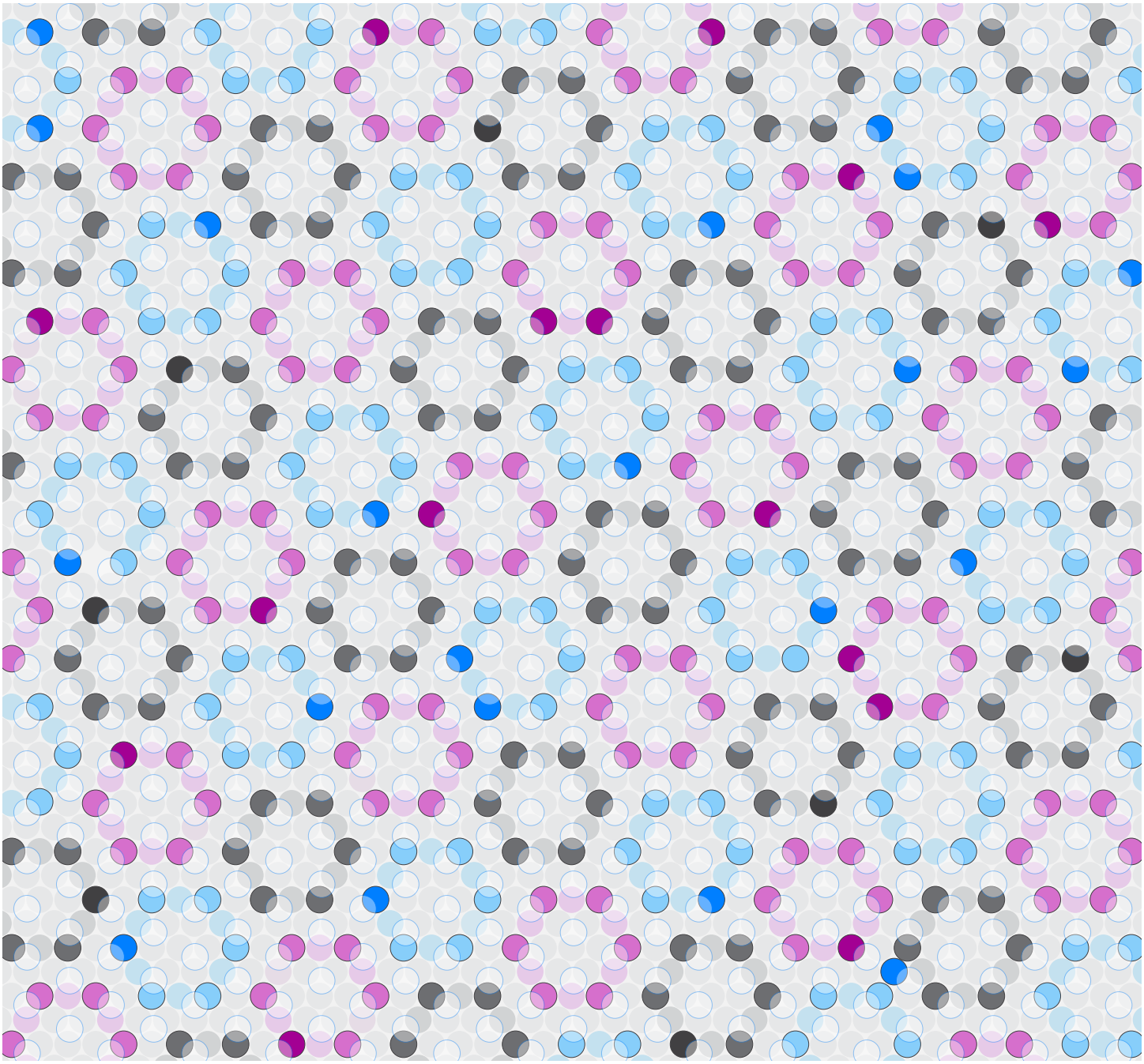

Final Report

The Practitioner Data Initiative (PDI)

September 2024

Blueprint

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About the Future Skills Centre

The Future Skills Centre (FSC) is a forward-thinking centre for research and collaboration dedicated to preparing Canadians for employment success. We believe Canadians should feel confident about the skills they have to succeed in a changing workforce.

As a pan-Canadian community, we are collaborating to rigorously identify, test, measure and share innovative approaches to assessing and developing the skills Canadians need to thrive in the days and years ahead.

The FSC was founded by a consortium whose members are Toronto Metropolitan University (TMU), Blueprint and the Conference Board of Canada, and is funded by the Government of Canada's Future Skills Program.

About Blueprint

Blueprint was founded on the simple idea that evidence is a powerful tool for change. We work with policymakers and practitioners to create and use evidence to solve complex policy and program challenges. Our vision is a social policy ecosystem where evidence is used to improve lives, build better systems and policies and drive social change.

Our team brings together a multidisciplinary group of professionals with diverse capabilities in policy research, data analysis, design, evaluation, implementation and knowledge mobilization.

As a consortium partner of the Future Skills Centre, Blueprint works with partners and stakeholders to collaboratively generate and use evidence to help solve pressing future skills challenges.

Future Skills Centre | Centre des Compétences futures

Blueprint

Canada

Building data capacity for the skills ecosystem

Unlocking the power of data to better meet the changing needs of Canadians.

Unlocking the power of data is foundational to a future-state skills ecosystem where public services are navigable, supportive, targeted, integrated and transparent. Through our experience with frontline practitioners, community leaders and government, we've identified three challenges that slow our progress:

1. **Community data capacity gaps.** Service providers collect data to meet reporting requirements, but these data rarely enable rapid learning, continuous improvement and impact measurement. *Service providers struggle to know if they are maximizing impact.*
2. **Friction within data-linking.** Opportunities to combine administrative data (e.g., tax records) with program data, like Statistics Canada's Social Data Linking Environment, could provide seamless ways to track long-term outcomes—but they are under-utilized. *Long-term outcomes from skills training remain difficult to track.*
3. **Under-leveraged datasets.** Governments collect large volumes of data that are not used due to constraints in time, technology and skills. *The ecosystem is missing insights about service effectiveness.*

Building data capacity

n response, we launched the **Building Data Capacity** portfolio to show how we can put data to work for Canadians. We are doing so via two workstreams:

Leveraging Government Data (LGD)

We are testing the use of government data holdings to understand needs and service demand, support continuous learning and improve outcomes.

- Using StatCan data to measure long-term outcomes of Canadians participating in our **Scaling Up Skills Development** programs; and
- Developing a **benchmarking** model that leverages the Labour Market
- Program Data Platform (LMPDP) to identify outcomes benchmarks for employment and training programs.

Practitioner Data Initiative (PDI)

We are providing funding, tools, advice and technical assistance to nonprofit organizations to help them better collect, manage and use data.

- Providing funding, advice, technical assistance and tools to 15 nonprofits to help build their capacity to collect, manage and use data; and
- Producing evidence on initiative outcomes to support scaling and build a sustainable path to help more organizations develop data capacity.

Executive summary

The Future Skills Centre (FSC) and Blueprint launched the Practitioner Data Initiative (PDI) in 2021 to address critical data capacity challenges facing nonprofit organizations across Canada. Over three years, PDI partnered with 15 community service organizations, providing them with flexible funding of $100k to $200k along with strategic, technology-neutral advice to enhance their data-related knowledge, skillsets, technologies, and processes. This *Final Report* describes how the PDI model evolved, what we learned over the course of working with our partners, key success factors, and future paths to sustainability and scalability across the sector.

Concept generation and timeline

- The PDI model was developed in response to three key barriers, uncovered during our scoping research phase, that consistently inhibit nonprofits' data capacity across the sector: lack of in-house expertise to articulate data challenges; limited funding for organizational capacity building; and disparate, funder-driven data requirements misaligned with strategic needs.
- The initiative was implemented in two phases. **Phase One** (2021–23) involved nine organizations across Canada. Based on learnings throughout, **Phase Two** (2022–24) was adapted to accelerate implementation, integrate project governance earlier in the process, provide more tailored sustainability support, and introduce a learning community among participants. Phase Two partnered with six additional nonprofits, with a focus on those operating in Alberta.

Design, delivery, and results

- Through collaborative workshops and capacity-building activities, PDI helped organizations assess their current data capabilities, articulate their data storytelling goals, and develop roadmaps for improvement across three core dimensions: collecting the right data, building effective processes and infrastructure, and developing necessary skills and talent.
- Partners reported high levels of satisfaction, with many describing PDI as a transformative experience. The model proved adaptable to diverse organizational contexts and use cases. Critical success factors for participating organizations included alignment between leadership and staff on data priorities; clearly articulated staff responsibilities and dedicated time for data work; and streamlined governance structures, enabling rapid decision-making. Key outcomes for our partners included 13/15 building better strategies for data collection; 10/15 improving internal capacity for data work; and 10/15 implementing consolidation tools and processes.

Next steps

- Looking ahead, Blueprint now aims to explore PDI's scaling and sustainability—first by developing a free online toolkit and workshop series for nonprofits to increase PDI's accessibility. Key areas to explore will involve delivering PDI cost-effectively, assessing demand across sectors, and understanding conditions for embedding data initiatives in existing systems. Future iterations may incorporate ongoing toolkit dissemination, identifying policy areas for model replication, convening data capacity expertise to refine the model, and testing lighter-touch engagements (such as additional workshops or office hours) for scalability.

The PDI model demonstrates strong potential as a lever for broader ecosystem change—though truly realizing this potential will require dedicated funding, integration of data capacity into funder performance frameworks, and sectoral leadership to build a data-literate social service sector. Ultimately, by enhancing nonprofit data capabilities, PDI can enable more responsive, innovative, and efficient social services supported by evidence-driven decisions.

Introduction

About the Practitioner Data Initiative (PDI)

More than ever, data are critical for organizations to drive strategic decision-making and program improvement. But community service nonprofits often struggle to harness the power of their data and thus struggle to understand the impact and cost-effectiveness of their work. Between limited funding opportunities and a lack of trusted technical advice, many leaders don't know how to get started.

This is a lost opportunity—for nonprofits, their funders, and the entire skills ecosystem. Without better data capacity, it remains a challenge to know how well community-based services, like skills training, are meeting the needs of the communities they serve.

To meet this opportunity, Blueprint created the Practitioner Data Initiative (PDI) in 2021 as part of our broader **Building Data Capacity** portfolio. This pan-Canadian project, funded by the Future Skills Centre (FSC), provides community service nonprofits with expert consultation, strategic support, and a one-time financial investment of $100,000 to $200,000. Over the course of 12 to 18 months, Blueprint marries this flexible grant with trusted and tech-neutral advice, grounded in our deep expertise with program data, technological solutions, and best practices in nonprofit service delivery.

> *This design makes PDI the only Canadian initiative that offers participating organizations a combination of direct, open-ended funding alongside impartial and strategic guidance to support the effective use of data across an entire organization.*

Through a series of collaborative workshops and capacity-building activities, PDI assesses an organization's current data capacity—a review of processes, technologies, and skills. We then co-articulate the nonprofit's goals for data storytelling and how their data can inform their outcomes and impact. This work culminates in a roadmap for improving data capacity, and we provide ongoing support and coaching as the implementation of that roadmap gets underway.

Ultimately, this means setting up nonprofits with the foundational knowledge, skillsets, technologies, and processes they can build upon long after their PDI engagements are over. While PDI cannot address the funding mechanisms that undervalue data capacity generally, it can provide organizations with the breathing room necessary to begin the process of improvement. By going beyond teaching individual data-related skills, PDI can help organizations shift cultures to give data higher priority; align data collection efforts with organizational strategy; embed data-related accountabilities into staff roles; and provide a set of practices that will encourage sustainable, long-term data capacity growth.

About this report

This *Final Report* is a follow-up to our *Design Report*, which described the PDI model, our learning agenda, and early implementation period. Here, we describe how the PDI model evolved from its first to second phase and share what we learned over the course of working with 15 partner organizations, including insights related to organizational readiness and their key success factors. We also explore future paths to sustainability and scalability across the nonprofit sector.

This report has five sections:

1. **Context and PDI model overview (pgs. 9–13)** reviews the data challenges community service nonprofits face and how PDI was designed to tackle them. It also outlines the core components of the PDI model and how it was adapted for our second phase.
2. **Learning agenda (pgs. 14–15)** presents our research questions, aligned to our six-stage innovation cycle and developed to ensure continuous improvement throughout the initiative.
3. **Research design and data sources (pgs. 16–17)** provides our approach to evidence generation and key data sources.
4. **Findings (pgs. 18–27)** includes answers to our research questions aligned with the six-stage innovation cycle.
5. **Discussion and conclusions (pgs. 28–31)** summarizes what we've learned about delivering PDI and explores how the initiative can continue in the future.

1. Context and PDI model overview

Blueprint launched PDI in 2021 in response to needs in the Canadian nonprofit sector identified through our research and partner feedback. This section provides a high-level description of the model and its implementation.

1.1. Meeting the data needs of the nonprofit sector

As mentioned in the **Introduction**, data are becoming increasingly vital to the day-to-day functioning of the nonprofit sector. However, the sector faces three core challenges in meeting these needs: I) there is little funding available to invest in data-related capacity building or staff upskilling; ii) funder-mandated data systems are not fully aligned with service delivery needs; and iii) nonprofits often lack internal expertise to clearly articulate data requirements. These needs are taken up in greater detail in section **5.1. Needs assessment phase**.

In response, Blueprint, with support from the Future Skills Centre, developed PDI, which marries dedicated and flexible funding with trusted and technology-neutral advice grounded in our expertise in program data, technology solutions, and nonprofit service delivery. Through a series of collaborative workshops and capacity-building activities, PDI helps community service organizations (CSOs):

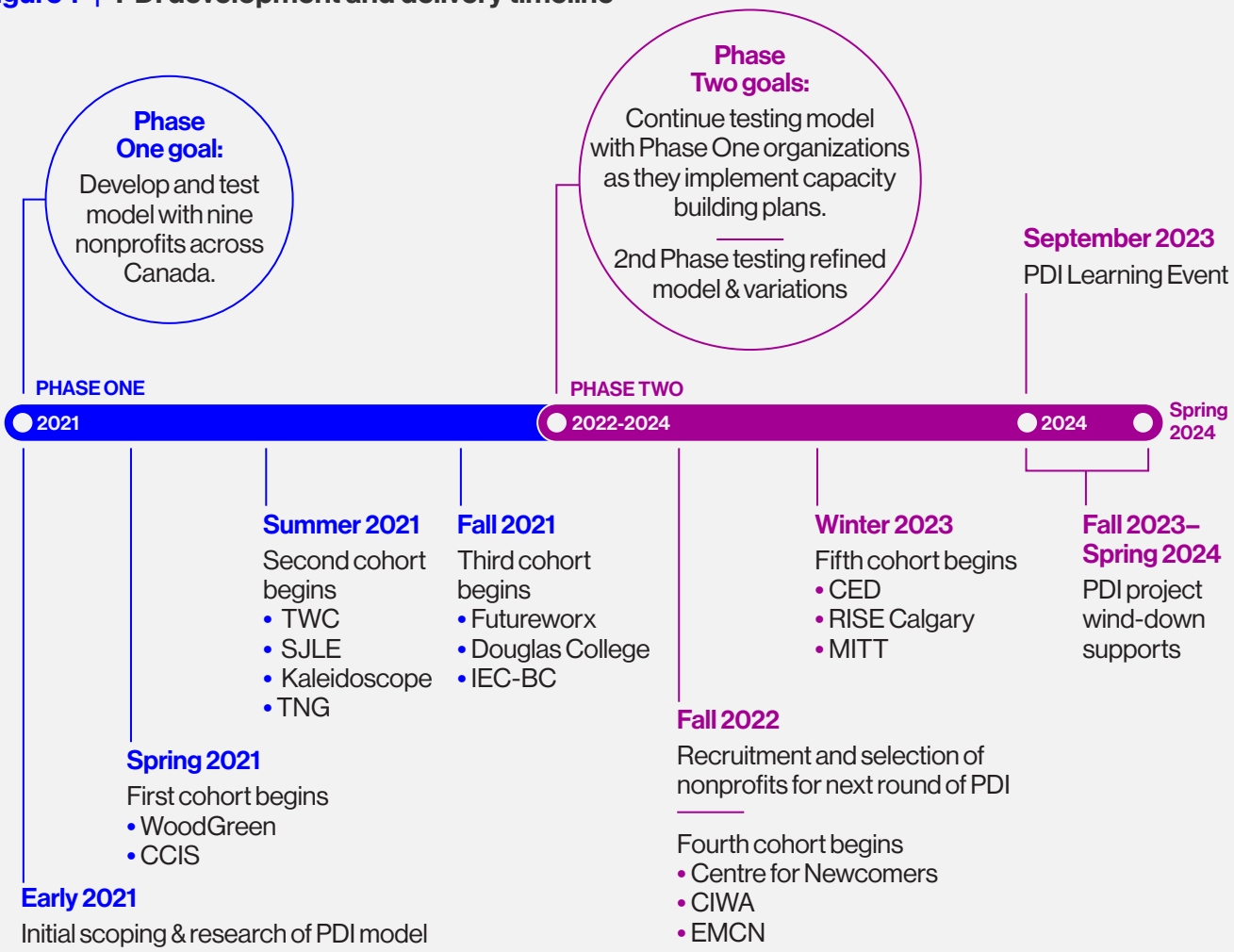
- Articulate their data storytelling goals, tying data collection activities to outcomes and impact.
- Assess their current data capacity with a review of processes, technology, and skills.
- Receive coaching activities to support knowledge- and skill-building.

Since 2021, Blueprint has led the development, delivery, and iteration of the PDI model with 15 CSOs.

1.2. Model overview

Phase One was delivered to nine CSOs in three launch cohorts, testing our model and making enhancements based on CSO feedback for Phase Two. **Figure 1** provides a visual timeline of PDI's Phases and CSOs. For a description of our partners and selection process, see **Appendix A**.

| Figure 1 | PDI development and delivery timeline



The CSOs in Phase One received three stages: the Discovery (involving workshops), Planning, and Implementation stage. Discovery workshops—about the partner's strategic priorities, their current-state capacities, strengths, weaknesses, and defined data goals—helped produce a Capacity Building Plan (CBP), refined in response to organization feedback, and consisting of concrete activities for the partner team to complete over 12 to 36 months. **Figure 2** describes the stages during Phase One.

| Figure 2 | Phase One PDI model

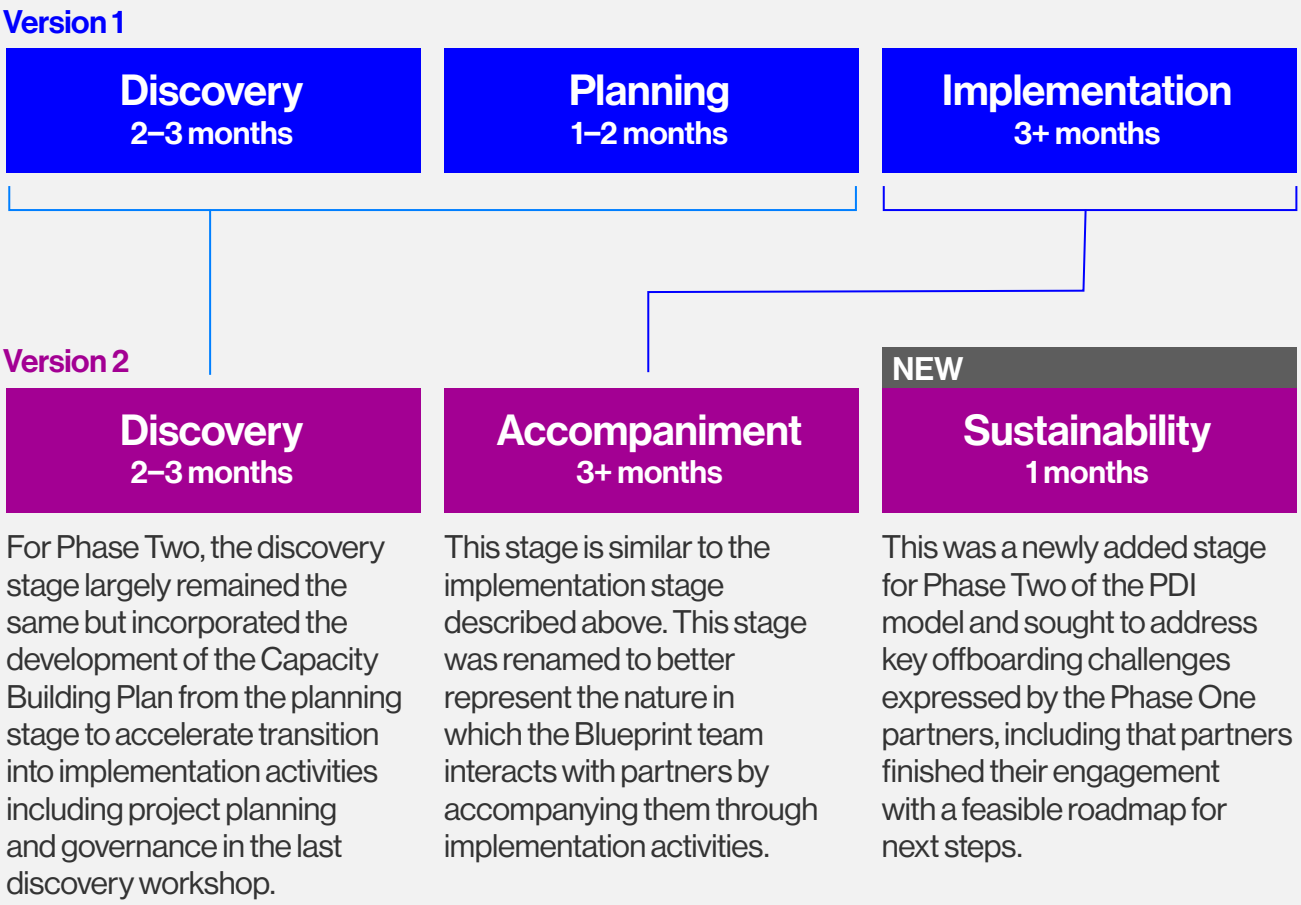
1.3. Adaptations from Phase One to Phase Two

With our approach to continuous improvement, Blueprint was able to collect feedback, identify pain points, and implement updates to the model. Adaptations from Phase One to Phase Two included:

- **Setting better expectations for the PDI engagement.** Many Phase One partners were surprised by the time commitment and broad scope. For Phase Two, we re-articulated time commitments in the EOI and held expectation-setting calls. After Phase One, the Blueprint team could better set expectations and describe the work through concrete examples.
- **Accelerating time to implementation.** During Phase One's Planning Stage, we articulated recommendations over one to two months. Partners found this timeframe slightly too long, challenging their momentum. In Phase Two, Planning Stage activities were integrated into the Discovery Stage and provided draft recommendations, which were to be refined into the CBP in the first weeks of a new Accompaniment Stage. This ensured greater momentum.
- **Integrating project governance into the Discovery Stage.** We integrated project governance coaching into a workshop at the end of the Discovery Stage. This built clarity around accountabilities and responsibilities. Documentation on shared goals and decision-making structures helped partners move rapidly and built trust among leadership and staff.
- **Creating an Accompaniment Stage.** We changed the Implementation Stage to an 'Accompaniment Stage,' involving monthly meetings to break down work into smaller activities and define action items. This provided structure and accountability while reinforcing partner ownership and skill-building.
- **Instilling confidence in next steps.** Partners expressed some anxiety about continuing after PDI. In response, we implemented a new 'Sustainability Stage' for focused support in transitioning out of PDI, tailored to each partner's needs.
- **Forming a learning community.** Partners requested opportunities to connect and learn from each other. Blueprint created optional webinars, roundtables, and case studies, culminating in an in-person event in September 2023. This shared experience provided a collective language and allowed comparison of approaches across sectors and organization sizes. These elements are described in greater detail in **Appendix D**.

The three slightly different stages of Phase Two—the Discovery, Accompaniment, and Sustainability stages—are mapped in **Figure 3**.

| Figure 3 | Changes from Phase One to Phase Two model



2. Learning agenda

As we implemented PDI, we aimed to learn about the type of support that community service nonprofits need to increase their data capacity along with how the PDI model could be scaled. PDI thus had a carefully tailored learning agenda to help us make continuous improvements.

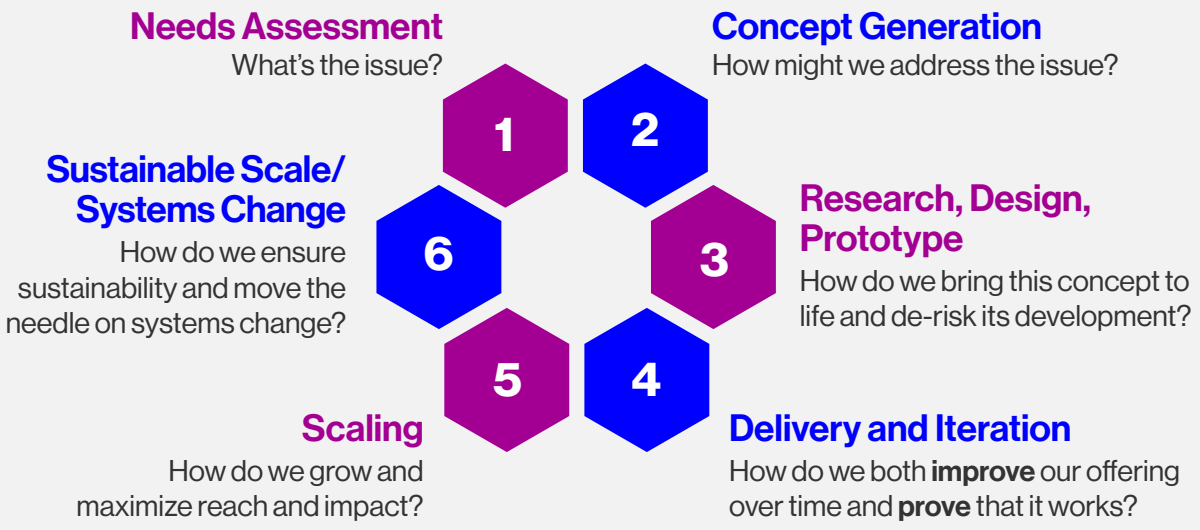
2.1. Aligning questions with the innovation cycle

Across all our portfolios, Blueprint aims to move the innovations we support through a six-stage cycle using our evidence generation toolkit (see **Figure 4**). In a well-functioning innovation ecosystem, innovations start with a needs assessment, move to conceptualization and design and then to delivery, testing, and iteration. For the interventions that are proven to work, the goal is to expand to meet the need at scale and create system changes to institutionalize the innovation.

Knowing where an intervention is in the cycle allows us to ask the right questions and generate the right evidence to move the project forward. Fostering early-stage innovation requires understanding and assessing complex issues, generating new and untested concepts and exploring the feasibility and desirability of these concepts with stakeholders. Projects that have moved into the delivery, testing, and iteration stage are typically ready for evaluation.

We began our work on PDI by developing a deep understanding of the needs of community service organizations (Stage 1: Needs Assessment) and then generated model concepts to meet them (Stage 2: Concept Generation). As we delivered PDI, we concurrently generated evidence that advanced the model through Stage 3: Research, Design and Prototyping and into Stage 4: Delivery and Iteration. After three years of delivery, we are now exploring the next steps for scaling (Stage 5) with the ultimate goal of sustainable scale and systems change (Stage 6).

| Figure 4 | The Six-stage Innovation Cycle



2.2 Learning questions

Blueprint was guided by the following questions to explore PDI's utility to practitioners, funders, and the sector.

1. Needs Assessment

- **a.** What are the specific barriers to data capacity we hope to address?
- **b.** For what types of organizations, and to which members of staff within them, would a practitioner data model be most relevant?

2. Concept Generation (Model Design)

- **a.** What features does an effective model require?
- **b.** What outcomes are organizations looking to achieve through enhanced data capacity?
- **c.** How would these features differentiate our model from existing approaches?

3. Research, Design, Prototype (User Testing)

- **a.** What were key constraints or challenges to the delivery of the PDI model?
- **b.** What tools do practitioners need to improve their data capacity?
- **c.** How do various organizational characteristics and resources impact the ability to leverage the PDI model effectively?

4. Delivery and Iteration

- **a.** To what extent do participating organizations improve their data capacity during and after engagement with PDI?
- **b.** How effectively does the PDI model address the identified data needs and pain points of community service organizations?
- **c.** How has or can the PDI model be adapted for different organizational contexts?

5. Scaling

- **a.** At this early stage, which parts of the PDI model might be generalizable and scalable?
- **b.** How could the PDI model be tailored to current and projected opportunities?
- **c.** Is there demand for the PDI model in other contexts from relevant stakeholders, delivery partners, and funders?
- **d.** What organizational resources are needed to deliver the PDI model in new contexts, and how can these be mobilized?
- **e.** What is the cost of the model (funding and support) and is it accessible to nonprofits?
- **f.** What will PDI partnership engagements cost in a sustainable future state?

6. Sustainable Scale and Systems Change (Institutionalization)

- **a.** How do organizations envision the role of policy in supporting the long-term implementation and scaling of the PDI model within their operations?
- **b.** What funding models and government investments support the innovation in digital skills and infrastructure—and how can these be leveraged for PDI?

3. Research design and data sources

3.1 Research design

Blueprint took a developmental evaluation approach to "guide adaptation to emergent and dynamic realities in complex environments,"[1] help us continuously improve the model, and answer our research questions. We collected both qualitative and quantitative data at multiple points to understand our partner journeys and gain actionable insights on success factors, challenges, outcomes, and implementation experiences. This approach supported continuous improvement of the PDI model via:

1. **Open and continuous feedback loops.** As part of building trusting relationships with our partners, we promoted sharing of open and continuous feedback—including regular touchpoints and reflective conversations at the end of each stage of work.
2. **Staggered cohort launches.** By staggering the start dates of PDI engagements, we incorporated learnings from earlier engagements to improve the experience for later cohorts.
3. **Regular iteration cycles.** At regular intervals, we held internal retrospectives to consider what was working well, what posed a challenge, and how we could adapt the model in response.
4. **Continuous learning for the Blueprint team.** The task of increasing data capacity touches all parts of an organization; it required that Blueprint staff possess a broad skillset. To ensure we remained supportive, our PDI team accessed continuous training to improve their knowledge of data equity, data management, and data privacy and security.

3.2. Data sources

This *Final Report* was developed through the consolidation of structured and direct feedback from partners and participating consultants, Blueprint's observations, and our review of engagement outputs (i.e., Learning Agendas, Data Goals, and CBPs).

Initial scoping research (early 2021)

Blueprint's initial scoping work involved key informant interviews with eight nonprofits across Canada that delivered community services; collected program or client data to meet reporting requirements from multiple funders; were eligible for support from PDI; and would fit within FSC's mandate. We spoke with CEOs, directors, VPs and managers with responsibilities in operations and programs, research and data analysis, and related infrastructure. We also reviewed data capacity building initiatives across North America to situate PDI within the broader ecosystem and highlight ways in which it might complement and/or amplify existing efforts at increasing data capacity in Canadian CSOs. Further detail on these initiatives can be found in **Appendix B**.

1 Better Evaluation. (2021, November). *Developmental evaluation*. https://www.betterevaluation.org/methods-approaches/approaches/developmental-evaluation

Partner surveys (spring 2022 and fall 2023 to spring 2024), interviews, and check-ins

We distributed surveys at the end of Phase One (spring 2022) and Phase Two (fall 2023 to spring 2024) to gather data about partner satisfaction, areas for improvement, and success indicators. We also held in-depth interviews at the end of Phase Two with all partners to gather insights about their PDI experience and its organizational impacts. Further details can be found in **Appendix B**.

| Table 1 | Report data sources

Data sources	Dates	No. of responses	No. of partners who participated
Phase One survey	Spring 2022	12 responses (three partners had multiple respondents)	9/9 partners
Phase Two survey	From fall 2023 to spring 2024 in a staggered cadence depending on delivery cohort	20 responses (five partners had multiple respondents)[2]	13/15 partners (one Phase One partner and one Phase Two partner did not respond)
Interviews	N/A	N/A	15/15 partners

Blueprint also held monthly check-ins with partners and at the end of each stage, starting during the Accompaniment Stage, via Zoom. This was to ensure we had a clear understanding of our partners' needs and objectives, that they were building knowledge and understanding about data capacity at their organization, and we had the right expertise at the table to support their emerging needs.

Technical consultations

Blueprint worked with technical experts to support with design and delivery. Ben Berres supported with the initial design of the model and provided ongoing technical expertise and mentorship throughout each phase. DARO (formerly Ajah) was our implementation partner throughout Phase Two, interacting directly with partners to support their Accompaniment Stage. Consultants participated in retrospectives and reflection conversations, supported the development of tools and templates, and provided feedback as data capacity experts in the sector. Consultant biographies can be found in **Appendix A**.

2 Phase One partners were not asked about their Discovery Stage activities on the Phase Two survey – their responses about these activities were collected in the Phase One survey. When reporting survey findings about the Discovery Phase activities, responses are aggregated (12 responses from the Phase One survey and six responses from the Phase Two survey, for a total of 18).

4. Findings

4.1. Needs assessment stage

What are the specific barriers to data capacity we hope to address?

Our initial scoping research helped us identify three key barriers to leveraging data as an asset:

1. **Lack of in-house knowledge and expertise** to clearly articulate data-related challenges. Nonprofit leaders struggle to improve their data capacity because they lack confidence in designing appropriate solutions. This challenge is exacerbated when advice is solicited from vendors selling tech solutions, as organizations find it difficult to accurately compare and select vendors, tools, and applications objectively.
2. **Limited funding sources for organizational capacity building.** Most government funding focuses on project outcomes and service delivery, leaving little room for investment in tech, technical staff, or organizational change. Organizations often must seek private philanthropic grants or develop other revenue streams to fill this gap.
3. **Funder-driven data collection.** Data often fails to answer key strategic questions for service delivery improvements, outcome assessments, or mission-oriented, data-driven storytelling about the organization's impact. Many funders require specific funder-mandated systems, leading to disparate data entry processes. If a nonprofit receives funding from several entities, staff may need to input data into separate systems lacking useful export features, creating a one-way data flow to each funder. To maintain a holistic view of data across programs, many nonprofits run parallel systems, requiring 'double data entry.'

For what types of organizations, and to which members of staff within them, would a practitioner data model be most relevant?

Organizations surveyed during the scoping phase indicated that a flexible, adaptive model addressing key barriers would have broad applicability across the nonprofit sector. But essential organizational elements must be in place for the PDI to operate effectively:

1. **Organizational capacity and resources.** The model assumes a minimum level of ongoing finances that organizations can invest in data capacity after the engagement.
2. **Not being currently engaged in digital transformation.** To fully benefit from PDI, an organization should not concurrently be undergoing a digital transformation. Rapidly changing data capacities complicate assessing strategic needs and plotting a roadmap.

Creating effective change means targeting the correct staff—those who enable organizational transformation and have diverse perspectives on challenges. Our research revealed two types of staff needed at the PDI table, both acting as facilitators and in-house experts:

1. **Strategists.** The PDI model requires people who can provide insight into overall strategy, sign-off on budget items, and guide decisions (often senior managers or directors). This role is key to developing leadership buy-in, enabling future accompaniment activities, and building internal expertise for ongoing data capacity efforts.
2. **Tactical coordinators.** The PDI model also needs individuals who can execute or coordinate day-to-day activities. These staff members must hold consolidated knowledge of organizational processes and capacities at the delivery level, ensuring frontline and mid-level staff experiences inform decision-making processes.

4.2. Concept generation stage

Based on our scoping research and a review of partners' expressions of interest (EOIs), we began to distill what a successful model may need—and how to address potential gaps in knowledge.

What outcomes are organizations looking to achieve through enhanced data capacity?

All PDI partner organizations deliver services, report to funders using funder-managed systems, and experience funding constraints. Our 15 partners hoped to achieve three common outcomes:

1. **Data-informed, strategic decisions.** Partners wanted data to answer questions on their strategic direction (e.g., to serve communities better and be more equitable). Common questions were: What new programs should we deliver? What's working and not working—and for whom? How can we anticipate future service demand and adjust resources accordingly?
2. **Streamlined service delivery.** Partners sought to improve reporting efficiency and reduce paperwork through digitized systems, eliminating manual data entry. This would allow administrators to consolidate data across disparate systems and spreadsheets, support clients more effectively, and better meet service demands.
3. **Data-backed storytelling for stronger funding applications.** Partners envisioned communicating greater detail around client demographics, program outcomes, and funding impacts. Enhanced data capacity would strengthen funder relationships and community advocacy.

While common challenges exist, we work with nonprofits to uncover specific strengths and challenges, designing tools and processes for right-sized solutions. During Phase One partner selection, we recruited CSOs varying in size, services, regions, and clientele. The PDI model was developed with flexibility as a key quality and applicable across a wide range of nonprofits.

What features does an effective model need?

To achieve these outcomes, the PDI model assesses partners' current and future data capacities across three core dimensions. This provides a flexible framework for nonprofits and creates a structure to parse interrelated, organization-specific challenges. **Figure 5** illustrates these dimensions as numerical stages of development.

| Figure 5 | Core dimensions of data capacity

1. Collecting the right data An effective model ensures partners understand what data to collect, why it's important, its purpose, and how it supports their mission, vision, and strategic objectives.	**2. Building the right processes and infrastructure.** An effective model improves business processes and leverages technologies to streamline, automate, and provide structures to collect, use, and manage data. It enhances decision-making, data-collection, and communication processes.	**3. Having and deploying the right skills.** An effective model helps organizations understand and develop skillsets for data collection, reporting, and ongoing management. This includes a strategic view of data as a continual practice, coupled with technical skills for data work and system management.

Our Discovery Stage workshops gathered information about these dimensions, allowing us to develop adaptable tools for specific challenges in the Accompaniment Stage. This framework equipped partners with questions to continually assess their data capacity after the PDI engagement.

How would these features differentiate our model from existing approaches?

Our scoping research and ecosystem scan showed providing *both* funds and strategic advice was critical to moving the needle on nonprofit data capacity. A combination of funding and tech-agnostic guidance is rare: only one other initiative—PropelNext, funded by the Edna McConnell Clark Foundation (US)—had this combination.

As data touches all parts of an organization, the PDI model needed a holistic, organizational-wide lens. In EOIs, organizations described the desire for more integrated approaches to data collection and management across delivery pillars. Even if PDI addressed only one priority, partners learned about tools and processes to help them scale-up their data capacity in other areas after PDI.

4.3. Research, design, prototype stage

Our research, design, and prototype stage centred on bringing PDI to life. To answer our questions, we leveraged partner conversations, internal team discussions, survey results, and reviews of engagement outputs across all 15 interventions.

What tools do practitioners need to improve their data capacity?

During the Discovery Stage, we identified two effective tools for planning data strategy from feedback provided by partners and our observations:

- **Learning agendas.** An essential tool developed during the Discovery Stage, learning agendas outlined partners' key questions about their organization, services, and sector. This document helped partners align strategic goals with measurement methods, defining the data each nonprofit needed to collect. Many partners regularly revisited their learning agendas during coaching activities to inform updated plans. All 20 respondents from the Phase Two survey 'agreed' or 'strongly agreed' that the "Learning Agenda helped us identify our data needs." In post-Phase Two interviews, nine of 15 partners noted they were still using their learning agendas. An example Learning Agenda is provided in **Appendix C**.
- **Project governance coaching.** At the end of the Discovery Stage, Blueprint provided project governance coaching for Phase Two partners to assign PDI-related accountabilities. This helped partners identify necessary staff and skillsets for the Accompaniment Stage and clarify decision-making responsibilities.

During the Accompaniment Stage, partners engaged in hands-on activities, using flexible tools with Blueprint's guidance. We met monthly or more frequently with each partner, providing coaching on change management, data culture, and leadership buy-in. Specific activities and tools were defined in each CBP. **Figure 6** summarizes four tools common across most partners.

| Figure 6 | Four tools common across nonprofits

1) Data inventory. This tool helped partners deconstruct collection processes to ensure they gathered the right data, in the right way and at the right time, to answer learning questions. It provided a structure to list data fields, identify duplicates, align data points (e.g., to measure gender or ethnicity in the same way), identify redundancies, and assign data stewards responsible for the quality of that data.	**2) Business process maps.** These visual representations show how activities are achieved, including touchpoints, actions, responsible parties, data types, and storage systems. Maps help confirm process consistency, identify streamlining opportunities, and assign accountabilities.
3) High-level data system maps. Used with partners with complex data architecture or exploring system integration or consolidation, these maps visually represent each data system used and their connections.	**4) Data system requirement documents.** These documents were created for partners hiring technology vendors; they articulated organizational needs, helping partners feel informed and confident when comparing potential services and systems. This ensured each partner obtained the best solution for their specific use cases.

What were key constraints or challenges to the delivery of the PDI model?

During the Discovery Stage, either *a lack of* senior staff or too many staff members at the table could obscure strategic priorities and hinder clear articulation of needs. Constraints during the Accompaniment Stage varied by type of organization and relationships with funders and leadership.

- **Leadership buy-in.** Leaders skeptical of technology (often due to past challenges) hesitated on platform decisions and change management activities.
- **Staff buy-in.** Staff most impacted by new processes and technology sometimes resisted PDI, fearing disruptive changes and time constraints.
- **Funder-mandated systems.** Some partners faced challenges integrating new processes and data management tools with existing systems. The PDI team often needed to create or refine processes to consolidate disparate datasets. Many funder-mandated systems lacked useful export functions, complicating streamlining efforts.

How do organizational characteristics and resources impact the ability to leverage the PDI model effectively?

Partners who were able to move through the activities described in their CBPs quickly and efficiently had some or all of the following characteristics.

1. **Mission, vision, and activity alignment.** Staff aligned on missions and vision statements could prioritize strategic learning questions swiftly and collaboratively—and articulate their importance to the organization. Ideal alignment included both leadership buy-in (i.e., leaders prioritizing the work and its outcomes and communicating their value) and buy-in around data culture (i.e., staff committed to using data to create an environment of excitement around the engagement).
2. **Articulated staff responsibilities and accountabilities.** Nonprofits with clear responsibilities and time to dedicate to PDI could engage more deeply and improve data-related organizational skillsets. Clear responsibilities created shared structures of accountability to promote data quality. Nonprofits with staff time to consider strategy tended to have higher annual revenues.
3. **Having strong, clear, and streamlined governance structures.** Strong, clear governance structures made decision-making around technology, hiring, and priorities quicker, increasing the number of ways we could assist. Leaders who trusted their staff, allowed them to make smaller decisions, and trusted their recommendations on PDI helped sustain momentum.

4.4. Delivery and iteration stage

Following our developmental evaluation approach, we established rapid iteration cycles during the delivery and iteration stage to address issues, collect successes, and evaluate model components. We synthesized partner feedback, team reflections, and themes to address key learning questions.

To what extent do participating organizations improve their data capacity during and after engagement with PDI?

All 20 Phase Two survey respondents reported increased confidence in advancing their data capacity and handling related challenges. The PDI model provided tools and support for the three core dimensions of data capacity (see **section 4.2**), addressing common challenges in collecting appropriate data, building talent, and developing infrastructure and processes for tangible outcomes. **Figure 7** describes the challenge nonprofits faced, the solutions we offered, and the number of organizations that implemented our recommendations.

| Figure 7 | Core dimensions of data capacity: challenges, solutions and affected organizations

1 Collecting the right data to learn and innovate

Common Challenge:
When the focus is on data to meet funder requirements, key data are often missing that would better inform program learnings and innovation.

Solution:
Create a learning agenda to prioritize and identify key data points for a more complete picture of the nonprofit programs and their impact.

13/15 Organizations created learning agendas about what and when to collect data.

2 Building talent with the right skills

Common Challenge:
Staff may lack the capacity and/or skills to manage data at strategic and technical levels.

Solution:
Hire staff with the data skills and knowledge and empower internal champions for increased data capacity.

10/15 Organizations created learning agendas about what and when to collect data.

3 Building efficient and effective data management processes

Common Challenge:
Having several separate and inconsistent data management tools can lead to ineffective reporting at the organization level and across programs.

Solution:
Develop a data inventory and the ability to select a digital data consolidation tool for a holistic view of the organization's influence.

10/15 Organizations implementing digital data consolidation tools to increase accessibility and visibility across key stakeholders.

By reviewing each partner's engagement outputs from the Discovery Stage—and the progress made in their CBP activities at the end of their engagement—Blueprint identified three common areas in which the 15 partners improved their data capacity:

1. **Collecting the right data to learn and innovate.** Organizations need to understand what data to collect and why, ensuring it serves strategic needs. The PDI's learning agenda facilitated discussions on data needs and service-related learning questions. **Thirteen of the 15 partner organizations created a learning agenda**, and the remaining two identified their data needs prior to their PDI engagement. On the learning agendas, partners commented:
   - "[We learned] to collect data more intentionally. We already collected a lot of data but without rhyme or reason."
   - "The data goals and learning questions were most useful to us and made us think of what kind of metrics we need to gather ... They provided a guiding north star."
2. **Building talent with the right skills.** Through flexible funding and Blueprint's support, organizations identified necessary skillsets for their learning agendas, either hiring new staff or adjusting positions to ensure their staff had the right skills. **Ten of the 15 partners hired new staff or updated existing roles.** The remaining five borrowed resources from other parts of the organization, had the resources on their team, or planned to hire post-engagement.
   - "PDI was a great project to get the needle moving in the right direction and advocate internally for more resources."
   - Eighteen of the 20 respondents from the Phase Two survey 'agreed' or 'strongly agreed' that PDI allowed their organization to advocate for new staffing positions that will be useful in building organizational data capacity.
3. **Building effective and efficient data management processes.** As we developed and supported the execution of the CBPs, partners implemented new data processes based on their goals and contexts. **Ten of 15 partners implemented a form of data consolidation tool, process, or technology.** These tools varied by needs, and included data inventories, business process maps, high-level data systems maps, and data system requirement documents for onboarding tech vendors. Thirteen of 15 partners were ready to perform these activities during their engagement.
   - "[Business process mapping] helped identify consistencies when looking at similar processes and ensured each division is using the same process."
   - "Data inventory is being used even now ... It's also very applicable to other facets of our work."
   - "Data is less siloed now and people have more access to data."

   Of Phase Two survey respondents, 13/15 indicated they were extremely satisfied with their engagement, with an average net promotor score of 9.25/10. Many attributed transformational change to PDI, describing this in the Phase Two survey as such:
   - "As a result of PDI, we have made major changes within our organization, including [hiring] a dedicated staff position, agency-wide CRM selection and rollout, and increased capacity to advise and share with others [regarding] data capacity and data equity. The resources also allowed us to create assets that continue to contribute to the larger conversation we are having within the sector."

- "The process made data-related conversations very tangible. The PDI project took [us] from an abstract concept of what [we] wanted to do ... to coming up with a good plan of how to do things. The PDI project helped [us] improve [our] data literacy and deal with collective challenges and not feel alone in dealing with data challenges."
- "It was a fantastic experience. It completely changed the way we collect, process, store and dispose of our data."

How did the PDI model address the identified data needs and pain points of community service organizations?

Flexible funding. Blueprint's flexible funding and technological/strategic advice were core model components, essential for giving organizations adequate space to engage in high-level strategic work. This pairing helped them make thoughtful, intentional decisions about their data and management practices. Organizations noted flexible funding as a key component to success in their close-out interviews.

Holistic reframing. In EOIs and early conversations, partners described ambitious goals for improving their technology and implementing data science tools. With PDI's holistic approach, we shifted these perspectives away from technology—or tech as the sole objective—to higher-level strategies involving staff, goals, and processes. In interviews, several partners saw this as a highly valuable reframing:

- "A big takeaway is that more often that we don't need a tool but rather need to update a process."
- "We are in a better position of success in implementing a system. It changed what the measure of success was—not just giving people a database but being able to articulate where we want to go."
- "PDI helped us not only focus on software, which was our initial intent. We now also think about who is storing [data], how to manage [data] and now also think about data governance."

The Discovery Stage. This was critical to shaping the entire engagement and created shared understanding of organizational activities and objectives between us and our partners. For some, this was the first time viewing their organization through a holistic lens—particularly if they were large and provided services across many pillars.

- All respondents polled about the Discovery Stage 'agreed' or 'strongly agreed' that "The Discovery Stage workshops sparked valuable conversations about data within my organization that otherwise wouldn't have happened." All survey respondents 'agreed or 'strongly agreed' that the "Discovery process consistently felt worthwhile as I was participating."

How has or can the PDI model be adapted for different organizational contexts?

In Phase Two, we tested the adaptability of PDI by implementing it for three different use cases.

1. **Using external data.** Calgary Economic Development (CED) acquires economic and employment data from government and third-party organizations. CED requested support with streamlining their internal

data consolidation processes to implement business intelligence tools and support the creation of automated, real-time dashboards to make these data more accessible and useful for staff to leverage and be shared with stakeholders.

2. **Building shared frameworks across organizations.** Rise Calgary partnered with the Women's Centre of Calgary (WCC) to align data collection methods and outputs to tell a collective story about the importance of providing basic needs within the community service sector. We helped identify and define a shared storytelling framework and create accessible solutions and processes that were right-sized for each organization's capacity.
3. **Developing complementary evaluation capacities.** The Manitoba Institute of Trades and Technology (MITT) sought the evaluation capacity to fulfil new reporting requirements implemented by the government of Manitoba for non-credentialed programming. This meant additional time and investment in the Discovery Stage to work with of MITT's non-academic department teams to identify key outputs and outcomes for their varied activities.

Blueprint used these engagements to address nuanced data capacity challenges and goals and explore how PDI could support collaborative data efforts via existing networks. Discovery Stage activities helped identify data capacity gaps within each case and create supportive CBPs. The three organizations 'strongly agreed' that the Discovery Stage consistently felt worthwhile in the Phase Two survey. Two noted that PDI content was relevant and tailored to them effectively in interviews.

4.5. Sustainable scale and systems change

The following section outlines key questions and areas of exploration for assessing the PDI model's scalability and sustainability.

In future potential iterations of the model, we aim to answer the following questions:

1. *Which parts of the PDI model might be generalizable and scalable?*
2. *How could the PDI model be tailored to current and projected opportunities?*
3. *Is there demand for the PDI model in other contexts from relevant stakeholders, delivery partners, and funders?*
4. *What organizational resources are needed to deliver the PDI model in new contexts, and how can these be mobilized?*
5. *What is the cost of the model (funding and support) and is it accessible to nonprofits?*
6. *What will PDI partnership engagements cost in a sustainable future state?*

The first three questions address the model's replicability and can be answered by adapting the model to different contexts. This can build a better understanding of PDI demand and how well it can be fine-tuned to meet it. The remaining questions address financial scalability and can be answered through a costing of model delivery and an assessment of ways to decrease its cost while retaining efficacy. Experimentation is needed to identify model variations that can achieve this goal; for now, we can consider four options for future iterations:

- **Funding the Discovery Stage only.** The Discovery Stage helps assess an organization's needs and turn them into a funding proposal. In a cohort, organizations could proceed directly into the Accompaniment

Stage, pending successful receipt of funding. This staged approach could also allow more highly tailored funding to meet specific needs.

- **Adjusting flexible funding based on hiring needs.** Across the portfolio, flexible funding helped organizations bring on new staff member(s) and/or create new funded positions. The price could be reduced if an organization is resourced for the work and hiring is not a need.
- **Building cohorts with similar organizations.** Assembling cohorts composed of similar organizations—and those who are at similar stages in their data capacity journeys—could reasonably reduce costs for funders and streamline resources.
- **Tailoring to meet funder objectives.** Costs can theoretically be lowered by aligning model delivery to address data or processes specific to funders—and reducing the scope from a holistic lens to a set of specific processes related to funder requirements.

To understand how the PDI model can function sustainably within the nonprofit ecosystem—and how it can contribute to systems change—we aim to answer the following questions in future iterations:

1. *How do ecosystem actors, including nonprofits and funders, envision the policy and program factors needed for the PDI model to work as a sustainable element of their approach?*
2. *What funding models and government investments support the innovation in digital skills and infrastructure—and how can these be leveraged for the PDI?*

Answers can illuminate how policy, programming, and the PDI model can be adapted to ensure sustained impact on sector data capacity. These questions must be answered via in-depth consultations with ecosystem actors once the scaling process has commenced. Based on our experience with implementation, we would begin with three areas of exploration, focused on funder perspectives and opportunities:

- **Dedicated data capacity funding.** Long-term, flexible, core funding is needed for organizations to invest in data capacity. This is especially true as funders introduce new and/or complex reporting requirements, forcing organizations to pivot their data collection methods. With the downturn of charitable giving,[3] this is more critical for the sector's sustainable health and its ability to deliver responsive, applicable services. A key element of sustainability will be understanding funders' opportunities and limitations for delivering funding for data capacity.
- **Considering data capacity as part of organizational performance.** Funders vary in how they consider data capacity an element of performance among nonprofits they fund. When data capacity is a consideration at both application and reporting stages, funders are better equipped to know if applicants can collect, manage, and report on data effectively, and whether intervention is needed. Assessing funder capacity to build data into their performance frameworks, and developing toolkits to do so, may be a critical element of sustainability.
- **Sectoral leadership.** Funding nonprofits to deliver services and grow their data capacity can create a strong, data-literate social service sector, supporting policymakers, funders, and clients. Investigation into sustainability and systems change can focus on where and how funders and other actors have the best opportunities to demonstrate leadership in this space.

3 CanadaHelps. (2024). The giving report 2024: *From disconnection to collective action*. https://www.canadahelps.org/en/the-giving-report/

5. Discussion and conclusions

5.1. Summary of findings

PDI incorporated a needs assessment and concept generation phase before moving on to prototyping and delivering a novel data capacity intervention. Throughout, we gained several insights about the effective design and implementation of the model.

First, nonprofit stakeholders indicated that the sector faced challenges in building data capacity related to knowledge and expertise, adequate funding, and navigating funder requirements. We learned that those hoping to build their data capacity wanted to improve their ability to make data-informed decisions, streamline service delivery, and support storytelling to funders and stakeholders.

PDI assisted in these regards: **13/15** of our partners built better strategies for the data they needed to collect, **10/15** improved their HR capacity for data work, and **10/15** implemented tools to consolidate their data holdings. The most relevant tools proved to be data strategy supports, such as learning agendas; analyses of current states, including data inventories, business process maps, and data system maps; and proactive design solutions, such as data system requirement documents.

We learned that an intervention like PDI was highly relevant to organizations with adequate resources for digital development and not currently engaged in a digital transformation. Across the first cohorts, engagements were also most successful among organizations with strong alignment between leadership and staff on the need for data and articulated staff responsibilities. Phase Two of the model developed based on feedback to better set expectations for what a PDI engagement required, accelerate time to implementation, and focus on governance earlier in the engagement. Multiple cases illustrated that PDI could continue to be a flexible model. It can focus on the use of externally sourced data; it can build frameworks across multiple organizations; and it can develop evaluation capacity alongside data capacity.

Key areas for exploration in scaling and sustainability include delivering PDI in a cost-effective way, assessing demand across sectors, and understanding necessary conditions for data capacity initiatives to be embedded in existing systems.

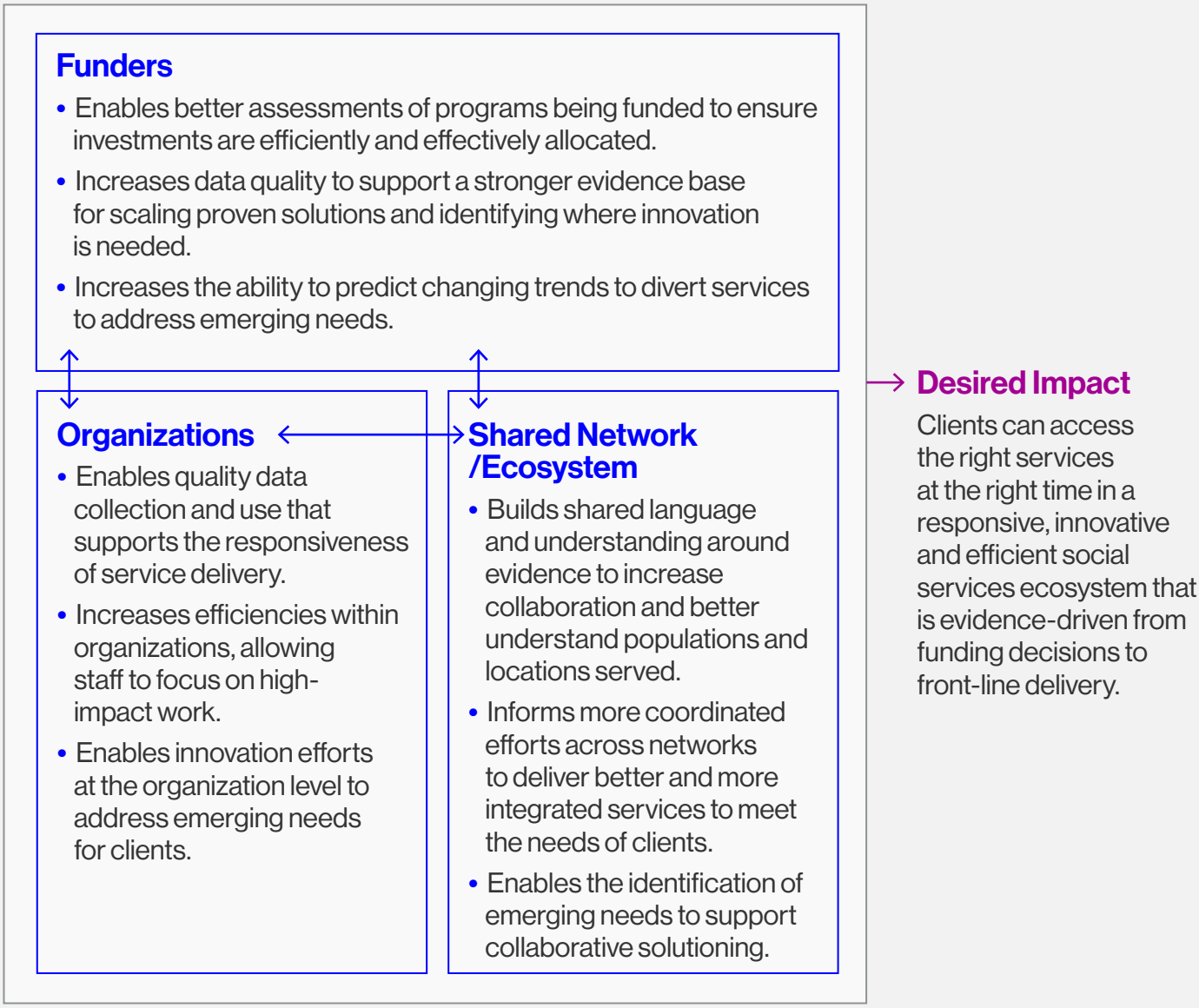
5.2. Discussion

5.2.1. Data capacity represents a strong lever for ecosystem change.

The challenges nonprofits feel across Canada are woven into the fabric of social service funding. Addressing these challenges is critical to creating a functional, responsive, and sustainable sector that can deliver the right programming to the right people at the right time. For nonprofits, this means having both funding and guidance to grow their data capacity—generating the right kind of evidence to drive strategic decision-making, inform service improvement, and respond to evolving economic, environmental, and geo-political crises. Funders must possess the appropriate data capacity to make critical funding decisions, ask the right questions to track progress towards their missions, and leverage data to track the overall health and sustainability of the sector.

Figure 8 illustrates Blueprint's hypothesis of how stronger data capacity can benefit the entire sector, from organization to funders. Creating an ecosystem with aligned data capacity will mean more responsive, innovative, and efficient social services supported by evidence-driven decisions.

| Figure 8 | Theory of change for better data capacity for nonprofits and funders



5.2.2. The PDI model is grounded in articulated sector needs.

Through our consultations, assessments of existing initiatives, and our recruitment and assessment of nonprofits, we identified the critical enablers to build data capacity across contexts. With flexible funding and strategic, technology-neutral advice, nonprofits could focus on internal capacities beyond tech and feel supported in decision-making to support strategic goals. To achieve our partners' common outcomes, including the ability to make more data-informed decisions, streamline service delivery, and tell data-backed stories to support advocacy and funding efforts, we assisted across three key dimensions that must grow in tandem to support overall growth:

- identifying and defining data needs in measurable terms,
- having the right infrastructure and processes in place to collect and manage the right data, and
- identifying and acquiring the right skills to support processes and data-use.

5.2.3. PDI components resonate with partners in a range of contexts.

Blueprint created and leveraged tools that were tested and refined to ensure they met our partners' needs. Partners expressed near-universal satisfaction with adaptations made to accommodate their contexts. Core model components—learning agendas, data inventories, business process maps, data system maps, and requirements documentation—can form a toolkit for future scaling and adaptation. Partners felt components were straightforward to access, highly relevant and adaptable, and contributing to key improvements in data capacity.

5.2.4. PDI supports measurable data capacity development.

Many of our partners described their PDI as transformative and supportive of major changes. By collecting the right data, building data talent and data processes, partners indicated concrete progress. They were confident about the sustainability of changes experienced and their momentum to continue building data capacity. While long-term follow-ups are required to understand the true nature of this progress, early evidence shows that PDI can support short- and long-term data capacity growth.

5.2.5. The PDI model has the capacity to scale.

Our final set of learning questions will assess the replicability of the model in additional contexts and ensure iterations result in desired outcomes. Future model directions may consider opportunities to scale by creating additional lower-cost versions to support integration into other funding streams—or to make it accessible to nonprofits with or without flexible funding investments.

5.3. What's next?

Our next phase is to make PDI's holistic framework more accessible. Throughout the summer and fall of 2024, Blueprint will develop a free online toolkit—a set of generalized, common tools and processes—and will hold a series for free workshops for nonprofits focused on discussing the toolkit and to bring organizations together to foster a broader learning community.

Though this toolkit is not meant to replace the PDI model, it offers a pathway for nonprofits to engage with its common tools in a low-cost manner, making it accessible to a broader range of organizations. Through our workshops, Blueprint will solicit partner feedback to continue to expand and improve on existing tools—we'll want to know if they feel more confident moving forward with building data capacity within their organizations after attending. Following toolkit development, Blueprint will explore further opportunities to iterate and scale the PDI model. These may include:

- Ongoing toolkit dissemination, with the goal of maintaining and improving the toolkit as an ongoing free resource for the sector.
- Identification of potential service and policy areas for PDI model replication.
- Convening of data capacity expertise for further refinement of the PDI model and to increase the sector's capacity to connect nonprofits with appropriate data capacity supports.
- Testing of lighter-touch data capacity engagements as routes to scalability, including workshops and office hours starting in 2025.

Appendix A

PDI partners

From November 2020 to March 2021, Blueprint identified nine organizations for Phase One and sorted them into three launch cohorts. We used four steps to identify CSOs that were a good fit for PDI:

1. **Ecosystem mapping:** Blueprint conducted another ecosystem mapping exercise to create a longlist of CSOs with mission statements aligned with FSC's strategic goals and objectives.
2. **Outreach:** In tandem, Blueprint contacted the community service organizations that were most aligned with those goals to gauge their interest and capacity to participate.
3. **EOI invitation:** CSOs aligned with FSC's goals and objectives, showed interest, and had sufficient time and resources to participate were invited to submit an EOI.
4. **Partner selection:** A panel of representatives from Blueprint and FSC selected the nine most suitable applicants based on the applicability of their data challenges, their understanding of the scope of the initiative, and the potential for data capacity to improve their service delivery. We sought a diversity of CSOs across locations, sizes, populations served, and services to develop a model that was applicable across a variety of contexts.

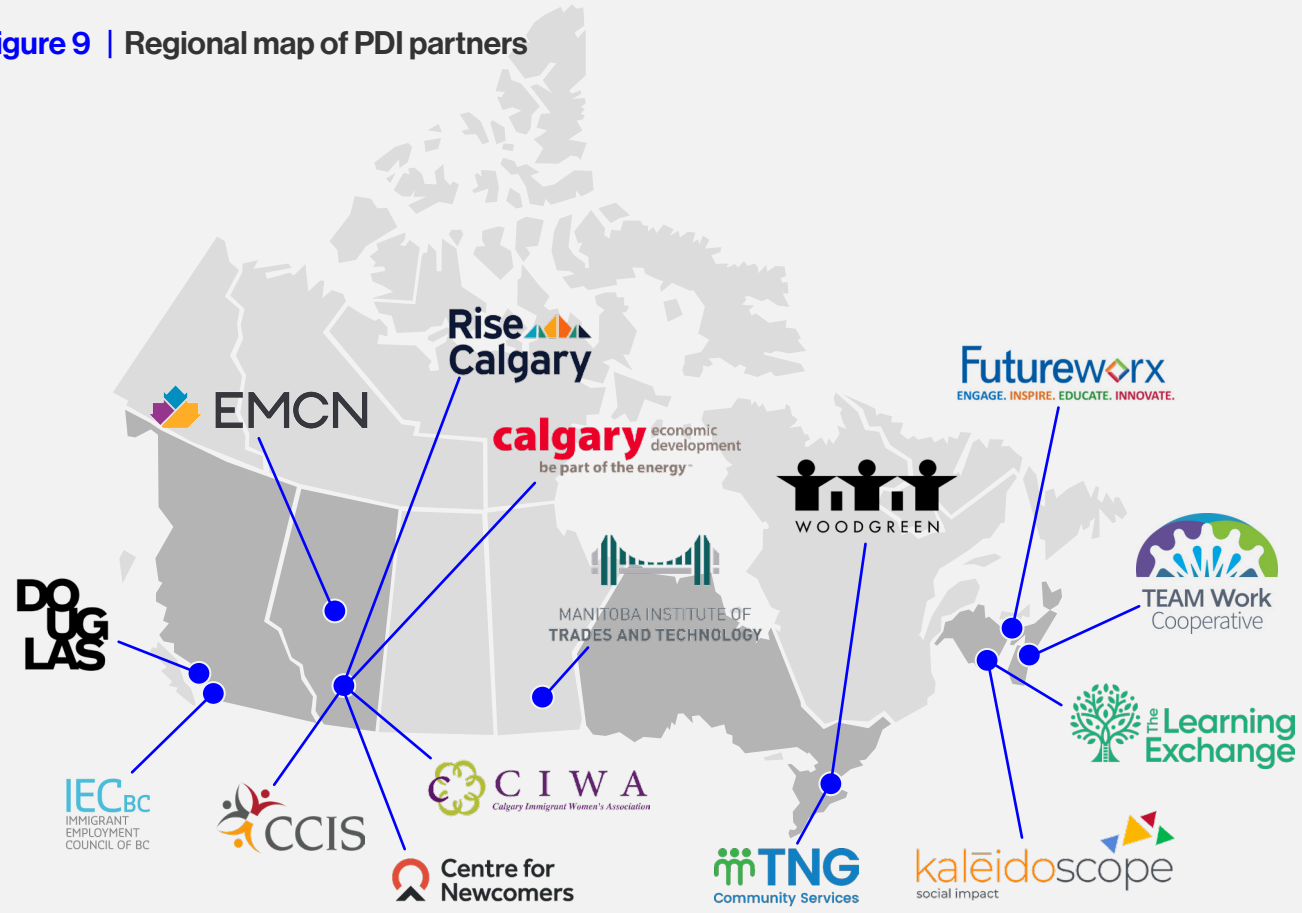
With additional funding from FSC in 2022 to launch Phase Two, we approached recruitment with a more targeted EOI. Our intent was to explore if shared contexts among CSOs—including geography, service focus, and common funders—improved opportunities for peer knowledge exchange and greater feasibility of scaling.

In terms of geography, Blueprint sought participants operating in the province of Alberta. There, 'PDI champions' from Phase One were ready to assist with recruitment and serve as mentors for new CSOs. We were also encouraged by the provincial government's expressed commitment to enhancing data capacity through the Enhanced Capacity Advancement Program.[4]

We recruited five organizations from Alberta, dividing them into two launch cohorts. The first was composed of three with other shared commonalities: community of focus (newcomers to Canada) and a core funder in Immigration, Refugees and Citizenship Canada (IRCC). These organizations were the Edmonton Mennonite Centre for Newcomers, the Centre for Newcomers, and Calgary Immigrant Women's Association. The second cohort, composed of Calgary Economic Development (CED) and RISE Calgary, shared the regional connection only. We also recruited the Manitoba Institute of Trades and Technology (MITT) to participate in this second cohort to continue partnering with at least one post-secondary institution per Phase (as we did with Douglas College in Phase One).

4 This program provides multi-year operational funding for up to three years to Alberta nonprofits to support capacity building across five focus areas: strategic leadership capacity, adaptive capacity, management capacity, operational and technical capacity, and systems capacity.

| Figure 9 | Regional map of PDI partners



| Table 2 | PDI partners and areas of focus

PDI partner	PDI area of focus
Phase One partners (2021–2023)	
Delivery Cohort 1	
WoodGreen Community Services (Toronto, Ontario) is one of the largest social service agencies in Toronto, providing Canadians and newcomers with housing, employment, training, and mental health supports.	• **Data-driven culture:** Determined a way to see a full picture of their organization's work by bringing together information from across all provided social services, assessing impact, and identifying gaps and opportunities for improvement.
Calgary Catholic Immigration Society (Calgary, Alberta) provides settlement and integration support services to vulnerable newcomers.	• **Staff capacity:** Hired a full-time data position. • **Data systems:** Introduced an agency-wide CRM; created a newcomer research library • **Data-driven culture:** Created executive dashboards from existing data to support data-driven decision-making and started new data initiatives with new and existing partners. • **Data collection:** Mined historical data.
Delivery Cohort 2	
TEAM Work Cooperative (Halifax, Nova Scotia) provides employment support services for job seekers and employers while advancing inclusive workplaces and employment opportunities.	• **Data system:** Selected and implemented a CRM to replace use of multiple spreadsheets across their services. • **Data collection:** Collected more data to demonstrate the value of their services (especially services tracked outside of their funder-mandated system).
Kaleidoscope Social Impact (Saint John, New Brunswick) formerly known as Saint John Community Loan Fund, specializes in skills development, financial literacy training and creating innovative and affordable spaces to rejuvenate neighbourhoods.	• **Data system:** Leveraged resources and expertise to deploy a database with shared indicators to support outcomes tracking for nonprofits. • **Data collection:** Linked outcomes tracking to administrative data sets.
Saint John Learning Exchange (Saint John, New Brunswick) provides education programs, work skills development, employment assistance and mental health supports.	• **Data system:** Built on findings from their SROI and launched a learning management system. • **Data collection:** Co-designed a quality-of-life survey and analyzed results. • **Data-driven culture:** Built a strong data culture, including all-staff data parties and a data analysis working group.
The Neighbourhood Group of Community Services (Toronto, Ontario) is a multi-service charity serving low-income people across multiple locations in Toronto. They support youth, seniors and newcomers, and provide childcare services, conflict resolution training and homelessness services.	• **Strategic planning:** Supported change management through a recent merger; began preparing for the upcoming employment services transformation in Ontario. • **Data-driven culture:** Helped teams align on their attitudes and processes related to data; automated client pathway processes; created meaningful dashboards that help tell their stories; and provided individual target reports. • **Staff capacity:** Hired a new position to support data quality and data governance.

PDI partner	PDI area of focus
Delivery Cohort 3	
Douglas College (Westminster, B.C.) is a public, nonprofit college and home to the Training Group, which offers employment, training and English language programs, as well as services for employers. PDI focussed exclusively on the Training Group department of Douglas College.	• **Data-driven culture:** Enabled evaluation of impact across funding streams and programs. • **Strategic planning:** Strategically considered rationale for activities and approaches. • **Data system:** Selected a CRM and supported a proactive CRM implementation strategy.
Immigrant Employment Council of B.C. (Vancouver, B.C.) is a not-for-profit organization that provides BC employers with solutions, tools and resources they need to attract, hire and retain qualified immigrant talent. IEC-BC works with employers, government and other partner stakeholders to ensure that BC employers can effectively integrate global talent.	• **Data system:** Implemented a CRM; integrated data across their programming into an Enterprise Resource Planning (ERP) system, allowing better measurement of reach to tailor service offerings to participants. • **Data governance:** Built data governance practices. • **Data-driven culture:** Built data culture across the organization.
Futureworx (Truro, Nova Scotia) is a social purpose organization responding to employment and skills development needs by partnering in their clients' journey to achieve their full potential at work home and in their community. Futureworx are innovators and collaborators in the employment support, training and skills development fields, offering an expansive range of programs, as well as, business, corporate and customized services.	• **Data-driven culture:** Empowered organizational staff to use their own data, learn, and improve, thereby supporting their strategic vision. • **Staff capacity:** Created a new staff position. • **Data system:** Implemented new software to replace outgrown data infrastructure and compile siloed data. • **Strategic planning:** Defined service standards and became strategic about what data is collected and why.
Phase Two partners (2022–2024)	
Delivery Cohort 4	
Calgary Immigration Women's Association (Calgary, Alberta) serves the needs of immigrant and refugee women, girls and their families, through more than 50 programs covering settlement needs, language and employment training, family matters and much more.	• **Staff capacity:** Added capacity, creating a data team. • **Data system:** Introduced a new Human Resources Information System (HRIS). • **Strategic planning:** Progressed towards business process improvements for all programs. • **Data-driven culture:** Laid the foundation to move from outcomes reporting to impact reporting with a senior-level data working group.
Centre for Newcomers (Calgary, Alberta) supports the integration of newcomers and the communities that welcome them through services and programs in multiple areas, including language, settlement, employment, mentorship, youth and volunteer engagement.	• **Data system:** Pursued solutions for a volunteer management CRM to better manage volunteer data and communicate their contribution to CFN's mission to staff and funders. • **Data collection:** Streamlined the collection, consolidation, and analysis of donor data to support fundraising efforts.

PDI partner	PDI area of focus
Edmonton Mennonite Centre for Newcomers (Edmonton, Alberta) helps newcomers find work, learn English, get settled and join a community.	• **Data system:** Introduced a new client database, learning system, and HR system to track client journeys and outcomes, support with referrals, and avoid duplication, eliminating several Excel spreadsheets.
Delivery Cohort 5	
Rise Calgary (Calgary, Alberta) is working to end poverty by supporting low-income individuals and families with access to basic needs supports, advocacy, financial empowerment opportunities, parenting, employment and life skills programming.	• **Strategic planning:** In partnership with the Women's Centre of Calgary, worked to identify data to support their shared story to help funders understand the role of stabilization supports in people's lives. • **Data system:** Identified key metrics and reconfigured their data systems to support the streamlined collection and reporting of metrics.
Calgary Economic Development (Calgary, Alberta) is funded by the City of Calgary to work with business, government and community partners to position the city as the location of choice for the purpose of attracting business investment, fostering trade and growing Calgary's workforce.	• **Data-driven culture:** Recognized that data is critical to explaining decisions and for storytelling. • **Data collection:** Provided teams with access to public workforce and economic data directly from a platform instead of a data request process and multiple Excel spreadsheets. • **Data governance:** Strengthened data governance.
Manitoba Institute of Trades and Technology (Winnipeg, Manitoba) provides certificate, post-graduate and diploma-level technical training for career-oriented post-secondary and secondary students. PDI focused exclusively on the Business and Organizational Development division of MITT.	• **Data documentation:** Documented data processes and infrastructure across departments to better understand current state and to provide tools to leadership to make informed decisions. • **Measurement, Learning and Evaluation:** Created a single framework and data governance to manage KPIs and outcomes for each program and department. • **Data Strategy:** Created a long-term vision and plan for sustainable improvements to infrastructure and processes that supports MITT in reaching their data and evidence goals.

Technical Consultants

The following bios were provided by the consultants.

Ben Berres

Ben Berres is a longtime collaborator of Blueprint. He has a career spanning over two decades as a seasoned data and technology leader. His experience primarily focuses on supporting children, youth, families, and communities through systems and initiatives across various sectors, including nonprofits, public agencies, philanthropy, start-ups, and private industry.

Ben began his career in Washington State, providing direct services to children involved in the child welfare system within a nonprofit organization. His work with the public child welfare system and local tribes inspired him to pursue an MSW and MPA from the University of Washington (where he also earned his BS). His dedication to improving societal outcomes through data and evidence has been a consistent driving force in his career and prompted him to transition to roles with systemic impact. Ben worked as a legislative advocate for human services, education, and public health policy issues. At Casey Family Programs and Partners for Our Children, he contributed to statewide performance-based contracting initiatives, program evaluations, administrative data research projects, integrated data systems, and public data reporting tools. He also played a key role in launching a technology program that enabled nonprofits across Washington State to systematically collect and report program data.

Ben's career journey then led him to Accenture, where he designed business intelligence systems and advanced analytics applications. Following this, he founded and led a consultancy that provided strategic data and technology advisory services to nonprofits, foundations, and public agencies, working with over 200 organizations to enhance their impact through strategic technology and data solutions. His leadership roles at Project Evident, the University of California, the Berkeley School of Social Welfare, and the University of Washington School of Social Work further solidified his expertise in launching strategic initiatives, leading cross-functional teams, and designing analytics and evidence-building strategies.

During his advisory role on PDI, Ben brought his experience to help the team and participating organizations integrate data and technology, making them more robust, right sized, and adaptable. His work has been helpful in enabling organizations to deliver impactful services and improving societal outcomes through careful analysis and sustainable systems.

DARO

DARO (formerly Ajah) builds systems that really work for organizations that do real-world good. When working with their clients, DARO prioritizes people, program objectives, and risks and impacts—because the real reason organizations aren't getting great results from their technology isn't their technology. DARO partners with nonprofits, philanthropic organizations, and government entities across the globe, providing services in digital transformation, data and information architecture, evaluation and impact measurement, and data sharing and governance collaboratives. DARO is based in Montreal, Quebec with an office in Houston, Texas. The DARO PDI team was made up of Chief Impact Officer, Jesse Bourns, Senior Managers, Elle Gemma Gruver and Jonah Kotzer, and Project Coordinator, Jamie Kim.

Appendix B
Outreach organizations

See **Table 3** for the list of organizations we consulted and context about the services they deliver.

| Table 3 | List of organizations consulted

Name of Organization	Location	Service
Canada Learning Code	Canada	Delivers programs that teach participants how to code
The Training Group at Douglas College	British Columbia	Employment services
Futureworx	Nova Scotia	Employment, educational and training services
Immigrant Employment Council of BC (IEC-BC)	British Columbia	Employment services targeted to newcomers to Canada
Opportunities for Employment	Winnipeg, MB	Employment services
The Neighbourhood Group	Toronto, ON	Multi-service provider
Toronto Region Immigrant Employment Council (TRIEC)	Greater Toronto Area, ON	Employment services targeted at immigrants to Canada
YMCA of Greater Toronto	Greater Toronto Area, ON	Multi-service provider

Existing and past initiatives

Table 4 lists each of the initiatives included in our scan and summarizes the types of support they offered.

| Table 4 | List of North American data ecosystem and capacity-related initiatives studied

Organization	Initiative	Locations	Workshops	Peer-to-Peer Networking	Direct Funding	Evidence Coaching	Strategic Support	Technical Resources
Innovation Network	Evaluation Capacity Building	Washington, D.C.	X			X	X	X
YaleEVAL & Scattergood Foundation	Building Evaluation Capacity	Philadelphia, Pennsylvania	X	X	X	X		X
The McConnell Foundation	Innoweave's Coaching Streams	Montreal, Quebec		X	X	X		X
Edna McConnell Clark Foundation	PropelNext	Boston, Massachusetts	X	X	X	X	X	X
DataKind Inc	DataCorps & DataDive	Brooklyn, New York	X	X		X		X
Data for Good	Datathons	Toronto, Ontario	X	X		X	X	X
Capacity Canada	EvalU	Toronto, Ontario	X	X		X		X
Project Evident	Services for Practitioners	Boston, Massachusetts		X		X	X	X
Pew Charitable Trusts	Evaluation Capacity Building	Philadelphia, Pennsylvania	X		X	X		X
Powered By Data	Data Policy Coalition	Montreal, Quebec				X	X	
Two Sigma	Two Sigma Data Clinic	New York, New York				X	X	
United Way Halton & Hamilton	Social Innol tivation Labs	Halton & Hamilton, Ontario		X		X	X	
Future Skills Centre & Blueprint	Practitioner Data Initiative	Toronto, Ontario		X	X	X	X	

Partner surveys (spring 2022 and fall 2023 to spring 2024)

Phase One survey

The first survey was designed to collect reflections on Phase One of PDI delivery. It included a series of Likert, multiple choice, and open-text questions on partner satisfaction with their PDI engagement, the Discovery Stage and Capacity Building Plans, and how partners mobilized what they learned within their organization. This feedback shaped key changes to the model for Phase Two and helped identify improvements for our Capacity Building Plan format and tools.

We received 12 responses across all nine Phase One partners, with three having multiple team members respond to the survey as they were equally involved in the PDI process.

Phase Two survey and interviews

PDI engagements wrapped up in a staggered cadence over the last six months of Phase Two. Phase One partners completed between September and December 2023; Phase Two partners finished their contracts by March 2024. As part of their wrap-up activities, each partner—from both Phase One and Two—was sent a new survey and interviewed about their PDI experience. All partners were asked about the Implementation and Accompaniment Stage activities and about the impact PDI had on their organization's data capacity.

We received 20 responses across 13 of the 15 PDI partners, with one Phase One partner and one Phase Two partner not responding. As above, we received multiple responses from five organizations.

Representatives from all 15 partners participated in a 75-minute Zoom interview that solicited feedback about the delivery and tools of PDI, how the collaboration and accompaniment process went, and what outcomes they were seeing as a result from the PDI engagement. Interview transcripts were analyzed, and feedback was consolidated for this report.

Appendix C

Example learning agenda

Learning question	Rationale/what would the answer help you do?	Why can't this be answered right now?
What are our most successful interventions and for whom are they most successful? What makes them successful?	• We want to continue to improve our programming and understand which parts of our interventions are critical for success, then use these learnings to improve all of our programs. • We want to ensure our programs are successful and accessible to all of our participants.	• We are collecting program data at varying levels of detail, which prevents us from doing an organizational-level analysis using consistent measures
How do participants move through our programming? Is there a combination of barriers that we see that require a set of interventions?	Having answers would help us... • better match participants to programs and activities; • identify gaps in programs to explore additional funding; and • increase support services that address barriers.	• We collect services delivered by date but lack the capacity to analyze participant pathways through programming. • We conduct needs assessments to identify barriers in accessing services at the start of the process, but none along the way.
Do our participants continue to retain employment (six to 12 months) after they complete our programming? Is the retention rate different for those who participated in soft skills training?	Having answers would help us... • Learn and share best practices within the sector. • Better communicate our long-term impacts. • Demonstrate the value of soft skills training, recognize our staff's work, and support additional funding opportunities.	• Currently, we don't consistently collect information on our participants after they leave the program.

Appendix D
Collaborative learning activities and mobilization

Section 1. Context and PDI model overview detailed how Blueprint adapted the structure and content of PDI in response to feedback from partners. Below, we provide further context on our optional collaborative learning activities. For future iterations, Blueprint is considering expanding this learning community element by establishing a mentorship opportunity—establishing more formal touchpoints between organizations that have completed the engagement and those just starting their PDI journey.

- **Webinars** consisted of a subject matter expert speaking on a topic related to common PDI recommendations, which included data storytelling and knowledge management.
- **Roundtables** allowed partners to share their approaches to specific accompaniment activities, setting up mentorship relationships and providing support to organizations less advanced in their implementation journey. Roundtables highlighted the creativity and expertise within our group of partners, positioning them as experts on topics to increase their confidence.
  - All respondents who indicated they attended at least one webinar or roundtable from the Phase Two survey (13/20) indicated that they agreed or strongly agreed that they learned something from the webinars and roundtables and felt the topics were relevant and useful to their PDI work.
- **The In-person Learning Event** created an opportunity to strengthen connections and consolidate learnings from our shared experience between representatives of all 15 PDI partners. These learnings are detailed in the Practitioner Data Initiative Learning Event: Insights Brief. Some representative reflections on this event from participants are below:
  - "We were honoured to participate in this undertaking with an amazing group of people on both the support team and the service provider sides. Everyone was open, welcoming, supportive, passionate, and engaged in this space. It felt more like a beginning than an end."
  - "The best part was that people were honest and open about challenge and their experiences, which allowed for true open discussions."
  - "I got the chance to connect with likeminded people who are experiencing similar struggles to what our PDI team faced."
- **Case studies.** Since June 2023, Blueprint has released four case studies introducing our CSO partners and their work; what PDI is and how it operates; the challenges that CSO faced with data management; the improvements made through PDI participation; and their plans and sustainability efforts. These case studies demonstrate the practical benefits of the PDI program for nonprofits, offering real-world examples of how improved data capacity can enhance operations and impact; specific improvements can inspire and guide other organizations facing similar challenges. They also effectively illustrate how targeted support can significantly improve a nonprofit's ability to serve its community, make data-driven decisions, and show impact to stakeholders and funders.

Learning event brief and case studies

Practitioner Data Initiative learning event: Insights brief (November 2023)

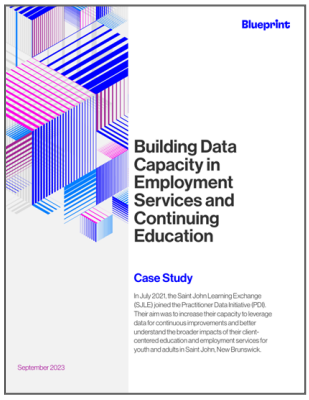
In September 2023, Blueprint convened all 15 PDI partners for the first time to host a Learning Event in Calgary, Alberta. This event brought partners together to connect, share experiences, reflect on the work of the PDI model and engage with new topics in data capacity building. At the end of two days together, it was clear that enthusiasm for the power of data and for the work of PDI had deepened. Nonprofit staff especially appreciated the opportunity to connect to a community of data champions, test new ideas and create connections for support.

Read the Insights brief

Building Data Capacity in the Frontline Settlement Services (June 2023)

In May 2021, Calgary Catholic Immigration Society (CCIS) joined the Practitioner Data Initiative (PDI). Their goals were to increase capacity to collect and analyze data in a streamlined and culturally safe manner, and to leverage data and insights to inform program development, provide better services and advocate for newcomers.

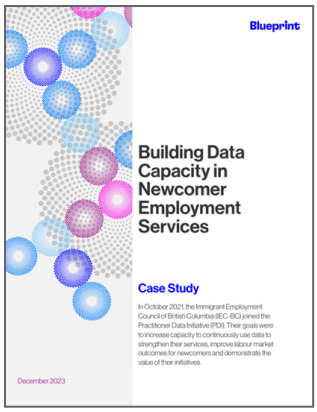
Read the case study



Building Data Capacity in Employment Services and Continuing Education (September 2023)

In July 2021, the Saint John Learning Exchange (SJLE) joined the Practitioner Data Initiative (PDI). Their aim was to increase their capacity to leverage data for continuous improvements and better understand the broader impacts of their client-centred education and employment services for youth and adults in Saint John, New Brunswick.

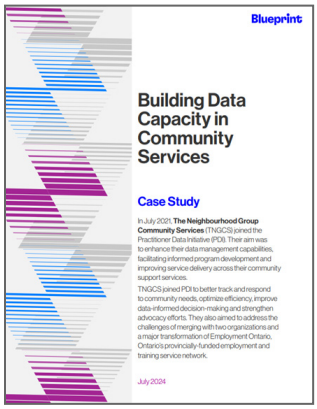
Read the case study



Building Data Capacity in Newcomer Employment Services (December 2023)

In October 2021, the Immigrant Employment Council of British Columbia (IEC-BC) joined the Practitioner Data Initiative (PDI). Their goals were to increase capacity to continuously use data to strengthen their services, improve labour market outcomes for newcomers and demonstrate the value of their initiatives.

Read the case study



Building Data Capacity in Community Services (July 2024)

In July 2021, The Neighbourhood Group Community Services (TNGCS) joined the Practitioner Data Initiative (PDI). Their aim was to enhance their data management capabilities, facilitating informed program development and improving service delivery across their community support services.

Read the case study

Future Skills Centre | Centre des Compétences futures

Blueprint