families | Alberta

Acknowledgments

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SUGGESTED CITATION

Taylor, Rebecca; Lau, Jason; Cui, Xinjie. (2020). *Building a Knowledge-Driven Nonprofit Sector: 2019-2020 Final Report and Project Plans*. Edmonton: PolicyWise for Children & Families.

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Executive Summary

The Alberta Nonprofit Data Strategy was launched in 2018 to enhance the nonprofit and voluntary sector's use of data. The Alberta Nonprofit Network (ABNN)[1], took on the leadership role in the development of the Strategy in 2019, given its ability to connect with and represent the sector. Creating a data strategy is one of four province-wide collaborative efforts under the ABNN.

There are many data champions within the nonprofit and voluntary sector advocating for more strategic use of data. Stakeholders have expressly stated that having the right information at the right time better equips nonprofit and voluntary organizations to:

- Advocate for system-level changes;
- Better understand, measure, and communicate impact;
- Make evidence-based decisions;
- Drive program and organizational outcomes; and
- Answer key organizational, community, and sectoral questions.

Moving toward the strategic use of data and evidence in the sector requires coordinated efforts and stakeholder buy-in. The Alberta Nonprofit Data Strategy brings together partners from government, funding organizations, and the nonprofit and voluntary sector to understand and improve the ways in which the sector leverages data. This year, with direction and oversight from the ABNN Data Strategy Steering Committee, PolicyWise convened three topic-specific Task Teams. Along with our government partners25 representatives from the disability, mental health, volunteer, technology and data, libraries, and immigrant and refugee sectors came together to collaborate on and advance the data strategy. The unique contributions from this diverse set of partners demonstrates the importance and relevance of this work.

From November 2019 to March 2020, each task team engaged the nonprofit sector and developed recommendations for action. The Data Hub Task Team researched national and international data platforms, and interviewed data hub moderators to develop a data hub model to best meet the needs of the Alberta nonprofit sector. The Newcomer Task Team scanned for current data initiatives in the Immigrant and Refugee sector, and the nonprofit sector more broadly in Alberta to document learnings from exemplars and assess gaps. The Government of Alberta (GoA) Data Task Team surveyed the nonprofit sector to better understand what the sector considered as high-value data, and matched those responses with data on the GoA Open Portal.

Eight projects of varying scale were developed through the work of Task Teams and key informant suggestions. Projects are intentionally designed to be developed further and launched by collaboratives and organizations big and small within this sector-wide effort. Leveraging existing projects and identifying additional funding opportunities are critical to the implementation of these projects as well. The projects proposed (see below) target data capacity building, data sharing, nonprofit organization data, Government of Alberta data, and the development of an Alberta Nonprofit Data Hub.

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[1] https://albertanonprofits.ca/

Demonstration User Stories partners nonprofit organizations with community data experts to support the nonprofit sector's use of available Government of Alberta data.

Open Data Capacity Building is a training series that supports nonprofits to work with data they identify as valuable. The creation of infographics and creating intake forms for the organizational use of data are two examples that could be incorporated into training.

An Open Data Competition is modelled after projects advanced by Open Canada and Service Nova Scotia to enhance awareness and use of valuable open data.

The Knowledge Hub is the first stage in a two-stage data hub model. This online platform will bridge organizations with capacity building opportunities, create opportunities to share data, and access data support.

Tip & Tricks partners nonprofit organizations with community-based data experts to create and disseminate tips on the specific uses of open data in the nonprofit context to build an engaged network of people that regularly use data together.

The Data Librarian is a data support and expertise mechanism supporting nonprofits to access timely information and data support.

Resource Sharing & Engagement will mobilize knowledge gained thus far in the Alberta Nonprofit Data Strategy through sharing of known resources and tools.

Data Entry is Caring Campaign aims to shift the message of data collection from a bureaucratic burden to an action of care within nonprofit organizations.

Our 2019-2020 Final Report further details the Alberta Nonprofit Data Strategy's progress, and informs our three-year strategy to sustain momentum. Collectively, partners will continue to come together to support and enhance the strategic use of data by the nonprofit and voluntary sector, and ultimately build a knowledge-driven nonprofit and voluntary sector.

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SECTION ONE: Introducing the Alberta Nonprofit Data Strategy

The Alberta Nonprofit Data Strategy was launched in 2018 to enhance the nonprofit and voluntary sector's use of data. The Alberta Nonprofit Network (ABNN)[2], took on the leadership role in the development of the Strategy in 2019, given its ability to connect with and represent the sector. Creating a data strategy is one of four province-wide collaborative efforts under the ABNN.

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Toward an Alberta Nonprofit Data Strategy

A number of initiatives at local, national, and international levels over the past ten years have created the conditions for an Alberta Nonprofit Data Strategy. Throughout the 2010's, new data platforms like CommunityView Saskatchewan[3] and Data Driven Detroit[4] indicated a growing interest in the uses and benefits of data. The global open government movement continued to snowball, bringing increased attention and opportunities for the availability and use of government data. In 2015, the Mowat NFP published its seminal report *An Open Future: Data priorities for the not-for-profit sector,* which suggested that it was time for the Canadian nonprofit sector to take action.

The Ontario Nonprofit Network (ONN) was an early data champion. In 2015, they published their framework, *Towards a Data Strategy for the Ontario Nonprofit Sector*. In it, the ONN discussed the ways data can support the nonprofit sector to learn and communicate its impact, deliver more responsive

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[3] http://www.communityview.ca/
[4] https://datadrivendetroit.org/

initiatives, collaborate more efficiently and effectively, and diversify and stabilize its funding. The ONN further identified how data standards, policies, skills & resources, and leadership are necessary to advance the data strategy.

It did not take long for both Ontario's data strategy framework and their nonprofit network model to gain traction in Alberta. Volunteer Alberta, the Edmonton Chamber of Voluntary Organizations (ECVO), and the Calgary Chamber of Voluntary Organizations (CCVO) met with then-Alberta Culture and Tourism in 2016 to discuss an Alberta nonprofit data strategy.[5] While work would not begin until 2018, this meeting represented the "tangible first step" toward a provincial data strategy.[6]

At the same time, key organizations were also planning an Alberta nonprofit network, which was launched in June 2018. By 2019, the ABNN had over 700 members and were advancing four sector-wide strategic priorities on behalf of the Alberta nonprofit and voluntary sector: workforce development, government relations, sector value & impact, and the development of a nonprofit data strategy.

The CCVO began leading Phase I of the Alberta Nonprofit Data Strategy in April 2018, with funding from Alberta Culture and Tourism. Province-wide engagements sessions in Lethbridge, Calgary, Red Deer, and Edmonton identified the data opportunities and challenges experienced by the nonprofit sector. Stakeholders identified how they used data, the datasets the sector is interested in, areas in which to focus data capacity-building efforts, and opportunities to leverage.[7] From these engagements, a high-level *Alberta Nonprofit Data Strategy Roadmap*[8] was developed to move the nonprofit sector from the current to future state.

The *Alberta Nonprofit Data Strategy Roadmap* was formally adopted by the ABNN in 2019 and oversight for the strategy transitioned to the ABNN Data Strategy

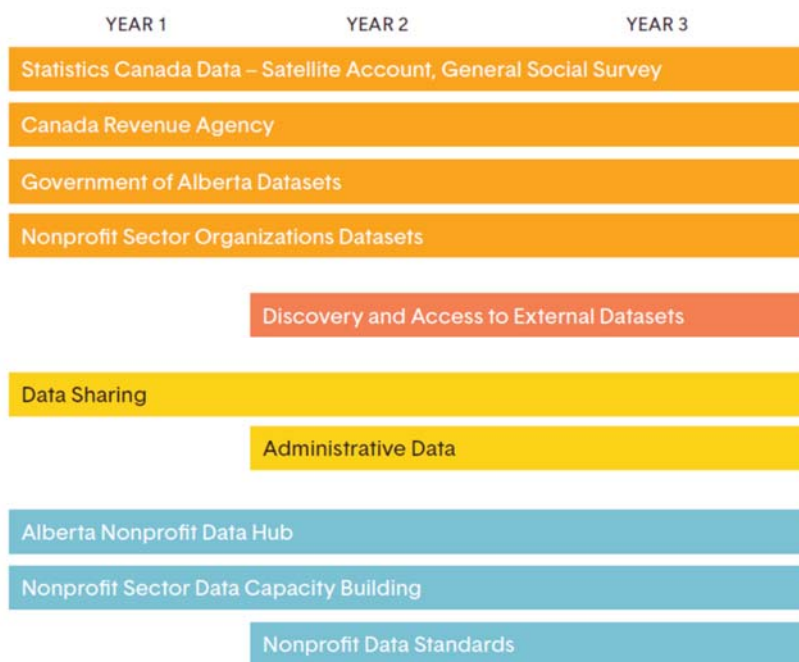*Figure 1: Alberta Nonprofit Data Strategy Roadmap and Focus Areas*

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[5] Calgary Chamber or Organizations (CCV0), *Building a Foundation for an Alberta Nonprofit Data Strategy – Project Whitepaper* (2018)

[6] CCVO 2018, p.1

[7] Geoff Zakaib, *Building a Foundation for an Alberta Nonprofit Data Strategy – Final Report* (2019a)

[8] Geoff Zakaib, *Alberta Nonprofit Data Strategy Roadmap* (2019b)

Steering Committee. PolicyWise and the Ministry of Alberta Culture, Multiculturalism, and Status of Women funded 2019-2020 work. PolicyWise aimed to develop five of the concepts introduced in the *Roadmap* into tangible actions in the coming years:

- Government of Alberta Datasets
- Nonprofit Sector Organizations Datasets
- Data Sharing
- Alberta Nonprofit Data Hub
- Nonprofit Sector Data Capacity Building

Project Engagement

Sector engagement has informed all aspect of this year's work. While the *Roadmap* outlined the Year One strategic priorities for each project focus area, it was critical to collectively define the project scope with nonprofit and voluntary sector representatives. PolicyWise engaged sector leaders at multiple intersections over 2019-2020: at the 2019 ABNN Sector Gathering, through qualitative interviews with key informants, and with the Steering Committee and three task teams.

ABNN 2019 Stakeholder Engagement

Participants at the 2019 ABNN collectively responded to three questions related to the data strategy:

- If we could only focus on one data priority to tell our story, where should we start?
- In order to leverage data at the sector level, which of the following capacities (staff capacity, technology, process/methodology, legal/privacy issues, sector/system level support) requires the most improvement?
- Are there any data initiatives that you are aware of or involved in that can be leveraged by the data strategy?

Over 200 stakeholders highlighted the top two data priorities as: demonstrate the sector's value to Albertan's quality of life; and better understand the sector's economic. Staff, technology, methods, legal and privacy issues, and systemic support capacities were noted as areas requiring high levels of support.

Qualitative Interviews with Key Informants

PolicyWise conducted qualitative interviews to enhance knowledge gained in Phase I on our five project focus areas. Informants answered open-ended questions on the current state of data capacity, data sharing, and the access and use of open data in the nonprofit and voluntary sector, and what steps were required at organization and sector levels to appropriately meet the needs of the sector. Informants also considered how a data hub could support the sector's use of data. 19 key informants from the immigrant and refugee, disability, library, volunteerism and mental health sectors, as well as community and government funders were interviewed between August and November 2019.

The interview data analyses were provided to each Task Team as background information and possible starting points for task team discussions.

Task Teams

As proposed in the *Roadmap*, a constellation governance model was adopted. Individual constellations (renamed to Task Teams) were formed around the 2019-2020 project focus areas (see Figure 2).

Three Task Teams convened to plan future courses of action based on how they understood the data needs and opportunities, as represented in the *Roadmap,* 2019 sector engagement, the qualitative interviews, and their own expertise and experiences. The Government of Alberta Data (GoA Data), the Newcomer Data, and the Data Hub Task Teams brought together nonprofit data champions from government, community-based funders, and the nonprofit sector. Each task team volunteered considerable hours to research and plan appropriate and meaningful inform responses and strategies to support the sector's use of data. Task Teams were formed to address specific project focus areas identified in the *Roadmap.* However, significant crossover in the project areas existed. For example, while the GoA Data Task Team was formed to focus on GoA Data, the Task Team also developed plans that created opportunities to build data capacity. As well, the Newcomer Data Task Team was formed to develop project plans which crossed data capacity, nonprofit organization data, data sharing areas using a subsector lens.
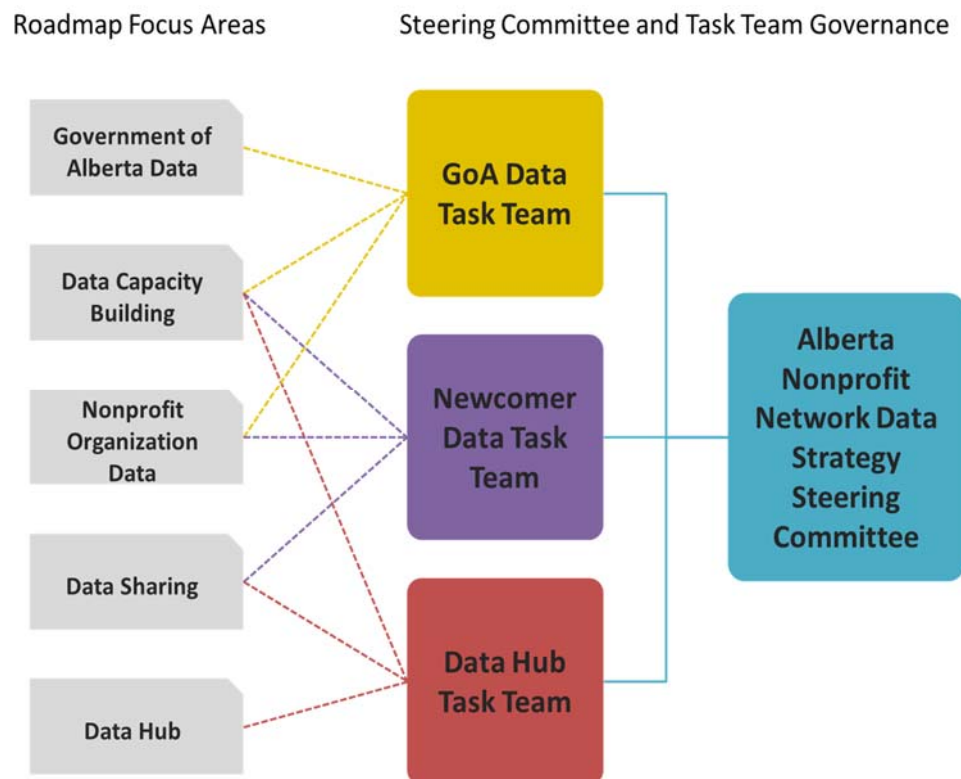
The Data Hub Task Team researched national and international data platforms, and interviewed data hub moderators to craft a data hub model to best meet the needs of the Alberta nonprofit sector. The Newcomer Data Task Team scanned current data initiatives in the Immigrant and Refugee sector, and the nonprofit sector more broadly in Alberta, to assess gaps, strengths, and learn from exemplars. The GoA Data Task Team surveyed the nonprofit sector to understand what the sector considered high-value data, and matched the responses with data on the GoA Open Portal.

The remainder of this report speaks to the specific efforts undertaken, and outputs created, by Task Teams.

SECTION TWO: The Government of Alberta Data Task Team

Background

The nonprofit sector knows that accessing timely, relevant information provides the best possible foundation to make evidence-based decisions. Data collected by the provincial government can be used to better inform organizations in many ways, from informing program development to enabling targeted fundraising. In addition to data collected by the provincial government through the course of administering grants, data about the nonprofit sector (e.g. Service Alberta Registries data and Alberta Labour workforce survey data) has been identified as important to the sector (see Figure 6).

With this knowledge, the *Roadmap* recommended the Year One focus be to:

- Determine what Alberta government datasets are priorities for the nonprofit sector, as well as to compile what government data is currently available, including reports such as the *Profiling the Nonprofit/Voluntary Sector in Alberta*[9] and the datasets which informed such reports; and

- Work with a cross-section of government ministries and departments to develop an action plan to make additional datasets available, with the support of the Alberta Nonprofit and Voluntary Sector Initiative (ANVSI).

Interview Data

The sector's needs as they relate to government data were explored in the qualitative background interviews with nonprofit sector key informants conducted by PolicyWise. To this end, informants answered:

- If you or your organization have accessed government datasets (e.g. Labour Force Statistics, the General Survey on Volunteering and Charitable Giving, or other administrative data), what was most useful?;

- What government datasets would your organization or subsector require, or make us of, that is currently not accessible?; and

- Does your organization access any open data portals for your organization (including Edmonton Open Data Portal, and Alberta Open Government Portal)?

Did you know?

The Alberta Nonprofit/Voluntary Sector Initiative (ANSVI) is a formal collaboration between the Government of Alberta and the nonprofit sector. ANVSI plays an important role in helping to guide the development of strategies and policies across ministries to support the sector.

https://www.alberta.ca/albertas-non-profit-voluntary-sector.aspx

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[9] https://open.alberta.ca/dataset/profiling-the-nonprofit-and-voluntary-sector-in-alberta

The interview findings demonstrated that overwhelmingly, stakeholders are not accessing relevant and open data. Three barriers to the use of open data in nonprofit organizations:

Open data portals are not user friendly:

… you really need to know what you're looking for to track it down. If you don't really know, it's unlikely you are really going to find it…. you need a certain familiarity with the portals to find anything, and be tapped into the communities to find it. They are not set up for anyone with a general interest in the topic to find anything.

For many reasons, stakeholders are unaware of what data is already available to them, and how accessing that data benefit their organization:

[I] don't know much about it. I'm not a researcher either. Is it going to give me basic or specific [information}?

Many nonprofits do not have the capacity (time, money, and staff) to explore open data portals:

Capacity and knowing that data exists, and how to use it, and how to compile it. [Frontline] staff, their skill set isn't centred on data.

If I had the time to sit down and spend some time on them, I would probably be able to get good info but I don't have time to.

These findings suggest that while the nonprofit and voluntary sector expresses high interest in accessing Government of Alberta data, there are many opportunities to improve both the knowledge, and use, of open data. Key informants highlighted these opportunities in interviews (See Figure 3):

Informant's suggestions to enhance knowledge of the portal, create use cases to demonstrate the portal's use, develop the position of a data librarian, dedicate resources, and develop appropriate tools, templates, and workshops providing the GoA Data Task Team with multiple options to brainstorm and workshop.

Knowledge
Of what data the portal has that nonprofits can use or access.

Use Cases
To demonstrate how the data can be used in nonprofits.

Open Portal
Opportunities

A Data Librarian
To support access to information.

Dedicated Resources
In organizations to increase capacity.

Tools, Templates, or Workshops
To learn how to use open data.
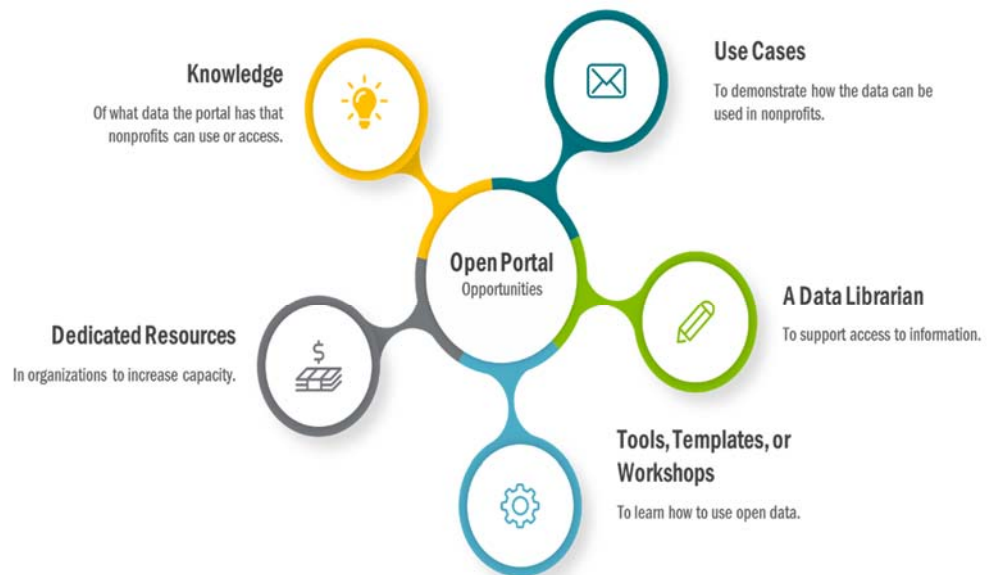
Figure 3: Opportunities to support the use of the open data

The GoA Data Task Team

To plan projects supporting the nonprofit sector's use of government data, representatives from Alberta Libraries, Alberta Culture, Multiculturalism, and Status of Women (co-chair), Edmonton Social Planning Council, Service Alberta, Volunteer Alberta (co-chair), first convened in November 2019. The Task Team co-developed the following objectives, based on the *Roadmap* recommendations and the background qualitative interview findings:

- Assess what data assets exist on the portal that would provide beneficial and timely information for the nonprofit sector or subsectors within it.
- Plan and document appropriate, achievable and timely short, medium, and long-term goals and strategies to support the nonprofit sector's use of existing data in the GoA Open Government Portal.
- When possible, assess and document GoA datasets that would provide benefit to the nonprofit sector, or subsectors within it. If possible, begin convening government stakeholders to advocate for the release of the data to the portal.

In alignment with these objectives, the GoA Data Task Team first conducted the Provincial Open Data Survey to assess what data the nonprofit sector wants access to, and how the sector understood that data to be helpful to their organizations and/or sector. The sector's responses (n=42) are represented in Figure 5:

Figure 5: Number of responses to the survey question of "Please list the provincial government datasets that would most help you with your work?" and coded qualitative responses.
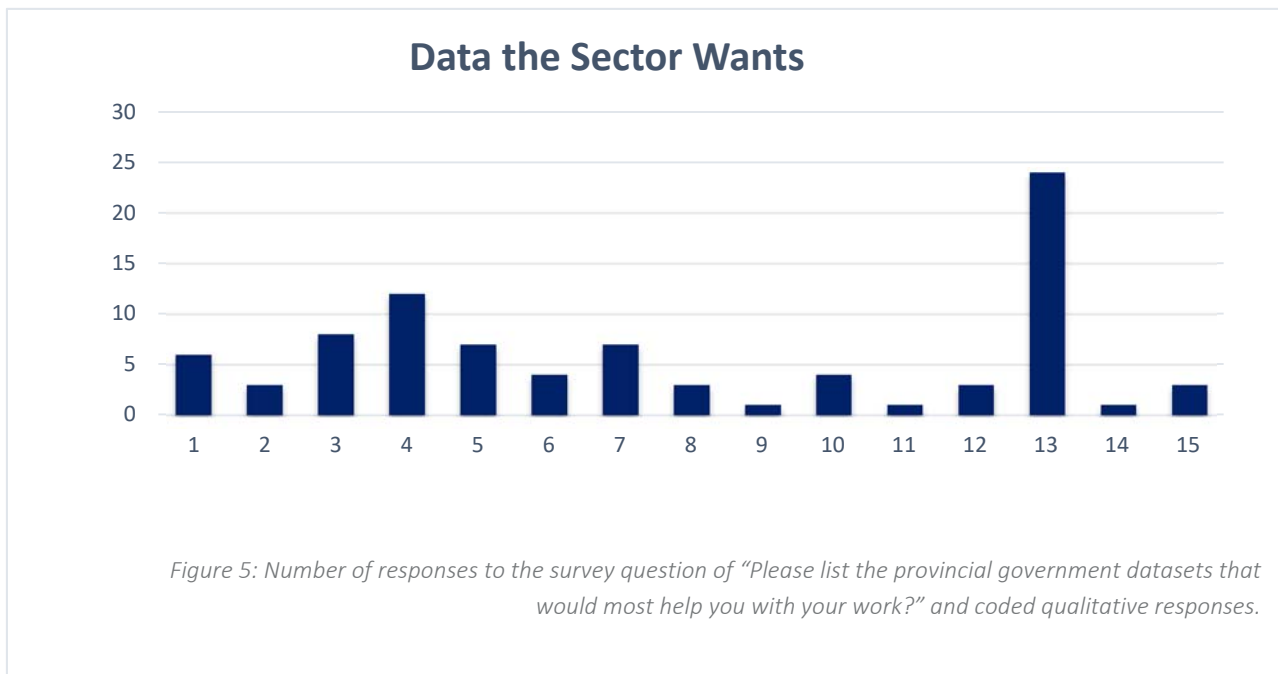
The survey answers indicated broad needs across the nonprofit and voluntary sector. Data regarding demographics, immigration, disability, and health and wellness were fairly evenly distributed. Survey respondents also provided the Task Team with important specifics on the data about the sector they are most interested in. Nonprofits want to know: how to measure and communicate their impact; the number, size, staffing, and operating costs of nonprofits across the province and in Canada; how nonprofit organizations are generating income; who is volunteering and the impact of volunteerism; and what data other nonprofits are collecting (see Figure 6).
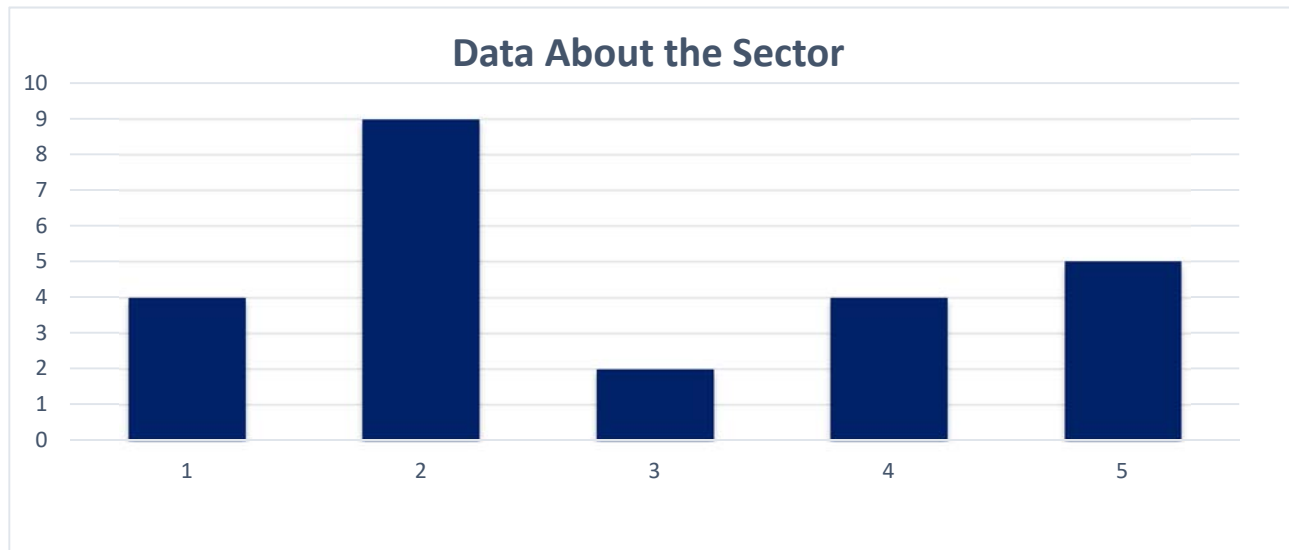
Figure 6: Number of responses and themed breakdown of data about the nonprofit sector

These responses, along with Phase I roundtable engagement, interview data, and the experiences of task team members provided the task team with a comprehensive understanding of the sector's needs related to government data.

As a direct response to the survey, the Service Alberta task team member prepared the *Open Portal Sampling Document*[10] for the nonprofit sector. This snapshot, while only a small sampling of the data available on the open portal, is a list of open datasets, reports, and legislation that correlate with the needs stated by survey respondents. This is a valuable resource that the Alberta Nonprofit Data Strategy will disseminate broadly and leverage in future work. The *Open Portal Sampling Document* also addressed the *Roadmap's* Nonprofit Sector Organization's Data Year One recommendation to:

- Prepare an inventory of surveys, reports, and research produced by nonprofit sector organizations, and develop criteria to prioritize.

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[10] GoA Open Portal Sampling Document, 2020.

SECTION THREE: The Data Hub Task Team

Background

The *Roadmap* cited a need for a data hub to support data sharing, data capacity building, and to coordinate other data related activities at the sector level. However, unlike data capacity building, data sharing, or even GoA data, this *Roadmap* focus area was a newly introduced concept. Research was necessary to better understand the following questions: Does a common understanding of what a data hub exist? In what ways could a data hub support evidence-informed decision-making in the nonprofit and voluntary sector? Who in this field can advise the data strategy on how to develop and maintain a data hub?

Significant research in the realm of data hubs occurred in 2019-2020. Interviews with key informants indicated how nonprofit stakeholders might access and use a data platform. PolicyWise also conducted an environmental scan of open data portals, data sharing platforms, and community network and data analytic sites. The environmental scan generated a long list what data platform features could meet the needs of the sector, and allowed the task team to act quickly after convening.

Interview Data

In the qualitative interviews, key informants answered: What comes to mind when you hear "data hub"?; and, What are the top needs for your subsector or the nonprofit sector more broadly that an online platform or data hub could support? A draft data hub model emerged from the interview data. Key informants envisioned the data hub to meet the needs of the sector with five components:

> **A Moderated Network:** in which users discuss data, share information and reports, and ask and answer data-related questions.
>
> **Data Support:** is available through a "data librarian" or supported through users.
>
> **Data Capacity-Building Education/Resources:** data tips, webinars, training, and resources are available on the Knowledge Hub.
>
> **Open Data:** "relevant" open data is defined by stakeholders as accessible, directly applicable reports, visualization, maps, and statistics.
>
> **Common Data Standard:** encourages nonprofit organizations toward data standardization with flexibility.

Environmental Scan

The scan began with a broad search for open data platforms, nonprofit resource hubs, and nonprofit, voluntary, and/or civil society data sharing sites (n=71). After eliminating open government portals and

sites that were just websites (for example, a website with community job postings), the remaining sites (n=24) were indexed to understand the shared and unique features across all of the platforms (see Table 1):

Data Platform (Y/N)
Defines itself as a data hub
Data can be searched
Data can be uploaded/shared
Posts collated or curated resources
Access to data is open
Access to data is moderated
Site analytic tools are available
Posting data is open
Posting data is moderated
Site posts community data
Site posts municipal data
Site posts provincial data
Site posts federal data
Site posts international data

Table 1: Data Platform Features

Two distinct types of data platforms emerged through the environmental scan analysis. The first category of platforms enable cross-system integration and allow members to access and share client data for the purposes of case planning. No public-facing information is available. The second category of platforms are more generally public platforms that share non-identifiable, aggregate data along with capacity building and analytic tools and data support.

The environmental scan generated 24 platforms for the Data Hub Task Team to engage and learn from. The results of the environmental scan, along with the components generated through qualitative interviews enabled the Task Team to develop an evidence-based hub model over the course of their work.

The Data Hub Task Team

The Data Hub Task Team brought together topic experts in nonprofit organization data sharing, data maturity, social innovation, and data platforms. Representatives from the Alberta Data Institute (co-chair), Canadian Mental Health Association Edmonton Region, Inclusion Lethbridge/ Volunteer Lethbridge, Technology Helps, Skills Society, and the YYC Data Collective (co-chair) first met in November 2019. Together, the task team co-created the following objectives:

- Utilize and build on the environmental scan and interview data to plan which data hub models could be implemented in the nonprofit sector or subsectors
- Recommend 1-2 models to implement along with estimated levels of funding, governance, infrastructure, technology support and human resources required to develop and maintain a data hub.

The Task Team prioritized developing a data hub model that was flexible enough to meet the current and future needs of the nonprofit and voluntary sector. The Task Team immediately actioned consulting the moderators of each data platform noted in the environmental scan to better understand the costs of data platform infrastructure and staffing, and the experiences of leaders who developed platforms.

Data Platform Consultations

The Task Team conducted interviews with 15 platform moderators between November 2019 and February 2020. Platform moderators answered the following questions:

- *Why did you create this data hub? Who was your target user?*
- *How did you decide what sorts of features your hub would have?*
- *What is working well, and what is not working?*
- *What sort of resources does your data hub require and how have you secured those resources?*
- *What is the future for your data hub?*
- *Do you have any advice for us as we move to develop a (sub)sector-wide data hub?*

Over two meetings in February, team members presented the information gained from interviewing the platform moderators and themed the information using an informal version of the "What/So What/What Now" reflection model.[11] Five key considerations were offered to the Alberta Nonprofit Data Strategy for the data hub:

Buy-in:
- Generate buy-in with stakeholders well ahead of and during the launch of the platform
- Leverage relationships to increase the use and traction of the data platform

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[11] https://libguides.cam.ac.uk/reflectivepracticetoolkit/models

– Create a strong roll-out strategy with a lot of supporting material, including webinars

Resourcing:

– Operating a platform is a very high-cost activity
– Plan for more than one large influx of funding so your model can evolve
– While dedicated staff is not necessary, platforms with high volumes of visitors have dedicated staff, including digital librarians and researchers
– A diversified funding stream offers flexibility in decision-making

Users:

– Have the users beta-test and/or prototype functions at every opportunity
– While not typical, many platforms have targeted and gained users with little to no technical skills

Technology:

– Focus on technology last, after engagement, buy-in, and understanding user needs
– Plan for ongoing technology support is required to stay relevant
– The search function is important and difficult to optimize to meet the needs of users

Data sharing:

– Do not underestimate the amount of work and resources required for all legal needs and developing data sharing agreements. The time and legal aspects required to share data should always be considered and accounted for.

These five considerations are incorporated into the Data Hub Project Plan.

Toward an Alberta Data Hub Model

Key informant interview data, the environmental scan, task team research and moderator interviews fed into the development of **a two-stage Data Hub Model.** The first stage, the **Knowledge Hub** (Figure 7) meets the current needs of the sector bridging open data users with data support, resources, a network, and a data standard. These foundational components enhance the capacity of new and experienced users of data.

The Data Hub (Figure 8) builds on the Knowledge Hub and introduces two additional components:
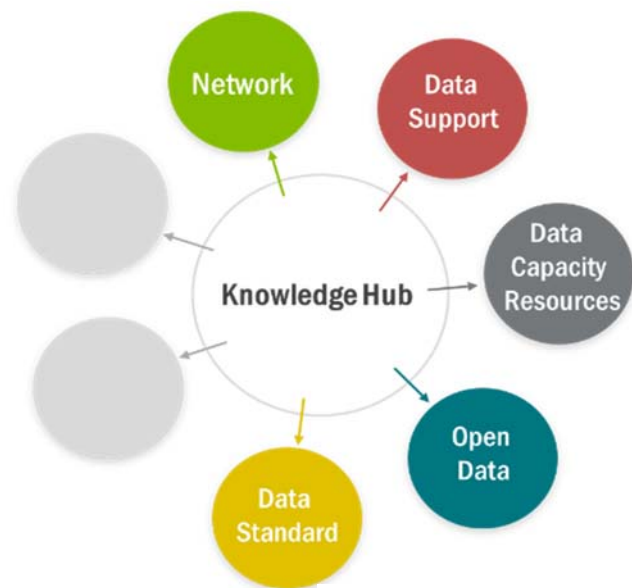
Figure 7: Knowledge Hub

Data Sharing: organizations and users can openly share data, information, and reports.

Data Analytics: a variety of applications are available to support users to analyze, present, and extract data.

This two-stage model offers many benefits to the nonprofit and voluntary sector. First, the Knowledge Hub advances opportunities for create a network through which data capacity is built, and the sharing of resources, opportunities, and relevant open data and information. Should the advice of the moderators be followed, this has the further advantages of testing features, generating buy-in, and planning for multiple stages of funding. The Data Sharing and Data Analytics components of the Data Hub can be slowly

Figure 8: Data Hub

incorporated to advance comfort and awareness of the uses of data. The two-stage model also avoids the dangerous pitfalls of creating a platform, captured by task team members in the final meeting of 2019-2019:

> *Nothing is sadder than building a data sharing hub no one shares data on…*

> *Except for maybe building the Cadillac model and it not being taken up by nonprofit organizations.*

Platform Highlights

The platforms researched by the Data Hub Task Team widely ranged in terms of accessibility, navigability, support, resources, and purpose. Four platforms stood out to the Data Hub Task Team as especially relevant to the nonprofit and voluntary sector's needs: Data Driven Detroit (D3)[12], the Halton Our Kids Network (OKN)[13], the Ontario Gambling Research Exchange (GREO)[14], and the Humanitarian Data Exchange (HDX).[15] Each of these platforms incorporates features of the **Data Hub Model** (see Figure 8). These four platforms also modeled how to incorporate navigability and accessibility improve the user experience.

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[12] https://datadrivendetroit.org/
[13] https://www.ourkidsnetwork.ca/Public/Home.aspx
[14] https://www.greo.ca/en/index.aspx
[15] https://data.humdata.org/

DATA DRIVEN DETROIT (D3)

D3 is a community-based data organization in Detroit that focuses on improving access to and use of data. Their organization goes beyond a digital platform to provide data capacity building outreach and project-based support to nonprofit organizations, foundations, universities, government, business and individuals. D3 also has evolved to become the primary data driver back to Detroit.

The D3 platform has both a "toolbox" and an open data portal. There are ten portal data categories: amenities, business & workforce, civic engagement, demographic, education, environment, health, transportation, property & land use, and public safety at differing local, state, and federal levels. The toolbox includes maps, visualizations, and other interactive tools in addition to datasets in the areas of kids & education, housing & neighborhoods, business & workforce, network directories, and demographics & more.

D3's navigable site demonstrates how data can improve and drive outcomes for the nonprofit sector. D3's project-based support, data capacity building outreach and resources, toolbox, and open portal each offer valuable considerations for the Alberta Nonprofit Data Hub Model.

THE HALTON OUR KIDS NETWORK (OKN)

The OKN supports Ontarian child, youth and family-serving agencies through its collective impact network. Their data portal offers the public open access to Halton data, alongside information, training, and guidance to its members.

The OKN data portal demonstrates the potential of a community-based subsector data platform. OKN informed the task team that their goal was that no technology or data expertise would be required for the data portal to be used. To that end, the portal offers easily accessible neighborhood maps with eight criteria. Additionally, they offer capacity building training to members multiple times a year to broaden the knowledge of the portal and the capacity of the network's members.

GAMBLING RESEARCH EXCHANGE ONTARIO (GREO)

GREO has evolved from a grant funder for research, funded by the Ontario Ministry of Health, to "an independent knowledge translation and exchange (KTE) organization that aims to eliminate harm from gambling". Their platform was first designed to build on, share, and mobilize research funded by GREO. Today on its Evidence Centre, GREO hosts open grey literature, academic data, journal articles, alongside outreach Knowledge Hubs, State of Evidence Reviews.

GREO also fosters strategic alignment across its subsector and builds community capacity to better understand and respond to gambling. These efforts, alongside the features of the GREO platform, closely align with the Data Hub Model envisioned by the Data Hub Task Team.

HUMANITARIAN DATA EXCHANGE (HDX)

HDX is an open data platform connecting that connects and shares global humanitarian data across organizations and crises. Multiple analytic tools are freely available to members, including tools to create charts, graphs, and maps, as well as tools to check and tag the data. Services targeting data literacy, policy, analysis, and network engagement are the core focus areas of the exchange. The exchange works to speed up the flow of data from collection to use, increase the number of partners connected through shared data infrastructure and goals, and ensure that decision-makers are using the right data more often.

The HDX model encompasses many aspects of a Data Hub Model: open data sharing, subsector (humanitarian crisis) focused, with data quality support and analytic tools embedded on the platform for use.

System Integration Platforms

Three additional platforms focused on the sharing of identifiable data across agencies. These models are case management systems focused on system integration across government and community agencies. Though sharing client data is not an immediate focuses for the Alberta Nonprofit Data Strategy, systems such as those referenced below are gaining traction in the human services as a way to improve client care. The Actionable Intelligence for Social Policy (AISP)[16], the San Diego Community Information Exchange (CIE) [17], and MyCompass[18] are worthwhile models to consider as the sector readies share client data across organizations and systems.

THE ACTIONABLE INTELLIGENCE FOR SOCIAL POLICY (AISP)

The Actionable Intelligence for Social Policy (AISP) is an American initiative that focuses on linking administrative data across government agencies. AISP is a backbone organization coordinating the creation and maintenance of integrated data systems (IDS) across county organizations, state agencies, and universities. AISP provides network support, resources, governance, training, and consultation on setting up IDS sites. AISP estimates that the data of roughly 36% of all Americans is linked through IDS.

AISP demonstrates how backbone organizations can support the move toward data sharing across different agencies, levels of government, and geographical locations.

SAN DIEGO COMMUNITY INFORMATION EXCHANGE (CIE)

The San Diego Community Information Exchange (CIE) defines itself as "an ecosystem comprised of multidisciplinary network partners that use a shared language, a resource database, and an integrated technology platform to deliver enhanced community care planning." Through the platform, community

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[16] https://www.aisp.upenn.edu/
[17] https://ciesandiego.org/what-is-cie/
[18] https://www.mycompassplanning.com/

care providers share and access basic client data, make and accept referrals, collaboratively plan client care, share challenges and best practices, and inform policy decisions.

The CIE has gained traction in Edmonton as a model to learn from and leverage when discussing how organizations can share client data. This innovative model leverages existing 211 infrastructure and networks in communities to create a resource database with health, human and social service providers programs, program eligibility, and intake information. The CIE enables coordinated services for complex needs individuals across sectors.

MYCOMPASS

MyCompass is an online platform designed to humanize the case management experience. This platform was conceived of and created in Alberta.

The system supports multiple users to access different views and information on MyCompass: This unique case management system has multiple types of users: the individual (person served), that person's guardian and supports, the government funder, supporting agency, and organizational staff. Case management planning and oversight and dashboards support the strategic use of data in organizations.

This data platform is gaining traction provincially as a case management tool that supports data transparency between people accessing an organization and an organization itself.

SECTION FOUR: The Newcomer Data Task Team

Background

The data sharing, data capacity, and nonprofit organization data were the planned project focus areas for this unique, subsector task team. Though overlap in existing initiatives and strategies exist, each of these three *Roadmap* areas is complex and dynamic. To best meet the sector's data sharing, data capacity building, and organizational data needs, the ABNN Data Strategy Steering Committee considered multiple approaches to forming this task team. Ultimately, the Steering Committee decided to approach known stakeholders in various subsectors to discuss how each could participate in this phase of the data strategy. Six subsectors ranging from the Arts to the Immigrant and Refugee sector were explored by committee members. The immigration and refugee (also referred to as the newcomer or settlement) sector through the Edmonton's Local Immigration Partnership (ELIP) and Alberta Association of Immigrant Serving Agencies (AAISA), demonstrated high readiness to engage.

Taking this subsector approach offered advantages. First, a growing number of data-related initiatives in different regions across the province offered the task team opportunities to learn and potentially leverage.

Second, it narrowed the task team's scope to a manageable size. Rather than attempting to address data capacity across the 26000 nonprofit and voluntary sector organizations, the task team was able to reflect on specific, tangible experiences. For example, in 2019 the federal Ministry of Immigration, Refugees, and Citizenship Canada (IRCC) published a Request for Proposals for a provincial, centralized intake system in Alberta. The current data collected by agencies on case management was lacking. Without knowing what case management entails in Alberta, and what it costs, there was risk that funding for case management would be taken away. The successful proposal pitched the *Gateway Project,* a provincial, centralized intake system for all new immigrants and refugees to Alberta. Though the *Gateway Project* has since evolved to different pilots in Calgary and Edmonton, experiences such as this grounded the task team's discussions in the realities of agencies and staff in the nonprofit sector.

Third and most importantly, a subsector task team enabled the leveraging of existing collaborative partnerships. As the backbone organization for the sector, AAISA had relationships with most task team members. Edmonton Mennonite Centre for Newcomers (EMCN), Islamic Family and Social Services Association (IFSAA), Catholic Social Services (CSS), Multicultural Health Brokers (MCHB), and M.A.P.S Alberta Capital Region are long-standing partners on the Edmonton-based Newcomer Mapping Project. EMCN, IFSAA, CSS, MCHB meet regularly as part of the Edmonton Local Immigration Partnership (ELIP). PolicyWise has established relationships with EMCN, CSS, M.A.P.S., AAISA, TIES, and the Social Enterprise Fund (SEF). The many cross-connections and established relationships on the team created a space in which frank conversations could occur.

Interview Data

Due to the broad scale of data capacity and varying understandings and competencies, key informants were asked, "*What specifically do you consider to be data capacity?"* in background qualitative interviews. Consistent themes emerged through the data analysis: nonprofit stakeholders collectively defined data capacity to be **the ability and expertise to collect, use, and share data strategically and appropriately.** They further identified the following indicators of data capacity:

- **Knowledge** of available data
- Access to appropriate **technology** and **infrastructure**
- Individual, organizational and sector **buy-in**
- Having **dedicated** staff, time, and funding to work with data intentionally.

Key informants were also generous with strategies to change and improve data capacity at organization and sector levels. The following suggestions were provided in interviews:

- A **shared data person across** a number of organizations with similar scope
- **Share Data** in trusted partnerships or relationships first
- **Change the message of data collection** from bureaucratic burden to impactful and meaningful;
- Address staff **data and technological literacy**
- **Work collectively and more closely with funders** to set the what, why's, and how's of reporting and data collection
- **Decrease confusion** about what data can be shared.

Data Capacity Opportunities

Key informants also shared their experiences sharing data in their subsector and the nonprofit sector more broadly. Without exception, those who work in the sector spoke of data sharing as risky. Informants identified the following risks associated with sharing organization or client data:

Fear of jeopardizing funding:

The barrier [to sharing data] is the harsh competitiveness of the environment. I'm not going to share my program results because that could be used competitively in a funding situation, because most organizations are competing for the same limited pools of funds…I'm not hopeful it will ever change because funders…is still funding individuals

projects. Until that changes and there is broader impact funding, we will continue to have challenges with data sharing.

Stakeholders have experienced losing control of the narrative, and/or have witnessed the data being interpreted incorrectly:

…there's an aversion to quantitative data because it's been used as a weapon against the disability sector. We don't want to lose control around the way that the story is told. That's why we have been depending on narratives for advocacy.

The sector requires clear guidance interpreting Alberta's privacy legislation and ethical guidelines:

We all have slightly different approaches… there's a lot of complexity around it, the ethics, protecting privacy…

…The biggest thing holding organizations back is how data can be shared in a way that doesn't put the organization at risk.

We don't do a good job of knowing when we are all helping the same people… I suspect we are duplicating services [but] it may be that they need that much help. How would you even do that with privacy?

In addition to these three identified risks, key informants commented on the lack of data standardization in the sector (consistency in data variables collected) and limited data capacity as barriers to data sharing. Together, this makes for a complex environment in which to share data.

However, stakeholders also spoke to the importance and benefits of data sharing. Many nonprofits expressed a willingness to share data, and stated that doing so would provide benefits to clients, organizations and the sector:

- More **effective client interventions**
- Holistic, ethical, comprehensive, and **coordinated support across sectors**
- Organizations and a nonprofit sector **better equipped to demonstrate their impact.**

The interview analysis for data sharing and data capacity building were both provided to all Task Teams at the launch meetings. This information enabled shared understandings and a strong foundation on which to plan and supplement projects.

The Newcomer Data Task Team

Representatives from the Alberta Association of Immigrant Serving Agencies, Catholic Social Services, Edmonton Mennonite Centre for Newcomers, Multicultural Health Brokers, Islamic Family and Social Services Association, M.A.P.S Alberta Capital Region, the Social Enterprise Fund, and TIES formed the Newcomer Data Task Team. Together, the group co-created the following objectives:

- Plan relevant and actionable short, medium and long-term solutions or strategies to address the data capacity, nonprofit datasets, and data sharing needs, of the newcomer sector, including the relevance of a data hub.

- If possible, plan and implement 1-3 achievable goals or strategies addressing the data capacity, nonprofit data sets, and data sharing needs of the newcomer sector, including the hub. These would require the task team to pursue and obtain funding. Deadlines for implementation should align with the timeline set out by the project sponsor (funder), and could extend past this year's work.

Given the varied needs and experiences of the sector, the data sharing and capacity challenges outlined above, and the limited timelines, a clearly defined scope was necessary. Though the objectives included the possibility of implementation, the task team limited the scope to:

- Explore emerging data practices currently being piloted in the Newcomer subsector.
- Catalogue the various data initiatives currently occurring in the Newcomer subsector.
- Determine which projects may be leveraged to contribute to the Alberta Nonprofit Data Strategy.
- Engage with stakeholders and existing networks in order to leverage their collective knowledge and expertise.
- Identify alignments with related strategic initiatives across the nonprofit sector.

As was seen in the work of the GoA Data and Data Hub Task Teams, it is necessary to first build data capacity to advance the nonprofit sector's collection, use and sharing of data. At each meeting across all three task teams, it became apparent that data capacity was both an area of opportunity as well as a barrier to the success of any Project Plan proposed.

Building data capacity is not a simple task. As described in more detail outlining the work undertaken by the Newcomer Data Task Team, enhancing data capacity requires coordinated knowledge building efforts with concerted resources and buy-in by many parties. With these considerations and the short time frame the task team was working with, it was decided at the first meeting to prioritize data capacity-building over data sharing and nonprofit organization data.

It was important to task team members that all learnings be shared broadly across the nonprofit sector to generate discussion, continue building momentum in these areas, and to demonstrate the challenges and strengths of the sector. Grounding the work in the context of the sector, which included understanding the many players and their roles was emphasized in early discussions. The Newcomer Data Task Team did not operate in a vacuum, and the work of the team was impacted in real-time by changes in the sector. IRCC for example, had just made changes to one of its funding streams, which could impact the types of outcomes targeted under the data strategy.

Finally, the task team understood that while there was existing momentum in the newcomer sector, as well as the nonprofit sector more broadly, early wins would be important. Advancing the work of the Alberta Nonprofit Data Strategy was referenced as a priority by the task team members. Establishing

sector buy-in would only occur by the creation and implementation of relevant, yet easily adoptable strategies.

The Data Initiative Scan

The *Roadmap* recommended broad sector engagement as a precursor to developing appropriate data capacity content. The qualitative interview data and the feedback gathered at the 2019 ABBN Sector Gathering provided a clear definition of data capacity, and a number of stakeholder-identified opportunities. With this knowledge provided to the team, the Newcomer Data Task Team was able to quickly begin next steps.

The Task Team conducted an informal scan of the province for known data initiatives in the newcomer sector, and the nonprofit sector more broadly. The Task Team members began with the initiatives they knew of or were involved in. Any grants related to the collection and strategic use of data, as well as data capacity were included in the scan. In all, the members were involved in 13 various data-related initiatives in Calgary and Edmonton, ranging from a local Evaluation Community of Practice to the multi-disciplinary Edmonton Newcomer Mapping Network. The lead(s) of each initiative were asked questions related to why the initiative began, what was working or not working within the initiative, and what advice they would provide to the strategy (Appendix B).

The scan and follow-up interviews were conducted In January, and the group reconvened in early February to present the information back to the task team. For each initiative the Task Team reflected together using an adapted and informal version of the "What/So What/What Now" reflection model.[19] The discussion at the table was rich. Multiple learnings and themes emerged:

Significant support for common approaches (needs assessment, data standardization, outcomes, and reporting) exists, with the caveat that the process is collaborative.

In Edmonton especially, **a small number of organizations participate in many different initiatives.** These "data champions" advance the use of evidence in and across the sector. This opportunity does come with risk (e.g. one organization changing direction could create gaps in the data ecosystem).

Data capacity building efforts are planned or established at multiple points across the data lifecycle (collecting, analyzing, sharing, preserving/discarding, reusing).

Buy-in through and across organizations is necessary to improve data capacity. When training one person, for example, in program evaluation or privacy legislation, the systems challenges remain. Data capacity efforts must target all aspects in an organization or collaborative, from the buy-in of frontline staff to the championing by Executive Directors, and with dedicated funding.

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[19] https://www.allassignmenthelp.co.uk/blog/driscoll-model-of-reflection/

Finally, it was noted that **these are not data problems, but rather, nonprofit collaborative problems.** Little to no funding exists for such collaborations. Combined with informal governance systems, they are difficult to sustain.

DATA SHARING INITIATIVES

Though data sharing as a project focus area was ultimately deferred by the Newcomer Data Task Team, it remains an area of strategic value and promise for the nonprofit and voluntary sector. Stakeholder engagement, interviews, and the *Initiative Scan* completed by the Task Team uncovered many regional and provincial data sharing efforts currently underway or currently being planned.

The *Roadmap's* data sharing recommendations reflect just how complex the current state of data sharing in the nonprofit and voluntary sector is. The following were recommended:

- Engage the sector on the ethics of data sharing and gaining informed client consent
- Learn from and leverage the work created by the Alberta Information Sharing Strategy and local data sharing initiatives
- Scan the privacy and regulatory landscape to identify the barriers to data sharing at different levels (e.g. psychologists, social workers, unregulated service providers, medical professionals)
- Document personal data anonymization and linkage tools.

Data sharing supports community agencies to collaborate together, and improve outcomes for shared clients. The Initiative Scan conducted by the Newcomer Data Task Team revealed a number of new and established data sharing initiatives at work in the Alberta Nonprofit & Voluntary Sector, which demonstrates that nonprofits across Alberta have made great strides in data-driven collaboration. Each initiative represents an opportunity to advance data capacity, including self-organized action, not only in the newcomer sector, but across the nonprofit and voluntary sector.

Collaborative for Health & Home[20]

The Collaborative for Health & Home (CHH) is a committee dedicated to improving health outcomes and housing supports through its innovative government and community partnership. The 26-partner collaborative is exploring how to improve information sharing between the health and housing care systems in Calgary. When they first began their work, the ethical dilemmas experienced at staff, agency, and sector levels became a barrier to developing shared processes. The CHH Steering Committee has since determined that the ethical considerations of sharing client information, and obtaining informed client consent to do so, required further research. An ethical framework for information sharing and training strategies for implementation are now under development.

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[20] http://calgarychh.ca/

Common Data Toolkit

PolicyWise has recently launched the Common Data Toolkit Project to develop a common data standard in partnership with Alberta nonprofit agencies. The Common Data Toolkit will be a question bank which includes a set of recommended questions and demographic data fields (identifiers, gender, Indigenous status, age, income, etc.) agencies can choose from in their design of intake and visit forms. This digital resource will be co-created with our nonprofit partners, and will include tools to support more robust and consistent collection of data such as a website, guidelines and associated knowledge mobilization guides.

Did you know?

The Alberta Information Sharing Strategy is a government-led initiative which works to enable information sharing across government and community service providers and agencies. Online courses, an Information Sharing Guide, and an Information Sharing Toolkit have been developed to guide governments, organizations, and individuals to share information about the clients they have in common. Visit www.alberta.ca/informationsharing

Common Outcomes Initiative[21]

The Common Outcomes Initiative (COI) is a provincial effort to simplify data collection and demonstrate the positive impact of community-based programs.[22] In 2011, the City of Edmonton Family and Community Support Services (FCSS), United Way of the Alberta Capital Region, and Edmonton Region Children's Services began working with their funded partners to develop a common reporting tool to reduce the administrative burden of nonprofit staff and organizations by having consistent data collected across programs. In turn, the COI publishes an annual Common Outcomes Report that highlights the work of participating programs and agencies. This initiative has evolved since its inception. In 2018, 116 nonprofit or voluntary agencies reported to COI, representing roughly 4% of all social service organizations in Alberta.[23]

Community Mental Health Action Plan[24]

The Community Mental Health Action Plan (CMHAP) is an Edmonton-area collective of community organizations and government stakeholders focused on the promotion of positive mental health and prevention of mental illness[25]. One priority of the collective is to improve information sharing across systems and agencies, by supporting data sharing across service providers. Ultimately, a web-based resource will be created to allow service providers to better understand key pieces of legislation, accreditation guidelines, and the professional codes governing information sharing in Alberta.

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[21] https://www.edmonton.ca/programs_services/documents/PDF/CommonOutcomeInitiative-CORModel.pdf
[22] Common Outcomes Report Summary, 2019
[23] Common Outcomes Report, 2018.
[24] https://www.myunitedway.ca/mentalhealthyeg/
[25] Community Mental Health Action Plan, 2016

Inclusive Supports for Marginalized Populations

The Inclusive Supports for Marginalized Populations (ISMaP) is an Edmonton-based collective impact initiative committed to "strengthening the system of care such that marginalized community members are supported, safe, respected, and empowered to achieve person-centred health and social goals".[26] The ISMaP Data Steering Committee, which launched in March 2020, will focus on the sharing of necessary client information and data with formal health and community-based supports, and ensuring ongoing strategic supports. More specifically, this Steering Committee will work at developing a common client consent form for sharing information across services, providing education on privacy and information sharing regulations.[27]

Edmonton Newcomer Mapping Network[28]

This data sharing and data capacity building initiative was created to improve the understanding of the settlement patterns, lived experiences, and cultural diversity of newcomers in Edmonton. In 2014/15, the municipal-level data on settlement patterns and program use was considered out of date and did not reference program use. When M.A.P.S. Alberta Region, an organization with the mandate to support capacity building in the nonprofit sector, began convening Edmonton service providers to gather current data, the breadth of data gaps and inconsistency in collection among the agencies became clear. The Edmonton Newcomer Mapping Network was born. Over the next year, this collaborative slowly developed a consistent approach to collecting data. The end result was a comprehensive series of maps providing relevant, neighbourhood-level information back to partnering agencies. By bringing the agencies together to share and develop information, the Edmonton newcomer sector better understands their population and gains valuable capacity.

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[26] ISMaP Common Agenda, 2019, p. 4
[27] Common Agenda 2019
[28] https://mapsab.ca/

SECTION FIVE: Toward a Knowledge-Driven Nonprofit Sector

The body of work documented in this report has culminated in concrete recommendations to advance our knowledge-driven nonprofit sector. Below, clear actions are recommended to implement in the coming years. These Project Pitches and Future Considerations are a result of the collective understanding gained from:

- Phase I stakeholder roundtables and the *Roadmap*
- ABNN engagement at the 2019 Annual Gathering
- Background interviews with key informants from the nonprofit and voluntary sector
- Research and analysis undertaken by task team members
- Task team direction and expertise.

Projects are intentionally designed to be developed further and launched by collaboratives and organizations big and small within this sector-wide effort. Leveraging existing projects and identifying additional funding opportunities are critical to the implementation of these projects as well. The projects proposed (see below) target data capacity building, data sharing, nonprofit organization data, Government of Alberta data, and the development of an Alberta Nonprofit Data Hub. Each project targets different data skill levels, capacities, and subsectors in the nonprofit and voluntary sector.

Each project focus area is identified by a unique icon:

GoA Data

Data Sharing

Data Capacity Building

Data Hub

Nonprofit Organization Data

Project Plan 1: Demonstration User Stories

> **PROJECT RECOMMENDATION**
>
> Develop Use Cases which demonstrate how nonprofits can use available Government of Alberta data using the data collected from stakeholder engagement.
> Use cases should be generated with nonprofit organizations and address an existing data Need or gap in a program, organization, or subsector. It is envisioned that the use cases will be created in such a way as to reach and inform a broad audience on the uses of open data.

Background:

The nonprofit sector can benefit from a clearer understanding of currently available data and specific examples of how and why a nonprofit would use it.

Open data portals are increasingly turning to supporting the use of open government data through the development and publication of use cases. Use cases, also known as user stories, is a well-documented accompaniment to open data portals. Generally, use cases document the subject matter, brief summary of how they were used, and the impact of using open data. GovLab, an action research centre out of NYU, has published 37 case studies on the impact of open data worldwide.[29] The European Data Portal has a "Tell us your story" form and publishes use cases directly on the portal. The New Zealand open government data program has published use cases on its portal dating back to 2012. Open Canada launched eight open data user stories in January 2020. Nova Scotia's Open Data Portal also has a small number of use cases posted.

The Sunlight Foundation[30], an American nonprofit that advocates for open government, defines open data use cases are and how they can help:

> *Comprehensive use cases describe how a specific person or persons will use open data or public information to solve a specific problem. They can help data providers to visualize the potential of open data for problem solving, without asking how exactly those problems will be solved[31]*

The Sunlight Foundation also suggests that use cases be co-created with community members to ensure the use case is relevant.

Project Activities:

The Sunlight Foundation has handily published a formula and example of a good use case:

Formula:

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[29] http://odimpact.org/index.html
[30] https://sunlightfoundation.com/2019/01/11/what-makes-a-good-open-data-use-case/
[31] https://sunlightfoundation.com/2019/01/11/what-makes-a-good-open-data-use-case/

[COMMUNITY MEMBER, CURRENT OR POTENTIAL DATA USER] needs [FORMAT OF DATA][TYPE OF DATA] from [DEPARTMENT HOLDING THIS DATA (OPTIONAL)] to [END GOAL MOTIVATING THIS USER].

Example:

Service providers with low data capacity but high subject matter expertise need easily accessible block-level neighborhood indicators from the Department of Neighborhood Services and the Police Department to make a stronger case for funding to support their work improving the neighborhood's well-being.

This project will benefit from close partnerships between a small number of nonprofit organizations and data experts. Data experts could be computing science students, community-based data groups, or nonprofits or social enterprise with experience in data analytics.

Using the data collected over the course of the Alberta Nonprofit Data Strategy and the formula provided above, it is proposed that partners generate five use cases that can be published in various formats: databytes, a short video, or a blog post.

Task Team members suggested that this could be hosted on the ABNN's website. This level of detail would be confirmed in the start-up of the project.

Project Plan 2: Data Capacity Building

> ## PROJECT RECOMMENDATION
>
> Develop an Open Data Workshop Series that focuses on the use of high-value data for people of varying data capabilities. Each workshop can be attended independently or as part of a series.

Background:

The information collected on behalf on the Alberta Nonprofit Data Strategy has created a clear picture of the data gaps, data needs, and data opportunities across the Alberta nonprofit landscape. Data capacity-building especially arose as a critical need to be addressed in all projects advanced under the data strategy.

The Newcomer, Data Hub, and GoA Data Task Teams all grounded their discussions and project plans in an understanding of existing data capacity in the nonprofit sector. Data capacity is not equal: staff, organizations, collaboratives, and subsectors are all entering the data capacity conversation at different points. These differences require the Alberta Nonprofit Data Strategy to provide opportunities for each.

This project plan connects capacity building to the use of open data specifically for several reasons:

To generate awareness of where to access timely and informative reports and information

To showcase the potential uses of open data to a broad nonprofit audience

To build nonprofit organization, funder, and government partner's motivation and capacity to share data.

Just how beneficial open data can be for any organization is directly related to the data literacy or maturity of the staff member, organization, or collaborative wanting to use it. The nonprofit uses of open data range from the simple to complex. Open data can support nonprofits to make a case for donations, grant applications, and decide the location of new services. The uses of open data are not just limited to being statistics in a report. The right data visualization with open data, for example, can generate interest and traction for nonprofits.

With an open data workshop series, there is an opportunity to build data capacity at many different levels in the nonprofit sector, including with open data.

Project Activities:

Workshops should aim to showcase the potential uses of open data and be accessible to the many different levels of users. Utilizing technology, such as webinars, can ensure accessibility outside of Alberta's urban centres. A sample workshop series may look like this:

Workshop # 1:

Create a visualization or infographic using open data and open source data

Workshop # 2:

Find open data that aligns with a question on your intake form (e.g. gender or ages of people in the organization's community, and people served in the organization), or how open data can strengthen a grant application.

Workshop # 3:

Learn how to synthesize two or more open datasets to better understand a topic or problem

Workshop # 4:

Learn how to do a comparative analysis of open datasets and compare with an internal dataset to solve a key organizational question.

The knowledge gained from each workshop could be leveraged to create or inform the creation of open data use cases.

Project Plan 3: Open Data Competition

> **PROJECT RECOMMENDATION**
>
> Partner with the Government of Alberta and an Albertan university or college to host an open data competition for the arts & culture or sports & recreation subsectors. Begin with a small initiative to develop a strong foundation for future projects.

Background:

Open data competitions are increasing in frequency as open governments expand the availability, knowledge, and use of open data. In 2019, the Government of Canada (GoC) hosted their first ever student open government challenge. According to their website[32], GoC aimed to demonstrate how open data can be used in creative ways to solve problems as well as create opportunities for students to participate in the open government community. In March 2020, the province of Nova Scotia hosted its fourth annual open data contest.

Many nonprofit data capacity building initiatives only offer opportunities to social service organizations. However, social services makes up only 10% of the over 25,205 charities and nonprofit organizations in Alberta.[33] Sports and recreation organizations make up roughly 25%, while arts & culture groups, and fundraising & volunteerism make up 9% and 8%, respectively. Organizations in these subsectors can greatly benefit from opportunities to enhance data capacity and better understand how to use open data.

Project Activities:

Consider engaging with Open Canada and Service Nova Scotia to learn from their experiences and build valuable partnerships across Canada in the open data movement.

Ideally, this project would be a joint effort between three partners: Service Alberta, a nonprofit organization on behalf of the Alberta Nonprofit Data Strategy, and a university program such as the School of Business or computer engineering. Partnering with large institutions offers financial and technical benefits to the project. University students in such a program could provide nonprofits with the data expertise required. This could benefit both the nonprofits to build data capacity, as well as the students to form relationships and gain an understanding of the nonprofit sector. Through such interactions, students are also introduced to a future career path in the nonprofit sector.

Sponsorship by the government and/or the university would be required to provide a cash prize to the winning nonprofit(s).

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[32] https://open.canada.ca/en/stories
[33] Government of Alberta, 2018).

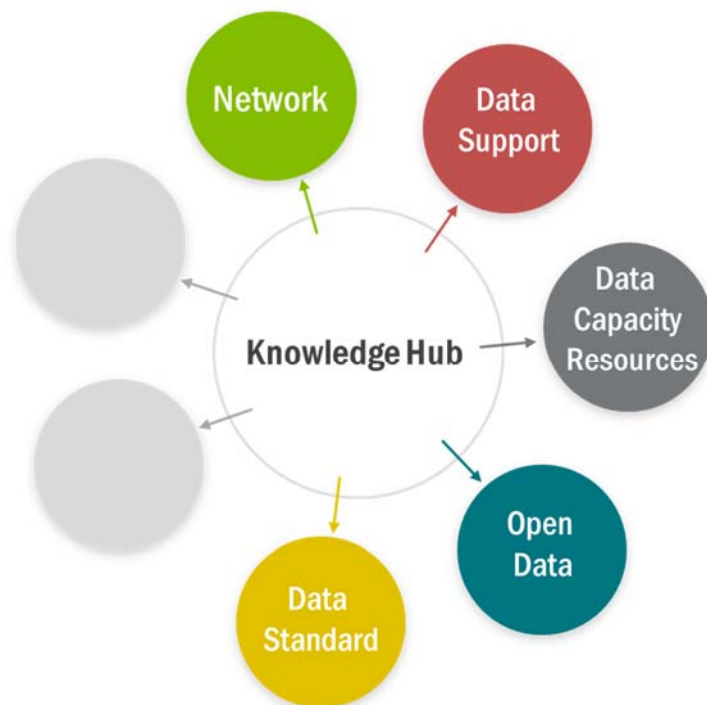# Project Plan 4: The Knowledge & Data Hub

> **PROJECT RECOMMENDATION**
>
> Develop the Data Hub over time in a two-stage model. Work closely with community-based experts and data champions to explore funding opportunities. Leverage the data collected in 2019-2020 to build on, including the advice provided by data platform moderators.

Background

This two-stage model offers many benefits to the nonprofit and voluntary sector. First, the Knowledge Hub advances opportunities for create a network through which data capacity is built, and the sharing of resources, opportunities, and relevant open data and information. Should the advice of the moderators be followed, this has the further advantages of testing features, generating buy-in, and planning for multiple stages of funding. The Data Sharing and Data Analytics components of the Data Hub can be slowly incorporated to advance comfort and awareness of the uses of data. The two-stage model also avoids the dangerous pitfalls of creating a platform, captured by task team members in the final meeting of 2019-2019:

> *"Nothing is sadder than building a data sharing hub no one shares data on…"*

> *"Except for maybe building the Cadillac model and it not being taken up by nonprofit organizations."*

A Moderated Network: in which users discuss data, share information and reports, and ask and answer data-related questions.

Data Support: is available through a "data librarian" or supported through users.

Data Capacity-Building Education/Resources: data tips, webinars, training, and resources are available on the Knowledge Hub.

Open Data: "relevant" open data is defined by stakeholders as accessible, directly applicable reports, visualization, maps, and statistics.

Common Data Standard: encourages nonprofit organizations toward data standardization with flexibility.

The Data Hub builds on the Knowledge Hub and introduces two additional components:

    Data Sharing: organizations and users can openly share data, information, and reports.

    Data Analytics: a variety of applications are available to support users to analyze, present, and extract data.
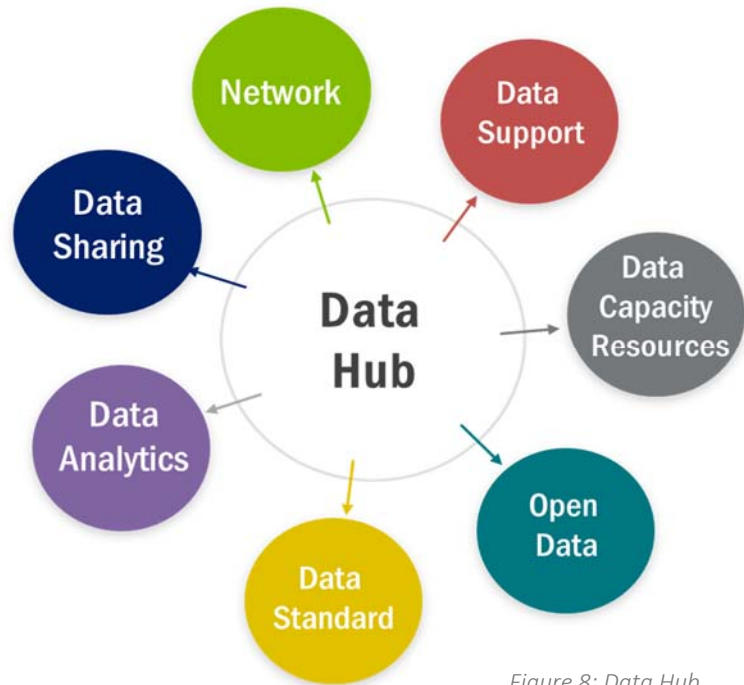
GOVERNANCE & FUNDING

The platform moderators who shared start-up and maintenance costs of their platform advised the task team

Figure 8: Data Hub

to establish a diversified funding stream with three stages of funding: one large influx at the beginning, a second large influx one to three years later to expand or adjust the features of the platform, an ongoing operational costs.

Three data platform moderators shared costs to create and maintain their hub. The budget varied extremely for those that did. All are included here, and anonymized.

    Example 1: $800 000 start-up costs over several years of development, maintenance of the site done by in-kind services across multiple organizations.

    Example 2: $35 – 40 000 annually for web development. Funding for a full-time librarian with digital language knowledge; two days per month of staff time for research and writing; and six plain language writers paid per data publication.

    Example 3: two students full-time to develop and launch the platform, and roughly 25 hours a month for maintenance and updating.

The costs can vary significantly across platforms depending on the features of the platform and the organization behind the platform. D3, for example, was launched as "as a one-stop-shop for data on Detroit and the region,"[34] and now has a full-time staff of nine. In other cases, the data platform is the avenue to share knowledge created by in-kind support of contributing organizations.

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[34] https://datadrivendetroit.org/blog/2018/03/20/history-of-d3/

Detroit and the region,"[35] and now has a full-time staff of nine. In other cases, the data platform is the avenue to share knowledge created by in-kind support of contributing organizations.

The funding opportunities listed below are only a snapshot of what is available to create an *Alberta Nonprofit Knowledge Hub.*

SOCIAL SCIENCE AND HUMANITIES RESEARCH COUNCIL GRANT (SSHRC)

More than one data platform gained start-up funding from a SSHRC. The SSHRC Partnership Grant[36] is a 4-7 year grant with two stages. Stage 1 is $20000, Stage 2: is up to $2.5 million. It is intended for "large teams working in formal collaboration between postsecondary institutions and/or organizations of various types. The SSRCH Transformation Grant[37] is a $2 million to $4 million dollar grant to support large-scale interdisciplinary research projects that create "a significant and real change impact" by proposing a "novel world-leading approach". Grants can be held for up to six years.

NATURAL SCIENCES AND ENGINEERING RESEARCH COUNCIL OF CANADA (NSERC)[38]

NSERC grants support university researchers collaborating with the private, public or nonprofit sector organizations. The grants available are from $20 000 to $1 million per year, for 1-5 years. Alliance grants support research creation and mobilization, and cross-disciplinary collaboration.

EDMONTON COMMUNITY FOUNDATION (ECF)[39]

ECF Community Grants provide funding for operation needs, including equipment, infrastructure. Grants range from between $50 000 for a first-time applicant and $80 000 for a second time applicant. Calgary Foundation.[40] The Engage Citizens Community Grant supports initiatives that pilot new programs and create new opportunities, among others. Only registered charities are eligible to apply.

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[35] https://datadrivendetroit.org/blog/2018/03/20/history-of-d3/

Project Plan 5: Tips & Tricks

PROJECT RECOMMENDATION

Partner nonprofit organizations with community-based data experts to create and disseminate "Tips & Tricks" Toolkit. This toolkit will build on the *Open Government Portal Sampling Document* created for the Alberta Nonprofit Data Strategy. Tips & Tricks will outline specific uses of the data in the nonprofit context to build an engaged community of people that regularly use data together.

Background:

Alberta nonprofit and voluntary sector stakeholders require access to timely information to enable the nonprofit sector to:

- **Advocate** for system-level policy changes
- Better **understand the impact** nonprofits have in their communities
- Make **evidence-informed decisions**
- **Drive outcomes** of organizations and programs
- **Answer key organizational, community, and sector questions** (e.g. who is settling in Alberta? How many privately sponsored refugees come to this province? What services are they accessing?)
- **Easily access the right data at the right time,** for example, when applying for a grant.

A wealth of information to support the above actions available to the sector, both on the GoA Open Portal and in reports generated by the nonprofit sector, such as the CCVO State of the Sector Report[41]. However, many nonprofit stakeholders remain unaware of what information they have access to, or may unsure of to use available data to advance the needs of their organization or the sector.

The data nonprofit and voluntary organizations consider to be high-value are documented in this report, and are largely referenced in the *Open Government Portal Sampling Document* created by the Alberta Nonprofit Data Strategy.

Project Activities:

To enable the nonprofit sector to easily use the available data to meet their collective needs Tips & Tricks should be developed by nonprofit organizations in partnership with community-based data experts. The toolkit, through both its development and when effectively mobilized, will support the development of a strong network of data champions, and enhance the ease in which nonprofits can access the information they need, when they need it.

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[41] https://www.calgarycvo.org/state-of-the-alberta-nonprofit-sector

Over time, Tips & Tricks will increase nonprofit stakeholders' exposure to open data and comfort level exploring the GoA Open Government Portal. By increasing the knowledge of available information, and how to use it, the sector collectively builds an engaged community of people that regularly use data together.

Knowledge Mobilization will be key to disseminating Tips & Tricks. It should be shared broadly among provincial stakeholders and continue to be developed in partnership. This toolkit will support the nonprofit sector to have a quick reference to the types of open data available to the nonprofit sector.

Project follow-up could include working with the ABNN to do a follow-up survey of its membership six months after Tips &Tricks publication to ask:

1) Did you try to use any of the datasets?

2) What were your successes?

3) What were the stumbling blocks?

4) Would you try again?

5) What additional information is needed to make it more useful?

Similar to the User Stories a repository of the Tips & Tricks can be hosted on a central platform such as the ABNN website.

Project Plan 6: Data Librarian

> **PROJECT RECOMMENDATION**
>
> Create a data librarian position to support organizations improve their strategic use of data, build a strong network of data champions, and share resources.

Background

The concept of a data librarian was introduced over the course of an interview with a nonprofit sector key informant. When asked how to address data capacity in the nonprofit sector, the information answered:

> *What would be more helpful, is if we could have a shared person with others in the sector, to have a position where you are collecting data, and to check the data to see if that data will help us with reports. I don't think it makes sense to build it within an organization, but more within a sector.*

> *The data hub would need a "librarian". When you go to a library someone shows you how to look things up. This is the problem. I'd be excited if the data hub came with supports and helped me navigate, that would be great.*

This concept was introduced and discussed across all task team and was positively received. Data capacity-building is effective when engaged communities of people regularly discuss and use data together.

Project Activities:

Initially, it may be difficult to maintain a full time nonprofit data librarian function at an independent nonprofit agency. This project plan intends for demand for, and knowledge of a data librarian's expertise to grow slowly over time until nonprofit agencies. A phased approach can be considered:

- Phase 1:
    - Partner with municipal library system or academic library systems to develop a part-time position in partnership and with existing resources. This may be an in-kind contribution or supported by a small grant.
    - Initially, the scope of service should be limited to a feasible focus area such as a data librarian that can help with grant applications using open municipal, Government of Alberta or Government of Canada open data.

- Phase 2:

- As the data librarian is able to respond to more information requests in Phase 1, demand for the service will increase. This early evaluation data will support a larger ask of funders to support a full-time position with a wider scope of service.

- This position may remain at a library environment or be moved to a nonprofit host organization. Potentially the same as that is hosting the Knowledge Hub.

- Phase 3:

  - Once demand grows, multiple positions may be required. Scope of the data librarian may also increase or take on specialties beyond gathering of information, such as data visualization and storytelling.

  - Cost-recovery should be introduced either as a fee-for-service model, a subscription model, or a network model. A network model would involve a network of agencies that fund a shared position together. This would also be relevant in a subsector context, in that a subsector, or a subsector umbrella organization may fund such a data librarian who would have expertise in that particular subsector. Again, potentially in conjunction with a subsector data hub.

With a phased approach, costs can grow with demand rather than requiring a large initial commitment. This will also allow the nature of the data librarian to evolve and specialize as the sector learns more about what needs are best met through such a data librarian versus building such capacity internally.

Project Plan 7: Resource Sharing & Engagement

PROJECT RECOMMENDATION

Plan to intentionally share the awareness of tools and strategies discovered by stakeholders and t___
team members over the 2019-2020 year. Leverage the relationships developed through the Alber___
Nonprofit Data Strategy to share known resources and create strategic alignment between initiati___
and tools, such as those developed by DataBasic, Data Orchard, and PolicyWise.

Background

Many tools, references, projects, and initiatives were discovered by the Alberta Nonprofit Data Strategy partners and contributors over 2019-2020. Significant research was conducted, which built on the Phase I learnings.

As the Alberta Nonprofit Data Strategy evolves, and with an ever-shifting landscape, it remains important to ensure the learnings gained from 2018-2020 be accessible and used to inform future work whenever possible.

Project Activities

Work with community partners to test and advance existing tools created by data champions and organizations. For example, DataBasic[42] lists the following four elements of nonprofit data culture:

- Leadership prioritizes and invests in data collection, management and analysis/knowledge production.
- Leadership prioritizes creative data literacy for the whole organization, not just for IT people, data journalists or program evaluators;
- Staff are encouraged and supported to access, combine and derive insight from the organization's data; and that
- Staff recognize data when they see it. They offer creative ways to use the organization's data to solve problems, make decisions, and tell stories.

DataBasic has created the data culture project, an online learning program designed to improve data culture for all staff within a nonprofit organization. They provide two activities, each with a set of guiding facilitation videos.

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[42] https://databasic.io/en/

Project Plan 8: Data Entry is Caring

> **PROJECT RECOMMENDATION**
>
> Support organizations to build a data culture by re-messaging data collection from a bureaucratic burden to an action of care.

Background:

At all intersections of engagement throughout the Alberta Nonprofit Data Strategy, the buy-in of front-line staff (in the social serving sector) to data collection and entry was repeatedly discussed as a barrier to the quality of organizational data.

Reasons for a lack of buy-in to data collection include:

· A lack of training in areas such in basic digital and technological literacy, both in educational and occupational settings;

· Pervasive messaging and culture of the "burden" and "bureaucracy" of data collection throughout an organization or sector; and

· No pay-off for those tasked with collecting and inputting data.

Shifting the message of data collection **from a bureaucratic burden to an action of care** creates opportunities for staff at all levels of an organization to buy-in to understanding data as valuable.

Project Activities:

Each organization experiences different reasons for low buy-in for consistent data collection. Opportunities to support organizations to communicate and demonstrate the outcomes related to quality data must respond to the needs of many organizations. Examples include:

· Respond to the needs of staff when it comes to documents (e.g. an intake form). What makes their lives easier?;

· Demonstrate how quality data enables an organization to improve on mental health programming staff;

· More effective programming for clients due to more effective use of funding within an organization, or a new funding stream gained by a clearly articulated proposal;

· A clear privacy standard; and

· A document or piece of information that makes their lives easier.

A campaign to shift behaviour may benefit from the support of an umbrella organization. For example, this could be a campaign led by the ABNN, ECVO, CCVO, or a large funder such as the ECF.

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Appendices

Appendix A: Data Hub Task Team Interview Guide for Data Platform Moderators

1. Why did you create this data hub? Who was your target user?

   a. Has the demographic of that user changed or shifted?

2. How did you decide what sorts of features your hub would have? (e.g. E.g., an educational component, a networking capacity, a Q&A forum, a data warehouse)

   a. What other options or features did you consider but ultimately choose not to include? Why?

3. What is working well and not working?

   a. If you knew what you know now, what would you change?

   b. The biggest challenge?

4. What sort of resources does your data hub require and how have you secured those resources?

   a. Infrastructure/technical resources and capacity

   b. Human resources

   c. Funds

   d. Governance (who runs what? How was that decided?)

5. What is the future for your data hub? (e.g. any plans for expansion?)

6. Do you have any advice for us as we move to develop a (sub)sector wide data hub?

Appendix B: Newcomer Data Task Team Interview Guide for Data Initiative Exemplars

1. Why did you begin this initiative? Who was your target participant?

   a. Has the demographic of that user changed or shifted?

2. How did you decide on the programming (timing, delivery, etc)?

3. What is working well and not working?

   a. If you knew what you know now, what would you change?

   b. The biggest challenge?

4. What would you say in the biggest impact of your initiative?

5. What sort of resources does it require and how have you secured those resources?

   a. Infrastructure/technical resources and capacity

   b. Human resources

   c. Funds

   d. Governance (who runs what? How was that decided?)

6. What is the future for your initiative? (e.g. any plans for expansion to provincial, broader scope, different target participant?)

7. Do you have any advice for us as we move to develop a (sub)sector wide data capacity initiative?