Background

This report presents highlights from Building a Collective Philanthropy Data System, a workshop that took place in Kampala on April 10th 2017. The workshop was the third in a series of meetings that have taken place over the past year in Uganda as part of the Data Strategy and Capacity Building Program, a joint effort led by East Africa Association of Grantmakers (EAAG), Uganda Philanthropy Forum (UPF), DENIVA, and the Independent Development Fund (IDF) along with more than 30 Ugandan philanthropic organizations. The program aims to strengthen the capacity of foundations and trusts to collect, analyze, and share data and knowledge that highlight the value of Ugandan philanthropy to national development outcomes, facilitate philanthropic collaboration, and inform grantmaking and programmatic decisions.

The workshop built on the progress made during the October 2016 Data Scoping Meeting and the December 2016 Data Strategy and Capacity Building Workshop, where participating organizations identified key data needs and challenges of the philanthropy sector in Uganda. To address these needs and challenge, the partners agreed on the following key priorities:

- Develop and promote the value of philanthropy data.
- Enhance the environment for data sharing.
- Build capacity of organizations, related to specific data skills.
- Decide on mechanisms for mobilizing resources to support the data work.
- Develop a collective philanthropy data system for Uganda, championed by organizations committed to improving their data management capacity.

During previous workshops, the partners developed a value proposition to demonstrate the benefits of collective data sharing to key development and philanthropy stakeholders, summarized in the tagline “Access to accurate and reliable data on philanthropy in Uganda”. The group also agreed on a shared set of values and principles for data sharing, which included openness and transparency, credibility and quality, integrity, relevance, and data security.

The workshop held on April 10th 2017 in Kampala, titled Building a Collective Philanthropy Data System, marked a transition from planning to implementation and sought to solidify recommendations made in earlier meetings and focused on the development of a prototype philanthropy data portal for Uganda. The group agreed on which specific types of data they were willing to share at this point in time and outlined a proposed structure for the data portal. Having agreement on what information to share and how to structure it was crucial at this stage of the process, as it will serve as a framework for data collection going forward and will ensure that the data that will ultimately be shared is contextually relevant and applicable. Further, the partners continued to develop the strategy for implementing the portal development and the population of its data, and hence agreed on partner roles and concrete next steps.
Value Proposition

HEADLINE
“Access to accurate and reliable data on philanthropy in Uganda”

SUBTITLE
- To facilitate the development and management of a universal philanthropic data bank for Uganda.
- To ensure that the UPF board and other stakeholders have access to the information they need to foster sustainable growth and development in philanthropy in Uganda.

BODY
- Ensures universal access to accurate and reliable data.
- Supports evidence-based planning and implementation by identifying gaps and results.
- Offers data to inform monitoring, evaluation and learning.
- Informs funding decisions and resource allocation.
- Encourages stronger accountability and transparency.

Key Considerations for the Data Strategy and Capacity Building Program

To inform this next phase of the data strategy and capacity building program, the partners reviewed and reaffirmed the principles and values proposed during earlier workshops that have, and will continue to inform decision making and planning throughout the implementation of the data strategy and capacity building process. After reviewing the principles from earlier meetings, the group shared the following two key considerations for the next phase of the program:

Confidentiality
To achieve this it was noted that the process must continue to build a data sharing culture, trust and confidence among data stakeholders by promoting the value of organized data and collectively identifying the minimum shareable data to allow for incremental data sharing.

Security
It was also agreed that there should be flexibility in the level of information sharing and data aggregation for some organizations. E.g. human rights organizations on portals such as Advancing Human Rights provide anonymized information about some beneficiaries and donors.
Developing the Prototype Structure

To provide context and background for group discussions on which data to share and how to structure the data, Foundation Center gave an overview of components of data that are often collected around the world, based on the organizational structure and approach of foundations. This included existing philanthropy data portals, the types of data that are included in those portals and/or shared beyond the portals, possible ways to structure the data, how to make sure data captures relevant information regardless of the type of organization and operating context, and a variety of geo-mapping and other data visualization tools.

Possible “data buckets” presented included foundation profiles, and information on which populations, geographic regions, organizations and sectors receive from funding. The possibility of sharing program and M&E reports, research, surveys, and nonprofit resources was also discussed.

DATA BUCKETS

FOUNDATION

OPERATING FOUNDATION

GRANTMAKING FOUNDATION

$ $

RECIPIENT ORGANIZATION

PROGRAM BEING IMPLEMENTED

PROGRAM BEING IMPLEMENTED

BENEFICIARY POPULATION

GEOGRAPHIC AREA SERVED

GOVERNMENT CONTEXTUAL DATA (i.e. GOVERNMENT STATISTICS)

MONITORING & EVALUATION

REPORTS & RESEARCH

☑️

☑️

☑️

☑️
The group shared the following reactions to the data tools and portals presented:

- The examples presented do reflect the objectives and “data dreams” proposed by participants in earlier meetings.

- Contextual knowledge is necessary to provide background for the qualitative data in the portal and to make sure information is structured appropriately. Participating organizations will be crucial in providing necessary contextual information and data and identifying which information is useful in the Ugandan context.

- It’s important to ensure that the prototype - and eventually the portal - does not duplicate existing portals and leverages existing data by aggregating and making better sense of the information.

- Data should be collected by sector and thematic area and at a variety of levels (region, city, organization etc.).

- The process should ensure that there is a certain level of uniformity in the data uploaded and presented on the portal to avoid a situation where some organizations access information without also submitting adequate and relevant data.

- The data collection tools and process should be user friendly to keep the cost to organizations of submitting data at a minimum.

- The process should be as inclusive as possible without interfering with the efficient management of the portal.

“\textit{The relevance of data is in its usefulness}”

—LARRY MCGILL

“\textit{You may see a small organization that has invested a lot in research, but nobody knows about it even when it’s important information that every organization can leverage on}”

—WORKSHOP PARTICIPANT
Group Exercise Results: Deciding Which Data to Share

To help develop data collection tools and define data buckets specific to the development of the Philanthropy Data Prototype in Uganda, participants were divided into groups tasked with identifying minimum shareable data based on their organization’s context. A list from previously proposed shareable data and proposed data buckets from other data meetings was circulated to guide the discussions.

The groups identified the following basic data and information as most relevant and shareable during the prototype development phase:

**ORGANIZATION PROFILE**
- Contact information.
- Link to website.
- Mission and values of the organization.
- Regulations and standards governing the organization.
- Beneficiary selection criteria.

**PROGRAM INFORMATION**
- Program strategies.
- Program descriptions.
- Geographic area benefiting from program.
- Population group benefiting from program.

**REPORTS AND OTHER RESOURCES**
- Annual reports.
- Survey and research results.
- Best practices and lessons learned.
- Outcomes and impact.
- Indicators being tracked.

**FINANCIAL DATA**
- Financial data (aggregate level data).

The discussion on data sharing generated the following recommendations:

- Annual reports are a source of information on the organizations, including financial flows, assets, best practices, and program and contact information, which can be extracted to feed into the proposed data buckets.
- The list of shareable data is based on priority information that is most relevant at the prototype stage, easy to access, and less sensitive, all factors that lessen the risk of ‘data fatigue’.
- The type and level of information shared about beneficiary organizations should be vetted carefully, and where possible anonymized. An example highlighted was the risks involved in sharing data on human rights funding, in particular funding for LGBT rights, given the current legal environment surrounding sexual orientation and gender identity in Uganda.
- Data should be presented in a way that protects organizations’ anonymity, especially the more sensitive data.
- Ensure that the data are relevant and easy to interpret and analyze. Foundation Center agreed to provide input on how to structure the data in a way that makes it easy to access and use.
- Although certain data, such as information on expenditure, assets, and transactions of individual organizations, nonprofit management and governance data, or information about beneficiaries, are sensitive, these kinds of data can be valuable for fundraising, grant allocation, and in pursuing strategic collaborations. If reassurances can be provided on the ability to protect the anonymity of data sources, and the data provided during the prototype phase proves to be relevant and useful, participating organizations would be more comfortable with sharing some of the more sensitive data.

“Not every information can be shared, for the moment.”

—WORKSHOP PARTICIPANT
Prototype Development Process: Sharing, Ownership, and Partner Roles

The partners agreed that EAAG will sign an agreement with Foundation Center on behalf of UPF to ensure that data provided is protected and used only as agreed with the data providers. The agreement will also state and ensure that only those who share data have access to the data.

In addition to conditions of access, the agreement states that Foundation Center will continue providing technical support to the process by first developing a prototype of the proposed data system which includes collectively and systematically designing the tools and process to collect, manage, and share data for and with participants.

As a way forward in the development of a prototype, participants agreed to submit minimum shareable and mobilize more foundations and data champions to contribute data to continue to pursue the strategic objectives of the program. It was agreed that EAAG and UPF will partner to facilitate the data collection process during the prototype development phase.

It was discussed and agreed during the workshop that Foundation Center will work with EAAG to develop a user friendly, standardized, Uganda specific, data collection form for the participants. The form will be developed based on the principles identified through the workshops, the types of data organizations have identified as shareable, as well as philanthropy best practices.

Participants will be asked to complete the online form via a link circulated by EAAG, as well as upload any relevant qualitative documents. Once this data is received, Foundation Center will clean, index, process this data per the data roadmap presented throughout the workshops so it can be presented in the online prototype portal to display information about local philanthropic organizations and their work. (See graphic on page 8).

This data will then be fed into and presented in a prototype of a data sharing portal specifically for the Ugandan philanthropic organizations that can only be accessed by other participants who have shared data and will be password protected.

In summary, it was agreed that:

- EAAG will sign the proposed agreement and share it with participants, highlighting minimum shareable data identified and a summary of the data process.
- Participants will seek formal approval from appropriate colleagues to share suggested data.
- Guided by the data buckets, EAAG and Foundation Center will design a user friendly data collection form and subsequently develop and populate the prototype portal.
- EAAG and participating organizations will identify and mobilize additional foundations to participate in the program.

“Foundation Center will work with EAAG to develop a user friendly, standardized, Uganda specific, data collection form”
DATA PORTAL DEVELOPMENT PROCESS

From: EAAG

Please fill in DATA TEMPLATE

UGANDA PARTICIPANTS' DATA

FOUNDATION CENTER SECURE SERVERS

DATA PROCESSING AND INDEXING

UGANDA PHILANTHROPY DATA PORTAL

Accessible only to UGANDA participants

DATA ROADMAP

COLLECTION

INPUT SYSTEMS
Surveys
Spreadsheets
Data updater systems
Grants management systems
Qualitative data

DATA FIELDS
Questions commonly asked of foundations
Who is funding What and Where
Measuring impact

TAXONOMIES
Subject areas
Types of support
Geographic area served
Beneficiary populations

Taxonomy example: Philanthropy Classification System (PCS)

PROCESSING

CLEANING
Internal consistency
Boundary checks
Missing data
Stale data

INDEXING
Applying the taxonomy
Degree of precision
Manual vs Autocoding

STORAGE (BACK END)
Local
Cloud based
Third party

MAINTENANCE
Periodic vs Continuous
Technical capacity
Refreshing the data
Frequency/Scope

ANALYSIS

ACCESS
User types
Conditions of access
Aggregate vs Disaggregate
Ownership

DATA TOOLS (FRONT END)
Data look up
Interactive data queries

APPLYING THE DATA
Story telling
Visualization
Reports
Case studies
**Conclusion**

EAAG, UPF, DENIVA, IDF, and Foundation Center are excited for the next phase of the Data Strategy and Capacity Building Program in Uganda as it shifts from strategy development to implementation. This marks a crucial turning point in a region where foundations have traditionally been reluctant to share information widely, due to low levels of trust and the lack of a collective approach towards philanthropy data management. Having a national philanthropy data portal—and eventually sharing the data beyond the participating trusts and foundations—will undoubtedly allow the sector to partner more effectively, and to demonstrate its impact and contribution to development.
## Workshop Agenda

### Uganda Data Strategy and Capacity Building

### Developing a Philanthropy Data System

**April 10, 2017  ♦  Sheraton Hotel  ♦  Kampala, Uganda**

<table>
<thead>
<tr>
<th>Time</th>
<th>Session</th>
</tr>
</thead>
<tbody>
<tr>
<td>08.30 – 09.00</td>
<td>Arrival and registration</td>
</tr>
<tr>
<td>09.00 – 09.15</td>
<td>Welcome <em>EAAG/UPF</em></td>
</tr>
<tr>
<td>09.15 – 09.45</td>
<td>Recap of progress made in achieving a collective data system for philanthropy <em>Foundation Center</em></td>
</tr>
<tr>
<td>9.45 – 10.15</td>
<td>The process for building the Data Portal <em>Foundation Center</em></td>
</tr>
<tr>
<td>10.15 – 10.30</td>
<td>Coffee break</td>
</tr>
<tr>
<td>10.30 – 12.30</td>
<td>Specifying the Portal Structure <em>Foundation Center</em></td>
</tr>
<tr>
<td>12.30 – 13.30</td>
<td>Lunch Break</td>
</tr>
<tr>
<td>13.30 – 14.30</td>
<td>Commitments and Next Steps for the Data Portal <em>Foundation Center</em></td>
</tr>
</tbody>
</table>
Participants (by Organization)

**Amity Child Uganda**
Tushabe Danson

**Charity Children Ministry**
Babra Namome

**Child Horizon Uganda**
Babra Namubiru

**DENIVA**
Torisha Omayam

**EAAG**
Evans Okinyi
Catherine Mwendwa

**Education & Development Opportunity**
Mutebi Brain

**ELOI Ministries**
Tendo Steven

**Foundation Center**
Lauren Bradford
Larry McGill

**Fountain Child Support Uganda**
David Tugume
Kemigisha Apopha

**Green Efforts Foundation**
Kobutungi Joan

**Global Goals Champion**
Kasori Mulindwa

**IDF**
Ruth Birungi

**Impact Mapper**
Drew cinema

**Kabaka Foundation**
Nabimba Samson

**Media Initiative for open Governance in Uganda (MIFOGU)/Reality Check Uganda**
Joseph Elunya

**InterDIP Uganda (African Women of faith Network)**
Sister Mary Goretti

**Self Help Foundation**
Deborah Auma

**Skill Empowerment Unit**
Ojambo Fredrick

**Uganda Charity Trust Fund**
Shem Wavamuno

**Uganda Environment Education Foundation**
Nabakooza Dorothy

**Women Caring Counselling Centre**
Ndagire Mariam
About Uganda Philanthropy Forum

The objective of the UPF is to explore strategies for consolidating and organizing the philanthropy sector in Uganda. By promoting successful local fundraising campaigns, serving as a vehicle for networking, and providing resources to support strategic local giving, the UPF aims to create an environment in Uganda where local philanthropy can thrive and live up to its full potential.

EAAG in partnership with the Independent Development Fund (IDF), DENIVA and GoBig Hub hosted the first Uganda National Philanthropy Forum (UPF) on the 22nd October 2015 at the Silver Springs Hotel in Kampala, Uganda. The objective of the forum was to explore strategies of consolidating and organizing the philanthropy sector in Uganda. The discussions sought to map out and facilitate the creation of an all-inclusive and active national platform for philanthropy.

Themed “Achieving more - Harnessing the Power of Philanthropy in Uganda” the forum targeted local private philanthropic organizations established or with a local presence including private foundations, family foundations, community foundations, corporate foundations and faith-based giving.

The agenda also included an afternoon learning and exchange sharing session titled Mobilizing Private Local Resources for Development in Uganda: Lessons from Foundations where participants shared their experiences in fund-raising from local private donors to support social programs.

Recommendations from the launch of the UPF centered on the need to:

♦ Provide a platform to share best practices amongst philanthropy in Uganda.
♦ Foster joint learning and collaboration among Foundations.
♦ Enhance the operating environment for philanthropy and generate relevant data on the contribution of local philanthropy to national development.

For more information about UPF, please contact: programmes@eaag.org or idf@idf.co.ug or visit eaag.org.

About Foundation Center

In order to strengthen the philanthropic sector to achieve more effective development and grantmaking outcomes, Foundation Center works with partners to understand the global philanthropic landscape and the in-country contexts within which philanthropy operates. We work with partners to understand specific data and knowledge gaps and associated capacity issues, and facilitate the building of long term sustainable local data strategies and capacity to address these issues. We work to provide technical assistance to local philanthropic organisations and associations to develop their own data collection processes and infrastructure and organize information in ways that allow it to be accessed, aggregated, analyzed, compared, and researched. Important partners in this work may include the National Bureau of Statistics, international and local foundations and philanthropists, grantees, and existing data infrastructure networks and processes both global and local, such as the Global Partnership for Sustainable Development Data, Worldwide Initiative for Grantmaker Support (WINGS), and others.

For more information about Foundation Center or this work, please contact Lauren Bradford, director of global partnerships, at lbr@foundationcenter.org.