NEWCOMER INSIGHT COLLABORATIVE

Data Sharing Collaboration Toolkit

2025

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i.   Toolkit updates

Welcome to the updated version of the Service Delivery Data Hub project's (previously the Service Delivery Improvement - Scarborough Newcomer Needs and Trends project) Data Sharing Collaboration Toolkit! This version of the Toolkit provides readers with an updated summary of the Data Hub project's learnings, tools, and resources on how to design and facilitate a data sharing collaborative within the non-profit sector.

With many insights to share through the Data Hub's cumulative experience, this Toolkit has been updated to provide readers with a narrative on the project's journey in initiating and executing a data collaborative in partnership with a post-secondary institution, the University of Toronto Scarborough Campus (UTSC), and twenty (20) newcomer-serving organizations in the non-profit sector across Scarborough, Ontario, Canada.

ii.   About the Data Hub project

Newcomer-serving organizations may face multiple capacity challenges in leveraging their data to inform their service planning and delivery. In response, the Data Hub project, building on the preceding SDI Newcomer Needs and Trends (SDI SNNT) project, offers participating organizations the Newcomer Insight Collaborative (NIC) platform to securely pool and jointly analyze their service delivery data.

Aggregated findings are shared back to organizations through bi-annual Scarborough Newcomer Needs and Trends (SNNT) reports, which aim to identify service access patterns and trends to help organizations with their program planning and decision-making. The ultimate goal of the project is to enhance newcomers' settlement experiences in Scarborough, Ontario through supporting organizations with strategic use of data within the sector.

The Data Hub is led by Catholic Crosscultural Services (CCS), supported by funding from Immigration, Refugees and Citizenship Canada (IRCC), and implemented in partnership with UTSC and the Toronto East Quadrant Local Immigration Partnership (TEQ LIP).

The Data Hub focuses on three core objectives:

1.   Leverage the technical capabilities of the NIC platform to enable diverse organizations to securely and efficiently pool their service delivery data for joint analysis;
2.   Conduct curated analyses on the pooled data to produce SNNT data reports that are the most updated and relevant to participating organizations' needs; and
3.   Build and enhance the capacity of organizations to make better use of their data for program planning and decision-making.

By combining the Data Hub's experiences and learnings over the years, this Toolkit is intended to provide organizations in the non-profit sector with insights, tools, and recommendations on setting up, and successfully participating in, data sharing collaborations.

iii. About this Data Sharing Collaboration Toolkit

This Toolkit provides an updated summary of the Data Hub's learnings, tools, and resources in designing and facilitating a data sharing collaborative in Scarborough, Ontario.

The goals of this Toolkit are to…

- Provide a proven framework for non-profit organizations that are interested in initiating a data sharing collaborative.
- Provide insights and recommendations on how to anticipate and address potential challenges and opportunities that may arise in a data sharing collaborative, whether it be as an initiator to a new data sharing collaborative or as a participant or partner.
- Highlight the role of capacity building on data and analytics in the non-profit sector.
- Showcase benefits of shared data pooling and analysis to provide operational insights to enhance community services.

Who should use this Toolkit?

- Non-profit organizations, public institutions, and/or charities interested in collaborating on data projects with other organizations and/or institutions.
- Post-secondary institutions interested in finding new collaborative approaches to working with community-based organizations on data initiatives.
- Organizations involved in traditional data sharing and/or organizations who are looking to activate their data sharing collaborations on a larger scale.

Why use this Toolkit?

This Toolkit provides useful approaches, guidance, and resources for readers to better understand, prepare for, and initiate data sharing collaborations by understanding how they can be applied, managed, and navigated, as per the Data Hub project's experiences.

Within the context of this Toolkit, we focus on the pooling of service delivery data that organizations collect for the purpose of generating shared learnings that may better inform service planning and service improvements in the non-profit settlement sector.

How to navigate this Toolkit?

This Toolkit presents information and processes in the chronological order they were experienced by the Data Hub project. However, readers may navigate this toolkit based on their needs and current state by selecting the headings that are most relevant to them using the Table of Contents on page 1.

Preparing to Begin a Data Sharing Collaborative

Preparing to begin a data sharing collaboration requires extensive planning, strategizing, and a clear goal your data collaborative wants to achieve.
This section of the Toolkit provides guidelines for non-profit organizations to consider as they prepare for a data sharing initiative, in accordance with environmental scans, organizational readiness assessments, and a data sharing decision matrix.

i.   Environmental scans

Environmental scans typically entail a multimethod approach to research and record the elements within a project's internal and external environments that may bear on its success. Environmental scans also serve as an excellent tool in identifying the gaps and needs that may exist and how your project can address them (i.e., the value that your project can potentially bring).

An environmental scan should be conducted before the start of the data sharing collaborative. If the collaborative is long-term, routine environmental scans should be considered, especially after significant events within your project's environments (e.g., the COVID-19 pandemic).

The Data Hub project conducted environmental scans during its initiation and again shortly after the COVID-19 pandemic. Both times, the Data Hub utilized individual stakeholder interviews and surveys to gain knowledge on…

- Research questions organizations are grappling with.
- Common data and data management systems used in-house and with open, or public, datasets.
- Desired capacity building opportunities related to data management and research.
- Willingness and perceived issues with participation in a data sharing collaborative.

See **Appendix A** for a list of questions that were used in the Data Hub's environmental scans.

General Steps to Conduct an Environmental Scan:

1. Identify the purpose of the scan and topics of interest.
2. Identify research questions – what are you trying to learn?
3. Determine what sources will be required to obtain information (e.g., surveys, interviews, literature reviews, etc.).
4. Collect information and organize it systematically for analysis (e.g., by theme, question, etc.).
5. Present and discuss findings with stakeholders (e.g., create a report).

Some Tips to Consider from the Data Hub's Experience:

Cast a wide net: Diversify your sources of information. This could include engaging organizations that provide a variety of services (e.g., settlement, language training, housing) to ensure a diverse group of service providers are represented.

Utilize different methods: Environmental scans could be completed through interviews, surveys, etc. A similar set of questions could be used in, for example, surveys, but then interviews could be conducted to ask additional questions or clarify survey findings.

Scans do not always need to be "formal": The Data Hub is constantly performing "informal" environmental scans by (1) routinely meeting with participating organizations to check-in on their research questions and capacity-building needs, (2) attending community events and forums to understand wider research needs and trends in Scarborough, and (3) subscribing to newsletters and data sources that provide updated research trends within the sector.

ii.   Data sharing decision matrix

There are four essential components of any data sharing collaborative which are summarized and framed within the below decision matrix. Non-profit organizations looking to initiate a data sharing collaborative should consider each component as a key decision point when preparing and planning for a data sharing initiative.

1) Why share data?

Non-profit organizations should define their purposes of sharing data. For example, the Data Hub's goal for data sharing is to generate timely and local insights to support organizations in their service delivery planning and coordination efforts by providing a more comprehensive picture of Scarborough's newcomer service needs and trends.

Why? Through its environmental scan, the Data Hub learned that organizations were reporting a dearth of locally relevant and timely datasets on newcomers and settlement needs in the Scarborough area to support their programming and decision-making needs.

Here are some other reasons for initiating and/or participating in a data sharing collaborative:

- Explore new perspectives or emerging issues to identify solutions or breakthroughs.
- Expedite and/or support evidence-based decision-making.
- Enhance operational efficiencies or foster internal and/or external coordination.

2) What data to share?

Non-profit organizations should consider a diverse range of data sources to fulfil their data sharing collaborative's objectives and needs (e.g., internal or primary data, secondary public or open data, etc.), as well as differing methods to gather data (e.g., transferring of files or raw data, interviews, surveys, etc.).

If internal/primary data is selected, however, it is crucial to be cautious about privacy and confidentiality, as discussed in the Data Privacy, Confidentiality and Ownership section of this Toolkit.

As an example, the Data Hub's objective is to track and understand the changing service needs of newcomers in Scarborough. Referencing the results of its environmental scan, the Data Hub determined to use data from both primary (i.e., data collected directly from participating organizations) and secondary (i.e., open or public data) sources to support its research.

3) Who to involve?

Drawing on the previous point, depending on the data collaborative's objectives, non-profit organizations should consider a range of entities to engage in a data sharing collaborative, considering how each entity will contribute data, knowledge, and/or resources to make the collaborative successful in meeting its objectives. Such entities could include other non-profit organizations, post-secondary institutions, public institutions, and charities.

Below are the entities involved in the Data Hub project and their role in the collaborative:

- **Catholic Crosscultural Services (CCS):** The lead agency of the Data Hub project - responsible for day-to-day project management and coordination with UTSC, ensuring the project's activities, deliverables, and outcomes ultimately serve the needs of its participating organizations.
- **University of Toronto Scarborough Campus (UTSC):** Development and hosting of the data pooling platform, support with technical and analytical resources, contribute subject matter expertise in data analytics, security, and technology underlying the NIC Platform and its operations.
- **Local Service Providers (Participating Organizations):** As key stakeholders in the project, participating organizations contribute their organization's service delivery data for joint analysis, make decisions on the types of data points to collect, provide input on data analysis, help to review analytical outputs and validate statistical findings. Participating agencies inform the direction of the project and analysis.
- **Toronto East Quadrant Local Immigration Partnership (TEQ LIP):** A collaborative comprised of 30+ organizations that help identify larger, overarching research and newcomer needs in the settlement sector in Scarborough and acts as a reference point to understand the sector's ongoing research questions and topics of interest.

4) How is data accessed?

When working with data, especially pooled data from various sources, it is important to establish exactly how the data is being accessed with considerations of privacy and confidentiality.

There are several forms of data access to consider in a data sharing collaborative:

- **No Access:** Data and findings produced in the collaborative are strictly confidential and are not available to those outside of the collaborative or to other stakeholders. Data and insights are exclusively available to partnered organizations.
- **Open Access:** Available to all, regardless of their participation in the collaborative.
- **Restricted Access:** Only available to those who, for example, have a license or subscription to access the data. Might be reliant on value exchange, such as money.

The Data Hub's model of No Access is slightly unique and entails the following elements:

- Once the data is uploaded to the data pooling platform, only authorized project staff may access the pooled data to conduct analytics – these individuals must sign Non-Disclosure Agreements (NDAs) and uphold confidentiality.
- Authorized researchers may access agreed upon data following participating organizations' unanimous review and explicit, written consent. This is a form of Restricted Access.
- Findings are shared with participating organizations exclusively. Participating agencies may agree, by unanimous consent, to make specific data results available to the public.

iii. Organizational readiness assessments

An organizational readiness assessment measures the ability and capacity of an organization to initiate or participate in a specific project. Such an assessment provides the knowledge and assurance that an organization is ready to engage in a significant undertaking, such as a data sharing collaborative.

There are a myriad of questions and topics that could be asked and explored during such an assessment. Below are some questions to consider when assessing an organization's readiness and ability to embark on a data sharing collaborative:

- **Are the data sharing collaborative's goals and objectives feasible for our organization?**
  - Is leadership committed to supporting the collaborative? How so?
  - Is our organization able to recruit, train, and staff the project?
  - Are there adequate funding opportunities to consider?
  - Are there partnerships within or outside of our organization that we can leverage and help fill in any gaps (e.g., staffing, training, physical resources)?
  - At what defined point will the organization not be able to support the collaborative's goals and objectives (e.g., price point, resource consumption, timeline)?

- **What value and risk does this collaboration bring to our organization and other stakeholders?**
  - How does this collaboration benefit our organization and fellow stakeholders?
  - If this collaborative were to fail, what would be the repercussions to our organization? To our stakeholders? (e.g., reputational, financial, legal)
  - What can our organization practically do to mitigate or avoid any of the identified risks?
  - Are all stakeholders, including our organization, willing (or most likely willing) to access the risk and reward of the data sharing collaborative?

Your organizational readiness assessment may take time and require several iterations to complete. Ideally, one should be completed before data pooling activities begin and should be well-documented (e.g., record meeting minutes, detailed responses to the questions above, etc.). Likewise, you might benefit from conducting additional organizational readiness assessments if components of your project significantly change (e.g., new risks are identified in data security, resource requirements change, etc.) or if there are significant changes within the organization (e.g., change in leadership, resources).

Regardless of the path taken, the goal of this assessment is to ensure that (1) everyone in your organization firmly supports the project, come what may and (2) everyone is informed of their role in making the collaborative as successful as possible.

Building Trust and Understanding for Data Sharing

Building trust and understanding is essential for the success of any data sharing collaborative in the non-profit sector, underscored by two main facets: transparency on how data is collected, analyzed, and applied; and data privacy and confidentiality by setting clear boundaries and expectations on how pooled data is to be secured, accessed, and managed (read more about this in the Data Privacy, Confidentiality and Ownership section of this Toolkit).

This section makes recommendations for non-profit organizations to create trusted intermediaries, facilitate capacity building, partner engagement, evaluations, and address competition in the sector to ultimately build trust and understanding.

i. Neutral third-party participation: trusted intermediaries

In this context, we focus on organizations pooling together service delivery data for shared analysis and to create learnings that lead to better service planning and improvements. While this might be a clear incentive for some organizations to join a data sharing collaborative, some organizations may still be reluctant to share data for reasons such as competition for funding and data privacy. Therefore, the key question is how data sharing can be incentivized for, and trusted by, non-profit organizations while avoiding potential conflicts of interest and data privacy concerns that accompany data sharing.

Data sharing platforms have emerged as trusted intermediaries to share data more efficiently and securely to a broad range of service providers while addressing the concerns and protecting the interests of data providers. This has been a solution implemented by the Data Hub through the creation of the Newcomer Insight Collaborative (NIC) Platform, which was built by the TEQ LIP and UTSC to securely manage the service delivery data collected from participating organizations.

Organizations are generally involved with the NIC Platform in the following stages:

- **Onboarding:** The project's dataset is adjusted to accommodate the new organization. Project staff then work with UTSC to configure a NIC Platform Template specifically for the organization based on sample data reports they have provided (see more about Templates below).

- **Data Collection:** The participating organization is provided their own NIC Platform login to upload their reports to the NIC dataset. Support during uploads are offered virtually and/or in-person with help from the project's Data Analysis Facilitator.

- **Research:** Project staff and UTSC researchers combine the contributions of all participating organizations and perform detailed statistical analyses. The results of analyses are presented to participating organizations before reporting on finalized findings via SNNT reports.

Data Hub in Focus: NIC Platform Customized Data Templates

Various data management systems and methodologies are used across the settlement sector, resulting in varying data output formats across organizations. To achieve a uniform dataset suitable for analysis while minimizing requirements of agencies to modify their data reports before upload, templates were developed as a solution to facilitate the data upload process. These templates are configured specific to each organization's data report format to ensure consistency, providing the following advantages:

- Allow for the extraction of only pre-specified data fields from organizations' data report files during the data upload process.
- Organize extracted data fields (e.g., client ID, gender, etc.) in a standardized format to be stored in the project's database for analysis.
- Identify, and consequently reject, duplicated data records and previously uploaded files.
- Eliminate the need for organizations to change their current data management practices.

Ultimately, NIC Platform Templates have helped make participation in the Data Hub more accessible.

ii. Building capacity and understanding about data sharing

Non-profit organizations' general lack of knowledge about data pooling, and consequently, hesitation to initiate or participate in a data sharing collaborative, goes hand-in-hand with an underlying need to build the sector's capacity to effectively work with and collaborate on data (discussed in more detail in the Integration of Capacity Building section of this Toolkit).

Data sharing collaboratives should aim to build non-profit organizations' capacity and understanding of what data sharing entails to help them make informed decisions about, and engage in, such collaborations. For example, the Data Hub's project plan includes data and research-centric capacity-building across the settlement sector as part of its activities. The intent is to organize trainings and resources that build and enhance organizations' capacity to utilize their own data and other data sources for evidence-driven service planning.

Capacity building is recommended to start early in a data sharing collaborative. Integration of capacity building through workshops and other hands-on activities guides participation in a data sharing collaboration. It provides opportunities to increase the capacity and understanding of organizations to not only effectively participate in data sharing but also enhance their ability to leverage their own data.

iii. Partner engagement in the development phase

Inclusive and active partner engagement during the development phase of a data sharing collaborative is essential to its success. It entails having transparent discussions on what is needed to initiate a successful data sharing collaborative, what each partner's vision, objectives, and concerns are for the collaborative, and which parties to involve (e.g., non-profit organizations, post-secondary institutions, individual consultants, funders, etc.). Such engagement and discussions will create a solid foundation of mutual trust and understanding that will result in success for the partnership and ultimately the data sharing collaborative.

For example, the Data Hub (previously the Service Delivery Improvement – Scarborough Newcomer Needs and Trends project) was initiated by CCS and the TEQ LIP in partnership with UTSC and funded by the IRCC. Leveraging the partnership capacity of the TEQ LIP and the research expertise of UTSC allowed the project to provide participating organizations with a means to pool data and conduct collaborative analysis to produce timely Scarborough Newcomer Needs and Trends reports. Therefore, CCS and the TEQ LIP's engagement with UTSC during the development phase resulted in the project's ongoing success, even several years later. In fact, the Data Hub's annual evaluations consistently showed the high success and positive impact of the CCS/TEQ LIP/UTSC partnership on project stakeholders.

iv. Group decision-making

Group decision-making is a type of participatory process where individuals collectively analyze problems, consider alternative courses of action, and make decisions. Such type of a participatory process is necessary for data sharing collaboratives to ensure that each member has a say in the type of data collected, analyses conducted, and to inform the direction of the research questions. Some group decision-making methods that could apply in a data collaborative are (ClickUp, 2024):

- **Brainstorming**: Members suggest ideas or alternative courses of action during a meeting. This could be done verbally or using tools such as polls, whiteboards and canvases.
- **Dialectical Inquiry**: Members are divided into sides and discuss the pros and cons of a decision.
- **Nominal Group Technique**: Group members write a list of their ideas independently before presenting them to the group for discussion.
- **Democratic Decision Making**: Once all ideas and options are presented, the group votes for the one they prefer where the majority rules.
- **Delphi Technique**: Group members are selected due to their specific knowledge or expertise. Anonymous feedback is then collected from the group and then shared for discussion.
- **Unanimous Decisions**: The condition that everyone must reach a consensus when deciding.

> **Data Hub in Focus: Participating Agencies Meetings & Decision-Making**

The Data Hub utilizes brainstorming methods, nominal group techniques, and unanimous decision-making during its meetings with participating organizations when deciding what analyses/research questions to address and data points to collect. However, the above decision-making methods could also be useful when other decisions and changes need to be made.

v. Importance of process and outcome evaluation

Evaluations help to assess a data sharing collaborative's effectiveness in achieving its stated outcomes. It is helpful to build evaluation into a data sharing collaborative's design to identify whether the process is conducive to meeting the project goals and what improvements can be made; to determine the extent to which the project has achieved its planned immediate, intermediate, and long-term results; and to examine the degree to which partner engagement is being established and maintained.

Some key questions that the Data Hub seeks to answer via evaluations are:

- Is the project helpful to the TEQ LIP and participating organizations? How so or why not?
- Has participation in the project been worth the time and effort for stakeholders?
- How are the project's SNNT reports being received by members? How are they being used?
- How has the project built organizations' capacity to work with data, if at all?
- If organizations are not participating in the collaborative, why not?
- Are there any unintended outcomes resulting from the project?

Evaluation reports are a helpful tool to highlight and understand a data sharing collaborative's successes, challenges, and recommended next steps.

vi. Addressing competition in the sector

Data is an important resource that helps non-profit organizations compete for funding opportunities. This may explain the reluctance organizations might have in sharing data with each other. However, sharing data for joint analysis enables organizations to be more knowledgeable about sociodemographic and service access trends which provides a clearer picture of what is happening beyond the data they collect individually. This strengthens their ability to plan for effective services.

Non-profit organizations looking to initiate a data sharing collaborative could proactively address competition in the sector by:

- **Being well-prepared** (e.g., conducting an organizational readiness assessment, environmental scans, and using a data sharing decision matrix)
- **Building trust** (e.g., involving trusted intermediaries, using individual consultations, and leveraging group decision-making)
- **Having a well-established governance structure** (e.g., cultivating a positive relationship with a post-secondary institution, forming a steering or advisory committee)
- **Ensuring privacy** (e.g., reviewing the relevant legislation, regulations, and agreements)
- **Taking ownership** (e.g., addressing the issue of power)
- **Integrating capacity building** (e.g., organizing workshops)
- **Developing a sustainability plan** (e.g., data lifecycle management)

The above are all important elements of addressing competition in the sector and, ultimately, building trust and understanding for data sharing. Non-profit organizations might take different actions to compete over a related cause, target audience, or funding opportunity. For example, an organization might offer complimentary services for their beneficiaries, whereas another organization might focus on generating awareness and public acceptance of their cause. Therefore, the key question is how to join forces together for the greater good.

The best collaboration occurs when partnered organizations have a common goal and clear understanding of their roles in the relationship. In this context, we focus on organizations pooling together service delivery data for shared analysis and creating learnings that lead to better service planning and delivery. Although many organizations are reticent to share information due to concerns of competition, the advantages of data sharing would compensate organizations for their concerns.

Governance Structure

The section of the Toolkit explores how a data sharing collaborative's governance structure could be a key factor in fostering members' trust and understanding in data sharing through meaningful and productive engagement and collaboration.

Several topics are discussed, such as governance models, the nuances of non-profit organization and post-secondary institution collaborations, governing a data sharing collaborative through a cooperative model, connecting with the non-profit sector, and engaging and ensuring collaboration with diverse organizations.

i.   Governance models

A governance structure is a framework which supports project management and compliance, and directs how stakeholders interact with each other in guiding and monitoring a data sharing collaborative. To achieve inclusive and productive engagement and collaboration, data sharing collaboratives must select a governance structure that best suits the needs of the collaborative, while also balancing the unique needs and interests of its stakeholders.

There are three common governance models one could adopt in a data sharing collaborative ("What Is a Governance Model and Why Does It Matter?"):

- **Advisory Model:** Provides guidance/advice on a project's design and activities. Members are considered "experts" with a range of relevant skills and experiences. However, final decision-making is ultimately up to the project lead.
- **Cooperative Model:** Makes consensual decisions as a group regarding a project's design and activities. All members are viewed as equally responsible for the outcomes of decisions.
- **Centralized Model:** All project decisions and responsibilities fall on the project lead. Stakeholders are merely updated on decisions. A formal board may hold the project lead responsible for the outcomes of their decisions.

An effective governance model will ensure all stakeholders are motivated and working towards a defined, shared goal.

ii.   Collaborating with a post-secondary institution

There are many advantages for non-profit organizations to collaborate with a post-secondary institution. The Data Hub project is done in partnership with the University of Toronto Scarborough Campus (UTSC), who acts as a trusted intermediary hosting the data sharing platform and the pooled data, and whose staff and students lead and support many of the project's key activities and components. Such examples include:

- Building, improving, and maintaining the NIC Platform's functionality and security, which is essential to enable diverse organizations to participate in the collaborative by providing them with a means to efficiently and securely pool their service delivery data for joint analysis.
- Conducting thorough data analysis on the pooled data to produce timely and comprehensive insights that are shared with participating organizations through quarterly meetings and a bi-annual SNNT report.
- Integrating capacity building to make better use of organizations' data for program planning and evaluation through workshops, resources, etc.

The Data Hub's partnership with UTSC has proven to be beneficial in many ways. For example, participating organizations deepen their familiarity of university operations, providing them with access to research and technical expertise, and enabling them to build stronger connections. Likewise, UTSC students are pleased with the remarkable learning opportunity to develop and implement a unique data sharing platform, and to directly work with participating organizations to help them understand and apply statistical insights from the pooled data. Additionally, CCS and the TEQ LIP are enthusiastic about working with UTSC due to their reciprocity in open communication, willingness and

availability to help with emerging challenges, and their shared passion and sense of responsibility to continuously improve the Data Hub project for participating organizations.

Collaborating with a post-secondary institution, such as UTSC, has proven to be substantially successful for the Data Hub project. The partnership has been largely successful due to all parties – UTSC, CCS/TEQ LIP, and participating organizations – recognizing and celebrating the complementary value they each bring to the data sharing collaborative. In fact, this has been the spirit of the project's cooperative governance model.

iii. Sustaining a cooperative governance model

The Data Hub project is the successor of the Service Delivery Improvement – Scarborough Newcomer Needs & Trends (SDI-SNNT) project, which was an exploratory initiative that was tasked with understanding the feasibility, benefits, and complexities of data pooling in the settlement sector.

The SDI-SNNT project was guided by an Advisory Committee made up of members from participating organizations, the TEQ LIP, and faculty experts from the UTSC. This Advisory Committee helped the SDI-SNNT project design its activities and operations by discussing issues and solutions to data sharing and capacity-building in the non-profit sector.

Since the launch of the Data Hub project in October 2021, the project has modified its governance structure to a model where participating organizations are regularly engaged as the main stakeholder group to provide collaborative advice, decisions, and oversight regarding the project's activities and design.

Participating organizations are engaged through several ways:

- **Quarterly participating agencies meetings:** Formal meetings where participating organizations collaboratively review and discuss a variety of topics with Data Hub staff, such as the findings from the pooled data and SNNT reports; ideas about new analyses and emerging research questions; capacity-building topics and activities; and any other suggestions.
- **Ongoing evaluations:** A third-party evaluator conducts ongoing evaluations to assess the Data Hub project's impact on participating organizations and to document their emerging needs. Participating organizations are able to share their open and honest feedback with a neutral evaluator through interviews, focus groups, surveys, etc. Findings are then summarized into an anonymized report for Data Hub project staff.
- **Open door policy:** Project staff welcome drop-in meetings and regularly check in with members.
- **NIC platform feedback forms:** Upon the completion of a data upload, members can voluntarily complete a feedback form which has been mostly used so far to share suggestions for analysis, user experience improvements, and research questions with project staff.

iv. Engaging participating organizations

Engagement of organizations in a data sharing collaborative will be determined by the goals and objectives the collaborative aims to achieve. The TEQ LIP connected with a diversity of organizations across Scarborough, particularly non-profit organizations that provide social, settlement, employment, and similar services to the community, with special focus on services for newcomers and immigrants.

Not only are participating organizations supported to pool their service delivery data for joint analysis through the NIC platform, they are also motivated to be active in the collaborative by being valued as the experts in helping the Data Hub to interpret the findings from the pooled data while uncovering trends and patterns in newcomer service access; and being ongoingly engaged during participating agencies meetings, evaluation activities, capacity-building workshops, etc.

Data Hub in Focus: Engaging Non-Participating Organizations

The Data Hub regularly engages organizations that are not formally participating in the data collaborative by contributing their data. For example, Data Hub staff regularly provide updates and seek feedback from the TEQ LIP network of 30+ organizations that provide social, settlement, employment, and similar services to the Scarborough community. These organizations are invited to the Data Hub's capacity-building workshops and encouraged to share workshop details with their own network of partner organizations.

Engaging with non-participating organizations has been helpful to the Data Hub's evaluation activities as well, as the project continues to seek feedback on non-participating organizations' research needs and gaps, as well as their perceptions of the challenges and benefits of data pooling.

v. Facilitating organizations' participation and accessibility

Organizations' participation in a data sharing collaborative can be facilitated and supported by removing the need for them to change their current practices of data collection, collect additional data, and/or change their data management systems. Recognizing that non-profit organization staff are already highly occupied with service delivery and may not have the capacity to devote significant amounts of time to data management, a key feature of the Data Hub project is the ability to make it as easy as possible for organizations to participate through the use of customized data templates in the NIC Platform. Through these templates, the NIC Platform is able to accommodate data uploads from a variety of data management systems that organizations use, effectively eliminating the need for organizations to spend additional time or resources on creating tailored data files/reports to upload into the Platform.

Before an organization uploads any data, they must first share a sample copy of their existing data reports for project staff and UTSC developers to study. During this phase, project and UTSC staff are primarily looking to understand where the project's focus data points are stored (e.g., Client ID is in column A) and how values are formatted (e.g., are dates formatted as "YYYY-MM-DD" or "DD-MM-

YY"?). Staff then create a customized data template specific to that organization's data report, so that the NIC Platform is then prepared on what to extract and store when that organization uploads their particular report.

The NIC Platform's flexibility to accept data from diverse data management systems has been key in enabling organizations' ease of participation in the Data Hub project over the years. If possible, non-profit organizations starting their own data sharing collaboratives should also look into similar innovative solutions to enhanced their project's ease of participation and accessibility.

vi. Facilitating the process of data upload and analysis

To ensure that all participating organizations are aware of what the Data Hub project's processes entail, the project has established four general stages to its data collection and analysis cycles:

1. **Engagement:** During this initial stage, project staff meet with a prospective organization to gauge their interest and eligibility to participate in the Data Hub project. Once the organization's interest and eligibility are confirmed, a mutually signed Data Transfer Agreement (DTA) is produced between the organization and CCS. No data will be shared before the finalization of the DTA.
2. **Onboarding:** The new organization shares a sample of their data report(s) at this stage for project staff to study and configure a corresponding data template in the NIC Platform. Internal testing is completed by the Data Hub team to ensure that the Platform is ready to receive the organization's data contributions upon their first upload.
3. **Data Collection:** Project staff provide the organization with a data upload date, report generation and NIC upload instructions, and their own unique NIC credentials. At this stage, the organization runs their reports, performs any pre-checks specified by project staff, and then uploads their data reports directly into the NIC Platform.
4. **Data Analysis/Research:** In this stage, Data Hub researchers combine all organizations' data contributions to then perform data cleaning and quality checks. Statistical analysis is performed on the aggregated data and summarized into presentations for participating organizations. After discussing and verifying the findings with members during these meetings, the research team then formally reports on their findings through an SNNT report. These SNNT reports help identify patterns and trends in service delivery, which can be used by participating organizations for future service delivery improvement initiatives and funding applications.

Data Privacy, Confidentiality and Ownership

Data privacy, confidentiality, and ownership are very important concepts when it comes to data sharing and are discussed in this section of the Toolkit: First, the section introduces ways to address privacy, confidentiality, and ownership in data sharing collaboratives by reviewing legislation, the Privacy Commission of Canada's regulations, Data Transfer Agreements, and Non-Disclosure Agreements. Then, the section explores how to ensure organizational ownership of data, followed by a discussion on how to address issues of power when engaging in data sharing.

i. Reviewing legislation

At the start of a data collaborative, organizations should review privacy legislations enforced within Canada and identify the legislation that applies to their particular data collaborative. Enforcement of privacy legislation is managed by various governmental organizations and agencies. For example, oversight of the **Personal Information Protection and Electronic Documents Act (PIPEDA)** is handled by the Office of the Privacy Commissioner. Certain factors determine what legislations apply and identify the administrators of the legislation.

These factors include:

- What is the nature of the organization managing the personal information (e.g., federal government, provincial or territorial government, federal-regulated business, private sector, engaged in commercial activities, non-profit sector)?
- Where is the organization based?
- What type of information is involved?
- Does the information cross provincial or national borders?

Non-profit organizations may collect personal information as part of their client services. Personal information includes race, religion, age, marital status, medical data, education attained, employment history, and financial status. Personal information does not include information that has been anonymized. Neither does it include an individual's business contact information that an organization collects, uses, or discloses, for the purpose of communication. It is important to ensure compliance with legislation when dealing with personal data to avoid risks associated with privacy breaches and violations, including the risk of court action, class action litigation, court-awarded damages and reputational injuries ("Why Not-For-Profits Should Comply").

ii. Reviewing Privacy Commissioner of Canada regulations

There are two privacy regulations that are enforced by the Office of the Privacy Commissioner of Canada: The Privacy Act and the PIPEDA. The Privacy Act outlines how the federal government administrates personal information, whereas the PIPEDA outlines how businesses control personal information.

The Privacy Act applies to all federal governmental institutions listed in the Privacy Act Schedule of Institutions. The Act relates to an individual's right to access and correct their personal information, and the federal government's collection, use, or disclosure, of personal information to provide services, which includes personal information of federal employees ("Summary of Privacy Laws").

The PIPEDA applies to any organization that collects, uses, or discloses personal information in the course of commercial activities. Since PIPEDA governs commercial activity, non-profit organizations are often unclear as to if or how the Act affects them. It is important to understand that the nature of the organization does not determine whether PIPEDA applies. Rather, it is the nature of the activity

undertaken by the organization that may elicit the requirements of PIPEDA. The term "commercial activities" is defined as: "…any particular transaction, act or conduct or any regular course of conduct that is of a commercial character, including the selling, bartering or leasing of donor, membership or other fundraising lists ("Why Not-For-Profits Should Comply"). Consequently, the Act applies to non-profit organizations if they are engaging in commercial activities that are not central to their mandate and which involve personal information.

Furthermore, each province and territory in Canada has its own regulations governing privacy. For instance, Ontario is governed by the **Freedom of Information and Protection of Privacy Act and the Municipal Freedom of Information and Protection of Privacy Act** ("Freedom of Information and Protection of Privacy Manual"). Non-profit organizations are encouraged to review these regulations, maintain strict confidentiality and seek legal advice based on their specific circumstances.

Data Hub in Focus: Ensuring Ongoing Compliance

Ensuring privacy standards are met is paramount in a data collaborative. The Data Hub conducts bi-annual security reviews with data analytics, technology and security experts from UTSC to help review and ensure that the collaborative's tools and processes of working with participating organizations' pooled data are as efficient and secure as possible. It is also important to note that these UTSC experts are not direct members of the project team, nor are they directly involved in the project's day-to-day activities. This is to ensure a level of objectivity when assessing the Data Hub's security.

During these reviews, Data Hub staff and UTSC experts discuss and scrutinize various elements of the project, such as:

- What specific data is being collected and stored.
- The state of project servers that store the pooled data and user information.
- Identify security patches, updates, etc. for the project's various technological components.
- Data quality assurance requirements and processing.
- The tools and code used for data processing.
- The NIC Platform's overall infrastructure, processes, and access.
- Human processes and their associated risks in handling the data.
- Review any risks associated with implementing new changes to the NIC Platform and/or the project's data management practices.

These reviews have been instrumental in ensuring that the Data Hub's practices, processes, and tools meet expert expectations and standards regarding data security and compliance.

iii. Data transfer agreements (DTAs)

Data Transfer Agreements (DTAs) are internal or external agreements that govern the sharing of data according to specific terms and conditions. These agreements identify the parameters which govern the collection, distribution, storage, security, analysis, and destruction of data. DTAs are an integral tool in data sharing collaborations since they govern the agreement and relationship between parties

in the collaborative, set out legal and ethical obligations, and in consideration to the risks related to inappropriate data usage.

The terms and conditions of a DTA should correspond with the nature of the data collected, the probability of a privacy break, and the potential magnitude of harm posed to organizations if their privacy rights were violated ("Data Sharing (or Transfer) Agreements").

Generally, DTAs contain the following elements:

- **Project Description:** data sharing project brief.
- **Data Description:** the data to be collected, the nature and scale of the data to be used.
- **Format:** the data formats and standards, usability, longevity, and suitability justification.
- **Data Organization:** data management and quality assurance during the project.
- **Storage:** back up methods for the data and future implications.
- **Security:** technical and procedural protections for the information.
- **Responsibilities:** the owners and stakeholders of the data and their roles.
- **Legal Requirements:** relevant federal and provincial laws.
- **Privacy:** procedural protections for participant confidentiality.
- **Term and Termination:** the duration of the agreement.

See **Appendix B** for a sample DTA created by the Data Hub project.

iv. Non-disclosure agreements (NDAs)

NDAs are legal agreements that are used between parties to ensure that certain information will remain confidential. Once an individual signs an NDA, they cannot discuss any information protected by the agreement with any non-authorized party. All project staff and UTSC partners, regardless of their status (i.e., full-time, contract, part-time) must sign an NDA. This means that they are not allowed to discuss data findings, participating organizations' contributions and participation, the NIC Platform's inner workings, etc., with anyone outside of the Data Hub project ("4 Things You Should Know About Non-Disclosure Agreements").

v. Organizational ownership of data

There are three distinct roles in data governance: data owner, data steward, and data custodian. The data owner is concerned with risks and access to data ("Data Governance Roles"). For instance, in the Data Hub project, participating organizations retain ownership of the data they contribute to the data sharing collaboration and have the right to withdraw their data. Any additional use of the data that is not set out in the DTA must be approved by the contributing organization.

The data steward is involved with the meaning and correct usage of data ("Data Governance Roles"). In comparing data steward and data owner, often the data steward does not restrict users on the access of data as long as they use it correctly. The data custodian is responsible for managing servers, backups, and networks. The data custodian has mastery of a data schema and lineage and may

provision access according to the data owner's rules ("Data Governance Roles"). In comparison with a steward and owner, the data custodian is often not involved in the decision-making process.

In relation to data ownership, transfer of data ownership to the research institutions or the host of the data sharing collaborative should be agreed upon as part of the DTA. Non-profit organizations are encouraged to recognize data ownership as a formalized role to take responsibility for the management of service delivery data across its life cycle (i.e., from collection to analysis).

vi. Addressing the issues of power

In data collaboratives, where organizations work together on data sharing and pooling, power struggles may arise. Non-profit organizations should consider some of the issues of power below:

- **Ownership Claim:** a number of possible parties may desire to claim data ownership (e.g., non-profit organizations, partnered organizations, post-secondary institutions).
- **Data Hoarding:** factors influencing the decision to withhold data access (e.g., collecting data can be costly and time consuming, technical obstacles, concerns about qualifications of partnered organizations).
- **Balance of Obligations:** negotiation on the balance between an organization's willingness to share data and its obligation to other collaborators ("Data Ownership").

Non-profit organizations are able to address the issue of power by implementing the corresponding recommendations:

- Addressing uncertainties about data ownership by ensuring organizational ownership of data, reviewing the privacy and confidentiality legislation enforced within Canada, and developing a DTA.
- Reinforcing trust and empowering partnered organizations through stakeholder engagements to maximize the value of data (e.g., trust building, sharing resources and expertise).
- Showcasing benefits of shared data pooling and analysis to provide operational insights to compensate organizations for their concerns (e.g., empowering unprecedented collaboration, data-driven decision-making, informing policy, amplifying social impact).

The above strategies are interrelated. For example, trust can be reinforced by empowering partnered organizations to address the risks of enhanced access and sharing. Data ownership is the act of retaining complete power over a data, thus, the issue of power demands non-profit organizations' further considerations.

Integrating Capacity Building

Integrating capacity building into a data sharing collaborative's design strongly supports participants' ability to fully realize the benefits of the collaborative.

Capacity building is an ongoing process where one obtains, improves, and retains the skills, knowledge and other resources needed to be successful in a data sharing collaborative.

This section further explains how the Data Hub has integrated and centralized capacity building throughout its activities and overarching project design, and the special considerations or challenges the Data Hub has encountered for each.

i.   Importance of capacity building

Capacity building is the term commonly used by non-profit leadership to ascertain the ability of an organization to achieve its mission in an effective way. Capacity building can be thought of on three different levels:

- **Individual:** capacity building activities are designed to increase an individual's knowledge and skills (e.g., group workshops, consultations, courses, etc.)
- **Organizational:** concentrate on supporting collaboration, establishing governance structure, and shoring up sustainability (e.g., data governance rules)
- **Systems:** more complex than organizational – involves the allocation of resources and development of policy (e.g., Data Transfer Agreements)

Many community organizations have expertise and capacity in service delivery, but not necessarily in data analysis. Therefore, organizations need to build capacity towards data management, data use, and their abilities to extract evidence from the data they collected to support service planning and improvements.

For instance, some of the Data Hub's earlier environmental scan participants identified a gap in knowledge regarding what service delivery data was collected regularly at their organization and how they would access that data in a matter appropriate for analysis.

The participants also noted that they lacked an understanding of what information their data was capable of providing them, one noting "Our biggest problem is we don't really know what to make of the data we have." As a result, capacity building workshops, one-on-one consultations, and participating agencies meetings were built into the Data Hub project's design to help organizations build the skillset and knowledge necessary to comfortably work with data.

ii.   Capacity building workshops

Capacity building workshops are designed to build participants' knowledge and skillset about a certain topic. Within the Data Hub context, this entails delivering workshops that target the settlement service sector's ability to effectively work with and collaborate on data to support evidence-based service planning and decision-making.

Over the years, the Data Hub has delivered a number of workshops focused on understanding data and research concepts and effectively utilizing free, accessible data tools. Examples of workshops include:

- Data Entry Do's and Don'ts
- Data Pooling and Collaborative Research
- Using Microsoft Excel for Data Analysis & as a Data Management Tool
- Navigating Newcomer & Immigration Data Resources
- Introduction to Descriptive Statistics for Exploring Data
- Basic Survey Design & Analysis in the Newcomer Service Sector
- Introduction to Basic Data Visualization Using Microsoft Power BI (Desktop)

These workshops are accessible to all organizations, regardless of whether or not they formally participate in the Data Hub project, and provide opportunities to increase the ability of organizations to not only effectively participate in a data sharing collaborative but also to enhance their ability and capacity to utilize their own service delivery data internally.

Benefits of capacity-building workshops include:

- **Direct interaction with experts:** Workshop attendees are able to interact with and learn from data and research experts directly.
- **Current topics:** Workshop topics are timely and in direct response to feedback and suggestions from the sector.
- **Interactive learning:** Workshops are generally designed around an activity or practical assignment, encouraging workshop attendees to test and demonstrate their understanding of the content.
- **Retention support:** Take-home resources are provided, supporting the retention of the workshop's teachings.

iii. One-on-one consultations

One-on-one consultations offer the ability to have thorough conversations with individuals and organizations to better understand their data needs and expectations, and to identify opportunities to build their skillset and knowledge to better work with data.

Typically, the Data Hub consults with organizations one-on-one on the following occasions:

- **During Outreach:** Data Hub staff routinely conduct outreach with organizations, which entails meeting with organizations one-on-one to discuss the Data Hub project and how they are currently working with data. In some cases, organizations have a solid data management and governance strategy in place and are able to commence their participation in the data sharing collaborative immediately. In other case organizations come to identify opportunities to improve their data management and quality before they can begin to participate in a data sharing collaborative.
- **During Data Uploads:** Participating organizations are engaged to upload their data into the NIC Platform twice per year. During these upload, Data Hub staff schedule one-on-one meetings with organization staff to (1) provide support, if needed, during the upload process and (2) check-in on how organizations feel about their data quality and data management.

These one-on-one consultations help organizations review their data management practices and stimulate meaningful conversation on how the organization and the sector overall can improve its ability to work with data.

iv. Participating agencies meetings

Following data collection and analysis of the pooled data, Data Hub staff organize participating agencies meetings for members to come together to collaboratively review, discuss and validate the findings from the pooled data, and to also discuss any other relevant needs.

The primary objective of these meetings is to progress research activities and collect organizations' feedback on their satisfaction or concerns, but a secondary goal is to also help build members' capacity to review, interpret, and critically discuss data findings as they consider applying it to their own service planning and delivery.

During these meetings, findings from analyses are presented to members through a collection of visualizations, statistics, and brief descriptions. Members can raise questions, make suggestions for improvements, and/or provide valuable qualitative contextualization for the quantitative trends and patterns extracted from the pooled data, thereby allowing members to engage in collective sense-making, building their curiosity and approach to interpreting data findings and analysis.

Sustainability Plan

The sustainability plan of a data sharing collaborative is a roadmap for achieving long-term data sharing goals. In this context, we focus on organizations pooling together service delivery data they collect as part of their client services, for the purpose of shared analysis. This has the potential to create learning that better informs service planning and improvements.

This section provides a practical framework for non-profit organizations to develop a sustainability plan for data sharing collaborations through data lifecycle management. The data lifecycle refers to the sequences of stages that service delivery data goes through from its capture to its distribution and reuse.

i.   Data lifecycle

There are six general stages of data lifecycle management to consider in a data sharing collaborative. Although these stages are ordered in an ideal sequence below, not every stage necessarily happens depending on the nature and goals of the data sharing collaborative:

Capture: Agencies collect/acquire data, either directly as part of their client services (e.g., data entry during case management) or indirectly (e.g., secondary research). This stage could also refer to when the data sharing collaborative receives contributed data by participants.

Maintenance: Before active use, the collected/acquired data might be subjected to processes (e.g., cleaning, enrichment, verification) to ensure and/or validate its quality.

Active Use: The data is analyzed and reviewed to support specified goals (e.g., answer a research question).

Distribution: Insights from the data are reported on and summarized for a target audience (e.g., presentations, reports, dashboards, infographics, etc.).

Archival: Data that is no longer in active use or being distributed is archived for, potentially, future use (e.g., moving data to an archive folder).

Purging: Data and any corresponding reports/summaries are deleted and removed from the data sharing collaborative's possession (e.g., permanently deleting contributed data).

Furthermore, data lifecycle management is the catalyst that flows data from one stage to the next ("Data Lifecycle"). When engaging in a data collaborative, participants should apply data lifecycle management to maximize the utilization of their service delivery data and to set out what happens with the data once the project has run its course. Successful data lifecycle management enables the availability of clean, accurate, and useful data to all stakeholders, thus providing operational insights that would enhance community services.

Data Hub in Focus: Overview of the Data Hub's Data Lifecycle Management

To help understand how data lifecycle management might look like within the operations of a data sharing collaborative, please see below for an overview of the Data Hub project's current data lifecycle management steps and procedures:

- **Capture:** Participating organizations securely upload requested service delivery data through the Newcomer Insight Collaborative (NIC) platform for analysis. Client IDs are encrypted upon upload. Representatives uploading data on behalf of their organization must do so through their own NIC user account, and must preview the data to check for any errors or inconsistencies before completing the upload.

- **Maintenance:** The uploaded data is pulled and decrypted within an internal data server by designated Data Hub staff, who then perform the following steps:
  - Review and verify the contents of the data (e.g., for completeness, correct mapping).
  - Clean the data where needed (e.g., correct spelling mistakes, standardize date formats.
  - Assign tags to services, allowing for the categorization of the data for focused analysis.
  - Consolidate and version the dataset.

- **Active Use:** Data Hub staff securely transfer the consolidated, versioned dataset to an internal virtual analysis server to be accessed by designated UTSC students and staff, who then conduct statistical analysis on the data to uncover insights specified by Participating Organizations (e.g., what is the country of origin of clients who access employment services the most?).

- **Archival:** SNNT reports are archived locally on project staff computers for future retrieval, if needed. Likewise, with the closure of the Data Hub project, archival of the project's dataset can only be initiated following a unanimous decision by all participating organizations. Without organizations' consent, the project does not routinely archive data.

- **Purging:** The Data Hub may permanently delete data on several occasions:
  - A data upload was completed but there were issues with the data itself, necessitating a permanent deletion of the uploaded data in order to accommodate a re-upload by the organization (e.g., missing data values, seemingly inaccurate values).
  - A participating organization has requested the permanent deletion of their own data, following the procedures outlined in the project's Data Transfer Agreement (DTA).
  - The project has ended, and the participating organizations have unanimously made the decision to purge or permanently delete the pooled dataset.

Appendices

A. The Data Hub Project's Environmental Scan Questions

Organization/Respondent Details

1. What services does your organization provide?
2. What is your position within your organization?
3. How do you directly work with your organization's data?
4. Is your organization currently participating in the Data Hub project?

Organization's Data Management

1. In your organization, who is responsible for data entry?
2. How is your organization's data analyzed?
3. What data management systems(s) does your organization use to store its data?
4. Is your organization using any additional encryption or security software for data protection?
5. To your knowledge, what is your organization's data commonly used for?
6. To understand what data variables are already being collected by service providers in Scarborough, would you be willing to provide us with a blank copy of the variables/fields your staff collect data on?
7. Do you have any concerns about your organization's data collection practices?

Organization's Capacity-Building Needs & Opportunities

1. What are some challenges your organization is facing in regards to using its data effectively?
2. What capacity-building supports do you think would be the most helpful in enhancing your organization's ability to effectively use its service delivery data?

Organization's Research Questions & Needs

1. If given the opportunity to access timely and geographically-specific analyzed data, what would you/your organizations like to know?
2. What public/open datasets does your organization utilize?
3. What do you most commonly use open/public datasets for?
4. What challenges do you encounter when using open/public datasets?
5. If the open/public datasets your organization uses are missing important data points, what are they?

B. Sample Data Hub Data Transfer Agreement (DTA)

This agreement is made between

ORGANIZATION'S NAME

(the "Provider")

and

ORGANIZATION'S NAME

(the "Recipient")

Effective the last date of execution below (the "Effective Date").

WHEREAS the Recipient intends to perform a Project entitled "[Service Delivery Data Hub]" as generally described in Appendix "A" (the "Project");

AND WHEREAS the Project ends [Date] unless otherwise extended by written agreement of all parties and pending funding availability;

AND WHEREAS the Recipient requires certain information as more fully described in Appendix "B" (the "Data") that is owned by, or under the control of the Provider for use in performance of the Project;

AND WHEREAS, the "University of Toronto Scarborough Campus ("UTSC") and the Recipient have collaboratively developed a Data Platform called the Newcomer Insight Collaborative Platform (the "Platform") to store the Data in accordance with the specifications set out in Appendix "C".

AND WHEREAS the Provider wishes to provide the Data to the Recipient in order for the Recipient to perform the Project;

NOW THEREFORE the Parties agree as follows:

1. **Data Provided.** The Provider shall provide the mutually agreed upon Data to the Recipient, and by such means, as described in Appendix "C" or as may be agreed to by the Parties in writing. Participation in any Data collection, as requested by the Recipient, will be at the discretion of the Provider. There will be several Data collection points undertaken in the course of the Project. The Provider may opt out of any request for Data. The content of any Data collection and focus of analysis will be a joint decision between all Parties.

2. **Withdraw.** Should the Provider wish to opt out of any Data collection or discontinue their participation in the Project, they will do so by providing written notice to the Recipient thirty (30) days in advance of that scheduled Data collection. All previously contributed Data will remain in the Platform and as part of the Project.

3. **Purpose.** The Recipient shall only use the Data for the purposes of the Project, or other purposes as agreed upon from time to time by the Parties in writing.

4. **Future use of Data:** The use of the Data for purposes outside of the scope of the Project, such as academic research and publication, will be agreed upon by the Parties on a case-by-case basis. The goal of any such purposes would be clearly in the interest of the populations served by the Provider, and will align with the purpose and objectives of the Project.

5. **Acknowledgement.** The Recipient agrees to acknowledge the source of the Data in any publications resulting from the use of the Data.

6. **Further Distribution.** The Recipient will not distribute the Data received from the Provider to third parties outside of the scope of the Project without the Provider's written consent, and shall refer any request for the Data to the Provider.

7. **Copies.** The Recipient shall only make such copies of the Data as is necessary for the purposes described in this Agreement. Unless otherwise agreed by the Provider, all such copies shall, upon request, be promptly returned to the Provider with the original or destroyed upon termination or expiration of this Agreement.

8. **Terms and Termination.** This Agreement shall enter into force as of the Effective Date and shall terminate concurrently with the termination of the Project. The Project end date is March 31, 2025 unless otherwise extended by written agreement of all parties and pending funding availability.

9. **Confidentiality.** The Recipient agrees to maintain the Data in confidence with the same degree of care as it normally takes to preserve its own confidential information of similar grade, but in any event, no less than a reasonable degree of care.

10. **No Personal Information.** The Provider shall ensure that the Data transferred to the Recipient does not contain any personal information as defined under the Freedom of Information and Protection of Privacy Act.

11. **Independent Parties.** The Parties are independent parties and nothing in this Agreement shall constitute either party as the employer, principal or partner of or joint venture with the other party. Neither party has any authority to assume or create any obligation or liability, either expressed or implied, on behalf of the other.

12. **Governing Law.** This Agreement shall be governed by and construed in accordance with the laws of Canada and the laws of the Province of Ontario applicable therein.

13. **Entire Agreement.** This Agreement is the entire agreement of the Parties and no change or modification shall be valid unless it is in writing and signed by both parties.

IN WITNESS THEREOF, the authorized representatives of the Parties have executed this agreement in two original counterparts as of the Effective Date.

A. ORGANIZATION'S NAME (the Provider)

B. ORGANIZATION'S NAME (the Recipient)

A. NAME: B. NAME:
   TITLE: TITLE:
   DATE: DATE:
   SIGNATURE: SIGNATURE:

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Works Cited

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