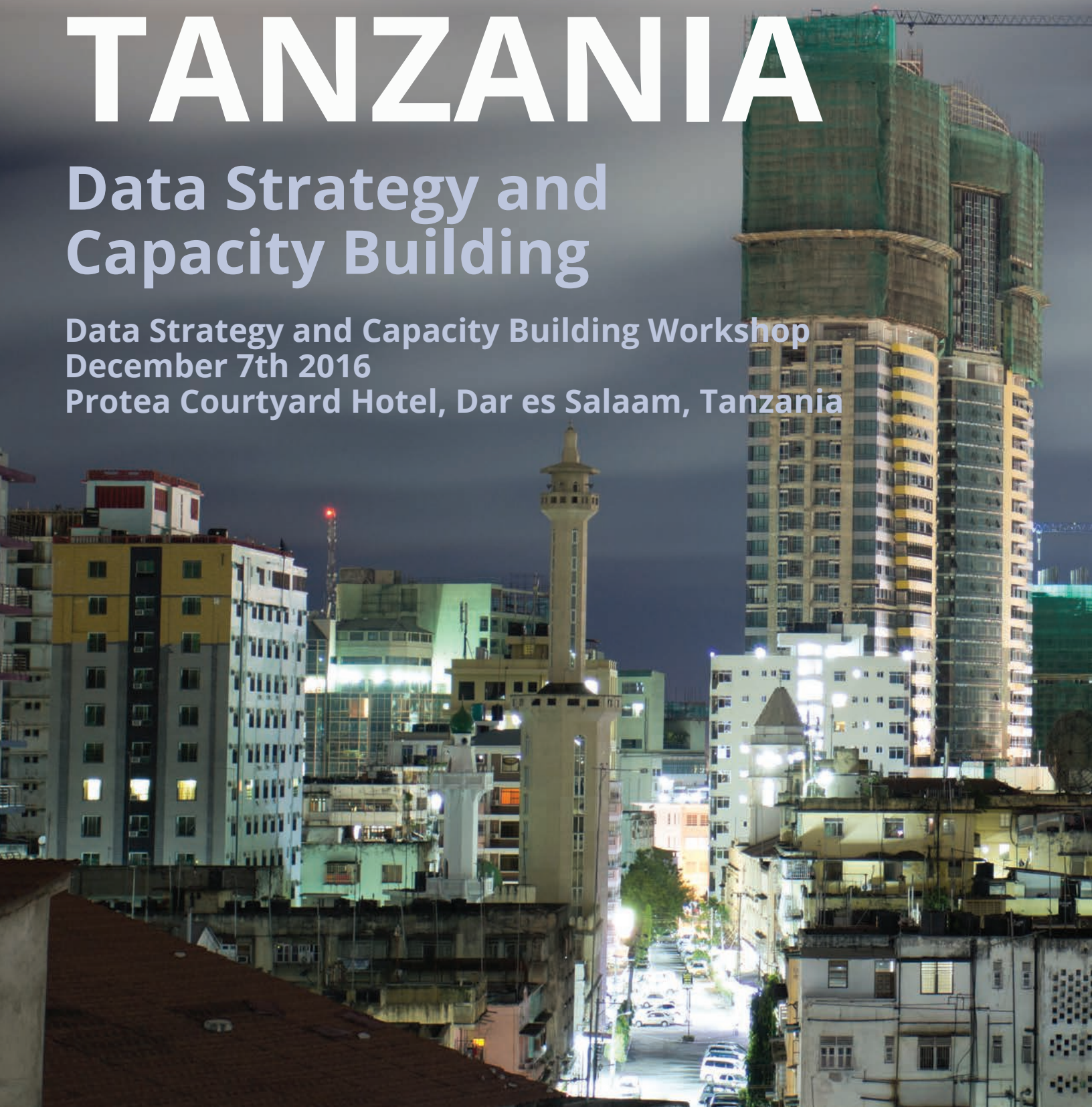


TANZANIA

Data Strategy and Capacity Building

Data Strategy and Capacity Building Workshop
December 7th 2016
Protea Courtyard Hotel, Dar es Salaam, Tanzania



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Introduction

This report presents key outcomes from the Tanzania Data Strategy and Capacity Building Workshop, held in Dar es Salaam on the 7th of December 2016. The workshop brought together local philanthropy stakeholders who participated in a “Data Scoping Meeting” held on the 27th of October 2016. This initial meeting identified the need to build capacity in data management and explore strategies for developing a collective philanthropy data system for Tanzania (For more information, [download the meeting report](#)). The Data Strategy and Capacity Building Workshop was hosted by the Tanzania National Philanthropy Forum (TPF) in partnership with Foundation Center, East African Association of Grantmakers (EAAG) and the Foundation for Civil Society.

The work on data strategy and capacity building in Tanzania is part of a broader agenda that seeks to support the philanthropy sector to collect, analyze and share reliable and pertinent data on community development in East Africa and other regions of the world. Conversations have been taking place over the past four years at the global level among representatives of foundations and foundation associations from more than 30 countries, to develop a set of universal principles to guide the collection of data on philanthropy. These conversations, facilitated by Worldwide Initiatives for Grantmaker Support (WINGS) and Foundation Center, have led to the creation of a Global Philanthropy Data Charter, that provides both context and guidance for the development of in-country data collection systems. Key lessons from this global work are included in this report, in order to connect the work being undertaken in Tanzania to a global framework, beginning on [page 4](#).

The ultimate goal of the Data Strategy and Capacity Building work in Tanzania is to lay the necessary groundwork for the local philanthropy sector to build and operate its own data collection system. The two workshops held to date provided opportunities for key stakeholders to develop a sense of common purpose around data collection and sharing. The result of the meetings was the creation of an Action Plan that identifies critical areas of work that need to be undertaken by TPF to build a sustainable data collection system and a community of practice committed to its achievement. The elements of that Action Plan are presented in this report, beginning on [page 8](#).

Reaffirming Priorities

Collectively agreed upon values, principles, and priorities are essential aspects of moving toward a shared data strategy. Workshop participants had the opportunity to review and reflect on the principles proposed during the October 2016 Data Scoping Meeting, reaffirming their commitment to them (for more information, [download the meeting report hyperlink to data scoping report](#)). Participants also discussed the data-related challenges and needs they identified during the previous meeting and recalled the top three priorities for the data strategy:

- ◆ **Priority 1:** Capacity Building
- ◆ **Priority 2:** Data Collection and Research Methodology
- ◆ **Priority 3:** Documenting and Packaging Data

Building a Data System for Philanthropy: A Roadmap

The Global Philanthropy Data Charter

There is value in ensuring that the collective data strategy in Tanzania connects with other ongoing data processes globally. At present, there is a growing recognition among countries and philanthropy support organizations of the need to develop robust systems for collecting and analyzing data on philanthropy. Recognizing that this is a global challenge, Worldwide Initiatives for Grantmaker Support (WINGS), a global network of philanthropy support organizations, has convened a series of meetings with philanthropy stakeholders around the world to identify global principles and values that should guide the development of such data systems. The result of these high-level conversations is the Global Philanthropy Data Charter, a framework for data collection and sharing to guide the philanthropic sector's data-related work.

Acknowledging the diversity in practice, culture, and legal environments in which philanthropy operates

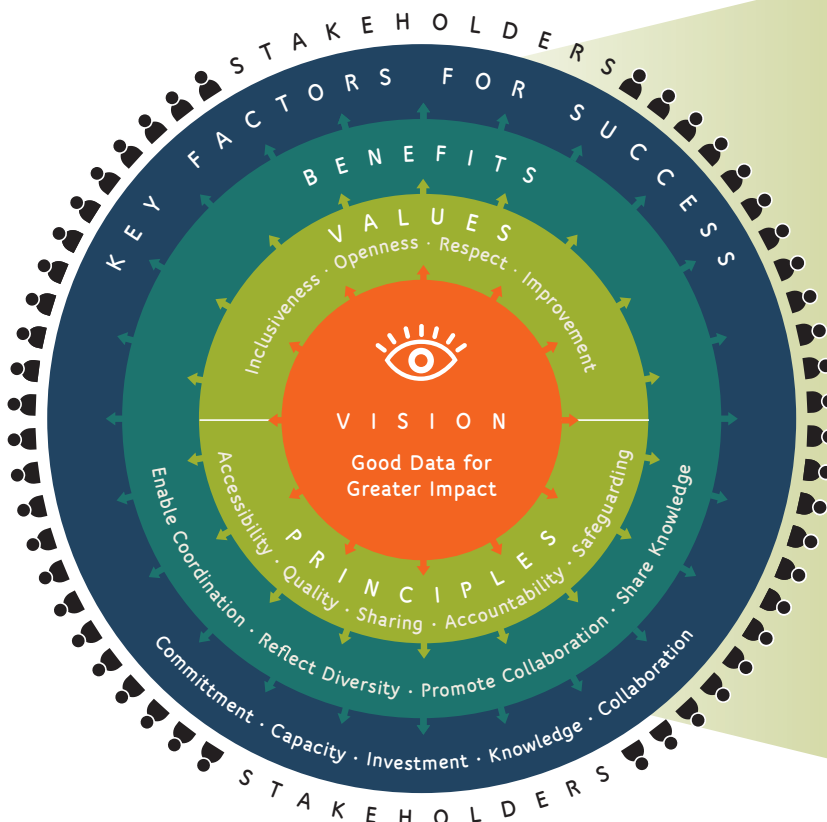
around the world, the Charter provides an overview of the key values and principles that should guide the collection and management of philanthropy data, and that are relevant and applicable across different regions and contexts. These principles further speak to the practical aspects of collecting and sharing data, ensuring its validity, quality control measures, and the importance of neutrality and objectivity.

The Charter also offers guidelines that the stakeholders engaged in the data strategy process in Tanzania can use to benchmark progress and outlines potential benefits of adopting a collective approach to collecting knowledge, such as:

- ◆ Better coordination of philanthropic investments
- ◆ Sharing of knowledge
- ◆ Promoting collaboration
- ◆ Reflecting diversity

The values and principles in the Charter can be used to inform the essential elements of good philanthropy data practices, and are reflected in the values and principles surfaced by participants in the earlier Tanzania Data Scoping Meeting.

Global Philanthropy Data Charter



Vision

Maximizing philanthropy's impact is a shared vision for the sector—organizations and individuals are constantly looking for new approaches and strategies to better serve their constituencies. Data is key to improving philanthropy's abilities to understand needs, coordinate efforts, and allocate resources. We envision a philanthropy sector powered by good data to achieve greater impact.

Values

Good data on philanthropy is open, inclusive, respectful to all stakeholders, and committed to improvement—resulting in comparable data that can be used to maximize social impact. It documents philanthropic flows and answers questions about who gives, how they give, who benefits, and how they benefit. Four values drive the collection and dissemination of philanthropy data.

Principles

Five fundamental principles underlie the strategic collection and sharing of global data on philanthropy. These principles are interdependent and should be applied concurrently. For instance, individuals and organizations will be willing to share their information only if they are assured it is safe to do so, in a transparent and respectful environment.

Data Roadmap

- ◆ Essential to building a collective data system is identifying the critical steps the philanthropy sector in Tanzania needs to take to achieve the envisioned outcomes and goals of the system.
- ◆ To guide this process, a data roadmap was presented, in which the process of developing a comprehensive data system was broken down into three major components: data collection, data processing, and data analysis.

“With the Data Roadmap as a guide, the Tanzania process can systematically identify and agree upon what priorities should be set, the type of data sets to be captured and how the data should be managed.”

Data Roadmap

Data Collection

Input systems

- ◆ surveys
- ◆ spreadsheets
- ◆ data updater systems
- ◆ grants management systems
- ◆ qualitative data

Data fields

- ◆ questions commonly asked of foundations
- ◆ who is funding what where
- ◆ measuring impact

Taxonomies

- ◆ subject areas
- ◆ types of support
- ◆ geo area served
- ◆ beneficiary populations
- ◆ taxonomy example: Philanthropy Classification System (PCS)

Data 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

Data 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

Envisioning the Tanzania Philanthropy Data System

The Tanzania Philanthropy Forum (TPF) has expressed its interest in and commitment to building a philanthropy data system that provides accurate, relevant, comparable, and reliable data on philanthropy in Tanzania. In a session facilitated by Foundation Center, participants explored the key elements they would like to include when building such a system, focusing on potential data stakeholders, which types of data would be most valuable to the sector, what role each organization should play, and the amount of resources required for developing and maintaining the system. The chart below summarizes findings from the session.

Potential Data Providers and Users

(By Order of Priority)

1. Foundations and Trusts
2. Non Government Organizations (NGOs), Civil Society Organizations (CSOs), and Faith Based Organizations (FBOs)
3. Researchers and Academia
4. Beneficiaries
5. Philanthropy Support Organizations
6. Private Sector/Investors
7. Government

“The Tanzania Philanthropy Forum (TPF) has expressed its interest in and commitment to building a philanthropy data system that provides accurate, relevant, comparable and reliable data on philanthropy.”

Data to Include

Organization profiles:

- ◆ Summary of mission.
- ◆ Organization type (Foundations, Trusts, NGOs, CSOs, FBOs).
- ◆ Website link and contact information.
- ◆ Financial profile (budget and expenditure).

Grant profiles:

- ◆ Types of grants.
- ◆ Classification by subject and populations served.

Geo-location data:

- ◆ Areas served by organizations.
- ◆ Demographic profiles for regions.
- ◆ Official government statistics.
- ◆ Baseline studies with relevant contextual data.
- ◆ Annual program and project reports.
- ◆ Best practices and case studies.
- ◆ Evaluations and impact reports.

Data Qualities—Key considerations for data processing

- ◆ The system must allow for appropriate levels of access for different groups of data contributors and users.
- ◆ The system must allow for data aggregation in order to measure and track contributions to national development.

Process & Resources

The participants offered the following recommendations on how best to move the process forward, including resources and commitments required.

Process Needs

- ◆ Set up a dedicated data working group to provide strategic and technical leadership.
- ◆ Conduct a survey of organizations to collect data on mission, funding, areas served and target populations.
- ◆ Develop a work plan with delegated tasks and set timeframes.
- ◆ Organize a knowledge sharing session for participating organizations.
- ◆ Ensure local ownership for sustainability.
- ◆ Better understand current systems being used in house by organizations.

Resource Needs

- ◆ Mobilize formal commitment among organizations on roles and responsibilities, including time committed for data sharing.
- ◆ Secure funding for tools, software and equipment.
- ◆ Build technical expertise to ensure efficient management and maintenance of the system.

Action Plans for Priority Areas

Two working groups were formed during the Data Strategy and Capacity Building Workshop to develop action plans for the key priority areas. One group defined specific capacity building needs, while the second group focused on data collection, research methodology and data processing.

Group 1—Capacity Building Needs

In previous meetings there was emphasis on the need to enhance the data capacity of philanthropic organizations while ensuring inclusivity and local ownership of the process. The sustainability of the data system not only relies on the capacity of organizations' staff but also on making sure each of the TPF working groups have a clear understanding of and are actively involved in the data management process. This group was tasked with defining the skills and knowledge needed by the staff of philanthropic organizations in order to work confidently and effectively with data, to identify relevant stakeholders, and develop a strategy for their inclusion in the process.

Data skills and knowledge needs

- ◆ Technical capacity
 - Appropriate equipment and software, including financing for such tools.
 - Data security and privacy.
 - A dedicated data working group with relevant expertise, commitment, and adequate knowledge to provide strategic and technical leadership.
- ◆ Functional
 - Reaching agreement on what content to share and how it should be presented.
 - Publicity to raise awareness of the value of philanthropy data among key stakeholders.
- ◆ Human capacity
 - Ensuring inclusive selection of strategic and technical leadership.
 - Ensure employee loyalty and retention.
 - Recruit individuals with skills in statistics and software development to support the TPF data working group.

- Consider establishing a graduate development program for those who wish to pursue careers in philanthropy data management to ensure sustainability and local ownership.
- ◆ Quantitative data management
 - Numerical competence.
 - Proficiency in data analysis and presentation.
 - Information technology (IT) skills.
- ◆ Qualitative data management
 - Good qualitative research skills, including qualitative data collection and analysis.
 - Excellent analytical writing skills.
 - Knowledge management and sharing skills—having capacity to share knowledge with others through various formats and channels such as storytelling, best practices, and success stories. The data process should consider establishing a knowledge management and exchange platform for philanthropy data stakeholders.
- ◆ Good budgeting skills.

Core Staff Values for Successful Data Management

- ◆ Accountability.
- ◆ Social awareness.
- ◆ Integrity.
- ◆ Honesty.

Data stakeholders

It is essential to include all the relevant stakeholders in data processes and the development of the data system as early as possible, making sure they have a clear understanding of the background and objectives, and of their role in the process. Investing time and effort in stakeholder inclusion is key to ensuring successful development and sustainable management of the data system. Stakeholders include:

- ◆ Grantmakers
- ◆ Grantees and beneficiaries
- ◆ Program implementation staff
- ◆ IT experts
- ◆ Research and development stakeholders, including government.

Group 2—Data Collection and Processing

As the field of philanthropy in Tanzania invests in data collection and research it is important to ensure that research methodologies be carefully designed in ways that are inclusive and reliable. The group discussed which data to collect and the type of processing required to ensure methodological rigor and data quality. They agreed on the following recommendations and considerations.

- ◆ Establish a database of key data providers, including:
 - Civil Society Organizations
 - Faith Based Organizations
 - Foundations
 - Trusts
 - Research organizations and academic institutions
 - Government
- ◆ Design and conduct a baseline survey of relevant stakeholders
 - Undertake a baseline mapping of the landscape and characteristics for the organizations, initially focusing on members of the TPF and then expanding to the philanthropy sector more broadly and beyond.

Research checklist for baseline survey:

- ◆ Develop a master list of stakeholders.
 - Leverage existing networks and associations for mapping, e.g. obtain list of organizations registered as NGOs, visit offices of associations and government agencies that have lists of organizations.
 - Develop inclusion criteria for sampling, e.g. organizations active in the last five years.
 - Aim to target 50 foundations per zone (five zones).
- ◆ Give advance notification and obtain required permits from government or target organizations when required.
- ◆ Use the survey to map the characteristics and financial flows of each organization to include in profiles.

Collective Action Plan and Way Forward

Based on the recommendations and considerations developed by the workshop participants, the following is a proposed collective action plan to inform the next phase of developing a philanthropy data system in Tanzania.

- ◆ Establish a community of practice among all members who agree to share data.
- ◆ Identify minimum shareable data and begin sharing knowledge and information as a community of practice. This can serve to foster a culture of data sharing and provide opportunities for member organizations to learn from and support each other.
- ◆ Position the TPF amongst stakeholders, including the UN and government, as an influential and inclusive platform that can provide relevant support and resources.
- ◆ Evaluate and enhance the data capacity of participating organizations. As a first step, Foundation Center could visit a selection of organizations to evaluate the organizational data and gain a better understanding of existing knowledge management practices and systems in Tanzania.
- ◆ Commit to the Tanzania philanthropy data process. Propose a primary and secondary organization contact person to join and participate in the data working group.
- ◆ Develop an up-to-date database of contacts.
- ◆ Develop a work plan, allocate tasks, and determine necessary resources needed to implement the plan.
- ◆ Determine how often the working group should meet. Research for Change volunteered to support the Foundation for Civil Society in organizing data meetings.
- ◆ Include a representative of the data working group in the TPF Steering Committee.
- ◆ Expand the data working group, including by inviting additional organizations, volunteers, and data experts

Resources

[Africa Philanthropy Knowledge Base](#)
Trust Africa & Issue Lab

[Global Philanthropy Knowledge Centre](#)
WINGS & Issue Lab

[Foundation Directory Online](#)
Foundation Center

[Discounted Software for NonProfits](#)
KCDF & TechSoup Kenya

[Global Philanthropy Data Charter](#)
WINGS

[Philanthropy Data System](#)
AFE Columbia

[Foundation Maps](#)
Foundation Center

[SDGFunders](#)
SDG Philanthropy Platform

[National Philanthropy Forums—East Africa](#)
East Africa Association of Grantmakers (EAAG)

[WASHfunders](#)
Foundation Center

[Early Childhood Development Funding Map for Eas Africa](#)
Foundation Center

Appendix A – MEETING AGENDA

Tanzania Data Strategy and Capacity Building Workshop

Strengthening organizations to develop their own long-term sustainable in-country data strategy, capacity, and tools for more effective development outcomes and grantmaking.

December 7th 2016, Dar-es-Salaam, Tanzania

Time	Session
7:45–8:15	Arrival & Registration
8:15–8:30	Welcome, Introductions and Setting the Scene
8:30–9:15	Our Agreements and Understandings <ul style="list-style-type: none">◆ Principles◆ Challenges & Needs◆ Data Dreams◆ Goals & Priorities◆ Reaffirm Agreements
9:15–10:30	BUILDING A DATA SYSTEM: A Roadmap BUILDING A DATA SYSTEM: Data Collection, processing, analysis and the role of your organization
10:30–11:00	BREAK
11:00–12:30	What does the Tanzania Philanthropy Data System look like and what is your role in its creation and use?
12:30–1:30	LUNCH
1:30–3:00	Action Plans for Priorities (3 break-out groups; semi-structured process) <ul style="list-style-type: none">◆ Priority 1: Capacity Building◆ Priority 2: Data Collection and Research Methodology◆ Priority 3: Documenting and Packaging Data
3:00–3.30	Reporting Out on Priority Action Plans
3:30 – 4:00	Identifying Early Wins and Potential Blockers
4:00–4:30	Agreeing on Action Plan and Way Forward
4:30	ADJOURN FOR THE DAY

Appendix B – PARTICIPANTS (By Organization)

Advance Africa Associate

Deus Valentine

BRAC

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EAAG

Catherine Mwendwa

Evans Okinyi

ESRF

John Kajiba

Foundation Center

Lauren Bradford

Larry McGill

The Foundation for Civil Society

Karin Rupia

Tanzania Gender Networking Programme

Gloria Schechambo

Haki Elimu

Godfrey Bonitura

Mo Dewji Foundation

Catherine Decker

Reach for Change

Redemptha William

Tanzania Breast Cancer Foundation

Kisa Mwakatobe

Women Legal Aid Centre

Wigae Kisandu

A vertical photograph on the left side of the page shows a nighttime cityscape. A tall, modern building with many lit windows is the central focus. Other buildings of varying heights and styles are visible in the foreground and background, some with balconies and laundry hanging out. The sky is dark with some light clouds.

About Tanzania Philanthropy Forum

On September 23rd 2015, the East African Association of Grantmakers (EAAG) in partnership with the Foundation for Civil Society hosted the first Tanzania National Philanthropy Forum (TPF). The objective of the forum was to understand and map the landscape of philanthropy in Tanzania and deliberate and validate pathways towards having an inclusive and active national philanthropy forum. Themed 'Working together: opportunities for strengthening Philanthropy in Tanzania' the forum targeted locally established private philanthropic organizations, and organizations with a local presence such as private foundations, family foundations, community foundations, corporate foundations and faith-based giving among other selected CSO groups. The launch of the TPF marked an opportunity for the philanthropy community in Tanzania to come together and strengthen its voice and influence in national development processes.

The TPF has identified the following as its core objectives:

- ◆ Consolidate and strengthen the voice of philanthropy in national development.
- ◆ Provide a platform for knowledge sharing and join learning for philanthropy organizations, particularly foundations and trusts.
- ◆ Strengthen philanthropy collaboration and innovation at the national level.
- ◆ Increase awareness of the value and contribution of philanthropy to national development in Tanzania by providing reliable philanthropy data.

By targeting corporations, foundations, grantmakers, individuals, NGOs, CSOs, international organizations and other key stakeholders the forum has spearheaded inclusive dialogue and collaboration on philanthropy in Tanzania. The TPF has begun to identify and address the key capacity and data needs of the sector, such as through an online mapping of philanthropy in Tanzania, and continues to play a strategic leadership role in developing a collective approach to philanthropy data management in Tanzania. For more information about TPF or this work, please contact Karin Rupia, Resource Mobilization Executive, Foundation for Civil Society, at krupia@thefoundation-tz.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.