

Transforming Transform the Sector

REFLECTIONS ON EQUITY AND INCLUSION
AT A NATIONAL CONFERENCE

Process Report

MICHAEL LENCZNER & JON MCPHEDRAN WAITZER

A Transform the Sector Report

About Transform the Sector

Transform the Sector 2017 was a one-day conference about revolutionizing the Canadian social sector's use of data. Held on February 23rd 2017, the event was organized by Powered by Data in partnership with the Ontario Trillium Foundation and the Stanford Digital Civil Society Lab. Transform the Sector 2017 was a collaboration between Powered by Data, the Ontario Trillium Foundation, and Stanford's Digital Civil Society Lab (DCSL).

About Equity and Inclusion at Transform the Sector

The co-hosts of Transform the Sector 2017 wanted this event to include leaders and change agents from across diverse communities, reflecting the broad range of stakeholders that's required for effective systems change. In this report, Michael Lenczner and Jon McPhedran Waitzer document Powered by Data's efforts around equity and inclusion at Transform the Sector. Powered by Data's work to promote equity and inclusion at the conference was funded by the Carold Institute and the Stanford DCSL. These efforts resulted in the selection of 22 Conference Fellows who were supported in attending the conference. They also included efforts to address barriers to attend for speakers from marginalized communities, as well as efforts to address barriers to participation at the conference itself. In sharing these reflections, Lenczner and McPhedran Waitzer hope to demonstrate the importance and impact of this work, and encourage other organizations to build on these experiences in order to make their own events more inclusive.

Acknowledgements

The authors would like to thank the following people for their valuable input and contributions to this report: Amanda Cockburn, Thomas Chanzy, Dave D'Oyen, Blair Dimock, Tatiana Fraser, Benjamin McNamee, Cynthia McQueen, Ramona Reece, Shirley Roburn, Nicholas Salter, Herleen Sayal, Darlene Seto, Ian Sunabacka, and John Wong.

Ontario
Trillium Foundation



Fondation Trillium
de l'Ontario

An agency of the Government of Ontario
Un organisme du gouvernement de l'Ontario

The production of this report was possible thanks to the generous support of the Ontario Trillium Foundation.

About Powered by Data

With the goal of enabling the social sector to benefit from the rapidly changing way society handles information, Powered by Data works with leaders in nonprofits, governments, and foundations to help them better use, share, and learn from data. Powered by Data also works with key stakeholders to open up their data for social impact. Powered by Data operates on Tides Canada's shared platform, which supports on-the-ground efforts to create uncommon solutions for the common good.

For more, visit <http://poweredbydata.org>



This work is licensed under a Creative Commons Attribution 4.0 International License.

ABOUT THE AUTHORS

Michael Lenczner has over 15 years of experience working at the intersection of technology and the nonprofit sector. He splits his time between serving as the CEO of Ajah, a Montreal-based company that develops online tools for fundraisers, and being the Director of Powered by Data, a nonprofit initiative launched by Ajah that helps the nonprofit sector use data to increase its impact.

Prior to this, Michael founded Île Sans Fil, a community wireless group now operating over 500 public hotspots in the Montreal area. Working in open data since 2005, he has co-founded national, provincial and municipal lobbying groups such as Montréal Ouvert, as well as coordinated numerous hackathons on issues such as sustainability, corruption and municipal services.

Jonathan McPhedran Waitzer was hired as a consultant to lead equity and inclusion efforts for Transform the Sector. They are a 2015-2017 Jeanne Sauvé Fellow, working with a cohort of 11 other Fellows from 10 countries to build knowledge around public leadership for culturally diverse societies. They recently served as Director of Montreal community organization Head & Hands, and as a Board member at the Centre for Community Organizations. Prior to this, Jon's professional background was in management consulting and international project management. They worked with McKinsey & Company in Montreal and Ashoka in Berlin, and advised clients from the public, private, and social sectors on strategy and organizational development.

CONTENTS

A FOREWORD	5
PROCESS REPORT	7
HOW WE INTEGRATED EQUITY AND INCLUSION INTO OUR CONFERENCE ORGANIZING	8
OVERALL APPROACH	9
ADDRESSING BARRIERS TO ATTENDANCE	10
Addressing Barriers to Attendance for Participants	10
Addressing Barriers to Attendance for Panelists	12
ADDRESSING BARRIERS TO PARTICIPATION	13
Before the Conference	14
During the Conference	16
After the Conference	18
CONCLUSION	19
ADDITIONAL RESOURCES FOR INCLUSIVE EVENT PLANNING	20
Event Planning Checklists and Guidelines	20
Other Relevant Equity/Inclusion Resources	20
APPENDIX A: ORIGINAL CONFERENCE FELLOWSHIP PARAMETERS AND SELECTION CRITERIA	21
APPENDIX B: CONFERENCE FELLOWSHIP APPLICATION	22
APPENDIX C: SAMPLE OUTREACH EMAIL	24
APPENDIX D: COLLABORATIVE OUTREACH TRACKING TOOL	25
APPENDIX E: POST-CONFERENCE LEARNING DAY FACILITATION PLAN	26

A Foreword

By Nicholas Salter, Powered by Data

On February 23rd 2017, in partnership with the Ontario Trillium Foundation and Stanford's Digital Civil Society Lab, Powered by Data organized the Transform the Sector conference, a one-day event about revolutionizing the Canadian social sector's use of data. This event brought together 300 data experts, policy innovators, and social sector leaders for a day of learning, networking, and strategizing on how the social sector can increase its impact through the use of digital data.

Early in the planning process, we recognized that participation in large conferences of this kind often reflects broader inequities among social groups. We did not want this event to perpetuate existing injustices in this way. We wanted to include leaders and change agents from across diverse communities so that the conference could reflect the broad range of stakeholders required for effective systems change. In partnership with the Carold Institute, we developed a plan to actively include perspectives that are typically excluded and/or marginalized at large cross-sector gatherings. These efforts resulted in the selection of 22 conference fellows, who were provided with support to attend the conference. Additional financial support for the fellowships was provided by Stanford's Digital Civil Society Lab.

Written by Powered by Data's co-founder and director, Michael Lenczner, and organizational development consultant Jon McPhedran Waitzer, this report serves to document Powered by Data's efforts around equity and inclusion at the Transform the Sector 2017 conference — where we succeeded, where we could have done better, and what we learned. In sharing Lenczner and McPhedran Waitzer's reflections, we hope to demonstrate the importance and impact of this work, and encourage other organizations to build on these experiences in making their own events more inclusive.

Lenczner and McPhedran Waitzer approached their writing process as a collaboration across complementary perspectives, much like their experience of working together on the conference itself. While both their voices are represented throughout this document, we have chosen to present their findings in two versions that reflect their distinct perspectives: a Summary Report and a Equity and Inclusion Process Report:

The **Summary Report** outlines high-level decisions and learnings from the perspective of Powered by Data with a focus on costs and benefits for the organization. It will be most useful for leaders who may be considering an investment in equity and inclusion for the first time.

The **Process Report** shares more information on the process and considerations behind each action taken, and includes more feedback from participants and other stakeholders. It will be most useful for event organizers who may already be familiar with equity and inclusion work, and are interested in building on the learnings from our experience.





Process Report

How we Integrated Equity and Inclusion into our Conference Organizing

Like many large events, *Transform the Sector 2017* was organized by a small team. Our core staff consisted of three full-time-equivalent employees when we began planning the conference, and grew to five by the time of the event. We knew that addressing structural barriers to inclusion for a conference of this scale would require more resources than our team had available, and we secured those resources through two crucial partnerships: the Carold Institute and Stanford's Digital Civil Society Lab.

Four months before the event, the Carold Institute provided funds for us to make the conference more inclusive. We hired a consultant on a 100-hour contract to lead this work and began planning a bursary program to support participants who faced financial and other barriers to attending. Furthermore, the Carold Institute's Board President participated actively in this work, contributing 20 plus hours as a thought partner.

Three months before the event, we established that the bursary funds available would be insufficient to support participants from across a full range of Canadian geographies, and we secured additional funds from Stanford's Digital Civil Society Lab to fill this gap. Ultimately, these funds allowed us to dramatically increase the number of bursaries awarded.

All in all, these two partnerships contributed \$18,000 in targeted funding to sustain our equity and inclusion work, which covered almost all associated costs beyond core team members' time. Collectively, we estimate that our core staff spent roughly 70 hours supporting this work.

As an organization with relatively little experience doing equity-based work, hiring a consultant to lead this part of our conference organizing was an important choice. Having a team member who was entirely focused on this work made it harder for it to be diluted in the face of other demands on our time and resources. The consultant's background in social justice work also provided valuable learning opportunities for Powered by Data's core staff.

At the same time, occasional tensions naturally arose as we collaborated across different professional backgrounds, lived experiences, and conceptual frameworks. We invested time early in our collaboration to build trust, dedicating several meetings to clarifying goals and expectations, and sharing meals to build personal rapport. These investments in the relationship reduced friction and supported mutual learning as our collaboration continued.

Overall Approach

Recognizing that structurally oppressed groups are typically excluded from sector-level conversations around digital data, we approached our work around equity and inclusion as both an ethical imperative and a strategic opportunity. We wanted the Transform the Sector 2017 conference to generate sustainable outputs that would benefit the sector as whole. We also knew that many of the groups typically excluded from this type of gathering are working with data in highly innovative ways. We understood that actively including the perspectives, skills, and expertise of these groups was crucial for our event to achieve its desired impact.

Beyond increasing the impact of the Transform the Sector 2017 conference, we also recognized that our work on equity and inclusion would provide valuable opportunities for Powered by Data in terms of organizational learning, outreach, and reputation. This was particularly relevant given our positionality as a group: the primary decision-makers for this project were four class-privileged white people. We thus committed to emphasizing the reciprocal nature of the relationships we would build through our bursary program. We framed this program as a Fellowship, to highlight the strategic contributions these participants would bring to the conference rather than identify them primarily as recipients of support. In that same spirit, we set ourselves a goal of adding value for participants through every interaction related to the bursary program.

Addressing Barriers to Attendance

“Members of marginalized groups often feel when we’re being tokenized. Your Fellowship program clearly thought through this issue and worked to limit that effect; this gesture inspired trust and more meaningful participation”
—IAN SUNABACKA, CONFERENCE FELLOW

In designing our interventions, we considered structural, institutional, cultural, and personal barriers to access. Our goal was to support the full engagement of participants, so we aimed to address both barriers to attendance and barriers to participation. The following sections outline the actions we undertook to address each type of barrier along with the results we observed and the learnings we gained.

The barriers we considered first were those that would prevent the expertise and perspectives held by oppressed groups from actually being present at our conference. We identified awareness of the event, sense of “belonging at the conference”, and access to financial resources as the key barriers to address. We then developed interventions around participant and panelist outreach, as well as financial support for selected participants.

ADDRESSING BARRIERS TO ATTENDANCE FOR PARTICIPANTS

What we did

Our first step was to clearly define which perspectives we wanted to prioritize. We developed criteria to guide our outreach and financial support according to three factors: experience working on digital data within marginalized communities, lived experience of oppression, and geographic diversity. While recognizing the importance of both work and lived experience, we prioritized the first of these factors to emphasize participants’ perspectives on the conference theme, and to avoid the potential tokenism of recruitment based primarily on identity.

We used these priorities as the basis for three outreach documents:

- A page on the conference website outlining the typically marginalized perspectives whose presence at our conference we wanted to support along with a description of the support resources available through our Fellowship program (Appendix A)
- A Conference Fellowship application form (Appendix B)

- A targeted outreach email, designed to be easily shareable by concisely summarizing the key points of our conference's equity and inclusion program (Appendix C).

We planned for a targeted outreach period of four weeks, with a contingency option of extending by another week if we hadn't received enough Fellowship applications - either overall or from particular priority communities. To spread the word, we shared our outreach email with nearly 100 individuals who we identified as "key influencers": people who had large personal/professional networks within communities that experience oppression. We asked these influencers to share our outreach email with their contacts and to post it on mailing lists to which they had access. We tracked our progress using a shared spreadsheet (Appendix D). Beyond attracting Fellowship applications, this outreach also spread awareness of the conference – and of our interest in hosting diverse perspectives – which contributed to increased ticket sales.

Two days before the initial Fellowship application deadline, we decided to extend our outreach period. We had received only 20 applications, and several regions (Northern Canada, Atlantic Canada, the Prairies) were not at all represented among candidates. We updated our outreach email to reflect these new priorities, and asked our network of influencers to share it once again. We also researched influencers in these regions outside our own networks and reached out, asking them to share our email. This extension and final push proved invaluable: we more than doubled our number of applications, though still without any Northern candidates.

We designed our Fellowship selection process to be rigorous and balanced. Recognizing the lack of diversity on our organizing team, we approached a digital data expert who was also a person of colour to serve as a selection advisor. Due to the importance of people from marginalized backgrounds not being coerced into positions as volunteers, we ensured this person was remunerated for participation. Our three-person selection committee included a range of gender, race, class, sexual and professional experiences to minimize identity-based blind spots.

Given our lack of Northern applicants, we were able to reallocate funds that had been set aside for travel from the North, allowing us to more than double the number of Conference Fellowships and invite 23 individuals to participate in this program.

Areas for improvement

The lack of Northern applicants was disappointing, and served as a lesson not to underestimate the deeply intersectional exclusion of Northern communities — our targeted outreach was not sufficient to overcome these entrenched access barriers. Conducting a more thorough early analysis of which communities face the greatest barriers to attendance would have allowed us to target our outreach more effectively.

ADDRESSING BARRIERS TO ATTENDANCE FOR PANELISTS

What we did

As part of our equity and inclusion work, we also endeavoured to represent typically-marginalized perspectives among panelists and presenters. These individuals set the tone and led the content of conference sessions, playing a key role in our gathering's overall range of ideas and voices. 16 of 36 panelists were women — an accomplishment given the strong historical gender gap in digital data leadership. Many applicants appreciated these efforts, which dramatically enriched the quality of conference dialogue.

ANDREW MEANS @
MEANSANDREW:
Love seeing female
majority panels at
#sectortransform17

“When you’re socially marginalized, imposter syndrome is real no matter how accomplished you are. Seeing more diversity among panelists would have had a huge impact in making the conference feel more inviting to various types of knowledge, experiences, and perspectives.”

—HERLEEN SAYAL, CONFERENCE FELLOW

Addressing Barriers to Participation

Areas for improvement

We recruited only seven non-white panelists, and only five who represented grassroots perspectives. These panelists were named in our conference survey more than any others for their particularly valuable contributions to the event. We likewise heard from many respondents that these perspectives should have been better-represented — both because of the content they bring, and the impact of their physical presence at the front of the room.

Our efforts to address access barriers for panelists included outreach, preparation, and compensation - and could have gone further. We made funds available to cover panelists’ participation costs, but did not offer stipends for panelists facing financial barriers to attendance. We did not prioritize outreach to diverse panelists until one month before the conference, which made it more difficult to reach out successfully beyond our own networks. We had some success engaging Fellows in recruiting panelists through their networks, and this could have been much more effective if done earlier. Indeed, a key learning here was the extent to which including Fellows and other stakeholders in earlier planning could have broadened the range of perspectives represented among conference presenters.

Our focus on structural oppression pushed us to consider access barriers beyond those which exclude certain participants altogether. We recognized that conference participants from marginalized groups can face many additional barriers to fully contributing. The barriers we aimed to address include physical accessibility, logistical hurdles, contextual information, social connections, support networks, and relevance of session topics. We undertook actions to address these barriers before, during, and after the conference day.

BEFORE THE CONFERENCE

Thinking about physical accessibility

Our earliest consideration in inclusive conference planning was physical accessibility. We chose a wheelchair-accessible venue with all-gender washrooms available, shared detailed location and schedule information, designated a direct contact person for questions and accommodation requests, and worked to understand and accommodate dietary needs. We also provided opportunities for non-verbal and remote engagement in most sessions by projecting a Twitter wall in the conference room and encouraging panel moderators to take questions from remote participants. We did not ensure a scent-free space, print nametags in accessible font size (or include gender pronouns), provide ASL interpretation, or offer fidget toys¹. Regrettably, our “vegan” meals included gelatin (a catering oversight), which limited food options for several participants.

Welcome phone calls

Our remaining pre-conference interventions focused on equipping Fellows to make the most of their experience, and contribute as fully as possible. The first of these was a 30-minute personal welcome phone call with each Fellow. Our goal for these calls was to establish rapport, share information, clarify expectations, and better understand how to support each Fellow. We shared an overview of all activities included in the Fellowship program and emphasized the reciprocal relationships we hoped to build. We asked them about their learning and networking goals for the event, along with whether and how they’d like to contribute to our communications plan. We also invited them to ask any questions they had and to share ideas for additional Fellowship activities. In some cases, we invited them to contribute to panelist recruitment. We received extremely positive feedback about the impact of these calls. They helped many Fellows feel valued, supported, motivated, focused and better-equipped to contribute.

.....
1 For detailed explanations of these and other accessibility interventions, check out the Additional Resources For Inclusive Event Planning section at the end of this report.

Networking support

To help Fellows connect before the conference, we created a “networking cheat sheet” and shared it with the group. This document consolidated contact information, personal/professional backgrounds, and travel dates for all Fellows. Several Fellows used it to engage across shared interests, identities and home regions in the month before the event. This allowed them to arrive with stronger networks of support and collaboration, and mitigated the risk of isolation as a barrier to engagement. We also hosted a “welcome breakfast” for them on the morning of the conference, creating a space for them to connect in person right before the event. Here, we introduced them to key leaders among conference organizers and funders. This event was very appreciated; many Fellows suggested it could have been even more valuable if it were longer and included some structured networking activities.

Planning logistics

In addition to financial support for travel and accommodation, we helped Fellows plan the logistics of their trips. We booked flights and hotels, responded to questions about navigating the city, highlighted key scheduling details and offered to walk Fellows as a group from hotel to conference venue. We heard that this was important; we didn’t assume that everyone would be comfortable managing logistics without assistance, and this was appreciated.

Areas for improvement

Several Fellows shared that they would have happily contributed more energy, time and insight towards conference preparations if we had invited this. Some Fellows would have appreciated an offer of pre-conference knowledge/capacity building activities. Even after clarifying expectations on the welcome call, they were surprised to feel out of their depth in certain conference sessions. Fellows also mentioned that sharing more detailed instructions for navigating the city could have saved them time and confusion, allowing them to show up to the conference with more energy.

DURING THE CONFERENCE

Territorial acknowledgement

We opened our event with an acknowledgment of our presence without consent on the traditional territories of the Haudenosaunee, Ojibway/Chippewa, Huron-Wendat, and Anishinabek people. This acknowledgement was delivered by the Ontario Trillium Foundation, our event's primary partner. It was intended to demonstrate respect for the original inhabitants of the land, express appreciation for Indigenous conference participants, and provoke reflection among non-Indigenous participants on the ongoing legacy of Canadian colonialism. To make this acknowledgment more effective, we could have invited an Indigenous elder to open the conference - and compensated them for that work.

On-call support throughout the day

Our other interventions on the day of the conference took place primarily between sessions. The consultant leading our equity and inclusion work made themselves available as on-call support throughout the day, personally checking in with Fellows and inviting them to call or text with any needs. This was much appreciated, especially since Fellows had built personal rapport with this person through pre-conference exchanges. We intentionally selected a consultant with extensive grassroots community experience and heard that this was an important factor in the effectiveness of support offered.

Shared session notes

At one Fellow's suggestion, we created a set of shared documents for all Fellows to compile their session notes — this was particularly useful for concurrent sessions.

Conference Fellows contributions

Conference Fellows were very active participants in sessions, making significant contributions to the depth and breadth of conversations. Despite representing only 7% of participants, Fellows were highly visible contributors through both verbal questions/comments and social media participation. Their community perspectives often complemented the more institutional knowledge of panelists, and their questions were consistently thoughtful and challenging.

Areas for improvement

We'd hoped to provide a designated "quiet space" for Fellows (and other participants) to gather in smaller groups, but unfortunately were not able to secure such a space at the venue. Such a space would have facilitated networking and mutual support for participants who felt overwhelmed by the social energy of 300 people.

There are many ways we could have made our sessions more inclusive of diverse participation. Greater panelist diversity would have had a significant impact, again, in helping participants from marginalized communities feel more comfortable in the space. Framing session topics in a way that more explicitly invites consideration of marginalized experiences could also have been helpful, as could making sessions longer and more interactive.

A key learning here is that designing for inclusion often benefits everyone. Many actions we took to support marginalized participants were highly appreciated by everybody at the conference. Similarly, several Fellows' requests that we didn't fulfill — such as breakout meeting spaces and more interactive sessions — would also have enriched the conference as a whole.

AFTER THE CONFERENCE

Even if we'd been able to carry out every intervention described above, there are major barriers to effectively “centering the margins” at any event of 300 people. In partnership with the Carold Institute, we organized an intimate half-day follow-up session for Conference Fellows, organizers and key partners.

Learning Day

This 40-person “Learning Day” built on the prior day’s sessions to synthesize the most relevant learnings for transformational change work, with an explicit focus on marginalized communities and social justice movements (see detailed agenda in Appendix E). The smaller group allowed for much deeper connection and learning amongst participants, and the topic focus made space for Fellows to share the full scale of their knowledge. As an organization, we gained new perspectives on data that will enrich our programming and strategy, and learned about innovative approaches that we want to help spread. For many in attendance, it was the highlight of their overall conference experience.

“The level of expertise shared by the Conference Fellows fundamentally changed the conference, and it really reinforced the tremendous value of including diverse voices in this work.”

—JESSE BOURNS, POWERED
BY DATA CO-FOUNDER

Conclusion

Reflecting on this experience, the clearest learning for us is that investing in equity and inclusion pays enormous strategic dividends. Our work around the Fellowship program increased the social impact of the conference, enhanced the quality of our sessions, improved the experience for all participants, and strengthened our organization.

We also find, upon reflection, that integrating this initiative into our conference organizing work was easier than expected. As a small organization with no prior experience “doing inclusion”, we were intimidated by this work. In the end, the process described in this report was much

less difficult, time consuming, and expensive than we expected. Hiring an expert consultant and investing in that relationship was crucial to the success of these efforts. Inviting Conference Fellows to participate in planning and outreach was also highly effective, and could have been done much more.

We see a need for more groups to integrate this work into their events and for more funders to support that. We were fortunate to be supported by the Carold Institute and Stanford’s Digital Civil Society Lab as visionary partners in this work. We hope our experience can help motivate other funders to follow in their footsteps and help other event organizers build on what we learned.

Additional Resources For Inclusive Event Planning

We have gathered two types of resources here: checklists/guidelines specifically for inclusive event planning, and more general resources around equity and inclusion with insights that are relevant to the work of event organizing.

EVENT PLANNING CHECKLISTS AND GUIDELINES

[Event Planning that Respects Diversity, Equity, and Inclusion](#)

A one-page condensed visual checklist produced at the University of Michigan that summarizes multiple elements of inclusive event planning.

[Accessibility Checklist for Organizers and Facilitators](#)

A set of guidelines created by Accessibilize Montreal. Includes tips around event spaces, session planning, presentations, documentation, facilitation techniques, and finances.

[The Accessible Meetings, Events, and Conferences Guide](#)

A comprehensive and easily searchable resource produced by the Americans with Disabilities Act National Network.

OTHER RELEVANT EQUITY/INCLUSION RESOURCES

[Native Land](#)

Community-generated resource for understanding which Indigenous groups have claims over different territories across Canada - very useful for preparing territorial acknowledgements.

[Beyond Territorial Acknowledgments](#)

An essay examining the aims, impacts, and limitations of territorial acknowledgments as a tool to advance decolonization.

[Make Anti-Oppression a Strategy Issue](#)

An essay by Daniel Hunter of Training for Change on the power of framing anti-oppression work as a core part of organizational strategy.

[How Diversity Makes us Smarter](#)

An article from Scientific American summarizing research on the impact of diversity on group performance.

[Principles for Equitable and Inclusive Civic Engagement](#)

A detailed guide created by the Kirwan Institute for groups looking to engage with diverse stakeholders across power differentials - valuable background material for any work focused on equity and inclusion.

Appendix A: Original Conference Fellowship Parameters And Selection Criteria

There are ten bursaries available: five for participants from Southern Ontario, and five for participants from the rest of Canada. These geographic constraints are based on an attempt to balance regional participation with other goals of inclusion while being subject to budget limitations.

Each conference bursary includes:

- Free conference registration
- Return travel to Toronto and two nights' accommodation for participants not based in the Greater Toronto Area
- Individualized support before and during the conference plus an optional post-conference session to deepen learning and impact
- Breakfast and lunch on the conference day and the day after.

To be considered for a conference bursary, individuals must meet the following criteria:

- Active within the nonprofit or public sector
- Working with communities that are typically marginalized from conversations and projects around applications of digital data within the social sector
- Excited about the potential of digital data to make their work more effective and strengthen the communities they work with
- Would otherwise be unable to participate in this conference because of personal or organizational financial barriers.

Among applicants who meet the criteria above, priority will be given to:

- Black, Indigenous, and People of Color, people with disabilities, women, two-spirited, queer, and trans people and other candidates with lived experiences of marginalization
- Candidates who incorporate new technology into their work
- Candidates involved in social movements.

Appendix B: Conference Fellowship Application

[The text below was used to create a Google Form document, which was embedded on the conference website. We deliberately made as many fields as possible optional, only requiring answers to questions that were essential to our decision-making process and follow-up communications. Those questions are underlined in this document.]

Thank you for your interest in this conference - we're excited to broaden the range of voices engaged in conversations around digital data and the social sector, and we appreciate your taking the time to fill out this application.

The following questions are intended to help us understand what you would bring to Transform the Sector, as well as what you would hope to gain as a participant. There are also some questions around your logistical needs as a conference participant, to help us support you more effectively if you are selected for a bursary. **Please respond to each question as completely as you can, referring whenever possible to our bursary selection criteria.**

Applications must be submitted by 6pm EST on Thursday, January 5th. All candidates will be notified of selection results within one week following the application deadline. Thanks again, and if you have any questions, feel free to contact Jon at transform@poweredbydata.org.

Personal Information

Name:

Gender:

Preferred pronouns*:

Date of birth:

**What do we mean by "pronouns"? How do you want people to refer to you in the third person? For example: She is in her room; They are in their room; He is in his room; Alex is in Alex's room (no pronoun). We ask to avoid making assumptions about a person's gender identity.*

Job title:

Organization:

City:

Email address:

Phone number:

Where would you be traveling from to this conference?

Do you have any accessibility needs (mobility, dietary, etc) you'd like to share with us in terms of travel, accommodation, or conference participation? These will **not** be a factor in our selection process.

How did you hear about this conference?

Application questions

Tell us about your work:

What do you do, which communities do you engage with, and how does (or how could) digital data contribute to your impact?

Tell us why you're interested in this conference:

What would you hope to learn, what kinds of connections would you be excited to make, and what perspectives would you bring?

Please answer as candidly as you feel comfortable: we want to read about how this conference could help you become a better-equipped enthusiast as well as a better-informed critic!

Is there anything else you'd like to share with us about your candidacy?

Appendix C: Sample Outreach Email

Hi ____ - thanks for helping me share this with the right people!

Basically, we're looking for folks who are working both with digital data and marginalized communities, and who would be interested in attending a major conference on data and the social sector - with the possibility of full financial support.

The conference is called Transform the Sector, and it's coming up on February 23 in Toronto. It'll be an exploration of how the social sector can increase its impact through the use of digital data.

The event aims to bring together data experts, policy innovators, and social sector leaders for a day of learning, networking, and strategizing... and we're hoping to make that day inclusive of voices and perspectives that are typically left out of these conversations.

One of the ways we're doing this is by offering 10 conference bursaries to cover all participation costs for folks who could bring an underrepresented perspective to this event (and who face financial barriers to attending). Bursary recipients will also receive personalized support to make the most of their conference experience - from planning, to networking, to debriefing and next steps.

Our application deadline is January 5th. We really want to make sure this opportunity is seen by the right people - and with the holidays approaching, we're running out of time!

So - thank you so much for sharing this with your network! If anyone has *any* questions about the conference or bursary program, Jon from the conference team will be super happy to speak with them. And they'll be available by email over the holidays, so they shouldn't be shy: transform@poweredbydata.org

Appendix E: Post-conference Learning Day Facilitation Plan

TIME	ACTIVITY
8:00	Breakfast for Conference Fellows - four questions set up as stations, with post-its for folks to share conference feedback/reflections: -What was one highlight of the conference for you? -What was one thing you wish had been included / you felt was missing? -What is one question you now have, that you didn't have before yesterday? -What is one intention you now have, that you didn't have before yesterday?
9:00	Welcome, framing of the day, agenda overview, introductions
9:15	Goals for the session (icebreaker activity), group agreements
9:30	Pair and share, at tables: how will I apply my learnings from this conference to my own work in social change?
9:45	Table discussion: Map out the main opportunities and challenges/risks that you see around using digital data within social change work? Wherever possible, capture the concrete experiences that ground your ideas.
10:05	Table discussion: Drawing on these opportunities and challenges, what is one question that you think this group should explore more deeply today?
10:15	Report back: Each table shares their question, explains why they chose it
10:25	BREAK - create discussion stations
10:40	Openspace: Participants choose which question they want to explore, and sit at that table. Free to switch tables at any point. Each table explores its question through reflective conversation, with the following prompts available as (optional) guides:-What exciting things are already being done around this issue? Can we identify any emerging best practices?-What's missing from current approaches to this issue?-What questions are emerging that need to be explored in more depth?
11:25	Report back: Each table shares a quick synthesis with the group
11:40	What next? Returning to our goal-setting exercise, participants choose one object they "need" to move forward with what they've learned/share today. Concrete ideas are captured up front, along with expressions of interest. Space for Michael and Tatiana to share thoughts here.
11:55	Check-outs: share one reflection or feeling you're leaving with today
12:00	Close