

2023 DEAL LEARNING REPORT

Ajah

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BY
DATA

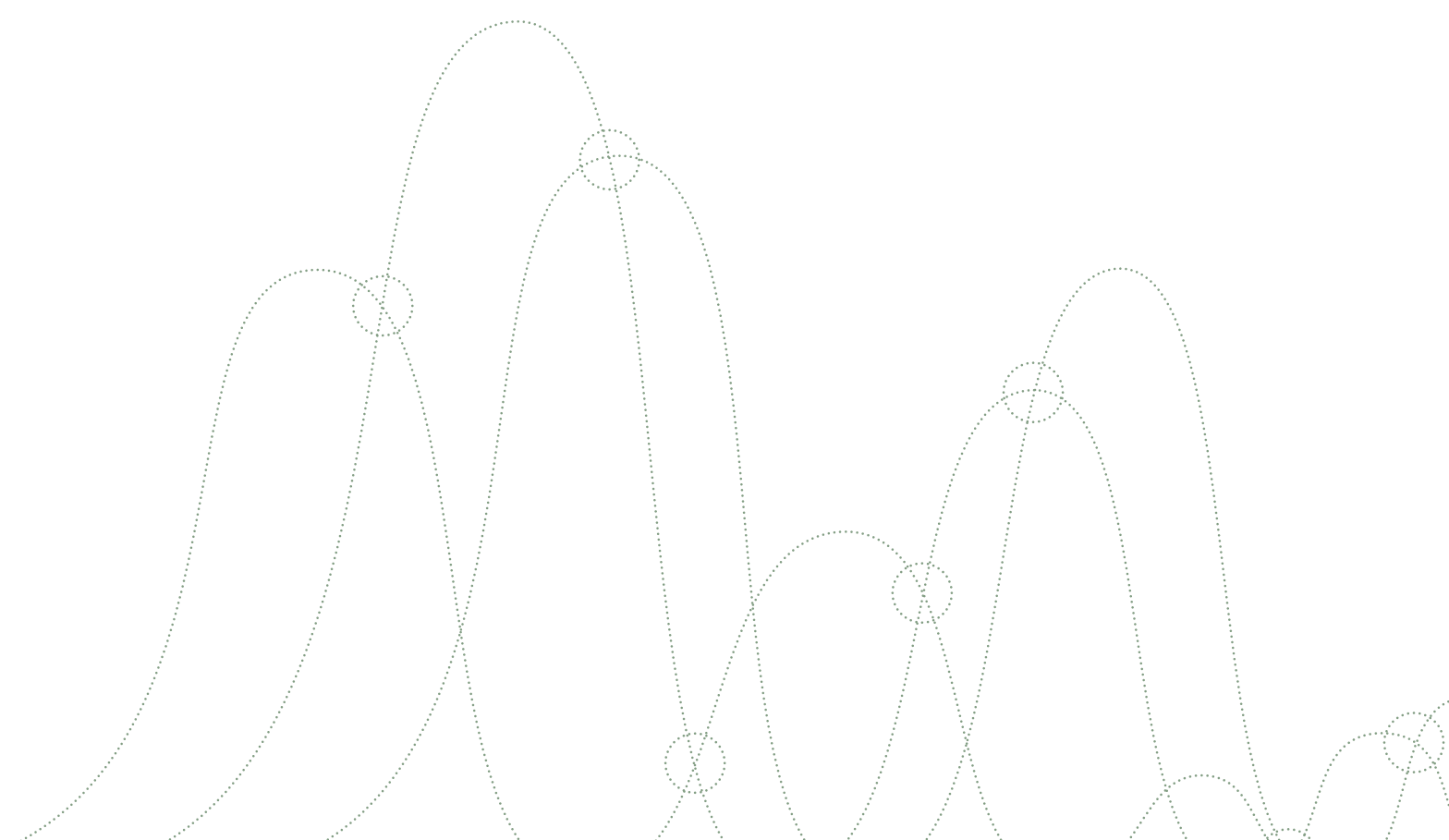
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EXECUTIVE SUMMARY

Ontario's nonprofit sector is a large and varied landscape, producing a huge amount of information. This information is a very valuable resource, but is often siloed within single organizations. A greater impact could be had if more information was collectively directed to the development of robust bodies of evidence, or, more broadly, to support learning for the sector as a whole. This report describes a project that took place between 2021-2023, as part of the DEAL Strategy, investigating this opportunity for greater collective impact.

The report begins by describing activities undertaken during this project: interviews, learning circle sessions, and an after-action review process. Following each section on activities, and in more detailed appendices, it provides an assessment of key findings and highlights specific opportunities. Within these findings, many barriers to a sector-wide culture of learning were identified, such as the diversity of stakeholders and unaligned incentives for learning. No clear consensus was discovered on a concrete direction for a sector-wide transformation. More optimistically, this project found considerable interest in sector-wide learning among high-level decision-makers. Additional education around knowledge-sharing for interested funders & targeted opportunities for collaboration are promising short-term pathways to explore in pursuit of the longer-term goal of systematic sectoral learning.



CONTEXT

The DEAL (Data, Evidence-use and Learning) Strategy is an initiative led by the Ontario Nonprofit Network (ONN), in partnership with Ajah and Powered by Data (PbD) and with support from the Ontario Trillium Foundation (OTF). The DEAL Strategy is exploring different approaches to connecting the Ontario nonprofit sector's data and knowledge to support learning and evidence-informed decision-making.

As part of this larger DEAL initiative, Ajah and PbD have been leading a smaller, exploratory project to understand knowledge sharing between organizations in the nonprofit sector for various purposes, including policy development and advocacy, evaluation and outcome tracking, and organizational learning. The organising group included Michael Lenczner (Ajah and PbD), Hilary Pearson (former president of Philanthropic Foundations Canada), Liz Forsberg (Ontario Trillium Foundation), Cathy Taylor (Ontario Nonprofit Network) and Neemarie Alam (Ontario Nonprofit Network).

To ground the project, during 2021 and early 2022, we conducted a series of interviews with nonprofit experts to understand how they see the gaps or barriers to greater knowledge sharing. We chose individuals who could provide insights based on their varied experience. The people and organizations with whom we spoke are listed below and a summary of each interview we conducted can be found [here](#).

INTERVIEWS

NAME	ORGANIZATION
Gabriel Zamfir-Enache	Canada Council of the Arts
Frederic Julien	CAPACOA
Liz Weaver	Tamarack Institute
Ruth Levine	IDinsight
Robyn Blackadar	PolicyWise
Lisa Lalande	Century Initiative
Kelly Fitzsimmons	Project Evident
Leslie Chan	University of Toronto
Anil Patel	Community Foundations of Canada
Ushnish Sengupta	York University
Marilyn Desrosiers	Canada Council of the Arts
Alina Turner	HelpSeeker
Anshula Chowdhury	Sametrica
Heather Smith Fowler	Social Research and Demonstration Corporation
Inès Chaâlala	Philanthropic Foundations Canada (PFC)
Ben Cairns	IVAR - UK

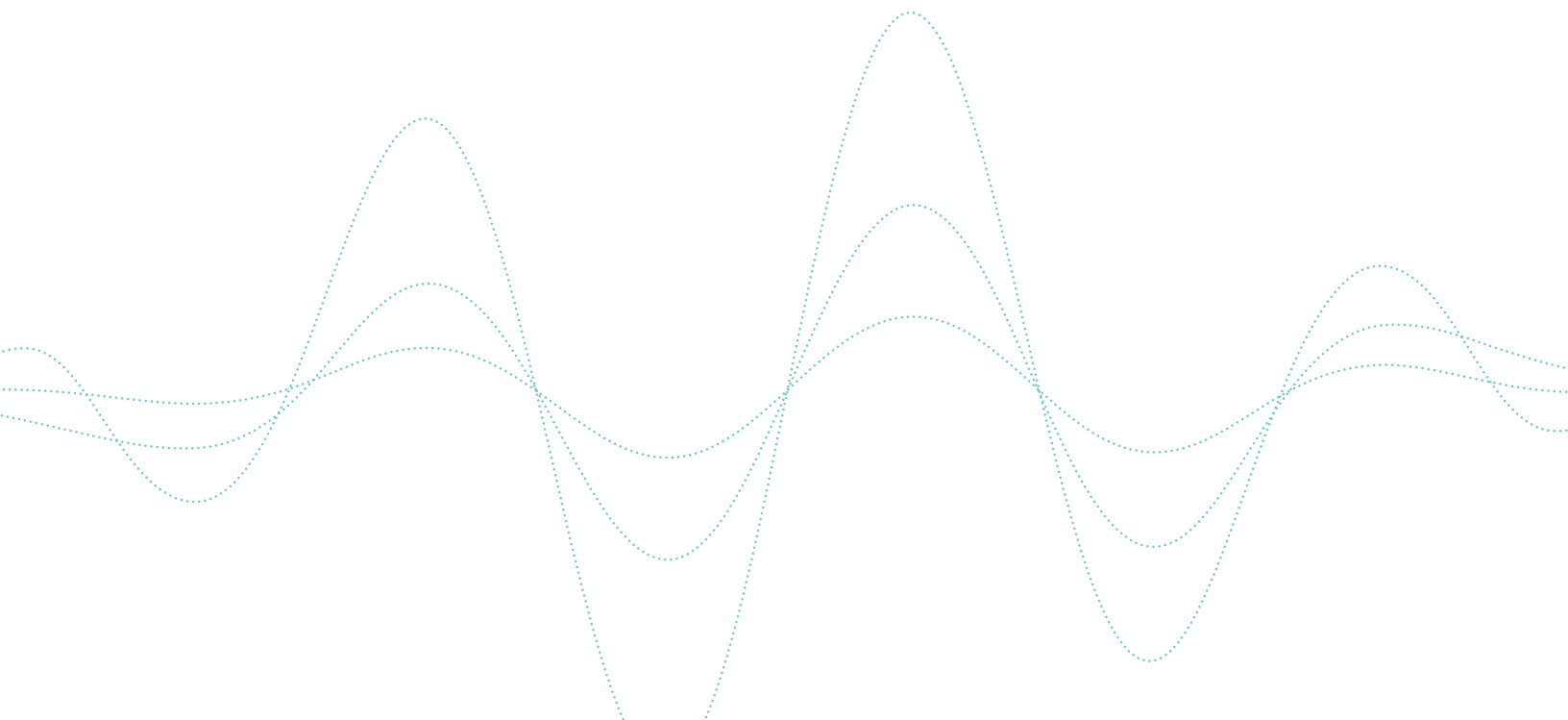
TRANSITIONING TO A LEARNING CIRCLE

We know that insights from projects, initiatives, and other nonprofit endeavours within the sector are not systematically captured or retained. This impedes cumulative learning and leads to a significant waste of human and financial resources being spent answering or trying to answer questions that are being explored by other organizations and other funders.

From the interviews, we concluded that practitioners see the importance of these questions but there is little consensus on how to move forward collectively. A number of our interviews were with public and private funders and we decided to explore their interest in an ongoing learning circle to explore, through their perspectives and experiences, the question of how to help catalyze more effective learning practices and frameworks for themselves and for the organisations that they fund.

We launched the learning circle of funders and intermediaries in mid-2022. Our goal was not to come up with a specific solution (such as a knowledge infrastructure or data-sharing platform). We aimed for an open discussion with philanthropic stakeholders to help develop our understanding on why our learning practices are underdeveloped in the sector and to explore how other sectors have addressed this challenge in their field.

Note: Ajah and Pbd worked separately on a shared data infrastructure prototype which is described in the appendix.



ABOUT THE LEARNING CIRCLE

THE CHALLENGE

We wanted to convene a group of funders, and other important stakeholders, to discuss learning in the non-profit sector. With this group, we aimed to change the focus from a potential solution (information infrastructure) to the problem (lack of shared learning within the nonprofit sector) focusing on three main questions:

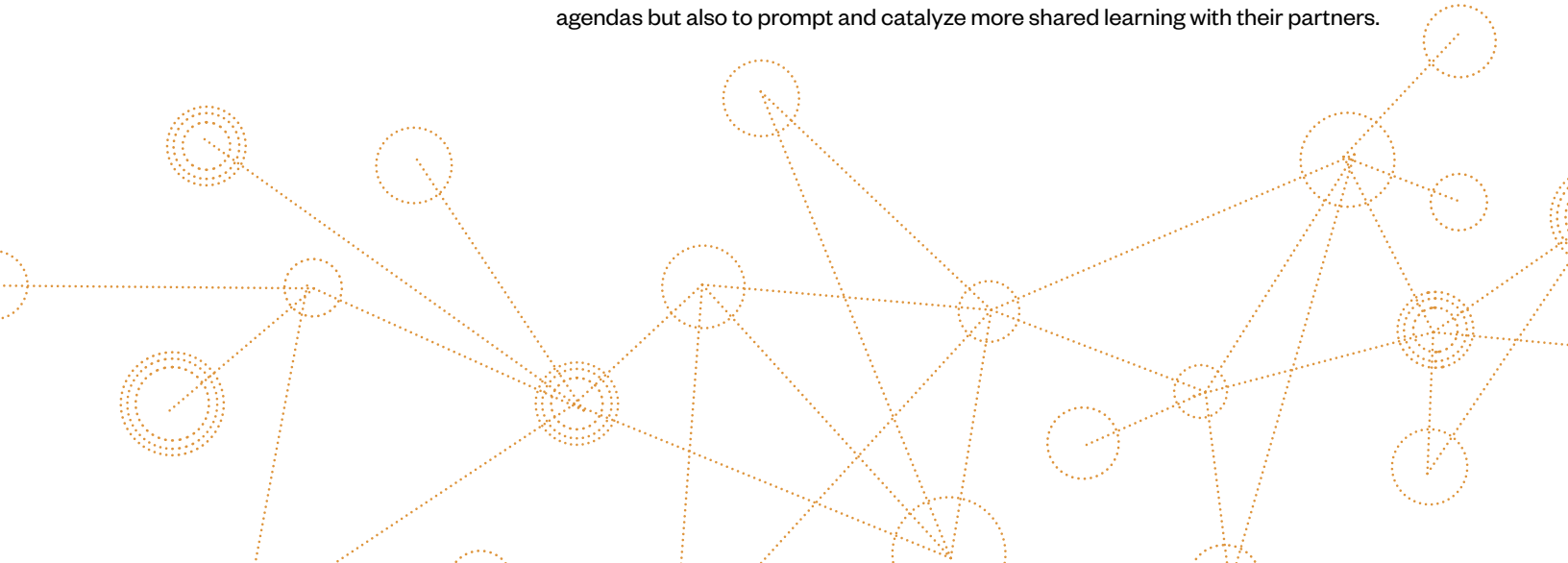
- What are the learning systems like in the non-profit / philanthropy sector?
- How could we improve them?
- How do we develop a learning sector not simply learning organizations?

OUR APPROACH

The goal of the Learning Circle was to serve as a space where funders led an open conversation to help develop a shared understanding of the nonprofit sector's learning practices as well as the learning practices of funders themselves. While practices are often highly localized, some form of collecting evidence of impacts, disseminating this information, and maintaining infrastructure to collect, store, and transfer information is a common starting point from which more systematic learning practices can be envisioned.

The project team started from the premise that there are certain barriers that are preventing nonprofit funders from sharing their knowledge/learnings with other organizations. It is not clear that it is only a capacity issue; since even larger funders with capacity are not sharing learnings systematically. Nor is it necessarily a technology issue; basic tools and sharing practices have been developed and work well in other sectors such as academia or international development. Data specific to funders is being shared on platforms such as 360Giving in the UK. Feedback and funder ratings on platforms have also been developed on platforms such as Fund for Shared Insight. What may be missing is human capacity, at the staff or board level, to know and practice learning, and to champion a learning culture. This would be true not only for funders but also for the nonprofit partners they work with.

Our theory was that starting this conversation with a group of funders might be a way to approach the problem, since they might be in a position not only to work on their own learning agendas but also to prompt and catalyze more shared learning with their partners.



We held two sessions of the Learning Circle with invited funders through the spring and summer of 2022. Participants included foundation executives from public and private foundations.

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KEY TAKEAWAYS

To date, the main takeaways of the Learning Circle sessions have been:

1. Difficulty in pinpointing the problem

- Participants raised questions about whose challenges we should be addressing (funders alone or funders and their partners, or their partners alone).
- Some participants pointed out that their peers and partners were not asking for cross-sector learning (although funders do ask for evidence of learning by individual grantees, in the form of tracked outcomes). Other participants, who work directly with nonprofits noted that organizations shared a need to know what works more broadly so they can better direct their limited resources.

2. Incentive structure in the nonprofit sector does not favour sharing failure

- Many nonprofits feel that they can't share information about what doesn't work. This may stem from funders unintentionally penalizing projects that don't have the intended results.
- Thinking about ways in which organizations can share failures safely and constructively may be important. Sharing this type of information could be easier for funders to share with each other as they have less risk in doing so.

3. Knowledge-sharing practices in other fields may not translate

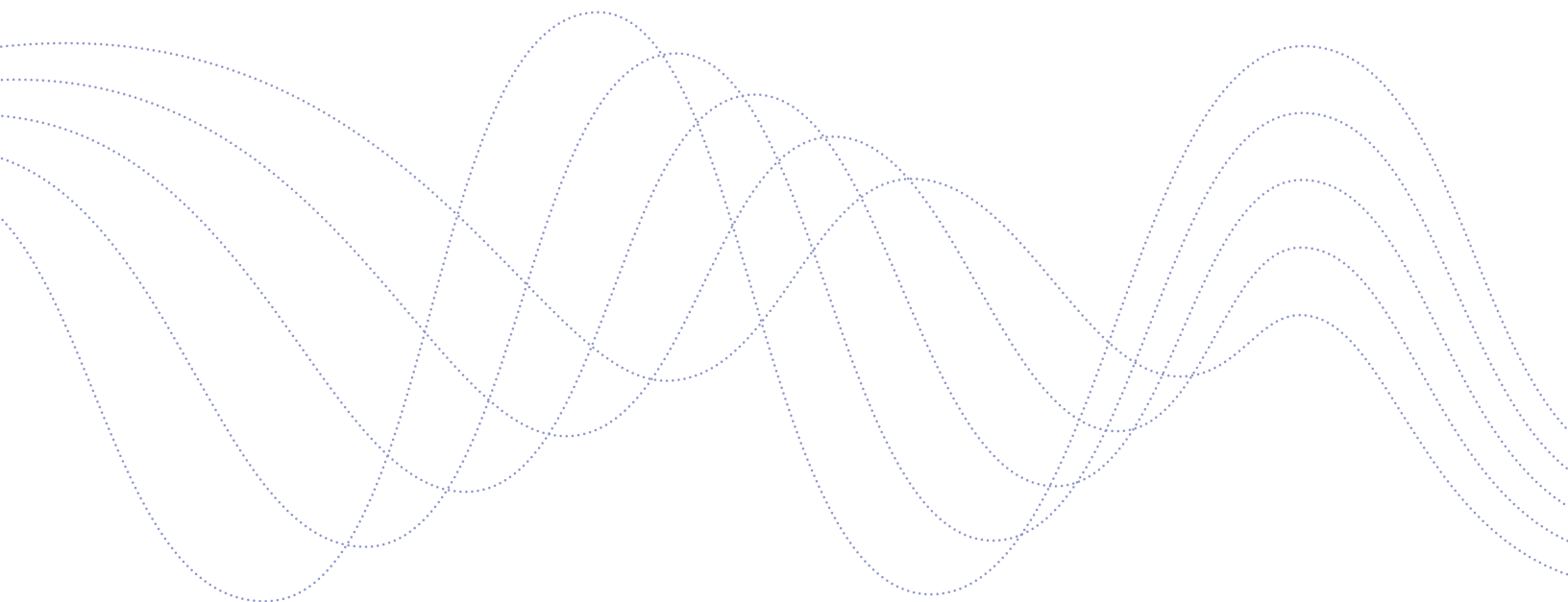
- Participants were unsure that examples from academia and international development, where formal knowledge-sharing models and data-sharing structures are more common, were relevant for philanthropy because the core business models and drivers might differ.
- Nevertheless, there may be specific practices within these sectors that offer ways to think about their application to nonprofit knowledge sharing.

EVALUATION

After the two first Learning Circle meetings, we conducted a survey of participants to validate and refine our approach, which drew responses from 10 participants. The evaluation provided valuable feedback and revealed two key findings. Firstly, the focus of the Learning Circle should prioritize learning itself, rather than exclusively focusing on data infrastructure. Secondly, the Learning Circle should adopt a peer-led approach and actively engage board members.

We also interviewed Ben Cairns, Director at IVAR, an organization in the UK focused on research, education and training for charities, foundations and public agencies. IVAR has supported for some years a community of practice for funders to share and learn from each other's evaluation and learning experiences and resolve practical challenges and dilemmas.

The interview with Ben was intended to learn the key success factors that have enabled this community of practice to sustain itself. Ben made clear that it requires some dedicated infrastructure (and minimal funding) which could be provided through an intermediary. A key point made by Ben was that the audience for the community of practice should be sorted and two key groups can be identified: foundation staff responsible for learning and evaluation, and leaders (board trustees and CEOs) who have a strategic interest in learning but have different questions from staff.



MOVING FORWARD & FUTURE DIRECTIONS

We ran an After-Action Review (AAR) to evaluate how to move forward. AARs are an evaluation tool that bring together the project team when a critical milestone has been reached to discuss successes and failures. The goal is to understand more clearly what was initially intended, what transpired, and why, as well as what might be done better and how to increase the chances of success of similar projects in the future.

We asked ourselves:

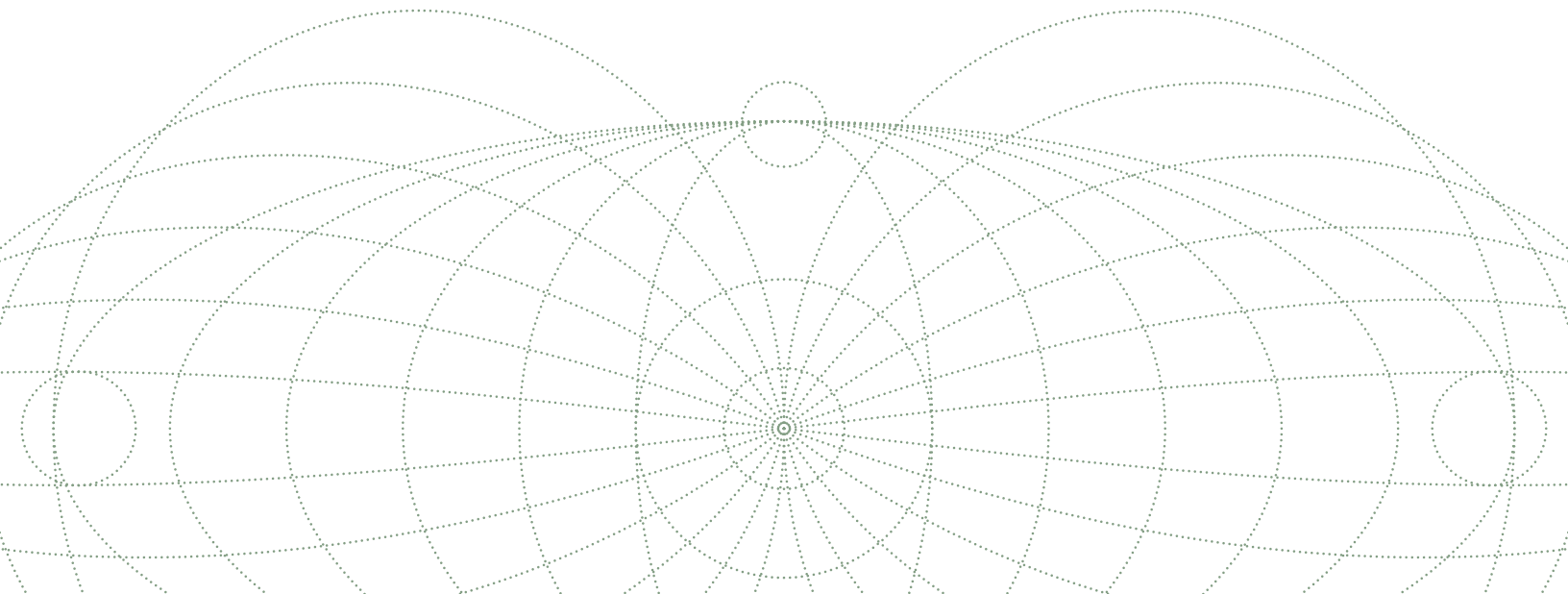
- What were the intentions and objectives for the Learning Circle?
- What actually happened? Did the objectives change? Why is there a gap there?
- Where do we think we are now? Have you learned anything? Has this group learned anything? Can we consider this a success or a failure or a successful failure?

Based on the insights provided during the AAR session, we identified six main findings from the overall project as well as the Learning Circle.

1. Clarity of Objective

There were several objectives, and not all were equally shared. Some of the identified objectives were:

- Understanding the current position of foundations regarding their interest in shared knowledge infrastructure.
- Supporting the sector in embarking on a collective learning journey, where learning becomes a goal in itself.
- Gaining insights into shared knowledge infrastructure and its potential to support the sector and foundations.
- Other objectives not explicitly mentioned.



The implication of this lack of clarity was that participants found it challenging to make informed choices about their participation, resulting in less fruitful engagement.

Moving forward, it is crucial to define clear objectives for the entire project as well as for the Learning Circle. These objectives may differ from each other but need to be well-defined and communicated to ensure effective participation.

2. Location of the Problem

The problem was identified as being predominantly within individual organizational culture. Addressing the foundational issues and location of the problem within organizational cultures presents significant challenges. This intersects with power dynamics, incentives, strategic focus, resourcing pressures, and other factors. Even when individuals or organizations want to participate, they may face obstacles in driving meaningful change.

It may be beneficial to gather a smaller, focused group of participants, narrowing the Learning Circle to funders with a clear and shared goal and intention of creating explicit learning agendas and cultures.

3. Meeting People at the Horizon

Participants generally needed a more robust background understanding of the topic area. The entry point into the conversation assumed a level of knowledge that prevented full participation and learning from the discussions.

To move forward, taking a step back and conducting a more basic education component could be beneficial. This could involve teaching foundational concepts, building understanding, and fostering an appreciation for the issue arising from the absence of shared knowledge infrastructure.

4. Interest vs. Priority

While there was considerable interest in the topic, interest alone does not necessarily translate into making it a priority. Participants expressed excitement and curiosity about the topics discussed, and their interest in learning continued.

Challenges in finding time and fundraising indicated that the topic was less of a priority for some. Competing organizational and individual priorities, lack of support, and conflicting incentives redirected attention away from engagement. When designing next steps, it is important to consider this feature of interest without priority.

5. Learning Did Happen

Despite the challenges, there was evident excitement and interest among participants at various points during the sessions. Notably, the session with Caroline Fiennes spurred learning on the part of foundations. The organizing group itself also expressed appreciation for the learning that occurred. They gained insights into funders' views on shared knowledge infrastructure and recognized the importance of culture, incentives, and the difficulties involved in moving forward.

These learning experiences highlight the potential for progress and inform future steps in advancing the initiative. We conclude that our focus should prioritize learning itself, rather than data infrastructure. The Learning Circle could continue as a community of practice for funders if lightly supported by an intermediary such as PFC, EFC or United Way of Canada, using a peer-led approach like the community of practice supported by IVAR, and actively engaging not just staff but also board members.

ADDITIONAL RELEVANT READINGS

We compiled a list of relevant articles if you are interested in reading more about this topic:

Knowledge-Sharing Infrastructure for the Nonprofit Sector by Ajah

Big Data Won't Save Us: Fixing the Impact Evaluation Crisis by Michael Lenczner,
Jesse Bourns and Tracey Lauriault

Learning about Learning in Philanthropy by Hilary Pearson

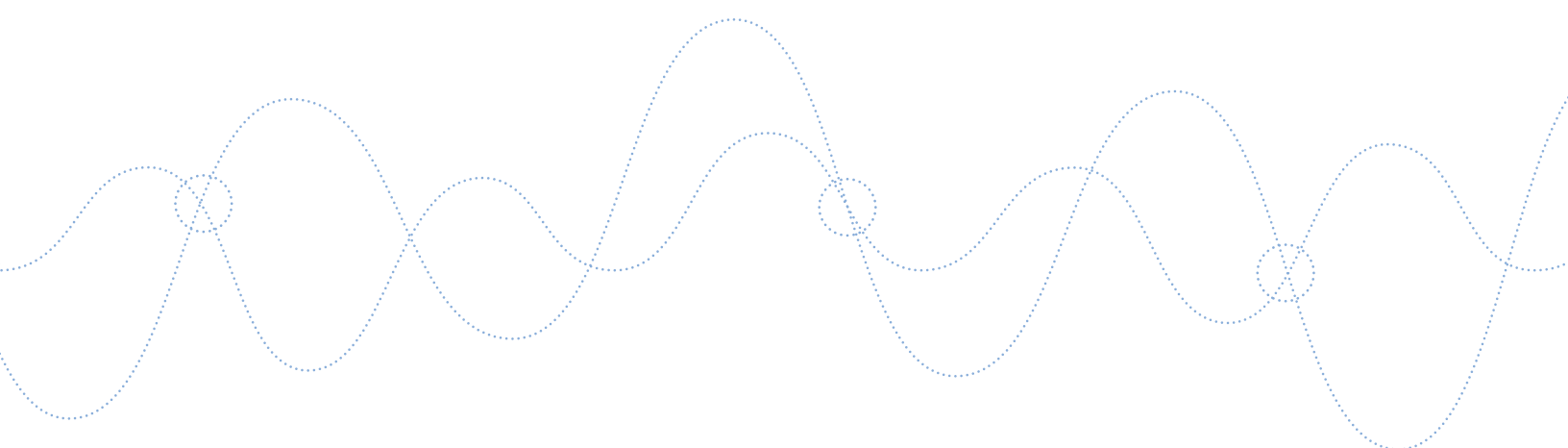
Oops: we made the non-profit impact revolution go wrong by Caroline Fiennes & Ken Berger

Building an Innovation Portfolio to Accelerate a Youth Employment Recovery
by Jason Pearman

More Data is Not the Answer by Ben Cairns, Houda Davis, Liz Firth

Giving learning a seat at the strategy table by Ben Cairns

Why we've launched a public data repository by Marc Shotland.



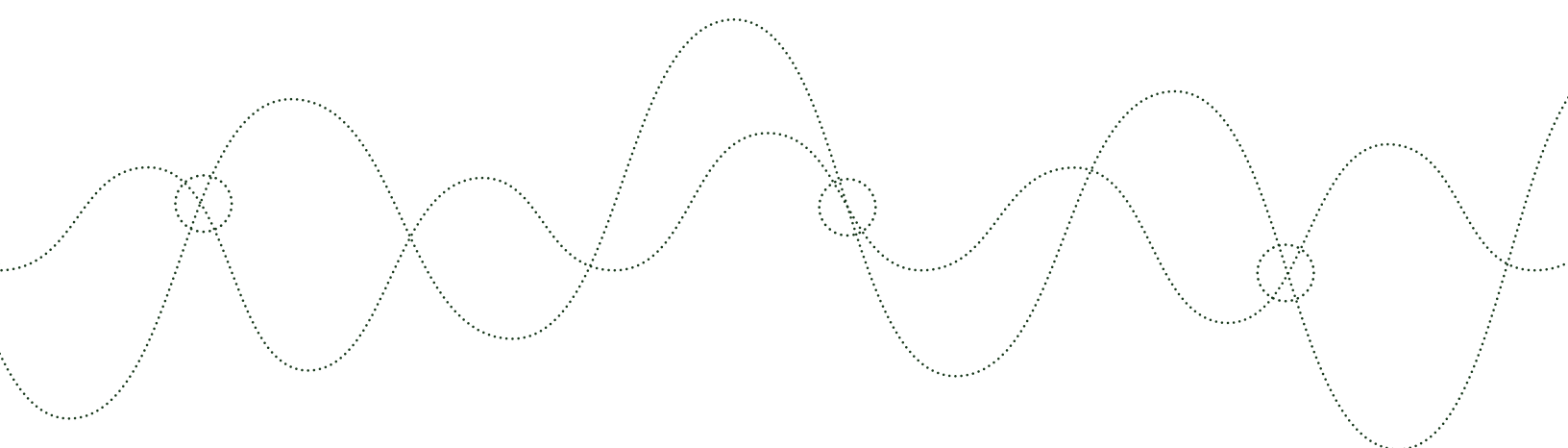
APPENDIX: INFRASTRUCTURE PROTOTYPE

The Infrastructure Prototype was designed to address the challenge of a lack of information infrastructure in the nonprofit sector dedicated to knowledge sharing. Our goal was to develop a prototype of open data infrastructure for the sector, focused on making data accessible to different users in the sector for common needs. This prototype was structured to help stakeholders answer their practical questions through the use of existing data, present what an infrastructure approach can accomplish, and help funders understand the role and value of this area of work.

The objectives of this work were to 1) develop tools that could be useful for different types of sector stakeholders by collecting and organizing information from public sources, 2) create a demonstration of the opportunities for collective approaches to data and information, compared to one-off projects, and 3) help provide tangible examples of data infrastructure to support the other workstreams of the Learning Circle work.

Specifically, the prototype focused on data about the entities in the sector (identifying the organizations working in the sector), the activities (the projects and funded work those organizations engaged in), and learnings (contained in documents about those activities). The prototype is a publicly accessible MVP interface written in Javascript - React framework (interface) and Python (server), deployed on DigitalOcean, a cloud computing platform, and serves as an example of what potential information infrastructure for the sector could look like. We developed code for scraping and structuring data from public sources on a regular basis and designed infrastructure and data models. All of this code, including the scrapers, has been made open source on GitHub.

The prototype prompted specific action by EFC to collect data from members through an open portal, facilitating the sharing of information on funders, grants, projects, and equity elements.



LESSONS LEARNED

1. Documents from government funders are HARD to find

- Almost no federal government department has publicly available evaluation reports on its individual programs, or reports available in any useful quantity
- No federal department makes available any documents related to grants for programs (e.g. reports)
- Ajah/Pbd explored using Access to Information and Privacy (ATIP) requests to locate some of these documents:
 - 90 days for 1st request (only information about 3 grants was given)
 - 2nd & 3rd request were delayed indefinitely
 - The government has the right to extend the deadline for delivering the documents requested every 60 days.

2. Everyone wants tagging, but no one wants to tag

- A big need is to be able to categorize organizations based on their area of focus and activities.
- Organizations typically don't have the capacity/bandwidth to manually sort and categorize, or to update the records on an ongoing basis.

3. Organizations understand their information needs "selfishly"

- Organizations have difficulty abstracting their specific information/data needs to the more general needs throughout the sector.
- Therefore, they may not see the need for collective information sharing.

4. Many people have attempted to address use cases - and failed

- Different organizations have tried to create directories, portals and dashboards:
 - GERIC created a directory of career and development professionals that ended up being very time-consuming to update
 - PFC tried to create a members' portal for grants data sharing but members did not participate and it was difficult to update
 - EFC grant portal is a challenge to update

5. Identified need to collect diversity and equity funding data

- Funders, Funder Associations, Community Advocacy Organizations
- All want to know more about funding patterns to diverse, marginalized and equity-serving or seeking organizations and communities

6. Consensus on the need for organizations to connect and learn from one another

- Connecting with organizations doing similar things has been a barrier
 - Unless you have an expansive network
- There is no easy way for organizations to:
 - Share their learnings from a certain program/activity
 - Find previous learnings from other organizations