information for social impact

- **Information Utilization**
- **Knowledge Management**

[1] Mark Kramer, Rebecca Graves, Jason Hirschhorn, and Leigh Fiske (2007) "From Insight to Action: New Directions in Foundation Evaluation", Foundation Strategy Group, http://www.fsg-impact.org/app/content/ideas/download/364, p.29

[2] Alana Conner Snibbe (2006) "Drowning in Data", Stanford Social Innovation Review, Fall, http://www.ssireview.org/articles/entry/drowning_in_data/

[3] Kramer et al. (2007), p.11

[4] Ibid., p.29

[5] Joel J. Orosz (2002) "Agile Philanthropy: Understanding Foundation Effectiveness", http://nonprofitbasics.org/PDF/Article7.pdf, p.6

[6] For example, see the Community Development Financial Institutions (CDFI) Data Project at www.cdfi.org/cdfi-dataproject.php

Timely, objective, and accurate information is scarce on many social issues, and making better data available can itself be a powerful tool for social change. Relevant data that is accessible in a timely manner for decision-making and learning purposes can enhance the impact of new or existing social investment initiatives. The CEDTAP datasets present an opportunity to optimize information assets for social change, and can be an important tool for corporations, social investors, funders, CED organizations, non-profits, academics, and policy makers.

Information for Social Change

Despite the best efforts of various classes of funders – corporations through CSR strategies, foundations through grant making, and other types of social investors – funding for social initiatives is often carried out on the basis of limited information. Financial metrics tend to be readily available for business investments, and can facilitate informed decision making. In contrast, timely, objective, and accurate information is scarce on many social issues.[1]

Given the recent wave of accountability concerns and the importance attached to evaluation, there are many signs that organizations are "drowning in data."[2] So simply collecting more data is not enough – it must be analyzed and packaged appropriately. Many non-profits do, in fact, collect and report data on their activities and performance. In many cases, though, reporting does not equate to learning, and funders struggle to distil lessons from the plethora of reports they receive from grantees.[3] This speaks to the need for *relevant* data that is *accessible* in a *timely* manner for decision making and learning purposes.

Making better data available can itself be a powerful tool for social change.[4] Information is important for informed decision making for social investments. Knowledge management can strengthen the connection between the practices and results of philanthropy.[5] Recent efforts by different groups have sought to enhance the quantity and quality of information available for assessing investment opportunities in social ventures.[6] In the Canadian context, the CEDTAP datasets are a promising example of how information can be harnessed towards the creation of positive social change.

CEDTAP Datasets

The Community Economic Development Technical Assistance Program (CEDTAP) was Canada's largest non-profit (non-governmental) granting agency in the field of community economic development (CED). From 1997 to 2007, CEDTAP provided grants to community-based organizations (CBOs) and also promotes activities that strengthen the CED sector as a

[7] *View the dataset online at http://patdec.gestion-ressources.com/PATFourn.nsf/fa_Go?OpenForm&Lang=en*

[8] *Edward Jackson (2006) "CEDTAP: Contributions, Lessons Learned and Next Steps", http://www.mcconnellfoundation.ca/utilisateur/documents/EN/Initiatives/CEDTAP/cedtap_lessons.pdf, p.2*

[9] *Mark Kramer (2003) "Mapping Grantee Clusters", http://www.fsg-impact.org/app/content/ideas/item/364; Sherri Torjman (2006) "Shared Space: The Communities Agenda", http://www.caledoninst.org/Publications/Detail/?ID=603*

whole. The program assisted nearly 500 CED groups amounting to $6 million with partners such as Bell Canada, the J.W McConnell Foundation, and Carleton University. In addition to Bell, other corporate supporters of CEDTAP included the RBC Group, Power Corporation, and Assiniboine Credit Union.

After more than ten years of grant making across Canada, CEDTAP's sponsor – the Carleton Centre for Community Innovation (3CI) – has now moved from its grant making activities to the role of knowledge mobilizer. A key aspect of this shift involves reflecting back on a legacy of capacity building initiatives in the social economy – to understand what impact has been achieved, and also to provide insights and direction to future endeavours in the social sector. In making this shift, there are opportunities to optimize CEDTAP's information assets for social change. Deeper inquiry on results, lessons, and good practice must be based on information that is accessible and relevant.

CEDTAP has built a significant pool of datasets of CED groups, non-profit organizations, technical assistance providers (TAPs), and other stakeholders such as funders and government agencies. These datasets represent an opportunity to utilize the information that has been systematically collected from the grant making process for wider use by diverse groups.

One promising, yet still untapped, source of valuable information is the dataset on CEDTAP grant recipients. All groups that received grants provided CEDTAP with details about their organizations, their activities and operations, and additional information relating to the specific project that was implemented using the grant funding (see box).

Another important asset is the dataset of technical assistance providers (TAPs). The CEDTAP grant making model used technical assistance providers (TAPs) to provide skilled expertise and consulting to CED groups across the country. TAPs were usually vetted by CEDTAP or grant recipients, and their details (see box) were entered into a searchable database.

CEDTAP Grant Recipients Dataset
Organization details:
Name, Region, Sector, Mission, Scope of Operations, Key Contacts
Project details:
Summary Description, Cluster Profile, Grant Amount Provided, Technical Assistance Provider, Dates of Grant Allocation and Project Implementation, Details on Grant Deliverables

Technical Assistance Providers Dataset [7]
Contact Information; Areas Of Expertise; Target Groups; Products/ Services; Modes Of Delivery; Communities With Which The Organization Works; Languages; Geographic Experience; Key Personnel; Previous Contracts/Projects

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Cluster Approaches

One of the ways that CEDTAP has organized its nearly 500 projects is by creating "knowledge clusters" as a way to categorize the thematic areas of grant recipients. Knowledge clusters are issue-based, where CED organizations and their projects that bring different approaches to the same issue are grouped together (see box). Most CEDTAP grants were used to test innovative approaches by individual community groups, as well as for bilateral exchanges between groups working in the same cluster.[8]

There are important advantages to using the cluster approach.[9] Creating intentional clusters of grantees brings multiple benefits: grantees can work together to develop multi-disciplinary or multi-sector solutions to complex social problems, learn best practices from each other by sharing their expertise and experiences, divide responsibilities or pool resources to

increase efficiency; foster and disseminate innovations more rapidly, and provide mutual support and encouragement.[10] There was systematic replication of social innovation within CEDTAP clusters, and two notable examples were social procurement portals and wind-energy cooperatives.[11]

> **CEDTAP Clusters** [12]
> Agriculture and Fishing
> Arts & Culture
> Community Economic Renewal
> Community Land Trusts
> Community Loan Funds
> Community Tourism
> Disability & Mental Health
> Employment Strategies
> Environmental Management
> E-Strategies
> Financial Equity
> Food Processing & Food Strategies
> Forestry
> Health & Nutrition
> Homelessness & Poverty
> Individual Development Accounts
> Industrial Reconversion
> Sustainable Housing
> Women Entrepreneurs
> Youth Entrepreneurs

For funders and policymakers, cluster approaches can yield important lessons on social change and potential areas for further investigation or allocation of funds. As an extension of the sector mapping, cluster mapping can yield important outcomes. Cluster mapping can break down silos between program areas and find synergies between different initiatives.[13] Higher performing clusters can serve as instructive examples of how foundations and grantees work most effectively together, modeling best practices for other clusters.[14]

The cluster approach that CEDTAP has used also holds much potential for research and learning. Universities and think tanks can explore the synergies generated within clusters, and how social innovation results from clustering. Another interesting prospect to encourage learning within clusters is to share the products from grantee projects if they are generic enough for use across other organizations dealing with similar social issues. However, CEDTAP is not a position to do this yet, because of privacy and copyright concerns, and many deliverables are not yet in electronic format.

Mapping the CED Sector

In its grant making activities, CEDTAP intentionally applied a very pluralistic, "big-tent" definition of community economic development, supporting proposals for local initiatives from community development corporations, non-profit associations, Community Futures Corporations, co-operatives, community foundations, credit unions, community loan funds and more.[15] To assist local groups, CEDTAP encouraged the use of professionals from consulting firms, universities, research institutes and CED organizations themselves, thus filling in even more of the CED map.[16]

The entire assessment and granting process has generated an enhanced understanding of the wider CED context in Canada, and facilitated interaction with diverse groups across the country. In fact, in the late 1990s, CEDTAP's data on CED groups and TA providers were the only independent pan-Canadian dataset on the sector. The Canadian CED Network, a professional association, used this information to build its membership. And governments, foundations and corporations used this information to assess needs and prospects of the CED sector.

Much of this information has been captured in CEDTAP's various datasets: grant applicants and recipients; technical assistance providers; and other stakeholder groups. Together, this information provides a useful starting point in mapping the CED sector at the national,

❝Cluster approaches can yield important lessons on social change and potential areas for further investigation or allocation of funds.❞

10 *Kramer (2003), p.1*

11 *Jackson (2006), p.2*

12 *For more information on each cluster, visit http://www.carleton.ca/cedtap/whatsnew/clusters_e.html*

13 *Kramer (2003), p.3*

14 *Ibid., p.2*

15 *Jackson (2006), p.2*

16 *Ibid., p.2*

17 *Paul Brest. 2006. "Creating an Online Information Marketplace for Giving", President's Statement, William and Flora Hewlett Foundation Annual Report, http://annualreport.hewlett.org/statement/*

18 *See www.communityinvest.org, which provides a searchable online database*

19 *Kramer et al. (2007), p.46*

regional and local levels, across different sectors and clusters. For example, the grant recipient dataset is a good reflection of the diversity and scale of CED activity across Canada. There are many uses for such a tool: funders or policymakers can identify funding needs according to sector or geography; CED groups can connect with others tackling similar problems in different regions; academics can undertake systematic analysis of local economic development initiatives. Another example, the technical assistance providers' dataset, can display the range of expertise available at the local level for non-profit capacity and organizational development.

Informing Social Investments

CEDTAP has demonstrated that small technical assistance grants to sustainable community organizations with innovative ideas can yield significant gains. For many funders, CEDTAP's impact has highlighted the importance of, and provides the basis for further investments in, the CED sector. As a result of receiving a CEDTAP grant, many recipient organizations have also been successful in leveraging other sources of funds to support their initiatives. The datasets remain an untapped source of valuable data, and have the ability to influence further investments in the CED and non-profit sector across Canada by facilitating informed decision making on social investments.

There is a demand for more information on social impact when investing in organizations with a social mission. Understandably, financial statements alone do not provide a clear indication of the social value that non-profits create. Where tangible information on social change may be difficult to acquire, there are two reasonably good proxies that can help funders decide whether or not to invest in an organization. First, the information that the organization itself can provide about its goals, strategies, capacity, and progress, and second, the views of various stakeholders.[17] For the

former, the CEDTAP dataset contains a good selection of this information on grant recipients. For the latter, the various datasets can be triangulated to assess how other stakeholders view an organization.

As the dataset evolves into a dynamic database, it could add further functionality and value. CED groups could update their online profiles to reflect their current organizational profile, showing not only past initiatives but also their current activities and objectives. This could include the nature of assistance (financial, in-kind, technical assistance) they are seeking from funders or volunteers. In addition to building the capacity of CED groups through the process of articulating their core competencies and needs, this process would enhance the data available to funders for informed decision-making on corporate giving, grant making, and socially-targeted loans and equity investments.

From Dataset to Database

The CEDTAP datasets are an important asset, but only one important tool in understanding the Canadian CED sector, and in harnessing information for social decisions. They represent a unique opportunity for catalyzing the learning and development of the CED and non-profit sectors in Canada. There is rich learning that can be shared across different groups – corporations, foundations, social investors, non-profit groups, policymakers – to enhance the practice and impact of philanthropic giving and social investing.

To understand how the dataset can be used as a functional database, there are several intermediate steps that must be taken. The datasets must be updated and verified, and privacy concerns must be addressed. The existing data could also be supplemented by in-depth case studies and key person interviews (using CEDTAP contacts) to generate lessons for the sector. Other tools, such as surveys, can provide a clearer picture of how the dataset

can be converted to a functional database for use by different groups. However, the scope of information that already exists provides an opportunity to harness it for multiple purposes.

Creating useful dissemination products is critical. Data needs to be converted into useful knowledge, through filtering and analysis, and packaging this knowledge into useful products that can be disseminated to the stakeholder groups already mentioned. There are existing online initiatives that can serve as models.[18] Ideally, this data should be relevant for different audiences, and accessible in different formats for those accessing and using the data. There should also be an appreciation of the context to the findings – that is, explaining what the numbers say, and what they don't.[19]

New Actions, New Opportunities

Much has changed in the decade that CEDTAP made its grants. For one thing, the Canadian CED Network (CCEDNET) is a stronger and broad-based organization, coordinating practitioners and promoting pro-CED policy. Other pan-Canadian networks on social

enterprise, led by the BC-based Enterprising Non-Profits Program, and on social finance, animated by the Causeway Initiative, are also key actors, as is the Canadian Community Investment Cooperative. Even more notably, a major research network of 300 scholars and practitioners has undertaken detailed region-based sector mapping studies, as well as an array of other research projects in the social economy. This research is funded by the Social Sciences and Humanities Research Council.

While the energy and expertise of these organizations are adding much value of the CED sector and our understanding of it, the CEDTAP datasets remain the most comprehensive and granular information base on local organizations and projects, and on technical assistance providers. These datasets can be transformed into knowledge products that can enhance the efforts of these organizations while providing important information for the organizations being asked to finance the sector: corporations, governments, foundations, and other social investors. And it is a tremendous opportunity to harness data towards the creation of social change.
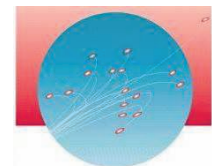
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Carleton Centre for Community Innovation
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CEDTAP PATDEC

Carleton Centre for Community Innovation

The Carleton Centre for Community Innovation (3CI) brings together superior academic research and knowledge dissemination to Canadian communities in ways that promote long-term growth and sustainable development. One of Canada's leading sources of expertise in social finance, 3CI has also played a leadership role in grant-making, evaluation and policy analysis in the fields of community economic development and social enterprise. From 1997 to 2008, the Centre managed the Community Economic Development Technical Assistance Program (CEDTAP), with the support of The J.W. McConnell Family Foundation, The Ontario Trillium Foundation, Bell Canada and other partners. Other action-research priorities for 3CI include local governance, community learning and community-university partnerships.

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