

# Alberta Nonprofit Data Strategy Roadmap

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# Building a Foundation for an Alberta Nonprofit Data Strategy

## Roadmap - February 2019

### 1. Background

This is a high-level Roadmap that has been developed to outline initiatives and projects related to the Alberta Nonprofit Data Strategy over the next three years. It was developed taking consideration of the feedback from the stakeholder engagement sessions held in September, October and November. The complete feedback can be found in a separate document (1) and a short summary is provided below.

#### Data about the Sector – Datasets

- Statistics Canada
- Canada Revenue Agency
- Service Alberta / Registries
- Nonprofit / Umbrella / Surveys / Research
- Labour / Workforce / Staff
- Funders / Grants / Funding
- Agricultural Societies
- Alberta Tax / OSI
- Alberta Gaming, Liquor and Cannabis
- Municipal / City / Neighbourhood
- Alberta Health / Alberta Health Services
- Social Issues
  - Housing / Homelessness
  - Children’s Services
  - 211 / Community Services
- Other
- Local – General, Calgary, Edmonton, Lethbridge

#### Data held by the Sector – Datasets

- Clients / Services
- Evaluation / Outcomes / Impact
- Nonprofit / Umbrella / Surveys / Research
- Government Sources
- Funders / Grants / Funding
- Labour / Workforce / Staff
- Volunteers
- Financial / Billing
- Social Issues
  - Health / Mental Health
  - Housing / Homelessness
  - Violence
  - Children’s Services

- 211 / Community Services
- Education
- Food
- Social Issues – other
- Other
- Local – General, Calgary, Edmonton, Red Deer

#### **Data External to the Sector - Datasets**

- Statistics Canada / Census
- Government Sources
- Nonprofit / Umbrella / Surveys / Research
- Economic / Financial
- Canada Revenue Agency / Tax
- Municipal / City / Neighbourhood
- Health
- Social Issues – other
- Funders / Grants / Funding
- Private sector
- Other
- Local – Calgary, Edmonton, Lethbridge

#### **Challenges and Opportunities – Data About, Held and External**

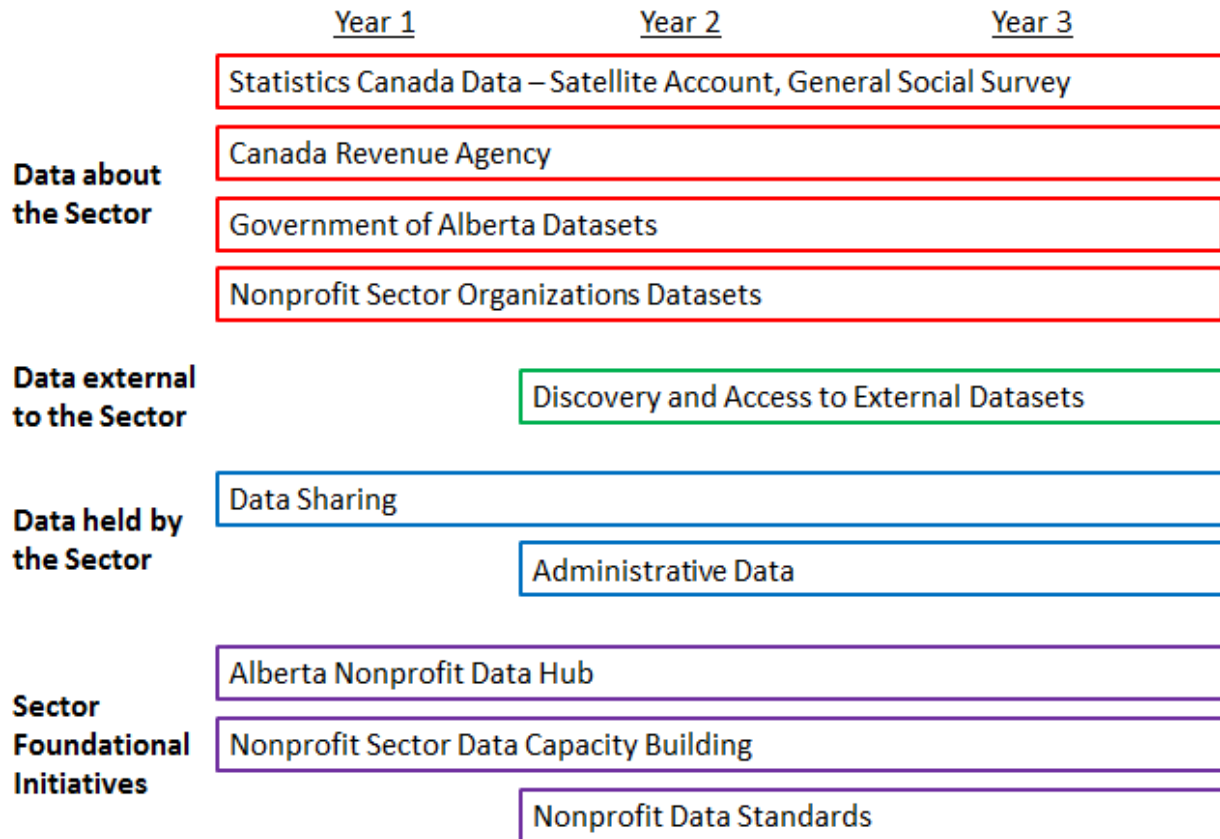
- Capacity / Resources / Skills
- Data Collection / Types of Data
- Standards / Data Quality
- Privacy / Regulations / Data Sharing
- Accessibility
- Technical / Infrastructure / Repository
- Culture / Mindset
- Sector Co-ordination / Collaboration
- Rural Issues
- Other

The Roadmap outlined below was developed from the Alberta perspective. It focuses on initiatives and projects that can be executed on the provincial level and be used to help inform and broadly support the local level. There are so many potential nonprofit data initiatives with such diversity that it will be impossible to address all of the specific datasets, challenges and opportunities at the organizational level. Thus the objective from the Alberta Nonprofit Data Strategy perspective is to focus on high-level datasets with broad applicability and to develop frameworks / infrastructure that would provide foundational value to the nonprofit sector across the province.

The suggested approach for the Alberta Nonprofit Data Strategy is to learn by tackling a series of smaller initiatives and projects as opposed to developing one large theoretical position paper. The Roadmap is action orientated and over time will provide the evidence necessary to build the components of the provincial nonprofit data strategy.

Initiatives and projects that are part of the Roadmap are outlined in detail in Sections 3-6 of this document. For reference a summary is shown below;

### Alberta Nonprofit Data Strategy – Roadmap Initiatives and Projects



The Roadmap as outlined above is ambitious. High-level priorities are suggested in the relative timing of the various initiatives and projects that would be pursued in order to address the key challenges and opportunities determined in the stakeholder consultations.

The number of initiatives and projects that can be launched and carried out simultaneously will ultimately be determined by the level of interest and capacity of stakeholder organizations as well as the resources available to the sector. The initiatives and projects can be considered to be building blocks that can be assembled in a variety of ways to best meet the needs of the nonprofit sector.

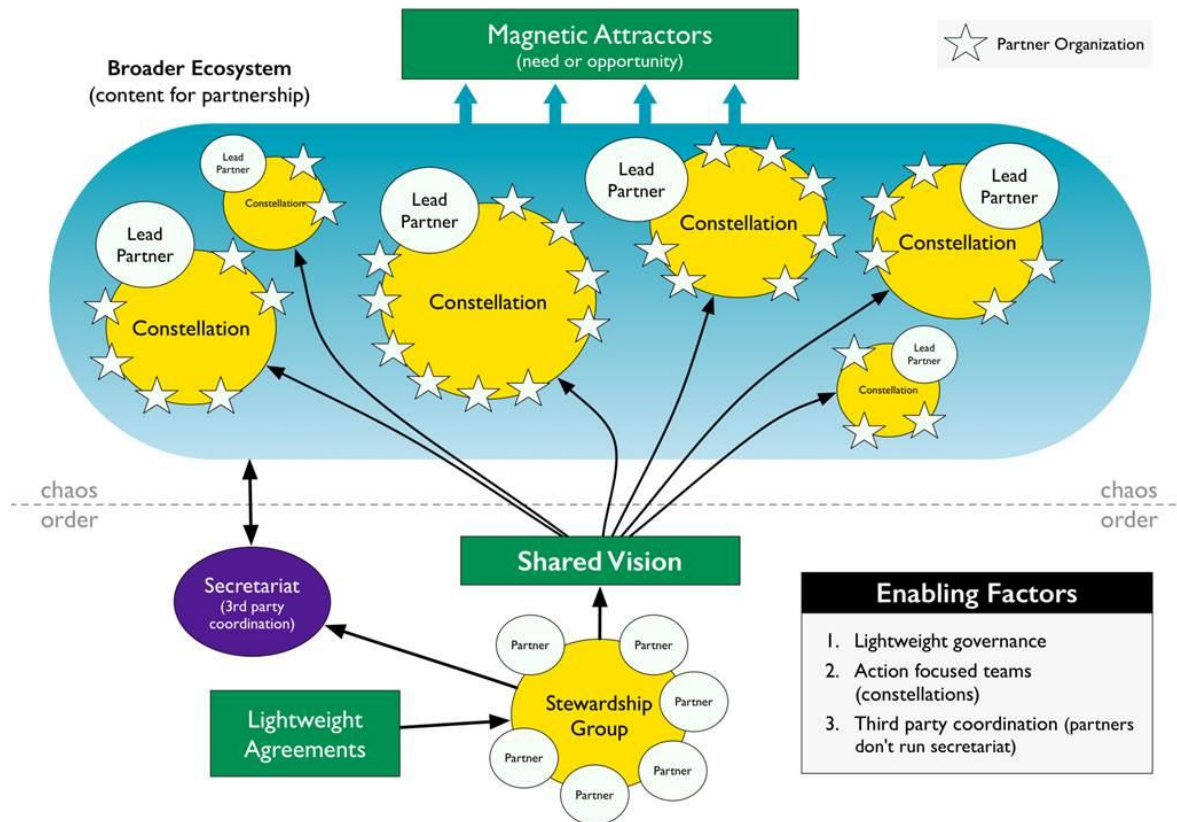
Broad consultation within the sector will be necessary to address the factors outlined above. Sustained momentum for the Alberta Nonprofit Data Strategy and the organization of the Roadmap implementation will require an effective governance model. This is discussed in the next section of this document.

## 2. Organization of Future Initiatives and Projects

### 2.1 Constellation Governance Model

#### Year 0 (part of current project)

This model reflects lightweight governance with a bias for action. It involves 3<sup>rd</sup> party co-ordination through a Secretariat (2).



**Note:** this graphic is based on the diagram included in the 2008 article, *Listening to the Stars: The Constellation Model of Collaborative Social Change*, by Tonya Surman and Mark Surman

Additional characteristics of this model include the following (3);

1. Lightweight governance where:
  - Partnerships are created to respond to specific needs or opportunities
  - Partnership is governed by lightweight agreements (no legal entities created)
  - A stewardship group provides overall strategy and terms of reference
  - The prevailing rule-of-thumb is to have “as little process as possible”
  - Most authority and decision making resides at the working (team) level
2. Action-focused teams (constellations) that:
  - Are small and self-organizing

- “Flow” towards the need or opportunity
- “Build on energetic leadership”, leveraging self-interest
- “Are loosely coupled”; forming and dissolving; creating a rough and chaotic whole

3. Third-party coordination that:

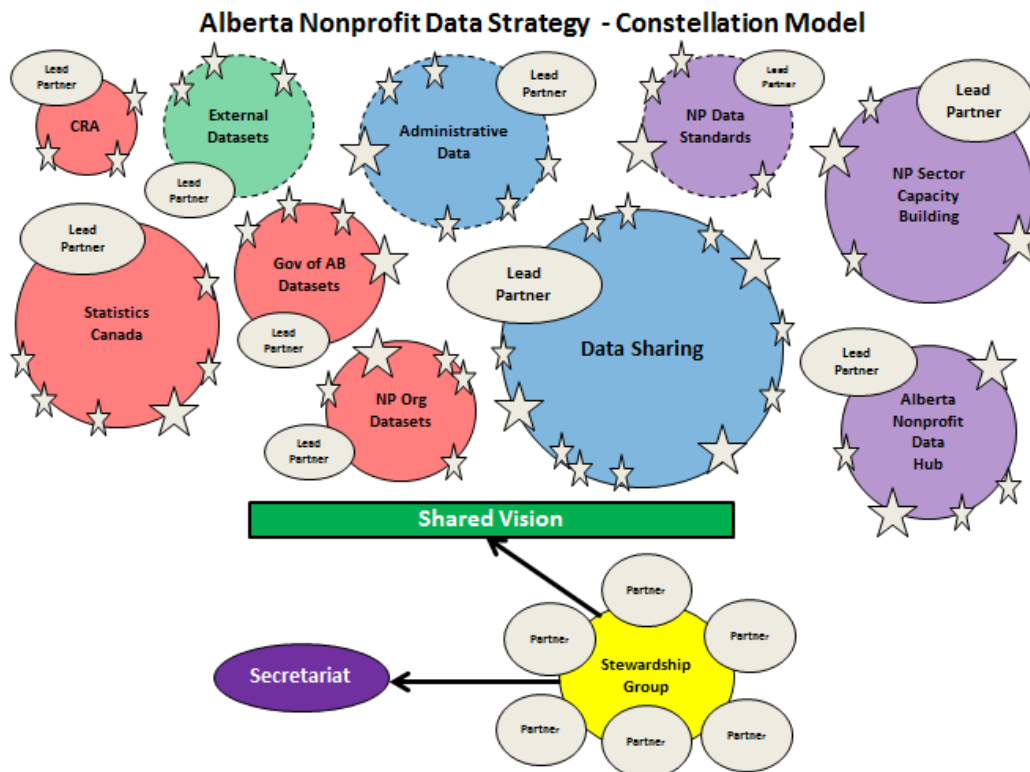
- “Manages day-to-day coordination of the partnership”
- “Resides outside of the core partners” (freeing partner resources for action)
- Ensures all partners have opportunity to lead (a team)
- Facilitates coordinated (cross-partner) fundraising
- Troubleshoots problems; e.g., conflict resolution

Implementation of this model in context of the Alberta Nonprofit Data Strategy could have the following components;

Stewardship Group – Current project Advisory Committee members supplemented with a small number of additional organizations (i.e. PolicyWise, ABNN Exploration Committee members for regional balance, etc.).

Secretariat – Long term form to be determined but initially could be an office established through the Alberta Nonprofit Network that would have sufficient human and financial resources.

Constellations - Initiatives and projects outlined in the Roadmap could be considered to be Constellations that would attract partners with an interest in participating. One of the partners with the necessary capacity would become the Lead Partner. The Constellation would decide on the objectives and scope of work. Funding would be pursued if necessary supported by the Secretariat.



## 3. Data about the Sector

### 3.1 Statistics Canada Data - Leveraging Imagine Canada Nonprofit Sector Data Initiative

#### 3.1.1 Satellite Account of Non-profit Institutions and Volunteering: 2007-2017 Update

##### **Year 1**

Support the work of the national bodies that doing work in this area and bring an Alberta perspective. Determine what capacity is needed to disseminate and utilize data, knowing that Culture & Tourism is hiring a data scientist to spend half time on non-profit sector data.

Statistics Canada has in the past provided a significant amount of data about the nonprofit sector through its Satellite Account but not recently. A one-time update has been prepared by Statistics Canada and will be released in 2018 / 2019. This update as described below (4) will be a valuable source of information. The update should be accessed and analyzed as the data is released.

In collaboration with Imagine Canada, Statistics Canada has committed to a one-time update of satellite account estimates for the period 2007 to 2017, expanded to include a provincial and territorial dimension and covering economic contribution (gross domestic product), employment and sources of income. We are actively working with partners to identify sources of funding to create the capacity for an ongoing statistical program.

Such an injection of capacity at Statistics Canada would enable, for example:

- Regular ongoing macroeconomic statistics on Canada's overall non-profit sector, fully comparable with standard macroeconomic indicators, such as the GDP.
- The future potential for extensions in specific areas (for example, characteristics of employment, volunteer activity, financing and wealth).
- Strengthening of data quality throughout the statistical system via the ongoing maintenance of a statistical frame of non-profit entities on Statistics Canada's business register.
- The potential to develop research files at the entity level, comprised of administrative and survey data, via Statistics Canada's Centre for Business Special Projects linkable file environment.

##### **Year 2**

Work with stakeholders to reinstate surveys in addition to the update and other work items as outlined above. Acquire and analyze data in detail from the Alberta perspective..

##### **Year 3**

Continue efforts as part of the stakeholder community and leverage the full range of data about the nonprofit sector produced by Statistics Canada

### 3.1.2 General Social Survey

#### Year 1

The General Social Survey is produced by Statistics Canada on a variety of topics on a rotating basis. Of particular interest to the nonprofit sector is the Survey of Giving, Volunteering and Participating as outlined below (5).

- 2018 Survey of Giving, Volunteering and Participating (data release in 2020)
  - Collecting information on how Canadians:
    - volunteer their time
    - donate money and in-kind gifts to charitable and non-profit organizations
    - provide direct help to others and to their communities
    - use the internet to participate in groups and online charitable giving
    - are aware of organizations that monitor how charities use donations
  - 2018 survey also includes information on the quality of the volunteer experience and skills used while volunteering
  - Partnership of federal government departments and voluntary sector organizations: Canadian Heritage, Health Canada, Employment & Social Development Canada, Canada Revenue Agency, Department of Finance Canada, Imagine Canada, Volunteer Canada and the University of Ottawa

Along with other stakeholders participate in the Modernization of General Social Survey Program as outlined below (6).

- Evolving and emerging needs for social data, changes in technology and technology use, together with declining GSS response rates point to the need for a modernization of the GSS program
- Modernization builds on strengths: capacity, reputation, public trust, gold standard data
- It is anchored in the pillars of Statistics Canada Modernization: sharing & collaboration, user-centric service delivery, leading edge methods and data integration, statistical capacity building and leadership, modern and responsive workforce
- Resulting in a GSS better- positioned to measure the social activities and condition of the people in 2021 and beyond (*Statistics Act*)
- Statistics Canada is renewing and modernizing to address these challenges, a process based on five pillars:



Sharing and collaboration



User-centric service delivery



Leading edge methods and data integration



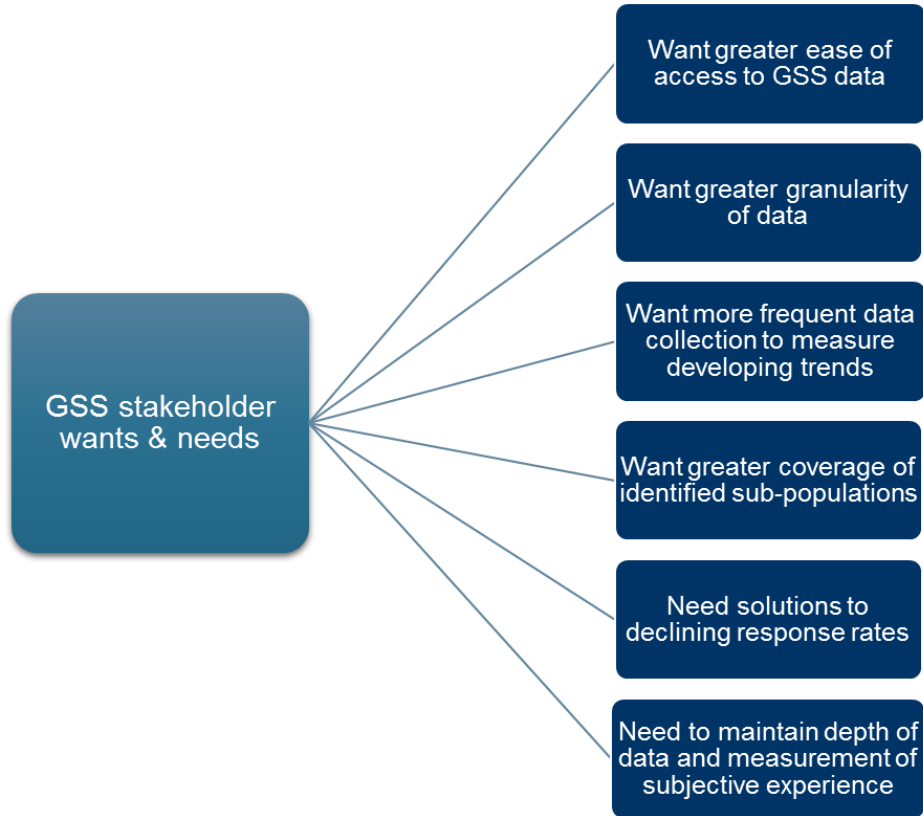
Statistical capacity building and leadership



Modern workforce and flexible workplace



- Key findings to date:



**Year 2**

Analyze the data released in Jan 2020 and public microdata in fall 2020 as an important addition to data about the nonprofit sector.

**Year 3**

Acquire and analyze data in detail from the Alberta perspective.

### 3.2 Canada Revenue Agency

**Year 1**

Continue efforts that are already underway by Alberta Culture & Tourism and Office of Statistics & Information (Alberta Treasury Board and Finance) to obtain better access to and analysis of charity related taxing filing data.

## **Year 2**

Investigate ways to make data currently collected by CRA Charities Directorate more accessible to the nonprofit sector in Alberta. Acquire and analyze data in detail from the Alberta perspective.

## **Year 3**

Develop an understanding of the Charities IT Modernization Project (CHAMP) and participate by providing input from the Alberta perspective where appropriate. Information on the project from CRA is provided below (7);

- To reduce the administrative burden on charities, the Canada Revenue Agency (CRA) is modernizing its Information Technology (IT) systems to provide new online service options.
- In June 2019, the Charities Directorate will make several new e-services available as part of this initiative:
  - [Form T2050, Application to Register a Charity under the Income Tax Act](#), will be replaced by a new online application for registration.
  - Registered charities will be able to complete and file their [T3010 Registered Charity Information Return](#) online through CRA's My Business Account.
  - Charities will be able to update their organization's information online and correspond with the Directorate electronically through My Business Account.

## **3.3 Government of Alberta Datasets**

### **Year 1**

Take a systems approach to determine what datasets are priorities and look for quick wins. Compile data currently available and make it accessible to the nonprofit sector in Alberta. For example the following reports themselves and the key datasets used in their preparation should be widely released;

- Profiling the Nonprofit/Voluntary Sector in Alberta (8)
- Nonprofit Voluntary Sector Supplemental Report to the 2017 Alberta Wage and Salary Survey (9)

Work with a cross section of Government Ministries and Departments to develop an action plan for making additional datasets available. This initiative should be authorized and supported by the Alberta Nonprofit and Voluntary Sector Initiative (ANVSI).

### **Year 2**

Based on the action plan make additional datasets available on an ongoing basis as barriers and challenges are addressed. This would include more detailed data from Service Alberta / Registries and other sources not currently available as identified in the stakeholder consultation.

## 3.4 Nonprofit Sector Organizations Datasets

### *Year 1*

Prepare an inventory of data about the sector (i.e. surveys, reports, research) produced by nonprofit sector organizations and develop criteria to prioritize. Leverage CCVO's Alberta Nonprofit Survey.

### *Year 2*

Develop an online compilation of the datasets and/or links to data and reports with improved access widely across the sector. Consider utilization of the Alberta Nonprofit Data Hub as a platform to enhance access (potentially as one of the initial pilot projects).

## 4. Data external to the Sector

### 4.1 Discover and improve access to external datasets

#### *Year 2*

Confirm needs and priorities of the nonprofit sector for external data. Using an approach similar to that outlined for Data about the Sector prepare an inventory of external data identified in the stakeholder consultation.

#### *Year 3*

Develop an online compilation of the datasets and/or links to data and reports with improved access widely across the sector. Consider utilization of the Alberta Nonprofit Data Hub as a platform (potentially as one of the initial pilot projects).

## 5. Data held by the Sector

### 5.1 Data Sharing

#### *Year 1*

Engage in consultations and workshops on the foundational elements related to nonprofit data sharing in the sector.

Compile a list of local projects and small-scale data sharing initiatives in Alberta that can be used to surface issues and provide opportunities for learning. Each of them can be considered to be a sub-Constellation and connections between them would form a valuable Community of Practice related to Data Sharing. Examples would include but not be limited to the following;

- Calgary
  - PolicyWise data sharing projects with community organizations (10)
  - YYC Data Collective
  - Distress Centre Calgary Data Discovery Project – 211, Crisis Line and other data
  - Calgary Homeless Foundation
  - Enough for All Poverty Reduction
  
- Edmonton
  - PolicyWise data sharing projects with community organizations (11)
  - Edmonton Social Planning Council
  - Abundant Community Edmonton
  - Common Outcomes
  - Homeward Trust
  - End Poverty Edmonton
  
- Red Deer
  - Citizen Satisfaction Survey
  - Red Cross – data on emergencies
  
- Lethbridge
  - Community Asset Mapping using HelpSeeker
  - Food Bank and Food Bank Alberta
  
- Fort McMurray
  - Wood Buffalo Community Strategy Roadmap
  - Collaboration Project To Strengthen Wood Buffalo Social Profits

Perform a scan of the privacy / regulatory landscape in Alberta to identify barriers to data sharing at various levels. Build on the report previously prepared by PolicyWise (12).

Research background on the Alberta Information Sharing Strategy and develop contacts to leverage the work that has been done with respect to data sharing in the nonprofit sector.

Engage the sector in discussions related to data ethics and informed consent.

Document the tools and techniques that can be used for personal data anonymization and linkage.

## ***Year 2***

Continue to share learnings and surface opportunities for new data sharing projects focussed on specific social issues in specific cities/towns/communities. Leverage data sharing technology/infrastructure (anonymization, linkage, common taxonomies, etc.).

## ***Year 3***

Expand data sharing projects to other cities/towns/communities on more social issues. Move towards the development of community data hubs (i.e. CommunityView in Saskatoon). Incorporate where

possible the federation (linking) of data from Open Data sources and the Alberta Nonprofit Data Hub (see Sector Foundational Initiatives).

## 5.2 Administrative Data

### **Year 2**

Initiate a review of ways to improve access to administrative data initially focused on Alberta Government datasets. This would be an internal government effort supplemented with external nonprofit stakeholders.

Leverage and build on the existing experience of PolicyWise related to Alberta Government datasets.

Engage a broad spectrum in society using the coalition-building experience in Ontario (the 2018 initiative on administrative data facilitated by Powered by Data).

### **Year 3**

Expand the scope of administrative data to include additional datasets of interest to the nonprofit sector beyond the Alberta Government.

## 6. Sector Foundational Initiatives

### 6.1 Alberta Nonprofit Data Hub

#### **Year 1**

Conceptualize the potential for an Alberta Nonprofit Data Hub based on existing platforms such as;

- PolicyWise – SAGE (Secondary Analysis to Generate Evidence) (13)
- Alberta Health / Alberta Health Services – Analytics Strategy (14)
- Service Alberta – Enterprise Data Analytics (15)
- YYC Data Collective (16)

Develop functional and technical requirements for the Alberta Nonprofit Data Hub.

#### **Year 2**

Select technology platform(s) and implement initial pilot project(s).

#### **Year 3**

Rollout access to the Alberta Nonprofit Data Hub to multiple cities, towns and communities.

Implement federated approach to data discovery and access.

## 6.2 Nonprofit Sector Data Capacity Building

### **Year 1**

Initiate stakeholder consultations to confirm priorities and start process to find / develop appropriate content across the data lifecycle.

Survey the landscape to determine resources that are available within and outside of Alberta. Examples would include but not be limited to the following;

- PolicyWise educational resources and training
- Data for Good workshops and volunteer data analysts
- Powered by Data resources and case studies
- Ignitech Solutions and other organizations supporting technology in the nonprofit sector

Develop content delivery strategy including partnership model(s). Consider concepts such as the following Data Skills Framework (17);

Seven themes cover the range of skills for working successfully with data:

- Requirements and business analysis – the ability to understand and prioritise user needs; and identify how data can be efficiently integrated into processes.
- Data governance – the responsibilities associated with collection, handling, ownership, publication and ultimately removal of data.
- Data management –knowledge of data concepts, including quality control, storage, and integration with other sources.
- Access and security – understanding of: the obligations and restrictions around granting and gaining access to data; the principles of open data; different licensing models; security; and the process of risk assessments
- Data manipulation – manipulating, processing, cleansing and combining data for further analysis or use. Automation of complex manipulation on large data volumes
- Analysis and modelling – analysis of data and data modelling. Includes statistical knowledge, processing chains, machine learning and predictive analytics
- Communication and visualisation – interpreting, summarising and communicating data and various analytical outputs for different audiences.

Study various approaches to knowledge sharing that leverages other Constellations. Gauge if there is support for the development of an Alberta Nonprofit Knowledge Hub.

### **Year 2**

Implement capacity building pilots to learn what works best and refine approach.

Curate inventory of datasets of interest to the nonprofit sector in order to improve discovery and accessibility. Coordinate with efforts on the development of the Alberta Nonprofit Data Hub.

Develop functional and technical requirements for knowledge sharing platform (Knowledge Hub).

Scan other jurisdictions for recommended practices related to capacity building and knowledge sharing.

### ***Year 3***

Select technology platform for the Knowledge Hub and implement initial pilot project.

## **6.3 Nonprofit Data Standards**

### ***Year 2***

Scan for data standards in use for the nonprofit sector in other jurisdictions.

Develop a prioritized list of nonprofit data standards from the Alberta sector perspective.

### ***Year 3***

Pilot the use of data standards in limited high-priority areas for projects that are active (see Data Sharing Constellation).

Prepare a plan to extend the use of nonprofit data standards in Alberta and develop the value proposition based on data quality improvement.

## 7. Endnotes

(1) Building a Foundation for an Alberta Nonprofit Data Strategy – Stakeholder Roundtables – 2 versions: merged by question with responses grouped, compiled by question and location

(2) Listening to the Starts: The Constellation Model of Collaborative Social Change – Tonya and Mark Surman - [http://tonyasurman.commons.ca/wp-content/uploads/sites/3/Surman\\_2008\\_Constellation-Model\\_SocialSpace.pdf](http://tonyasurman.commons.ca/wp-content/uploads/sites/3/Surman_2008_Constellation-Model_SocialSpace.pdf) and Open Sourcing Social Change: Inside the Constellation Model - Tonya and Mark Surman - <http://timreview.ca/article/183>

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

(4) From background material - Data gaps and requirements for Canada’s non-profit sector - Consultation at Statistics Canada on October 24, 2018

(5) From presentation - The General Social Survey: An Overview - Joelle Mader, Chief, Modernization, General Social Survey Program, Social and Aboriginal Statistics Division, Statistics Canada – October 2018

(6) From presentation - Modernization of the General Social Survey – Statistics Canada – October 2018

(7) Charities IT Modernization Project – Charities Directorate – Canada Revenue Agency - <https://www.canada.ca/en/revenue-agency/services/charities-giving/charities/guidance-videos-forms/champ.html>

(8) Profiling the Nonprofit/Voluntary Sector in Alberta – Community Engagement Branch – Alberta Culture & Tourism - <https://open.alberta.ca/publications/profiling-the-nonprofit-and-voluntary-sector-in-alberta>

(9) Nonprofit Voluntary Sector Supplemental Report to the 2017 Alberta Wage and Salary Survey – Alberta Labour - <https://open.alberta.ca/publications/2017-alberta-wage-salary-survey-nonprofit-sector-report>

(10) Calgary Thrives – Secondary Analysis to Generate Evidence - PolicyWise for Children & Families - <https://policywise.com/sage/projects/>

(11) PolicyWise-C5 Collaborative Data Linkage Project – Secondary Analysis to Generate Evidence - PolicyWise for Children & Families - <https://policywise.com/sage/projects/>

(12) Law & Governance of Secondary Data Use: Obligations of Not-for-Profit Organizations in Alberta - Kiran Manhas, 2017 - PolicyWise for Children & Families - <https://policywise.com/wp-content/uploads/2017/08/LAW-GOVERNANCE-OF-SECONDARY-DATA-USE.pdf>

(13) Secondary Analysis to Generate Evidence (SAGE) – PolicyWise for Children & Families - <https://policywise.com/sage/>



(14) AHS Strategy for Clinical Health Research, Innovation and Analytics 2015-2020 - <https://www.albertahealthservices.ca/assets/info/res/if-res-strat-doc.pdf> and Alberta Health - Analytics and Performance Reporting Branch - <http://www.health.alberta.ca/initiatives/health-research.html>

(15) Government of Alberta's Enterprise Data Analytics Strategic Plan – Service Alberta - <https://open.alberta.ca/documentation/government-of-alberta-s-enterprise-data-analytics-strategic-plan>

(16) YYC Data Collective – University of Calgary - <http://yycdatacollective.ucalgary.ca/> and Engaging Open Data Research - <https://geog.ucalgary.ca/opendata/yyc-data-collective>

(17) Data Skills Framework: A generic approach to assessing and developing data related competencies and skills - Heeley, L. & Wilkinson, S., (2018) - JNCC Report 590, ISSN 0963-8091 - [http://jncc.defra.gov.uk/pdf/Report\\_590\\_WEB.pdf](http://jncc.defra.gov.uk/pdf/Report_590_WEB.pdf)