KENYA
Data Strategy and Capacity Building

Building a Collective Philanthropy Data System
April 6, 2017 • Sarova Panafric Hotel • Nairobi
Background

This report highlights the key outcomes of the Building a Collective Philanthropy Data System Workshop held in Nairobi on April 6, 2017, the third in a series of workshops conducted over the past year in Kenya as part of the Data Strategy and Capacity Building Program, a joint effort led by East Africa Association of Grantmakers (EAAG), Kenya Philanthropy Forum, and Foundation Center in partnership with the Kenya Community Development Foundation (KCDF), SDG Philanthropy Platform, and more than 40 Kenyan philanthropic organizations. The program aims to strengthen the capacity of foundations and trusts to collect, analyze, and share reliable data to highlight the value of Kenyan philanthropy to national development outcomes, facilitate philanthropic collaboration, and inform grantmaking and programmatic decisions.

The workshop built on work that was undertaken over the past two years to collectively develop a data strategy for Kenyan Philanthropy. During the April 2015 Data Scoping Meeting and the July 2016 Data Strategy and Capacity Building Workshop, the partners identified the key data needs and challenges of the philanthropy sector in Kenya:

- Limited capacity for data collection and sharing in respect to human capacity, infrastructure and funding.
- Low level of collaboration in data collection, management and sharing.
- Lack of standardized tools for collecting, analyzing, and visualizing philanthropy data in line with existing national data systems.

To address these needs and challenges, the partners agreed on the following steps to guide the implementation of the program:

- Promote a culture of data management and sharing.
- Build capacity for philanthropy data management among actors in Kenya.
- Develop standardized approaches for data collection and sharing.
- Establish tools and processes for a common data portal for philanthropy that is comparable, easy to interpret and visualize.

During previous workshops, the group also developed a value proposition to demonstrate the benefits of collective data sharing to key development and philanthropy stakeholders, summarized in the tagline “Philanthropy Data in One Portal for One Kenya”. Further, the partners agreed on a set of values and principles to guide the program, which included principles on data quality; access to data by peers, researchers and the public; data security and consent; acknowledgement of data sources; application of best practices; transparency; accountability; standardization; inclusivity and data comparability.

The most recent workshop, Building a Collective Philanthropy Data System, was held to move the program forward from knowledge sharing and strategy development to implementation. The workshop sought to solidify agreements made during the first year of the program and was focused on the development of a prototype data portal on Kenyan philanthropy. The partners agreed on which data are shareable at this time and outlined the structure of the data portal. Having agreement on what information to share and how to structure it was crucial at this point in the process, as it will serve as a framework for data collection and to make sure the data that will ultimately be shared is contextually relevant and applicable. Further, the partners continued to develop the strategy for implementation over the medium term and agreed on partner roles and concrete next steps.
Kenya’s Role in Driving the Local and Global Agenda for Development Data

Kenyan philanthropy is playing a role in both the development, and data ecosystems at a local, regional and global level. It is important to explore these linkages and to understand what initiatives are already taking place in addition to the Data Strategy and Capacity Building Program to inform the development of the data portal. To this end, Zoravar Singh, managing director of IDEAfrika, provided insight on the role of data partnerships and platforms in driving social progress in Kenya.

Singh identified two key ways in which data has the potential to unify objectives and facilitate more strategic allocation of resources:

- Increasingly, data has become a mechanism for building partnerships.
- Data on philanthropic giving can be a powerful tool to better understand and adapt to a changing funding landscape and facilitate collaboration among organizations working at the local level.

For example, Kenya has played a leading role in promoting the global development data agenda, including as a strategic partner in the Global Partnership for Sustainable Development Data (GPSDD) along with 10 other countries and several UN agencies.

At the national level, the Kenya Data Revolution, an ongoing initiative supported by the Deputy President’s Office, makes use of geo-mapping technology to provide an overview of existing development investments by county and helps to identify funding gaps and facilitate strategic resource allocation.

A philanthropy data portal with comparable location-based data on investments and programmatic activities by philanthropy, government, and other development actors can be a powerful tool to promote partnerships and collaboration across sectors and would ensure greater visibility of philanthropy’s contributions to social progress and economic development.
The Global Partnership for Sustainable Development Data

The Global Partnership for Sustainable Development Data (GPSDD) is an initiative that is supported by governments, international organizations, companies, civil society groups, statistics and data communities in all sectors of the society and all regions across the world, dedicated to achieving the Sustainable Development Goals by 2030. GPSDD seeks to:

- Improve effective use of data.
- Find key data gaps.
- Expand data literacy and capacity.
- Increase openness and leverage existing data sources.
- Mobilize political will and resources.

"I found Kenya is a very progressive country in terms of leveraging data and technology. How can philanthropy drive this journey?" —ZORAVAR SINGH

"Government is investing massively in supporting better data to support development goals in Kenya. It’s refreshing!" —ZORAVAR SINGH

Key Considerations for the Data Strategy and Capacity Building Program

During a session that sought to validate and affirm the values and principles for collective data sharing agreed to in earlier workshops, the group stressed the importance of considering the specific contexts in which organizations work to ensure that the process of developing the portal is informed by widely accepted and practical principles and agreed on four key elements to consider throughout the implementation of the program:

- **Data Security and Access**
  Protect organizations by ensuring that the data shared does not compromise their work. In addition, there is value in sharing challenges and lessons organizations face and the process should provide a safe space for organizations to share failures.

- **Compliance with Principles and Values**
  Recognize that some organizations might not be in a position to fully adhere to some of the principles if their capacity needs are not addressed. There is a need to form a community of practice to leverage each other’s knowledge and experience. (For more detail on data principles and values, see the Data Strategy and Capacity Building Workshop Report.)

- **Data Sharing Within Sub-sectors**
  The process should consider issue and sector based data sharing processes because in some sectors, certain principles may come into conflict with other important concerns. For example, absolute transparency on data sources for human rights focused organization could compromise their work.

- **Reciprocity**
  Shared data should be only accessible to data providers.
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 operating practices of foundations. This included existing philanthropy data portals, the types of data that are shared in those 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.

Based on the discussion of existing portals, the group reaffirmed the value of including a section that provides a summary of each organization’s profile. The profiles would provide basic information about organizations, such as background, focus or thematic area, geographic location, program strategies, grant application procedures (for grantmaking foundations), categorization of beneficiary population groups, and formal contact information at the secretariat and governance level.

Sharing this information was agreeable to all since it is information that is readily available and considered public by most organizations. The portal however, will consolidate and provide a common system for easy reference, with visual summaries.

---

DATA BUCKETS

<table>
<thead>
<tr>
<th>FOUNDATION</th>
<th>OPERATING FOUNDATION</th>
<th>$</th>
</tr>
</thead>
<tbody>
<tr>
<td>BENEFICIARY POPULATION</td>
<td>$</td>
<td></td>
</tr>
<tr>
<td>GEOGRAPHIC AREA SERVED</td>
<td>$</td>
<td></td>
</tr>
<tr>
<td>GOVERNMENT CONTEXTUAL DATA (i.e. GOVERNMENT STATISTICS)</td>
<td>$</td>
<td></td>
</tr>
<tr>
<td>MONITORING &amp; EVALUATION</td>
<td>$</td>
<td></td>
</tr>
<tr>
<td>REPORTS &amp; RESEARCH</td>
<td>$</td>
<td></td>
</tr>
</tbody>
</table>

| GRANTMAKING FOUNDATION | $ |
| RECIPIENT ORGANIZATION | $ |
| PROGRAM BEING IMPLEMENTED | $ |

---
### Group Exercise Results: Deciding Which Data to Share

In group discussions participants were requested to propose specific types of data that would be most useful to share amongst the group within the next few months to support the development of the prototype. Participants were asked to indicate which types of data was easily shareable and which types were more sensitive or required more time to agree on conditions and processes for sharing.

#### EASILY SHAREABLE DATA
- Profile information
- Contact information
- Core values, vision and mission
- Social media channels
- Partners
- Annual Reports
- Subject areas of work (primary and secondary)
- Program descriptions
- Geographic location of programs
- Success stories
- Criteria for selecting beneficiaries
- Strategies for achieving outcomes
- Regulations, standards, and ethics
- Nonprofit management tools
- Population groups served
- Audited financial reports

Although participants saw sharing financial data as useful they noted that sharing information beyond what is provided in audited annual reports may be sensitive.

#### SENSITIVE DATA
- Best practices and case studies (most said yes, but some sensitivity).
- Beneficiary database (sensitivity to sharing this data depended on the areas of focus among organization. Those in the education center identified this as critical information and that they would easily share the information to support their work).
- Outcomes as well as monitoring and evaluation reports.
- Lessons learnt in funding programs and making grants.
- Potential grantees by geography and demographics.
- Survey outcomes and research reports.

### Prototype Development Process: Sharing, Ownership, and Partner Roles

It was agreed that EAAG will sign an agreement with Foundation Center on behalf of Kenya Philanthropy Forum 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.

Foundation Center committed to providing technical support in achieving these goals by working closely with the East Africa Association of Grantmakers and the Kenya Philanthropy Forum. The support includes collectively and systematically designing the tools and process to collect, manage and share data for and with participants.

To take the process forward, a proposal to design a prototype of the Philanthropy Data System that would help in demonstrating the value of a collective data approach was approved – the philanthropy data prototype for Kenya. This allows the Data Sub Committee led by Foundation Center and EAAG to collect minimum shareable data to feed into the prototype that will be presented as an example of what a Philanthropy Data Portal for Kenya can do. This will provide a basis for the long term strategy for data collection, and development and sustainable management of the portal. (See graphic on page 7).
Please fill in DATA TEMPLATE

KENYA PARTICIPANTS' DATA

From: EAAG

DATA PORTAL DEVELOPMENT PROCESS

FOUNDATION CENTER SECURE SERVERS

DATA TEMPLATE

DATA PROCESSING AND INDEXING

Accessible only to KENYA participants

DATA PORTAL DEVELOPMENT PROCESS

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
It was discussed and agreed during the workshop that Foundation Center will work with EAAG to develop a user friendly, standardized, Kenya-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 an 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. This data will then be fed into and presented in a prototype of a data sharing portal for Kenyan philanthropic organizations that can only be accessed by program participants who have shared data and will be password protected.

**In summary, it was agreed that:**

- EAAG will sign an agreement with Foundation Center on behalf of and in consultation with the Kenya Philanthropy Forum Data Sub Committee stipulating the condition of data use and access including clear agreement on how the data will be used to protect organizations that share information.

- Participants should seek confirmation from organization leadership on the level of data sharing they would commit to (in particular with regard to financial data).

- The involvement of a neutral organization such as EAAG will build confidence among organizations that data shared will be secure and ease any fears that may exist.

- Ensure that only data identified by the group as shareable will be used during the development of the prototype.

- The portal will be password protected and Foundation Center and EAAG will ensure that only those who share data have access to the data.

- In developing the prototype, Foundation Center and EAAG will design a common template to collect information according to the agreed upon shareable data and structure. The template should make it easier for organizations to submit data.

- EAAG will circulate the template to participants for them to complete and provide the data.

- Participants, Foundation Center and EAAG will also leverage existing information (e.g. from websites and annual reports) to extract general data to feed into the portal (e.g organization profile information).

- A mutually agreed-upon tool will be developed to collect and present financial information in ways that do not compromise data sources, e.g. by presenting such data only in aggregated form.

- The process of collecting information will improve over time as organizations build trust among each other.

**Conclusion**

EAAG, KPF and Foundation Center are excited to facilitate these next steps with Kenyan philanthropy to shift 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

**Kenya Data Strategy and Capacity Building**

**Developing a Philanthropy Data System**

**April 6, 2017  ♦  Sarova Panafric Hotel  ♦  Nairobi, Kenya**

<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 (EAAG/KPF)</td>
</tr>
<tr>
<td>09.15 – 09.45</td>
<td>Recap of progress made in achieving a collective data system for philanthropy (Foundation Center)</td>
</tr>
<tr>
<td>9.45 – 10.15</td>
<td>The process for building the Data Portal (Foundation Center)</td>
</tr>
<tr>
<td>10.15 – 10.30</td>
<td>Opportunities for linking to existing local and global data initiatives (Zoravar Singh – Advisor Equity Group Foundation)</td>
</tr>
<tr>
<td>10.30 – 10.45</td>
<td>Coffee break</td>
</tr>
<tr>
<td>10.45 – 13.00</td>
<td>Specifying the Portal Structure (Foundation Center)</td>
</tr>
<tr>
<td>13.00 – 14.00</td>
<td>Lunch Break</td>
</tr>
<tr>
<td>14.00 – 15.00</td>
<td>Commitments and Next Steps for the Data Portal (Foundation Center)</td>
</tr>
</tbody>
</table>
Participants (by Organization)

**Action Foundation**
Sarah Nasimiyu

**Asante Africa Foundation**
Anne Mueni Muli
Bob Otigo
Ewald Tesha
Zakayo Kipuyo

**Cooperative Bank Foundation**
Nicholas Shiateya

**EAAG**
Antonny Otieno
Catherine Mwendwa
Evans Okinyi

**IDEAfrica**
Zoravar Singh

**ESRI East Africa**
Clifford Okembo

**Foundation Center**
Larry McGill
Lauren Bradford

**Gertrude's Children's Hospital Foundation**
Ashford Munene

**Global Education Fund**
Daniel Masawi

**HF Foundation**
Samson Nganga

**Hilde Back Education Fund**
Joan Ing'aa

**Hivo Foundation**
Stephanie Muchai

**KCDF**
Patrick Mwangi
Susan Odongo

**Kilele Foundation**
Nancy Munyao

**Optiven Foundation**
Joyce Njambi

**Segal Family Foundation**
Virgile Bahujimihigo

**Ufadhili Trust**
Wambugu Maina

**Uhai Eashri**
Leonard Mutisya

**Viwango**
Wycliff Ayaka

**VSO Jotolee**
Emanuel Mutua
About Kenya Philanthropy Forum

The Kenya Philanthropy Forum aims at enhancing cooperation and coordination among philanthropy actors in Kenya and other stakeholders in the private and public sphere. It also seeks to heighten recognition and the contribution of the philanthropy sector in the national development agenda. Specifically the forum seeks to:

1. To strengthen partnerships among the philanthropy actors through building synergies and leveraging investment resources for greater impact.
2. Positively engage national and county governments and other multilateral partnerships to influence public policies and proactively respond to development challenges—to enhance a favorable environment for growth and impact of philanthropy in Kenya.
3. To provide institutional strengthening to philanthropy actors in program development and implementation.
4. To strengthen collective research, collation of data, documentation, peer learning, sharing of information and best practices for greater influence and impact of the philanthropy sector.

The forum has successfully brought together 40 foundations and trusts to be part of its membership since its inception in March 2015. These include private, corporate, and community foundations. KCDF in partnership with the EAAG currently acts as the interim virtual secretariat with rotational leadership among the steering committee members.

The forum has initiated a series of interventions that has organically increased and built the constituency of the philanthropic sector in Kenya. They include:
- A forum on data management in philanthropy that identified critical data sets that would improve data collection on local giving and give the sector recognition in national development.
- A meeting of foundations and trusts working in the education sector that demonstrated the important need to consolidate efforts on education.
- Representation of foundations as technical advisors to the UNDP—United Nations Development Assistance Framework (UNDAF).
- Recognition of the philanthropy sector in the Development Partners Forum.
- And ongoing conversations on the place of philanthropy actors in line with the Sustainable Development Goals (SDGs).

In line with this, the Kenya Philanthropy Forum has established sub-groups on:
- Data management: The team seeks to establish clear philanthropy data sets in partnership with the Kenya Bureau of Statistics to effectively collect data that demonstrates the philanthropy sector’s contribution to GDP.
- Promoting an enabling environment: Continuous conversation on ensuring that the regulatory, legal, and fiscal environment continues to facilitate the work of the philanthropy sector.
- Education: To strengthen partnership, increase effectiveness of the philanthropy sector in supporting education in Kenya, and positively engage national and county governments and other multilateral partnerships to influence public policies and proactively respond to development challenges.

For more information about KPF or this work, please contact programmes@eaag.org or susan.odongo@kcdf.or.ke.

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.