

Phase 2 Strategic Decision & Enablement Framework

Calgary Humane Society

University of Calgary Haskayne School of Business MBA Program

MGST 615 – Strategic Business Analysis

Prepared For: Instructor Karla Blonsky

Prepared By: Alexandra Hedderson, Sam Horton, Darren De Peuter and Mark Fiselier

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Executive Summary

The Calgary Humane Society (CHS) is not facing a lack of ideas, as Phase 1 established that housing-related pet surrender is driven by structural pressures and generated a portfolio of potential initiatives. Phase 2 builds on that foundational research by shifting the focus from insight generation to strategic decision-making. Phase 2 seeks to give CHS the tools to decide how initiatives should be prioritized, sequenced, and what governance and measurement conditions must be met before implementation.

This Phase 2 report seeks to provide CHS with a decision support framework that goes beyond a typical implementation plan. The key strategic contribution is a structured logic for evaluating initiatives across the three core dimensions of impact, feasibility, and sustainability, while distinguishing long-term viability from near-term readiness. By distinguishing between what is ideal and what is actionable, CHS can better allocate its limited resource capacity, making more disciplined choices with lower execution risk.

Several outputs are supporting this objective by forming a management system that supports prioritization, sequencing, and strategic learning:

- The Strategic Prioritization Matrix provides a consistent method for comparing initiatives by scoring several sub-criteria that are an extension of the core dimensions. The purpose of this matrix is not to create a hierarchy of initiatives with a single score, but rather to evaluate initiatives so that their strategic attractiveness can be viewed against capability gaps, governance requirements, resource constraints, or ecosystem dependencies. The matrix is meant to be a robust, reusable tool that CHS can utilize for future initiatives.
- The sequencing and roadmap logic then translates CHS's initiative evaluations to inform staged decision making, determining which initiatives should advance, hold, or be refined.
- The KPI framework informs how CHS can monitor progress, validate assumptions, and communicate results credibly to internal and external stakeholders.
- The dashboard strategy, platform methodology, and service-provider guidance seek to guide CHS on how to best pursue its highest impact initiative with strategic intent, avoiding letting technology dictate direction.

This Phase 2 report supports decision readiness and does not build technical assets, redesign programs, execute vendor selection, or prescribe operational implementation. Its purpose is to provide the strategic framework necessary to transition from planning to implementation with greater clarity. Phase 2 takes the well-informed ideas from Phase 1 and turns them into a reusable decision framework that CHS can continue to utilize, modify, and scale up.

Project Context & Objectives

Background: Phase 1 → Phase 2 Continuity

Phase 1 established that housing-related pet surrender is a structural issue, not an isolated operational problem. Prior research linked sustained surrender pressure to rental restrictions, affordability challenges during housing transitions, limited mediation supports, and weak visibility into emerging surrender patterns. In response, Phase 1 identified six evidence-based initiatives, including landlord and tenant toolkits, a dashboard, expanded pets and renters programming, partnership mapping, and a response hub. See [Appendix A](#) for a more detailed summary of Phase 1 initiatives.

That foundation made Phase 2 a strategy problem rather than a discovery problem, as CHS did not need more ideas. CHS needed a disciplined way to assess which initiatives best aligned with its strategic plan, operational capacity, and ability to sustain implementation over time. Therefore, a strategic lens was necessary to move beyond intuition and ensure that recommendations were evaluated not only for potential impact but also for feasibility, sequencing, and organizational fit.

Pursuing all initiatives simultaneously would have introduced unnecessary execution risk. Advancing the full portfolio at once could dilute resources, fragment ownership, and reduce the likelihood of successful implementation. Phase 2, therefore, builds on Phase 1 by helping CHS determine which initiatives to prioritize, how to stage them, and where to focus effort to produce meaningful and sustainable progress.

Phase 2 Mandate & Constraints

Phase 2 moves CHS from insight generation to decision readiness. Building on Phase 1's evidence that housing-related pressures contribute materially to pet surrender, Phase 2 focuses on helping leadership determine which initiatives warrant priority, how they should be sequenced, and what conditions influence their potential implementation. Phase 2's purpose is to give CHS a credible basis for deciding where to concentrate effort without overextending the organization.

Phase 2 is scoped around decision readiness rather than delivery readiness. It does not redesign programs, build technical assets, conduct vendor contracting, or execute operational implementation. Instead, Phase 2 defines the readiness conditions that should guide future action. Phase 1 identified initiatives shaped by systemic housing factors, external stakeholders, data

limitations, and internal capacity constraints. Determining that an initiative is ready to implement too early would risk overreach, fragmented execution, and unclear ownership. Therefore, Phase 2 stays focused on disciplined prioritization and leadership decision support.

Based on feedback from the CHS sponsor, the Expanded Pets & Renters Program (Initiative #4 from Phase 1) will not be pursued further within the scope of this project due to identified legal risks and potential conflicts of interest. This project does not include redesign, execution planning, budgeting, staffing, or any digital build, nor does it include policy advocacy or external outreach beyond analytical assessment.

Project Objectives

Phase 2 transforms broad initiatives into a disciplined framework for action by improving leadership prioritization, reducing execution and reputational risks, and creating scalable decision-making tools useful beyond this project. Rather than treating all initiatives as equally ready or equally valuable, the objective is to give CHS a structured way to assess relative impact, feasibility, and sustainability implications before committing organizational resources. Phase 2 supports more credible decision-making in a context where initiatives vary in complexity, stakeholder exposure, and long-term resource burden, while also equipping CHS with reusable frameworks that can inform future strategic choices as conditions change.

Project Approach & Methodology

Overall Engagement Structure

Phase 2 is organized as a structured decision-support engagement rather than the discovery exercise that Phase 1 represented. Phase 2 builds on the comprehensive evidence and insights developed in Phase 1 to focus on helping CHS determine how initiatives, current and future, should be prioritized and what conditions need to be in place before implementation. The project followed a structured engagement model designed to support decision-making through staged analysis, stakeholder input, and iterative validation. The engagement was structured over 8 weeks, progressing from initial discovery and alignment through strategic analysis, roadmap development, deliverable synthesis, and final reporting. The detailed breakdown of work blocks, including activities and outputs, is provided in [Appendix B](#) and [Appendix C](#). Milestones were structured in draft-validation-final cycles across each major deliverable, beginning with project planning and alignment, followed by development and refinement of the strategic matrix and implementation roadmap, and concluding with synthesis, final reporting, and the executive decision briefing.

The project sponsor acted as a central coordination point, facilitating access to internal stakeholders, aligning project outputs with organizational priorities, and ensuring consistency between the consulting team's work and CHS's strategic direction.

Validation was embedded throughout the engagement to ensure outputs were aligned with CHS expectations, grounded in operational reality, and adaptable to evolving insights. Fortnightly meetings with our CHS sponsor, scheduled instructor check-ins, and classroom feedback ensured Phase 2 work remained aligned with CHS priorities and the proposed scope. Targeted questions were directed to the CHS sponsor, with responses provided either in-session or following internal consultation with the broader CHS team. Feedback was gathered at key checkpoints to keep input focused and manageable. Deliverables were refined through draft and revision cycles, ensuring alignment from the prioritization matrix through to the roadmap, KPIs, and dashboard.

Analytical Foundation & Frameworks Used

For Phase 2, the team did not employ a specific proprietary methodology for strategic prioritization or for building the implementation roadmap. Rather, the team relied on general best practices and the collective experience of team members to select specific tools and approaches that they felt best suited the initiatives being evaluated and the needs of CHS. This approach ensures a "fit-for-purpose" and avoids unnecessary or inappropriate effort that may be outside the scope of the work.

Working Approach

Phase 2 takes CHS's high-level broad initiatives and turns them into something clearer, more structured, and usable for decision-making and action. Phase 1 initiatives were structured around a common fact base to ensure all evaluations began from a consistent understanding of purpose, assumptions, and constraints. Building on this foundation, a shared set of strategic evaluation criteria was developed, which is explored further in the Strategic Prioritization Matrix section. This approach was intended to reduce bias, improve comparability across initiatives, and provide CHS with reusable decision tools. These tools can be applied to reassess Phase 2 findings and support ongoing initiative prioritization beyond this project. A user guide outlining how to apply these Phase 2 frameworks is included in [Appendix D](#).

Strategic vs. Implementation Planning

Phase 2 is an exercise in strategic planning, not operational implementation, and its purpose is to improve decision readiness. The work is designed to help CHS assess which initiatives align with current conditions, which are better suited for short- or long-term advancement, and what risks or capability gaps must be addressed before implementation. This distinction is important because it helps CHS reduce execution risk by enabling it to make more deliberate choices before committing organizational resources.

Strategic Prioritization Matrix

The strategic prioritization matrix was developed iteratively. The initial dimensions of impact, feasibility, and sustainability, along with their associated sub-criteria, were shared with the CHS sponsor for review and approval to ensure decisions were not made in isolation. This was crucial to ensure that Phase 2 went beyond an academic exercise and was useful for CHS beyond our consultation. The finalized matrix was then used as a decision-support tool to evaluate initiatives, as shown in [Appendix E](#).

Implementation Roadmap

The Strategic Roadmap approach is structured and analytical, integrating the tools developed throughout this report to support data-driven decision-making rather than execution. It is designed to be reusable and adaptable across initiatives of varying size and complexity, ensuring relevance beyond a single use case.

The methodology supporting the roadmap comprises 4 key components. First, the Strategic Prioritization Matrix evaluates initiatives across impact, feasibility, and sustainability to support comparison. Second, strategic sequencing and lifecycle thinking reflect the interconnectedness of initiatives, with outcomes from one influencing the others. This reinforces the importance of readiness, dependencies, and timing in decision-making. Third, the approach emphasizes evidence-based decisions using KPIs, structured data, and validated assumptions. Finally, ecosystem and stakeholder analysis reinforce CHS's role as a convener, influencer, and facilitator, incorporating external dependencies into decision-making.

Core principles guide this approach: it is decision-oriented, iterative, and aligned with CHS's capacity and long-term sustainability. Together, these elements inform the four-stage roadmap, providing a structured and repeatable framework to guide initiative advancement.

Key Performance Indicators

The KPI framework was built around nonprofit best practices, with a deliberate emphasis on outcomes rather than just activity, and how those outcomes inform decisions. Every metric was chosen with CHS's core goal in mind: reducing pet surrenders tied to housing instability. If a KPI could not tell a meaningful story about progress toward that goal, it did not make the cut.

To keep things consistent, the KPIs were aligned with the same three dimensions used in the Strategic Prioritization Matrix: impact, feasibility, and sustainability. That way, the criteria used to select projects and the criteria used to evaluate them over time are speaking the same language.

The framework is organized into four categories: surrender prevention outcomes, initiative readiness and progress, stakeholder engagement, and sustainability and scalability. Together, these categories give CHS a well-rounded view of performance across both mission delivery and day-to-day initiative management. Within that structure, KPIs fall into three tiers: outcome KPIs that track whether

surrenders are declining, operational KPIs that monitor whether initiatives are running as planned, and validation KPIs that confirm the underlying data is reliable enough to support decision-making.

When direct outcome data is unavailable, the framework relies on proxy indicators and early signals to provide a preliminary assessment before the full picture emerges. Practicality was also at the forefront throughout. Each KPI was considered through the lens of how easy it is to collect the data, how reliable it is, and who owns it. Beyond just tracking performance, the framework is designed to support three types of decisions: knowing when to scale an initiative, recognizing when to pause and redesign, and communicating results credibly to donors and partners.

Dashboard

The dashboard section was informed by secondary research into nonprofit dashboard practices, KPI design, reporting logic, and governance considerations. Access to proprietary databases available through the University of Calgary, combined with search assistance from the business librarian, allowed for a robust mix of secondary sources. Rather than replicating a single relevant dashboard model, nonprofit dashboard best practices were used to develop recommendations for CHS to consider when selecting a developer and implementing the dashboard.

With CHS's permission, the Calgary Homeless Foundation (CHF) was contacted to gather information from its stakeholder dashboard as a use-case example. This was in response to the CHS sponsor citing CHF's success as partially influencing CHS's decision to explore the dashboard initiative. This primary research was conducted through a questionnaire for two key reasons. First, the breadth of topics required input from multiple staff with relevant expertise, which a questionnaire allowed time to coordinate. An interview may have limited the completeness of responses if information was not readily available. Second, the outreach occurred late in the project timeline, making a questionnaire the most efficient way to gather timely, comprehensive input for inclusion in this report. See [Appendix F](#) for the completed questionnaire.

Strategic Evaluation of Phase 1 Initiatives

Evaluation Criteria

The framework is structured around three core constraints selected to align with CHS's mission and strategic objectives: Impact Potential, Feasibility, and Sustainability. To provide a consistent baseline for evaluation, each initiative begins with a standardized overview that captures the essential facts and assumptions necessary for a full understanding of the proposal. These inputs inform the evaluation but are not scored directly; this ensures all stakeholders are working from the same information baseline without prematurely influencing the strategic scores. The essential points are found in [Appendix G](#).

Each of the following three dimensions will receive an aggregate score based on several sub-criteria that will be individually scored with the methodology listed later in this report:

Impact Potential

Impact potential assesses whether a Phase 1 initiative is worth pursuing by evaluating if it meaningfully advances CHS's mission and strategic priorities. Criteria include:

- **Surrender & Prevention:** How well the initiative reduces pet surrenders. This can be adjusted to score the initiative on any overarching goal.
- **Reach:** Breadth of beneficiaries affected by the initiative.
- **Strategic Alignment:** The initiative's alignment with CHS's strategic plan (see [Appendix H](#) for a codified visualization of CHS's strategic plan).
- **System-level influence:** Assesses influence on external housing, landlord, or partner systems beyond CHS. This can be adjusted to score the initiative on broad systemic issues.
- **Outcomes Durability:** Looks at how long-lasting the benefits are after implementation.

Feasibility

Feasibility assesses how well CHS can realistically pursue a Phase 1 initiative given current and future constraints. Criteria include:

- **Complexity:** Considers process changes, coordination needs, and new capabilities required.
- **Internal Capability:** Evaluates if staff have the skills, roles, and capacity to execute the initiative.
- **Implementation Risk:** Measures potential exposure to operational, reputational, or stakeholder risks.
- **Budget requirements:** Focuses on whether funding is secured or can be secured, and if it is sufficient for implementation.
- **Timeline fit:** Assesses how well the initiative can be executed within CHS's timeline.

Sustainability

Sustainability assesses whether a Phase 1 initiative can be sustained and scaled in a way that remains proportionate to CHS's resources and capacity. Criteria include:

- **Resource Burden:** Looks at the initiative's staffing, financial, and administrative demands relative to CHS's capacity.
- **Financial Viability:** Assesses whether funding or costs can be sustained over time.

- **Adoptability:** Measures how likely internal staff and external partners are to embrace the initiative.
- **Scalability:** Considers whether the initiative can grow in reach or impact without proportional cost or complexity increases.
- **Maintenance Requirements:** Evaluates ongoing effort, skills, or equipment needed to keep the initiative operational.

Distinguishing Feasibility from Readiness

This framework distinguishes between Feasibility and Readiness:

- Feasibility answers the structural question: Can CHS execute this initiative given its capabilities, resources, and risk profile?
- Readiness answers the timing question: Is CHS positioned to pursue this initiative now, given current funding, alignment, governance, and information clarity?

An initiative may be feasible in principle but not ready for immediate advancement. Separating these dimensions allows sequencing decisions to reflect timing and capacity realities rather than long-term viability alone.

Scoring Methodology

Impact Potential: How much of a difference will this initiative make? - 1:5 (40%)

- 1 (Low Impact): Minimal improvement; benefits are isolated to a single team or process. (e.g., internal process improvement only)
- 3 (Moderate Impact): Noticeable improvement in operations or visible benefit to stakeholders outside the organization; moderate influence on teams/programs. (e.g., improves one program or stakeholder group)
- 5 (High/Transformational Impact): Broad, organization-wide or community-wide transformation; meaningful impact across most or all programs, people, and teams. (e.g., system-wide change affecting multiple stakeholders)

Feasibility: Is it technically and operationally achievable? - 1:5 (30%)

- 1 (Low Feasibility): Requires major structural change, significant funding, long timelines, high risk (e.g., replacing core IT systems).
- 3 (Medium Feasibility): Moderate funding, some structural change, moderate risk (e.g., implementing a new CRM system).
- 5 (High Feasibility): Low cost, minimal changes, quick adoption, low complexity (e.g., updating an internal policy).

Sustainability: Will the results last and continue to deliver value with minimal ongoing effort? - 1:5 (30%)

- 1 (Low Sustainability): Short-term benefits that require high maintenance or resources; often crisis-driven or temporary (e.g., short promotional campaigns).
- 3 (Moderate Sustainability): Stable improvements that can continue if regularly monitored; some ongoing support needed (e.g., standardized operational or marketing models).
- 5 (High Sustainability): Self-sustaining or revenue-generating; continues delivering value with minimal effort (e.g., intellectual property generating royalties).

Scale Modifications

Our analysis used a 1:5 scale, but CHS could transition to a 1:6 scale for their own evaluation of Phase 1 initiatives or for future projects. Adopting an even numbering system eliminates the neutral midpoint, forcing evaluators to take a definitive stance. This ensures clearer distinctions between competing priorities during the review process.

Weighting Rationale

Impact is weighted highest (40%) because CHS's mandate prioritizes meaningful surrender reduction and mission advancement. Feasibility (30%) and Sustainability (30%) ensure that high-impact initiatives are pursued responsibly and do not compromise organizational resilience. Weightings reflect mission alignment rather than operational convenience.

Strategic Prioritization Matrix Overview

The strategic prioritization matrix evaluates relevant initiatives using a transparent framework that supports CHS leadership decision-making under real-world constraints. To ensure a disciplined and objective process, the framework strictly separates initiative inputs from scoring logic. By distinguishing descriptive facts from evaluative dimensions, this approach reduces bias, prevents double-counting, and maintains a focus on comparative decision-making. The development of this matrix serves a dual purpose:

- It facilitates the immediate assessment of current initiatives and
- Establishes a durable evaluative framework for the organization.

Consensus and Scoring Governance Methodology

To ensure transparent decision-making, at least three stakeholders will independently score each initiative with written justifications. CHS will average these scores to create a balanced baseline; however, any significant discrepancies will be resolved through a structured reconciliation process (see [Appendix D](#)). This focuses discussions on rubric interpretation and evidence rather than individual preference, ensuring a defensible final assessment.

Beyond achieving a final number, this reconciliation process provides intrinsic value by highlighting how different stakeholders prioritize or perceive initiatives despite operating under the same set of assumptions. This focuses discussions on rubric interpretation and evidence rather than individual preference, ensuring a defensible final assessment while offering CHS a deeper understanding of varying internal perspectives.

Scoring

A major source of value provided by the strategic prioritization matrix is that it enables CHS staff to evaluate both these and future initiatives through their own internal context, thereby shaping how impact, feasibility, sustainability, and organizational readiness are interpreted in practice. For our recommendations, we applied the matrix to the Phase 1 initiatives and conducted our own analysis to establish a comparative view of their strategic value and implementation suitability. The averaged strategic prioritization scores for each initiative are as follows:

Landlord Toolkit

- Impact average: 3.13
- Feasibility average: 3.48
- Sustainability average: 3.05
- Summary of reasoning: The Landlord Toolkit is a mission-aligned, low-complexity initiative that is operationally realistic to develop. However, there is concern that its impact may be limited by voluntary adoption, likely reaching only landlords who are already pet-positive rather than changing the minds of those who prohibit animals. While maintenance costs are low, the initiative offers limited long-term scalability or growth potential due to its primarily static nature.

Tenant Toolkit

- Impact average: 3.15
- Feasibility average: 3.75
- Sustainability average: 3.40

- Summary of reasoning: The Tenant Toolkit is a highly feasible and sustainable way to provide renters with navigation tools that are scalable through wide distribution. While it empowers individual pet owners, it has a minimal direct impact on increasing the overall supply of pet-friendly housing or changing system-level policies. Its long-term value lies in its low overhead and potential to influence policy as adoption becomes more widespread.

Dashboard

- Impact average: 4.30
- Feasibility average: 2.75
- Sustainability average: 3.30
- Summary of reasoning: The Dashboard is a high-impact, strategically transformative tool that could visualize surrender data to drive fundraising and decision-making. Despite its value, there are hurdles regarding technical complexity, data governance, and the need for external expertise or a "champion" partner. While a basic version may be feasible within the current timeline, significant upfront investment and ongoing stewardship may be required to manage reputational risks and ensure data accuracy.

Partnership and Ecosystem Engagement / Mapping

- Impact average: 3.85
- Feasibility average: 2.75
- Sustainability average: 2.70
- Summary of reasoning: Identified for potential to bridge coordination gaps and improve referral efficiency across Calgary's housing and social services. While it is structurally meaningful and requires a low capital investment, its success depends heavily on the ongoing participation and commitment of external partners. Consequently, it is likely a resource-intensive effort that requires dedicated staff capacity for ongoing relationship management and facilitation.

CHS Response Hub

- Impact average: 3.60
- Feasibility average: 3.80
- Sustainability average: 3.53
- Summary of reasoning: The Response Hub is a feasible and mission-aligned internal initiative that intervenes at the point of imminent surrender by formalizing staff training and workflows. Because CHS has direct control over these internal processes, this initiative is operationally achievable and sustainable through minor adjustments to existing roles. However, its reach is naturally limited by staff capacity and the case-based nature of the work, requiring disciplined scoping to avoid overextending resources.

This analysis is supported by the full strategic prioritization matrix visualization provided in [Appendix E](#), which illustrates the relative positioning of each initiative across impact, feasibility, and sustainability dimensions. In addition, the accompanying folder includes the Phase 2 results Excel file, containing the detailed scoring outputs, as well as a reusable matrix template and outline designed to support the evaluation of future initiatives using the same structured framework.

Key Strategic Insights

High-impact vs. high-complexity initiative

Initiatives in this category offer the potential to drive significant system-level impact, but require substantial coordination, resources, and organizational capability to execute effectively. These initiatives typically involve multi-stakeholder collaboration, including partners across sectors, and depend on access to sustained funding and specialized expertise. The complexity is driven by interdependencies across organizations, policies, and service systems, making stakeholder alignment a critical success factor. Without broad buy-in and coordinated action, implementation risks increase significantly.

These initiatives also require robust data infrastructure and analytic capabilities to support decision-making, monitor progress, and enable long-term scalability. As stakeholder expectations and external conditions evolve, the operating environment can shift rapidly, further complicating implementation. Given their scale and strategic importance, these initiatives serve as “flagship” efforts, shaping the organization's long-term direction. Successful execution requires a comprehensive implementation roadmap that includes clearly defined governance structures, phased rollout planning, and strong partnership models.

Quick-win vs. long-horizon initiatives

Quick-win initiatives are characterized by low complexity, high organizational readiness, and rapid, visible outcomes. While their overall impact may be more incremental, they play a critical role in building momentum, demonstrating early value, and strengthening stakeholder confidence. These initiatives often serve as proofs of concept, generating initial data, validating approaches, and supporting broader stakeholder buy-in for future efforts. In contrast, long-horizon initiatives are designed to drive systemic, sustained change. They typically involve longer development timelines, greater complexity, and require ongoing investment, coordination, and iterative refinement. Although their benefits may materialize more gradually, they offer significantly higher long-term impact and can shape strategic direction and decision-making over time.

Maintaining a balanced portfolio of both initiative types is essential. An over-reliance on quick wins may limit long-term impact and dilute strategic focus, while an exclusive emphasis on long-horizon initiatives can reduce organizational momentum and stakeholder support. Achieving the right balance and adjusting it over time is critical to sustaining progress while enabling meaningful, long-term outcomes.

Where sequencing matters most

Many initiatives, both current and future, are interdependent rather than standalone, making effective sequencing a critical component of successful implementation. Thoughtful sequencing can reduce uncertainty, strengthen internal capabilities, and improve stakeholder alignment, while poor sequencing increases the risk of low adoption, duplication of effort, and stakeholder fatigue. In resource-constrained environments, particularly within non-profits, sequencing also plays a key role in optimizing resource allocation and minimizing execution risk.

Sequencing can take several forms, depending on the nature of the initiative:

- Capability-first sequencing focuses on building foundational infrastructure, such as data systems, internal tools, and operational processes, before scaling initiatives. Establishing these capabilities early allows for more effective execution and long-term sustainability.
- Pilot-to-scale sequencing involves testing initiatives on a smaller scale, allowing for refinement, validation, and learning before broader rollout.
- Engagement-before-influence sequencing prioritizes early stakeholder engagement and trust-building, creating the conditions necessary for successful collaboration and policy influence.
- Data-before-decision sequencing emphasizes generating insights and evidence upfront to inform resource allocation, program design, and strategic prioritization.

Applied effectively, sequencing strengthens both internal readiness and external credibility. For example, investing in data infrastructure and capability-first sequencing enables the development of a robust dashboard that provides credible insights to inform decision-making and demonstrate system-level trends. These insights can then be used to validate and refine approaches within the landlord toolkit, ensuring it is grounded in evidence and responsive to real housing pressures. In parallel, engagement-before-influence sequencing supports the development of strong partnerships, building the trust and alignment required to scale initiatives and drive broader systemic change. Ultimately, the goal of sequencing is to reduce implementation risk, increase adoption, and maximize long-term impact by ensuring initiatives are introduced at the right time, in the right order, and with the necessary foundations in place.

Certain initiatives are not primarily constrained by internal capacity, but by the readiness of the broader external ecosystem. These initiatives depend on stakeholder willingness and alignment, as well as the enabling conditions required for adoption, rather than on direct execution by CHS. For example, initiatives such as the landlord toolkit require buy-in from landlords, property managers, and housing partners, as well as a supportive policy and regulatory environment. Success is contingent on whether external stakeholders have the capacity, incentives, and motivation to adopt and implement the proposed solutions.

In this context, CHS's role is less about ownership and delivery, and more about acting as a catalyst for system change. This includes raising awareness, aligning incentives, convening stakeholders, and facilitating collaboration across the ecosystem. By strengthening relationships and fostering shared accountability, CHS can help create the conditions necessary for these initiatives to succeed. Ultimately, progress on these initiatives is driven by external alignment and system readiness, requiring a sustained focus on partnership development, advocacy, and ecosystem coordination.

Initiative Sequencing & Strategic Roadmap Logic

Decision-Oriented Roadmap

This implementation roadmap serves as a guide for CHS to navigate the lifecycle of an initiative. It is not an execution plan and does not prescribe specific actions or steps. Instead, it provides a structured, decision-oriented process that supports progression from problem identification to data-driven insight, to informed decision-making, action, and continuous learning.

The roadmap is not linear, but cyclical and iterative. Each stage generates decision signals that guide whether an initiative should progress, pause, be re-scoped, or be deprioritized. This approach allows CHS to advance initiatives based on readiness, performance, and alignment rather than assumptions. The framework is designed to be flexible across both current and future initiatives, with pacing that can be adjusted based on organizational capacity, uncertainty, and external dependencies. Each stage should be interpreted as a distinct unit with a defined purpose, key focus areas, and decision signals that support ongoing evaluation, rather than as a fixed sequence of steps. Decision signals evolve across stages, from advancement and refinement to scaling and sustainability decisions.

The visual roadmap in [Appendix I](#) illustrates how initiatives progress through each stage over time. While presented sequentially, movement between stages is not strictly linear, and initiatives may advance, pause, or loop back based on decision signals and evolving conditions. The roadmap follows a staged progression from initiative selection and alignment to evidence generation, ecosystem engagement, and finally refinement and sustainable scaling.

Stage 1: Strategic Alignment & Capability Foundations

Stage 1 focuses on decision enablement rather than execution. The objective is to establish a structured approach to evaluating, selecting, and validating the right initiative before committing significant time and resources. The Strategic Prioritization Matrix serves as the primary evaluation tool in this stage, enabling CHS to compare initiatives against others based on their perceived impact, feasibility, and sustainability, as assessed by pre-selected internal stakeholders.

While the matrix provides a comparative view, initiative selection should not be based solely on the highest score. Instead, decisions should reflect CHS's current needs, organizational capacity, and the type of initiative being pursued, whether a quick win, a large strategic initiative, or an option in between.

Once an initiative is initially selected, stakeholder alignment and governance structures are developed to support further advancement. The stakeholder alignment table establishes a shared understanding of stakeholder needs, incentives, and influence, while the governance and decision-making structure clarifies roles, ownership, and decision rights. Although some of these elements may already exist, formalizing and aligning them early helps prevent ambiguity and reduces the risk of misalignment as the initiative progresses.

Overall, this stage focused on laying the necessary groundwork to ensure the selected initiative is feasible, well understood, and appropriately supported before further investment. By reducing uncertainty and strengthening alignment upfront, stage 1 creates a strong foundation for subsequent stages focused on evidence generation, stakeholder engagement, and implementation.

Stage 2: Insight Generation & Evidence Building

Following initiative selection and alignment in Stage 1, Stage 2 shifts from assumption-based thinking to evidence-based decision-making. The focus is on testing the selected initiative in a controlled manner, generating reliable data to inform future decisions, and building the systems and processes needed to support ongoing evaluation. A structured KPI framework underpins this stage by providing the metrics needed to evaluate performance and generate decision-relevant evidence.

KPIs are used to evaluate performance and inform decisions, rather than serve as fixed targets. For example, in an initiative such as the Landlord Toolkit, a KPI may track percentage changes in usage over time to assess trends and adoption. Data collection should be multi-dimensional, incorporating usage data, stakeholder feedback, and emerging concerns. Data governance ensures this information is consistently defined, accurately interpreted, and used to support decision-making. Capturing learnings is equally important, providing clarity on what is working, what is not, and where refinement is needed.

The key questions guiding this stage include:

- Do we have reliable data to support decisions?
- Are we measuring outcomes rather than activity?
- Are the initial assumptions being validated?

These questions inform the decision signals that determine how the initiative should progress. Strong and consistent evidence may support continued advancement, while weak or inconsistent signals may indicate a need for targeted refinement. When data quality is insufficient or unclear, it may be necessary to pause progress until more reliable information becomes available.

Common risks in this stage include overbuilding tools or systems before data needs are clearly defined, focusing on outputs rather than meaningful outcomes, and unclear data ownership leading to inconsistent or biased interpretation. Managing these risks is critical to ensuring that decisions remain grounded in credible evidence and that the initiative evolves based on insight rather than assumption.

Stage 3: Ecosystem Engagement & Coordinated Action

Stage 3 builds on the evidence and learnings generated in Stage 2 by scaling initial efforts and preparing the initiative for broader expansion within the ecosystem. At this stage, CHS's role shifts from internal evaluation to acting as a convener, influencer, and facilitator within the broader ecosystem. The purpose of this stage is to establish the external conditions required for successful adoption and long-term impact. This includes developing a stakeholder engagement strategy, mapping partnerships, conducting pilot initiatives, and aligning incentives across stakeholders.

Stakeholder engagement focuses on assessing whether key stakeholders are willing and able to participate, as well as on determining how best to communicate updates, goals, and changes throughout the initiative lifecycle. This process supports the development of partnership mapping, which helps identify organizations that can contribute to or support the initiative. Building on this, it is critical to define and align the incentives stakeholders and partners receive for participating, ensuring the value proposition is clear and consistent across the ecosystem. Strong incentive alignment not only reinforces desired outcomes but also helps build motivation, trust, and sustained engagement among stakeholders.

The tools developed during this stage include the stakeholder alignment framework, engagement strategy outline, partnership mapping, and initial pilot learnings. Like Stage 2, these tools inform decision signals that guide progression. Strong engagement and validated pilot outcomes may support advancement, while low adoption or misaligned incentives may require CHS to adapt its approach. When broader ecosystem readiness is lacking, it may be necessary to pause further rollout.

Key risks in this stage include overestimating stakeholder readiness, experiencing low adoption despite active engagement efforts, and becoming overly reliant on external partners without sufficient alignment. Effectively managing these risks is critical to ensuring that initiatives are positioned for sustainable expansion rather than premature scaling.

Stage 4: Refinement, Scaling & System-Level Influence

Building on the validated engagement and pilot learnings from Stage 3, Stage 4 brings together insights from previous stages to prioritize sustainability, responsible scaling, and continuous improvement. The focus of this stage is to operationalize KPI monitoring and performance tracking to inform scaling decisions, refine the initiative, and ensure long-term alignment with CHS's capacity and strategic objectives. At this stage, the initiative is no longer being explored or validated but actively managed based on evidence and performance.

The primary goal of this stage is to determine whether the initiative is delivering meaningful outcomes, whether it is ready to scale, and whether scaling can be sustained within CHS's resource constraints. The tools established in earlier stages, including KPIs, governance structures, and stakeholder feedback mechanisms, are actively used and refined to support these decisions.

CHS should conduct regular performance reviews using KPI trends and stakeholder insights to determine the appropriate path forward. Strong and consistent performance may support scaling the initiative to a broader audience. Stable but limited performance may indicate that the initiative should be maintained at its current scope. Underperformance may require redesign or targeted adjustments, while initiatives that demonstrate low value or disproportionately high resource burden may be considered for wind-down.

This stage represents the transition from initiative to a sustained program. Initiatives may mature into long-term, embedded practices, be refined to improve outcomes, or be discontinued based on performance and strategic fit. Key risks to monitor include scaling too early without sufficient evidence, overlooking sustainability constraints, and failing to incorporate feedback into ongoing improvements. Managing these risks ensures that CHS scales initiatives responsibly and maintains alignment with its mission and operational capacity.

This roadmap is designed as a repeatable decision-making framework for initiatives of varying size and complexity. Its objective is to help CHS reduce the risks associated with pursuing new initiatives by providing a structured approach to prioritization, evaluation, and scaling. Beyond selecting the right initiative, the framework also supports decision-making on key implementation aspects, ensuring initiatives are advanced in line with organizational capacity and long-term sustainability.

By emphasizing evidence-based decision-making, the roadmap encourages CHS to build and maintain a strong data foundation that supports ongoing evaluation, informs future strategic choices, and enhances transparency. This not only strengthens internal decision-making but also

creates opportunities to demonstrate measurable impact to external stakeholders, including donors and partners. Overall, this framework supports long-term strategic adaptability by enabling CHS to assess, refine continuously, and scale initiatives based on performance, readiness, and evolving organizational priorities.

Governance & Decision Rights

Governance and decision rights are structured to support clear accountability without introducing unnecessary rigidity. Executive leadership retains ownership over strategic direction, resource allocation, and key go/no-go decisions at defined roadmap gates. At the same time, management-level stakeholders are responsible for operational assessment, KPI monitoring, and implementation readiness. Escalation occurs when initiatives encounter material risks, resource constraints, or misalignment with prioritization outcomes, ensuring that higher-level decisions are informed by structured evidence rather than delayed by uncertainty. This approach aligns decision ownership with the outputs of the prioritization matrix, roadmap, and KPI framework, reinforcing a consistent and transparent decision-making process.

Stakeholder Alignment Approach

Effective sequencing is not only dependent on initiative complexity and internal capacity, but also on the readiness and alignment of the stakeholders required to support and adopt each initiative. For many of the proposed initiatives, particularly those involving landlords, government, and community partners, CHS does not directly control implementation outcomes.

As a result, CHS's role shifts from direct execution to acting as a convener, influencer, and facilitator within the broader ecosystem. This makes stakeholder alignment a critical enabler of successful implementation, adoption, and long-term sustainability. To support this, a structured stakeholder alignment approach was developed to help CHS systematically identify, assess, and engage stakeholders across each initiative.

The approach groups stakeholders into key categories, evaluates their levels of influence and interest, and aligns engagement strategies with their roles in the initiative. It also incorporates stakeholder needs and incentives to ensure initiatives are positioned to drive participation and sustained adoption. Several key insights emerged from this analysis:

- High-influence external stakeholders, such as the City of Calgary and large housing providers, require early alignment and ongoing engagement to support system-level adoption

- Internal alignment across CHS leadership and operational teams is a prerequisite for consistent execution and decision-making
- Low-influence but high-interest stakeholders, including pet owners and community organizations, play a critical role in adoption, feedback, and long-term success
- Stakeholder interest and alignment are dynamic and evolve, requiring a phased and adaptive engagement approach

As a result, stakeholder alignment should be approached in phases. Early-stage sequencing should prioritize engagement with high-influence stakeholders to validate direction and feasibility, followed by broader collaboration with users and partners to support implementation, adoption, and scaling. This approach is intended to be applied at the start of each initiative and revisited throughout implementation to ensure continued alignment and to adapt engagement strategies as stakeholder needs evolve.

Detailed stakeholder mapping, engagement strategies, and alignment considerations are provided across the appendices, including Stakeholder Identification ([Appendix J](#)), Influence–Interest Mapping ([Appendix K](#)), Needs and Incentives ([Appendix L](#)), Engagement Frameworks ([Appendix M](#)), and a Phased Alignment Roadmap ([Appendix N](#)).

Dashboard Strategy: Purpose, Scope & Value

Why a Dashboard Now

CHS has established a stakeholder dashboard as a high-priority initiative in their analysis of Phase 1 findings, attributing housing-related pet surrenders in part to fragmented data and uneven visibility across stakeholders. A CHS dashboard would provide the organization with a decision-support tool to help monitor and course-correct future initiatives. According to our evaluation of the initiatives in the strategic prioritization matrix, the dashboard was the highest-impact initiative, scoring 4.30. The Phase 2 team sees a CHS dashboard as going beyond mere information display to improving identification of surrender patterns, decision-making, and stakeholder communication, specifically demonstrating CHS’s value to funders and partners. Even if CHS had no pre-existing preference among the Phase 1 initiatives, results show the dashboard as a high-priority initiative that would act as a strategic enabler contributing to CHS’s broader strategy.

Dashboard Role, Scope, & Boundaries

The Phase 2 team's Strategic Prioritization Matrix evaluation identified the dashboard, despite being high impact, as having the lowest feasibility score (2.73). This means the dashboard was found to have more execution risk than other initiatives and must have a disciplined scope. Therefore, a CHS dashboard should be a decision-support tool that adds strategic value by enabling progress monitoring and signal interpretation, rather than a reporting tool that presents all conceivable information. It should use a specific set of meaningful indicators that are tailored to different stakeholder groups. Specific strategic recommendations for the CHS dashboard design will be explored further in Section 7 of this report. For a cited breakdown of nonprofit dashboard design best practices, see [Appendix P](#).

A CHS dashboard is not a case management system that manages individual files, workflows, or service delivery. The dashboard is also not a substitute for proper data infrastructure (i.e. reliable inputs) and ongoing governance. It can make data more visible and easier to interpret, but weak data quality will undermine the value to stakeholder users. Importantly, the dashboard is a strategic commitment rather than a quick fix. To ensure it remains accurate and reputable for CHS, the dashboard will require expert collaboration and leadership. For CHS, the real value lies in building lasting capability in stages rather than treating it as a one-time project or expense.

Recommended KPI Framework for CHS

KPI Design Logic

The KPI framework presented in this section is designed to serve CHS leadership as a decision-support tool, not a compliance checklist. Each KPI was selected based on its direct connection to CHS's mission of reducing housing-related pet surrenders and its ability to inform meaningful organizational choices. KPIs that measure activity in isolation, such as the number of toolkits distributed or training sessions held, are de-emphasized in favour of indicators that reveal whether CHS's interventions are changing outcomes. This distinction between outputs and outcomes is central to the framework's design logic and reflects the best practices outlined in [Appendix P](#).

All KPIs are anchored to CHS's strategic plan and the three evaluation dimensions used throughout Phase 2: impact, feasibility, and sustainability. This alignment ensures that the metrics CHS tracks over time correspond directly to the criteria by which initiatives were prioritized in the first place, creating a coherent link between strategic selection and operational monitoring. Where long-term outcome data are not yet available, interim proxy indicators are included to maintain measurement momentum without sacrificing analytical rigour.

The framework balances three types of KPIs: outcome KPIs, which measure whether CHS's work is reducing surrender and its root causes; operational KPIs, which track whether initiatives are being delivered as intended; and validation KPIs, which confirm that the data and processes underlying the framework are reliable enough to support decisions. This three-tier structure prevents CHS from over-relying on easily collected activity data at the expense of harder-to-measure but strategically critical outcomes. Each category is described in detail in Section 6.2, and the full KPI definitions, measurement notes, and reporting cadences are provided in [Appendix O](#).

KPI Categories

The KPI framework is organized into four categories. Each category reflects a distinct dimension of CHS's strategic objectives, and together they provide a comprehensive view of organizational performance across both mission delivery and initiative management.

Category 1: Surrender Prevention Outcomes

This category focuses on the most mission-critical outcomes: whether housing-related pet surrenders are decreasing and if CHS interventions are effectively keeping people and their pets together. KPIs in this category include the total number of housing-related surrenders as a percentage of all intakes each quarter, the rate at which surrender inquiries are successfully diverted through CHS programs like the Response Hub or referral networks, and the number of repeat crisis contacts from the same households. This serves as an early indicator of whether early intervention is reducing recurrence. Since surrender data is naturally affected by external factors such as housing market trends and economic pressures, these KPIs should always be considered alongside relevant external environment indicators rather than in isolation. Two system-level indicators identified in consultation with the City of Calgary should also be added to facilitate measurement of changes in external housing dynamics. These include keeping an eye on how pet-friendly rental housing is changing and figuring out more accurately why people give up their homes. You can find out how many pet-friendly rentals are available by regularly sampling major rental sites like RentFaster.ca and Rentals.ca. If possible, you can also use voluntary landlord participation systems, such as pledge or registration systems. In the same way, making it easier to categorize surrender reasons, such as cases where people cannot find housing that allows pets, will help CHS track trends in housing-driven surrender and ensure its own data aligns with data from outside partners like Animal Services.

Category 2: Initiative Readiness and Progress

This category tracks whether each prioritized initiative is advancing toward the readiness conditions identified in Phase 2 and whether, once begun, implementation is proceeding as planned. These KPIs are operational in nature and serve as internal management signals rather than measures of mission impact. For the Tenant Toolkit and Landlord Toolkit, relevant indicators include the completion of content development milestones, the number of active distribution channels, and the percentage of target audiences reached. For the CHS Response Hub, KPIs include the proportion of staff trained under the updated protocols, the percentage of surrender inquiries triaged through the formalized response process, and referral completion rates. For the Dashboard initiative, progress indicators include the number of data fields for which ownership and definitions have been formalized, the percentage of KPIs with validated data sources, and the completion of phased build milestones if a platform has been engaged. For Partnership and Ecosystem Engagement, readiness indicators include the number of active partner organizations participating in coordination activities and the frequency of cross-sector touchpoints per quarter.

Category 3: Stakeholder Engagement

Because several Phase 2 initiatives depend heavily on voluntary adoption by external parties (e.g. landlords, housing providers, social service agencies, and community partners), stakeholder engagement is a distinct and meaningful performance category. KPIs here include the number of unique landlord and housing provider contacts reached through toolkit dissemination efforts, the volume and quality of inbound inquiries generated by the Tenant and Landlord Toolkits, and the proportion of referral outcomes that are followed up and recorded. Engagement KPIs also serve as early signals for adoption risk: consistently low engagement with a toolkit or referral pathway is an indicator that the initiative may require redesign or a modified dissemination strategy before investment is scaled. For donor-facing purposes, stakeholder engagement metrics can also help CHS demonstrate community reach and the breadth of its prevention programming, supporting fundraising and advocacy communications.

Category 4: Sustainability and Scalability Indicators

This category monitors whether CHS can sustain its chosen initiatives over time without overextending its donation-dependent operating model. Sustainability KPIs include the staff hours dedicated to each initiative per quarter relative to the allocated budget, the proportion of initiative costs covered by confirmed funding versus unfunded projections, and the frequency with which toolkit content or training materials are reviewed and updated. Scalability indicators assess whether

initiatives are expanding their reach without proportional increases in cost or complexity. For example, toolkit distribution may grow through new channels without significant additional staff investment. Similarly, Response Hub protocols may be embedded into standard onboarding processes, eliminating the need for recurring training. Monitoring these indicators over time gives CHS leadership an evidence base for determining when an initiative is ready to scale, when it requires additional resourcing, and when scope constraints need to be imposed to protect organizational capacity.

Using KPIs to Support Decision-Making

KPIs serve different functions depending on where an initiative is in its lifecycle. The Phase 2 framework distinguishes between three strategic uses of KPI data: guardrails for expansion, signals for pause or redesign, and evidence-based stakeholder communication. Understanding which mode applies requires CHS leadership to review KPI trends in context rather than reacting to any single data point.

Guardrails for expansion define the conditions that must be met before an initiative is scaled in scope or cost. For CHS, these conditions should include a minimum period of stable or improving performance on the relevant outcome KPIs, evidence that the initiative is operating within its budgeted resource envelope, and confirmation that the data being used to evaluate performance is reliable and consistently captured. Scaling an initiative before these conditions are met risks amplifying problems that have not yet been identified and consuming resources that could otherwise be directed toward higher-readiness priorities. These guardrails directly support the sequencing logic developed in Section 4: initiatives advance on the roadmap only when the KPI evidence warrants it.

Signals for pause or redesign are patterns in KPI data that indicate an initiative is not performing as intended and may require intervention before further investment is made. These signals include sustained low stakeholder engagement despite active dissemination, a flat or declining diversion success rate across multiple reporting periods, staff hours per initiative consistently exceeding budgeted allocations, or data quality scores that remain below the threshold required for credible reporting. A single below-target result is not a pause signal; a pattern across two or more consecutive reporting periods in the same KPI category warrants a structured leadership review. The appropriate response, whether scoping, redesign, resourcing, or discontinuation, should be determined by that review rather than predetermined, ensuring decisions remain evidence-based.

Evidence-based communication with stakeholders is the third use case for KPI data and one that is particularly relevant for CHS, given its dependence on donor funding and its role as a convener of

external partners. Outcome KPIs and engagement metrics can be translated into stakeholder-appropriate communications that demonstrate the reach and impact of CHS's prevention programming without overstating results or making claims that are not yet supported by the data. For donors, the most compelling indicators are those that show housing-related surrender trends, successful diversion outcomes, and the number of households supported. For partner organizations, engagement metrics and referral outcomes demonstrate the value of participation in the CHS ecosystem. The dashboard, if developed, will be the primary vehicle for this communication; in the interim, KPI summaries can be incorporated into CHS's existing reporting cycles. In all cases, CHS should be transparent about the limitations of its current data, as credibility with stakeholders depends more on honest reporting than on positive results alone.

Dashboard Platform & Supplier Landscape

Non-Profit Dashboard Design Best Practices

A dashboard is a strategic compass for navigating the complexities of housing-related pet surrenders, prioritizing utility over volume to move CHS from passive data collection to proactive stakeholder engagement. While CHS may not design the tool directly, understanding nonprofit best practices establishes a shared language to guide a champion developer. This technical lead is responsible for translating animal welfare goals into functional code. This foundational knowledge ensures the final product remains visually intuitive, aligned with mission-critical KPIs, and empowers non-technical stakeholders to generate data-driven insights and decisions. The selected solution must be cost-effective, easy to use, and scalable as data needs evolve. For a comprehensive breakdown of these dashboard design methodologies and their respective source citations, see [Appendix P](#). These design best practices have been extrapolated into dashboard design recommendations for CHS.

A well-designed CHS dashboard will:

1. **Be built on strong data governance** to standardize definitions, data-entry rules, and validation processes so outputs are credible and comparable. Metrics need assigned ownership to maintain responsibility over data capture, review, and interpretation.
2. **Be designed for decisions, not display.** Metrics need to be selected for decision-making, rather than showing all available data.
3. **Be kept focused** by limiting metrics families and prioritizing high-value KPIs to tighten scope and improve stakeholder adoption.

4. **Have separate views for leadership, staff, and external stakeholders** to improve relevance, protect sensitive information and be useful across different audiences.
5. **Visualize geographic patterns**, if possible. Incorporate Calgary neighbourhood mapping to show clustering of housing barriers, service gaps, and surrender pressures. Mapping is not precise but is useful for directional insight and targeted efforts.
6. **Use thresholds and status signals.** Collaboratively define thresholds around what is explicitly on-track, emerging concern, or off-course so that staff share a common understanding. Visual signals highlight where action is needed.
7. **Tie KPIs to mission drivers.** Prioritize metrics that connect external pressures and internal actions to the core mission. This keeps the dashboard anchored to mission outcomes rather than generic reporting.
8. **Emphasize outcomes over outputs** so that systemic impact is better measured through meaningful change and not immediate tangible results. Where long-term outcomes are harder to observe, interim indicators may be appropriate.
9. **Present data in context** by showing it next to trends, benchmarks, market conditions, and internal changes. Interpreting results more accurately will help leadership distinguish between actual results, external factors, and poor data.
10. **Link to the theory of change** to show how upstream activities link to downstream outcomes to emphasize it as a strategic learning tool, further, not simply a reporting tool.
11. **Include external indicators** related to Calgary housing to help stakeholders understand both what is happening and why it might be changing.
12. **Support accountability and execution** by tracking initiative status, ownership, milestones, and progress against strategic goals. This promotes the dashboard as a management tool that goes beyond observation by supporting follow-through.

Dashboard Use Case: Calgary Homeless Foundation

The team reached out to the Calgary Homeless Foundation (CHF) for information on the strategy and implementation of a stakeholder nonprofit dashboard. A questionnaire was submitted to and completed by CHF staff regarding dashboards (see [Appendix E](#) for questionnaire with answers). CHF and CHS are both Calgary nonprofits that manage complex stakeholder ecosystems, with processes that involve high volumes of real-time data and consequential, time-sensitive decision-making. They are also both directly impacted by similar forces in the Calgary housing space. CHF, therefore, represents a suitable use case with insights that could be relevant to a potential CHS dashboard.

Operational Objectives

CHF initially pursued a dashboard to improve internal operational efficiency over external reporting. A key objective for CHF was to eliminate manual reporting and better support housing triage activities with real-time data. A community-level dashboard was developed separately to ensure that contributing organizations could access relevant data and vital metrics in a single, accessible view. This facilitated a view for both external and internal stakeholders. The CHF dashboard enabled monitoring program performance against organizational targets, enabling immediate course correction when a program is underperforming. This two-tiered access model, an internal view with high granularity and an external view with high simplicity, allowed CHF to optimize internal precision while empowering external partners to facilitate system-wide accountability better.

Technical Implementation & Organizational Capacity

CHF chose to build the dashboard system on Qlik because of its potential for integration with existing database providers. While Qlik functioned adequately, the integration was never fully realized. If CHS is interested in a similar approach, it will need to assess its own technology stack compatibility. CHF had the distinct advantage of having in-house expertise to develop the dashboard. This allowed for quick changes without the need to pay external vendors, efficient troubleshooting, and alignment on the dashboard, all of which contributed to day-to-day operations.

Strategic Impact

By automating the data collection lifecycle, CHF's dashboard enabled staff and organizational capacity to focus on evidence-based decision-making rather than manual information gathering. By consolidating data from various stakeholders, CHF gained system-level foresight by identifying broader community trends. These stakeholder partners were empowered as they now had direct access to their own data, which both reduced administrative burden and fostered a culture of accountability.

Key Lessons for CHS

- **Simplicity:** If dashboards are too complex to be interpreted on a cursory view, they lose their strategy value. Data that is useful but contextually irrelevant (i.e., "nice to know") does not yield actionable insights.
- **Audience Consideration:** Level of detail must be tailored to expected users. External stakeholders with lower data literacy (e.g., donors or volunteers) require a significantly different interface than internal operations staff.

- **Cost-Benefit:** Start with conducting a simple cost-benefit analysis to determine whether the resources required to develop complex external metrics will impact decision-making or generate information noise.
- **Internal Adoption:** For CHS to achieve a high return on investment for a dashboard implementation, there needs to be a cultural shift that sees stakeholders use it for daily operational needs rather than periodic data review.

Strategic Outlook

CHF demonstrates that a nonprofit dashboard can go beyond a reporting tool to become an operational engine. If a dashboard can automate some or all of the reporting cycle, CHS can redirect staff hours towards front-line care while gaining a real-time system view that will facilitate proactive, rather than reactive, responses to animal welfare trends. CHF is evidence that a CHS dashboard could be a step towards achieving operational excellence and strategic sustainability.

Dashboard Vendor Selection

A structured approach is outlined to support the selection of both a dashboard platform and an implementation partner. The intent is not to prescribe a single vendor or tool, but to establish a clear framework to assist in determining the best-fit platform and partner that align with CHS's capacity and needs at the time of implementation. To ensure the successful implementation of the proposed dashboard, it is recommended that Calgary Humane Society engage a third-party provider with experience in both dashboard development and nonprofit data strategy. While a range of potential organizations and platform options are identified in [Appendix Q](#) to inform early consideration, it is recommended that CHS conduct a formal Request for Proposal (RFP) process to obtain detailed, comparable bids and ensure alignment with technical requirements, budget constraints, and long-term strategic fit.

Platform Selection Criteria

Dashboard platforms should be evaluated against four core criteria: cost and nonprofit accessibility, ease of use and scalability, integration flexibility, and vendor support model, with an emphasis placed on current usability and long-term adaptability rather than just technical sophistication. From a cost and nonprofit accessibility perspective, evaluation should consider the total cost of ownership, including implementation, licensing, and ongoing support, with preference given to platforms that offer nonprofit pricing or low-cost entry points so that financial resources are directed toward impact rather than infrastructure.

Ease of use and scalability are equally critical, as platforms must be accessible to non-technical staff to ensure long-term sustainability. This includes intuitive interfaces, minimal training requirements,

and the ability to expand from basic KPI tracking to more advanced reporting as organizational data matures. Integration flexibility should also be assessed, ensuring the platform can connect to internal data sources such as operations, intake, and donations, and can incorporate relevant external data, such as housing or economic indicators. Flexibility in handling both manual and automated data inputs is particularly important in early implementation stages.

Finally, the vendor support model should be considered in terms of implementation guidance, knowledge transfer, and ongoing assistance, as strong support reduces execution risk and helps build internal capability over time. These criteria should be applied relative to CHS's current state, prioritizing practicality, adoption, and sustainability.

Platform Options (High-Level Comparison)

A range of platform approaches is available, each with different implications for cost, flexibility, and implementation effort. Low-code and business intelligence (BI) tools are often the most practical starting point, as they enable organizations to quickly build functional dashboards without requiring significant technical experience. The benefit of this option is that it provides early visibility and internal reporting; however, CHS may outgrow it as more advanced analytics or predictive modelling are needed.

Platforms designed specifically for the nonprofit sector offer a more tailored approach, particularly for impact reporting and donor communication. These options can align closely with how organizations like CHS communicate outcomes, but that specialization can limit adaptability, especially when integrating with broader or more complex data environments.

A key decision point is whether to pursue a fully custom build or adopt a configurable solution. Custom development provides complete control over functionality and design but introduces higher costs, longer timelines, and ongoing maintenance requirements. Alternatively, configurable platforms offer a more efficient path forward, enabling CHS to implement and adapt a solution without overextending internal capacity or incurring unnecessary risk.

Recommended Path Forward

It is recommended that CHS adopt a structured RFP process to facilitate platform and partner selection. This ensures that decisions are informed by predetermined requirements, comparable proposals, and alignment with organizational priorities, rather than being driven by individual tools or vendor positioning.

The RFP should be grounded in the KPI framework and data requirements outlined earlier, with evaluation criteria aligned with cost, usability, integration with existing infrastructure, and vendor support. Shortlisting should focus on a small number of viable platforms and implementation partners capable of delivering a practical and scalable solution. Given the technical and strategic

considerations involved, partnering with an external organization is recommended over internal development. This approach reduces execution risk, accelerates delivery, and ensures the dashboard design aligns with current needs and available data.

A staged approach should be utilized during the vendor selection and implementation. The initial dashboard designs prioritize simple, high-value dashboards aligned to core KPIs, with the ability to expand functionality over time as the data matures. This avoids over-engineering early and supports sustainable adoption across the organization.

Service Provider Management Best Practices

As Calgary Humane Society (CHS) advances toward implementing a third-party data dashboard, the effectiveness of the technology solution will be closely tied to the organization's ability to govern and manage its chosen service provider. Academic research consistently demonstrates that successful IT outsourcing outcomes depend not only on vendor capability, but on the client organization's governance structures, performance management practices, and relational oversight mechanisms (Kim et al., 2013).

This section outlines the importance of vendor governance, identifies best practices across the service provider lifecycle, and proposes a governance model tailored to CHS's organizational context.

Importance of Vendor Governance

Vendor governance is the structured oversight framework organizations use to manage supplier relationships, ensure contract compliance, and maintain accountability for vendor-related operations. It defines the policies, roles, monitoring processes, and decision-making structures that guide how companies interact with and supervise their suppliers (Hyperbots, n.d.).

Research in IT outsourcing emphasizes that dashboards and analytics tools are socio-technical systems rather than purely technical assets; as such, governance failures often arise from unclear accountability, weak performance monitoring, and insufficient client involvement rather than from technical shortcomings (Mtsweni et al., 2021). Organizations that lack defined governance mechanisms frequently experience scope creep, misaligned expectations, and underutilized dashboards, reducing the intended decision-support benefits (Coutinho, 2025).

Furthermore, governance plays a critical role in mission-driven and non-profit organizations, where resource constraints and stakeholder trust heighten the importance of transparency, data accuracy, and accountability (Directors' Institute, 2024). For CHS, vendor governance is essential to ensure that the dashboard supports animal welfare outcomes, donor transparency, and operational decision-making while safeguarding data integrity and organizational values.

Best Practices Across the Vendor Lifecycle

Academic literature consistently frames vendor management as a lifecycle process encompassing selection, onboarding, performance management, and continuous improvement (Sumida, 2025).

Vendor Selection and Contracting

Best-practice research highlights the importance of selecting vendors not only on cost and technical skills, but also on relational fit, domain experience, and governance compatibility (Sumida, 2025). Clearly defined contracts and service level agreements (SLAs) establish baseline expectations, reduce ambiguity, and provide mechanisms for performance measurement and control. Well-designed SLAs complement trust-based relationships rather than substitute for them, reinforcing both accountability and collaboration (Treasury Board of Canada Secretariat, 2019).

Onboarding and Role Clarity

Effective onboarding includes explicit role definition, escalation pathways, and shared understanding of success metrics. Studies of complex outsourcing relationships indicate that early alignment between client and vendor significantly reduces downstream conflict and rework. For dashboard initiatives, onboarding should also include data governance standards, access protocols, and decision rights related to data changes and visual design (Dosovitckaia, 2024).

Performance Management and Review

Ongoing performance monitoring is a central pillar of vendor governance. The use of predefined KPIs, regular review cadences, and documented feedback loops enables organizations to identify issues early and foster continuous improvement. In analytics outsourcing, performance management should extend beyond delivery timelines to include usability, data accuracy, and stakeholder adoption (Singh & Sharma, 2025).

Relationship Management and Continuous Improvement

Academic research consistently demonstrates that high-quality client–vendor relationships, characterized by communication, trust, and joint problem-solving, enhance performance outcomes in IT outsourcing arrangements. Structured governance forums, such as quarterly performance reviews, support both formal accountability and relational alignment, enabling iterative enhancement of dashboard functionality as organizational needs evolve (Singh & Sharma, 2025).

Suggested Governance Model for CHS

Drawing on established outsourcing and IT governance literature, a fit-for-purpose governance model for CHS should balance formality with flexibility, recognizing the organization’s size, mission, and resource environment.

At a minimum, CHS should designate an internal dashboard owner responsible for vendor coordination, requirement prioritization, and internal stakeholder alignment. Research emphasizes that organizations that maintain internal ownership, rather than fully delegating responsibility to vendors achieve stronger outsourcing outcomes.

The governance model should include:

- **Formal governance cadence**, such as monthly operational check-ins and quarterly performance reviews, aligned with KPI and SLA reporting
- **Clearly defined decision rights**, specifying which changes require CHS approval and how scope adjustments are evaluated
- **Documented performance metrics**, covering delivery reliability, data quality, system usability, and stakeholder adoption
- **Continuous feedback mechanisms**, enabling dashboard refinement based on evolving organizational priorities and user insights

By adopting a structured yet scalable vendor governance model, CHS can reduce implementation risk, protect organizational resources, and maximize the long-term value of its dashboard investment. Academic evidence suggests that such governance practices are critical for ensuring that outsourced analytics capabilities translate into sustained decision-making impact and mission advancement.

Key Assumptions, Risks & Limitations

Data Availability & Quality

The current data provided to us, which outlines historical surrender reasons, is strong but not fully optimized. The available data on surrender reasons from 2015 to 2025 provides a strong foundation, particularly for identifying key drivers of pet surrenders and tracking trends over time to monitor changes or emerging patterns. This provides sufficient support for strategic prioritization and direction setting, though insights should be interpreted directionally rather than as precise measurements.

However, improvements can be made to ensure the data is optimized for accurate trend tracking. Specifically, the listed categories overlap and could be standardized to capture the larger picture. The data captures only a primary reason, while in reality, many cases are multifaceted, and most of the data is internal and surface-level, leaving external factors unaccounted for.

While the available data is sufficient to support strategic analysis and identify high-level trends, it is not yet fully structured for detailed performance measurement or external reporting without further validation. In its current state, inconsistencies in category definitions, data entry practices, and the use of single-reason classifications may limit the precision and comparability of results over time. For internal decision-making, this level of accuracy is acceptable; however, for external reporting or performance tracking, greater standardization, validation processes, and clearly defined metrics would be required to reduce the risk of misinterpretation.

External Stakeholder Dependencies

CHS plays a convener, influencer, and facilitator role across many of the initiatives. This means the initiative's success depends on its adoption by stakeholders such as landlords, partners, and governments. While CHS cannot control the outcomes of implementing these initiatives, it can influence the stakeholders to improve the chances of success. Key success factors include stakeholder willingness to adopt, clear incentives for participation, and overall ecosystem readiness.

The two most significant risks are slow adoption and delayed engagement, which could limit impact and slow progress despite internal readiness. Slow adoption can be limited by the general public's willingness to use the initiative or by the perceived value of the initiative to immediate stakeholders. Delayed rollout or limited adoption may prevent key KPIs from being achieved and shift timelines, even when internal processes are ready, impacting resources, momentum, and overall progress. These initiatives should be treated as conditional on external alignment, not just internal priority. As a result, early stakeholder validation and phased engagement should be prioritized to test adoption, refine value propositions, and reduce implementation risk before scaling initiatives.

Organizational Capacity Constraints

Given the finite resources available to CHS in terms of staff, funding, and leadership capacity, not all initiatives can be advanced at once. Overextending the organization can reduce overall impact, leading to inconsistent execution, stalled initiatives, or lower-quality outcomes. Capacity constraints extend beyond funding and include staff time, leadership attention, technical capability, and the organization's ability to manage and sustain change.

Success depends on clear ownership of each initiative, focused prioritization, and realistic pacing supported by regular review and adjustment. Sequencing reduces duplicated effort, strengthens focus, and ensures foundational work is completed before scaling additional initiatives. Importantly, capacity constraints affect not only the ability to start initiatives but also the ability to sustain and scale them over time. Sequencing is not optional; it is necessary to protect impact and sustainability.

What Would Need to Change Before Implementation

Prior to moving into execution, CHS would need to confirm initiative priorities, the ownership structure for each initiative, whether current data are sufficient and reliable, whether resources are available both immediately and over time, and where they can lean on stakeholders for early confirmation of interest and support when required.

The initiatives should be evaluated and prioritized in line with CHS's strategic direction over the coming years. Identifying which initiatives to advance first helps focus effort and enables learnings to be applied to future initiatives. Implementation ownership plays a huge role; clear leadership, data-informed decision-making, and strong execution are critical to guiding each initiative.

Consistent KPI data enables effective monitoring and informed adjustments. A particular individual or team should also own this data to ensure scope and interpretation are consistent and not misrepresented. Sustained resource availability allows initiatives to progress without disruption and increases the likelihood of success. Finally, early stakeholder validation provides actionable insight into interest and adoption, allowing initiatives to be refined before scaling. Implementation should begin only once these conditions are sufficiently in place.

Conclusion & Recommended Next Steps

In conclusion, this report builds on the ideas and evidence from Phase 1 to ensure CHS is decision-ready. Its purpose is to help CHS prioritize, sequence, and evaluate initiatives in a disciplined and

repeatable manner. The strategic prioritization matrix is the foundation of this project. It enables CHS to evaluate initiatives across feasibility, sustainability, and impact, incorporating input from multiple stakeholders to reduce bias and blind spots. The implementation roadmap shows a staged approach to advancing the preferred initiative, rather than pursuing multiple initiatives simultaneously. It provides a repeatable framework to determine when to progress, pause, refine, or scale initiatives through structured decision checkpoints. A KPI framework that focuses on decision-making rather than activity tracking provides insight into outcomes and informs decision checkpoints. This also allows for consistent performance measures that can be linked to the Strategic Prioritization Matrix, creating consistency between selection and monitoring.

Next, the dashboard is positioned as a tool to communicate outcomes and insights to stakeholders, rather than a static reporting system. To prevent future dashboard bloat, strict design principles and scope boundaries were outlined to keep future dashboards useful, credible and aligned with CHS's mission. To move the dashboard concept toward practical application, CHS identified platform considerations, supplier criteria, and build-vs-partner trade-offs as a starting point. This should reduce the risk of premature or misaligned technological decisions, enabling CHS to evaluate future platforms and vendors more effectively. Lastly, a service provider governance guide highlights that dashboard success depends heavily on how vendor relationships are governed and managed. Having detailed, mutually agreed-upon best practices for ownership, accountability, review cadence, and performance oversight helps protect the dashboard's long-term value. These tools create a detailed decision-support system that, when used together, provides valuable strategic insight for any initiative.

This report also highlights key strategic insights from the previous Phase 1 recommendations. Most importantly, not all initiatives should be advanced at once. With limited resources, CHS will gain greater value by focusing its efforts on fewer initiatives and using lessons learned and outputs to support future initiatives. When choosing a starting point, the highest-impact initiatives are not always the most appropriate. CHS should balance its strategic resources among quick-win initiatives, high-impact, long-term initiatives, and those in between, based on what CHS can realistically support as an organization. The sequencing of initiatives also matters because each initiative affects CHS's capacity and readiness, and it aligns differently with stakeholders. Having multiple ongoing initiatives could create competing priorities. Overall, CHS is not the sole executor of Phase 1 or future initiatives. CHS's role is to act as a convener, influencer, and facilitator within the ecosystem. The success of the initiative is not determined by only internal action, but also by overall industry readiness and stakeholder adoption.

The frameworks developed are reusable and can support future initiatives beyond the Phase 1 options. The goal is to help CHS create more consistent, transparent, and evidence-based decision-making over time. However, this report does not replace implementation planning; it does not replace the need for resource decisions, stakeholder engagement, or technical validation. Instead, it lays a stronger foundation for the next steps and enables CHS to leverage actionable data and

insights that support decision-making. This project now allows CHS to choose initiatives with greater confidence, pace them more realistically, reduce the execution risk, and make future decisions using clearer evidence and governance logic.

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Appendices

Appendix A: Phase 1 Summary Table

Initiative	Description	Primary Objective	Key Stakeholders
Landlord Toolkit	A set of educational and practical resources for landlords (e.g., pet policies, risk-mitigation tools, behaviour guidance) to reduce perceived risks of renting to pet owners.	Increase landlord confidence and willingness to offer pet-friendly units.	Private landlords, property managers, CHS
Tenant Toolkit	Resources to help renters with pets prepare for housing searches, understand expectations, and demonstrate responsible pet ownership.	Improve tenant readiness and reduce the risk of housing-related pet surrenders.	Renters with pets, CHS, housing support agencies
Dashboards (Internal & External)	Internal dashboards to track surrender drivers and program effectiveness; external dashboards to communicate impact and trends to stakeholders.	Improve decision-making, transparency, and evidence-based advocacy.	CHS leadership, funders, policymakers, public
Partnership & Ecosystem Engagement / Mapping	Mapping and coordinating housing, social service, and animal-welfare partners to identify gaps and collaboration opportunities.	Strengthen system-level coordination around pet-inclusive housing.	Social service agencies, housing providers, CHS
CHS Response Hub	An internal coordination function to triage housing-related surrender risks and connect clients to appropriate supports.	Shift CHS from reactive intake to proactive prevention.	CHS staff, partner agencies, at-risk clients

Appendix B: Work Blocks

Work Block	Focus	Key Outputs
Block 0	Discovery & Alignment	Scope validation, evaluation criteria
Block 1	Strategic Analysis	Prioritization matrix
Block 2	Roadmap Development	Sequencing logic, lifecycle structure
Block 3	Synthesis	Integration of deliverables
Block 4	Final Reporting	Report + executive briefing

Appendix C: Project Methodology & Workplan

Block 0 - Information Discovery and Alignment

In this phase, prior group work will be reviewed, scope boundaries confirmed, evaluation criteria established, the project work plan reviewed with CHS, and any additional information required to begin development of the Strategic Analysis and Implementation Roadmap gathered. (Completed).

Block 1 - Strategic Analysis (SA)

The project will begin by evaluating each of the six initiatives identified in Phase 1, using several tools, including a decision support matrix, decision sequencing map, scalability assessment framework, and value pathway map. The team will use a series of successive analytical stages focused on strategic prioritization, organizational readiness assessment, scalability analysis, value creation mapping, and risk and dependency evaluation. Each phase culminates in a specific deliverable, allowing insights to be progressively validated and built upon throughout the project lifecycle. CHS will participate by providing input and feedback, ultimately leading to the determination of the best recommendations to move forward with, while evaluating what may yield the highest rate of success given the constraints in place.

Block 2 - Implementation Roadmap Development (IR)

Establish and populate templates to gather/organize information about each initiative to be placed on the IR. This will include outputs from SA, how the initiative links with CHS goals, objectives, and measures from the current Strategic Plan; timeline start and finish dates, milestones, dependencies, person/team responsible, resources needed, anticipated challenges, and the definition of how progress will be assessed; and change management and sustainability activities. This will ensure consistent data is available for each initiative and is a transferable tool for CHS. Key inputs include Phase 1 documentation, outputs from Phase 2 Strategic Analysis and CHS input and feedback.

Synthesize data collected for each initiative and draft the first version of an integrated IR with supporting documentation. Identify areas of conflict in sequencing, resource capacity, or other constraints, and document how sequencing activities could be adjusted to accommodate them. Document assumptions and risks. Propose mitigation strategies. Design performance indicators and measures of success and ensure alignment to CHS measures as appropriate (refer to [Appendix D](#)). Identify change management strategies and develop a high-level communication plan aligned with IR.

Refine into a finalized IR, update materials, and create process documentation describing how the IR was developed, along with recommended procedures to ensure the roadmap is a living strategy tool, including the overall governance framework, communication and visibility recommendations, and performance measurement. Develop a governance framework that includes strategies for

maintaining the IR and recommendations for change management activities, including the internal communication approach and planning, to ensure the IR remains a “living” artifact.

Block 3 - Overall synthesis of project deliverables

Synthesize findings, finalize all deliverables, and prepare supporting documentation for submission.

Block 4 – Develop final report and Executive Decision Briefing

Organize project deliverables and link them to the project's motivation and scope. Assess the degree of success against the success criteria. Develop appropriate commentary for deliverables and findings. Compile into an overall report to support the Executive Decision Briefing presentation.

Appendix D: Strategic Matrix User Guide

This user guide is designed to ensure the utility of Phase 2 deliverables tools for CHS decision support. It provides a systematic guide for CHS to effectively apply the framework to current Phase 1 initiatives and future strategic opportunities, ensuring that organizational decision-making remains consistent, data-driven, and aligned with evolving priorities. This guide does not present findings, evaluations, or specific recommendations regarding the Phase 1 initiatives, nor will it serve as a summary of strategic outcomes.

Usefulness of Framework for Decision Making

CHS can use phase 2:

1. To compare initiatives consistently through a shared set of criteria.
2. To help sequence decisions.
3. To prepare implementation requirements.
4. To support accountability.
5. As a reusable framework to approach emerging opportunities.

Strategic Prioritization Matrix

This strategic prioritization matrix evaluates initiatives using a transparent framework designed to support CHS decision-making under relevant constraints. To ensure an objective process, the framework strictly separates initiative inputs from scoring logic to reduce bias, prevent double-counting, and maintain a focus on comparative decision-making. The matrix is structured around three core constraints selected to align with CHS's mission and strategic objectives: impact potential, feasibility, and sustainability.

To provide a consistent baseline for evaluation, each initiative begins with a standardized overview that captures the essential facts and assumptions necessary for a full understanding of the proposal. These inputs inform the evaluation but are not scored directly to ensure that all stakeholders are working from the same information baseline without prematurely influencing the strategic scores.

Instructions: Strategic Prioritization Matrix

To ensure that the Strategic Prioritization Matrix supports transparent and defensible decision-making, CHS may apply the following structured process when multiple stakeholders complete the scoring framework.

1. **Independent Scoring:** Each initiative is scored independently by at least three evaluators prior to any group discussion. Independent scoring reduces anchoring bias and ensures diverse perspectives are captured. Evaluators must reference the defined scoring anchors (1–5) and provide a brief written justification for each sub-criterion score. Scoring will be recorded on the sheet below for each initiative:

Initiative Scoring Sheet

[Initiative Name]

Impact Potential

Impact potential assesses whether an initiative is worth pursuing by evaluating if it meaningfully advances CHS's mission and strategic priorities. Criteria include:

- **Surrender & Prevention:** How well the initiative reduced pet surrenders.
 - Score:
 - Justification:
- **Reach:** Breadth of beneficiaries affected by the initiative.
 - Score:
 - Justification:
- **Strategic Alignment:** Initiative alignment with the CHS strategic plan.
 - Score:
 - Justification:
- **System-level influence:** Assesses influence on external housing, landlord, or partner systems beyond CHS.
 - Score:
 - Justification:
- **Outcomes Durability:** Looks at how long-lasting the benefits are after implementation.
 - Score:
 - Justification:

Feasibility

Feasibility assesses how well CHS can realistically pursue an initiative given current and future constraints. Criteria include:

- **Complexity:** Considers process changes, coordination needs, and new capabilities required.
 - Score:
 - Justification:
- **Internal Capability:** Evaluates if staff have the skills, roles, and capacity to execute the initiative.
 - Score:
 - Justification:
- **Implementation Risk:** Measures potential exposure to operational, reputational, or stakeholder risks.

- o Score:
- o Justification:
- **Budget requirements:** Focuses on whether funding is secured and sufficient for implementation.
 - o Score:
 - o Justification:
- **Timeline fit:** Assesses how well the initiative can be executed within CHS's timeline
 - o Score:
 - o Justification:

Sustainability

Sustainability assesses whether an initiative can be sustained and scaled in a way that remains proportionate to CHS's resources and capacity. Criteria include:

- **Resource Burden:** Looks at staffing, financial, and administrative demands relative to CHS's capacity.
 - o Score:
 - o Justification:
 - **Financial Viability:** Assesses whether funding or costs can be sustained over time.
 - o Score:
 - o Justification:
 - **Adoptability:** Measures how likely internal staff and external partners are to embrace the initiative.
 - o Score:
 - o Justification:
 - **Scalability:** Considers whether the initiative can grow in reach or impact without proportional cost or complexity increases.
 - o Score:
 - o Justification:
 - **Maintenance requirements:** Evaluates ongoing effort, skills, or equipment needed to keep the initiative operational.
 - o Score:
 - o Justification:
2. **Quantitative Aggregation:** Individual scores are compiled into a consolidated strategic prioritization spreadsheet to facilitate compiling and averaging scores. The "Evaluation Framework" tab will allow individual evaluators to input their independent sub-criterion scores for each initiative being compared. Scores will then be averaged for each dimension and displayed on the "Individual Scores" tab, where evaluators will write a summary of reasoning for each initiative. This reasoning will allow any user, evaluator, or observer to gain a brief snapshot of the rationale behind any high-scoring variance between evaluators. If further justification for significant scoring differences is required, users can compare

evaluators' individual scoring sheets mentioned above. The weighted total scores for each initiative are compiled and displayed on a scatter plot in the "Average Scores" tab. Averaging provides a balanced representation of stakeholder perspectives and reduces the influence of individual bias; however, it must be viewed in the context of variance, so averaging does not imply consensus when variance is high.

3. **Variance Identification:** CHS should identify sub-criteria where meaningful variance exists, including: a difference of two or more points between evaluators or when the standard deviation reaches 1.0 or higher. This threshold seeks to identify when a middling score represents a fundamental disagreement (e.g. a mix of 1s and 5s), rather than moderate consensus. High-variance areas should be prioritized for discussion. Addressing these high-variance outliers maintains the integrity of the matrix and ensures that final initiative scoring is based on reconciled perspectives.
4. **Structured Reconciliation Discussion:** For each high-variance dimension, evaluators should review and discuss their written justifications. Discussion should focus on the interpretation of the scoring rubric, the underlying assumptions, the evidence used to support the score, and time expectations or risk tolerance differences. The objective is to clarify reasoning and align on shared assumptions rather than to negotiate preferences.
5. **Score Refinement:** Following discussion, evaluators may retain their original scores, adjust scores based on new understanding, or agree to a consensus score. CHS may determine whether final scores are based on revised averaging or formal consensus.
6. **Documentation:** For any sub-criterion where discussion materially changes the outcome, CHS should document the rationale for the final score. This record supports institutional learning and improves consistency in future applications of the matrix.

Reusability and CHS Ownership

The matrix serves as a reusable decision framework for potential CHS strategic initiatives, which can be similarly evaluated without modifying the matrix. CHS leadership can apply a consistent, evidence-based process when comparing potential programs, partnerships, or strategic opportunities.

To ensure the matrix remains a living decision-support tool rather than a one-time analytical exercise, CHS should maintain clear documentation of how the matrix is applied and updated over time. Documentation builds an internal knowledge base and institutional memory, ensuring that future strategic prioritization remains transparent, repeatable, and evidence based. Recommended documentation standards include:

- **Version tracking of the matrix:** maintain dated versions of the matrix and any structural updates to scoring criteria or weighting.
- **Archived scoring and justification sheets:** retain completed matrices and individual scoring sheets for each evaluation cycle to support transparency and future review.

- **Consensus discussion notes:** record key assumptions, evidence, and reasoning used to reconcile differences among evaluators.
- **Initiative status updates:** track whether initiatives are advanced, sequenced for later phases, paused, or discontinued.
- **Re-scoring intervals:** reassessing initiatives when internal (e.g. strategic priorities) or external factors (e.g. Calgary housing conditions) change.

Mistakes to Avoid: Strategic Prioritization Matrix

CHS should not view the matrix results as a final objective answer, as it is not intended to rank the worth of initiatives or determine which are acceptable. As already mentioned, part of the value of the matrix lies in the process itself, which encourages a robust analysis of the initiatives and reveals how strategically viable they could be for CHS. Stakeholders must articulate assumptions, apply a common evaluative lens, and surface differences in judgment that might otherwise remain hidden until later decision-making or implementation.

CHS should not begin scoring an initiative until its description is clear to ensure any evaluation is strategically relevant. Similarly, while CHS is encouraged to adapt, scale, and refine the strategic prioritization matrix with use, CHS should not change any weighting or criteria midway through an evaluation, as this would warp perceptions of that initiative. If new information leads to a reevaluation of assumptions, the process should be restarted.

Initiative Sequencing and Roadmap Logic

This part of the framework should be used after the initiatives have been evaluated using the matrix.

Governance and Decision Rights

The governance for the strategic Prioritization Matrix is designed to ensure clear accountability for how initiatives are evaluated, interpreted, and advanced. Executive leadership retains ownership over final prioritization decisions, including how matrix outcomes inform resource allocation and whether initiatives proceed, pause, or are deprioritized. The matrix serves as a decision-support tool, not a decision-maker, with leadership responsible for applying organizational context and strategic judgement.

Management-level stakeholders are responsible for conducting the evaluation, including scoring initiatives based on defined criteria, providing rationale, and identifying risks, dependencies, and feasibility considerations. This ensures that the Matrix outputs are grounded in operational insight and evidence.

Escalation should occur when there are significant scoring discrepancies, key assumptions or data inputs are uncertain or contested, or when matrix results conflict with strategic priorities or resource

realities. In these cases, leadership is used to review and validate interpretations, not override them without proper justification.

This governance approach ensures that scoring remains evidence-based and consistent, that decision-making remains transparent and aligned with strategy, and that the Matrix is used to structure decision inputs rather than as a standalone outcome.

KPI Framework

KPIs are intended to complement the Strategic Prioritization Matrix by providing an evidence-based foundation for both initial scoring and ongoing reassessment of initiatives. While the matrix captures a structured, point-in-time evaluation based on available information and stakeholder judgment, KPIs allow CHS to validate or refine those assessments over time as real-world data becomes available.

When scoring for the first time, stakeholders should consider KPIs when defining what impact, feasibility, and sustainability mean. For instance, projects with clear, measurable goals, easy-to-access data, and clear ownership structures may score higher on feasibility. On the other hand, projects that depend on indirect or hard-to-measure goals may need to be scored more carefully. In the same way, initiatives with strong leading indicators, such as stakeholder engagement or early adoption signals, may have greater potential for impact when long-term outcomes are not yet clear.

After the first prioritization, KPIs should be used to monitor the progress of initiatives regularly. Instead of treating matrix scores as set in stone, CHS should again assess how well initiatives are doing, using KPI trends to determine whether the assumptions made during scoring remain valid. This makes the matrix a dynamic decision-support tool rather than a one-time assessment.

Interpreting KPI Signals Within the Matrix

KPI data should be interpreted as directional signals rather than absolute thresholds. CHS should focus on patterns over time and use these patterns to inform decisions about whether an initiative should advance, be refined, or be deprioritized.

- Strong and improving KPI trends may support increasing an initiative's assessed impact or advancing it along the implementation roadmap
- Flat or inconsistent trends may indicate a need for refinement before further investment
- Declining or weak signals across multiple periods may suggest that initial assumptions were overly optimistic and that reassessment is required

Importantly, a single reporting period should not drive decision-making. Patterns observed across multiple reporting cycles provide a more reliable basis for adjusting matrix scores or sequencing decisions.

Linking KPI Categories to Matrix Dimensions

Each KPI category supports a specific dimension of the Strategic Prioritization Matrix:

- Surrender Prevention Outcomes → Impact
Measures whether the initiative is meaningfully reducing housing-related surrender and influencing system-level outcomes
- Initiative Readiness and Progress → Feasibility
Indicates whether the initiative is progressing as expected and whether CHS has the capacity and structure to deliver it
- Stakeholder Engagement → Impact and Feasibility
Provides early signals of adoption, particularly for initiatives dependent on external stakeholders
- Sustainability and Scalability Indicators → Sustainability
Assesses whether the initiative can be maintained and expanded without overextending CHS resources

This alignment ensures that KPI monitoring reinforces the same logic used to prioritize initiatives, maintaining consistency between strategic selection and ongoing evaluation.

Incorporating External System Indicators into KPIs

CHS should include system-level KPIs in its evaluation of initiatives affected by external factors, such as the state of the housing market. These include changes in the number of pet-friendly rentals available and more detailed tracking of the reasons people give for leaving their homes.

Because these indicators are partially outside CHS's direct control, they should be interpreted alongside internal performance metrics. Improvements in these measures may lag behind internal activity, but they provide critical context for understanding whether CHS's efforts are contributing to broader system change.

Dashboard Platform

Refer to [Appendix Q](#) for a comparison of potential dashboard design options. The options/candidates outlined are considerations for CHS to explore in developing a dashboard, not formal endorsements. The Phase 2 team has not contacted these firms. In considering dashboard development options, CHS should refer to the dashboard design best practices discussed in the body of the report to ensure that any external design work is scoped within the organization's

specific data needs and user expectations before implementation. The CHF case, also discussed in this report, provides valuable insights into setting expectations for what a nonprofit dashboard can reasonably be. CHF has expressed a willingness to answer any non-proprietary questions that may arise to ensure a CHS dashboard is a trailblazer in the animal wellness space. Note that the CHF dashboard is built with in-house technical expertise and so has limited insight into potential vendor selection.

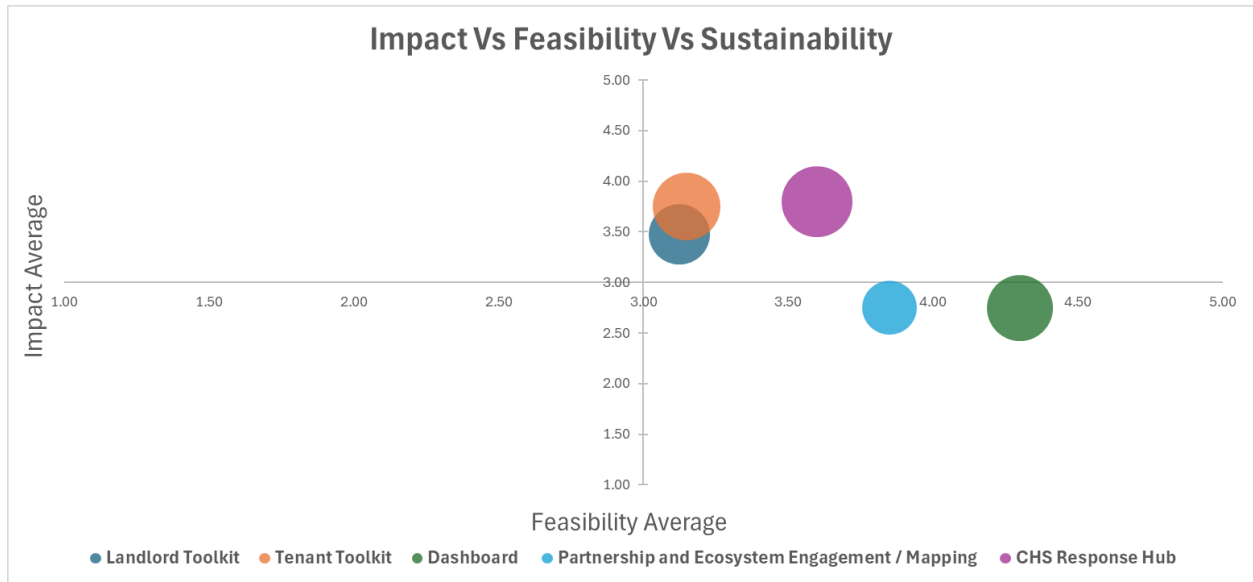
Our CHS sponsor consistently mentioned that, as a charity, they prioritize vendors that go beyond delivery to understand the story CHS is trying to tell and align with their mission. CHS refers to them as champions. Charity donors focus their support on causes in their own communities, so charitable organizations must align their strategies with local impact, backed by a strong digital infrastructure to ensure donation continuity (CanadaHelps, 2025). To ensure the CHS narrative remains authentic and locally grounded, they may want to consider their ideal vendor champion being headquartered in the Calgary area, directly linking the project's digital infrastructure to the community it serves.

Another key consideration in champion selection is whether the option specializes in nonprofit dashboards. This risks an approach to a nonprofit dashboard process being more formal, technical, and process-heavy, with less focus on and understanding of CHS's mission and stakeholder communication requirements. CHS needs to confirm that it can build something aligned with its mission.

Conclusion

Phase 2 findings and processes are intended to aid CHS in moving from broad ideas to structured strategic decisions in the complex environment in which they operate.

Appendix E: Strategic Prioritization Matrix



Appendix F: Calgary Homeless Foundation Completed Questionnaire

What strategic objective or organizational need originally led to the development of your stakeholder dashboard?

Our initial dashboards were developed primarily to address internal efficiency and operational decision-making needs rather than external reporting.

One example is our Coordinated Access and Assessment (CAA) triage dashboard, which supports housing placement decisions. Previously, preparing triage lists required the HMIS team to manually pull multiple reports (youth, adult, family) and compile detailed demographic information. This process could take most of a day and relies on a relatively slow system. The dashboard replaced that process by making information available in real time, allowing staff to access up-to-date data quickly ahead of placement committees or for ad hoc inquiries.

Separately, our community (program-level) dashboard was developed to ensure that organizations contributing data to HMIS could also access and use it effectively. It consolidated client- and program-level housing information (move-ins, exits, evictions, income, length of stay, etc.) into a single, accessible view for both community housing providers and CHF internally.

Who were the primary intended users of the dashboard, and how did those audiences shape its design?

The intended users strongly shaped both dashboards, particularly in terms of data access, level of detail, and overall usability.

- Community dashboards:
The primary users are housing providers and program staff, many of whom are not data specialists and need quick, practical insights to manage their programs. As a result, the dashboard was designed to prioritize clarity, simplicity, and relevance over complexity. Each program can only see its own client and program data, which shaped the inclusion of role-based permissions and filtered views. In contrast, CHF can see aggregated data across all programs to support system-level analysis. The dashboard focuses on straightforward filters and high-level indicators—such as housing status, length of stay, and whether programs are under or over target—so users can easily understand performance and trends without needing to interpret dense or highly technical data.
- CAA triage dashboard:
This dashboard is strictly internal and supports CHF staff and housing placement committees. Because it is used directly for operational decision-making, it was designed with greater detail and flexibility than the community dashboards. The internal audience shaped the inclusion of more granular, client-level information and demographic details needed for housing prioritization and triage. Since usability constraints for external partners did not

apply, the design could balance efficiency and complexity, enabling staff to quickly access comprehensive information before placement meetings or for ad hoc decision-making.

In what ways did the dashboard support decision making, stakeholder alignment, or accountability?

The dashboards allowed staff to:

- Quickly identify trends across housing programs.
- Monitor program performance against targets.
- Support efficient housing triage through the CAA process.
- Internally, dashboards significantly improved the ability to understand the system needs and therefore informed decisions on types of housing or programs needed in the system.

For community partners, having a single, reliable source of program data helped with alignment and accountability within their own programming. Programs could easily see what was happening within their own portfolios without relying on CHF staff to pull reports for them, which supported more informed conversations and shared understanding.

Did the dashboard improve how your organization communicated impact or progress to external stakeholders such as funders, partners, or the public?

The most substantial value for us has been internally at CHF and with funded agency partners for day-to-day knowledge of system performance and activity as well as for regular operational decision-making rather than public-facing communication. The greatest impact has come from staff and partners using the dashboards consistently to understand trends, performance, and triage priorities in real time.

This year we will be embarking on a project that focuses on how dashboards and other communication tools can be utilized to better communicate impact or progress to a wider or more public audience.

Were there any implementation challenges or lessons learned that you would recommend another nonprofit consider early?

A key lesson learned is that simplicity matters. It is very tempting to include as much information as possible, but dashboards are most effective when they are easy to interpret at a glance.

Other lessons:

- Be clear early on about who the dashboard is for and how they will actually use it.
- Conduct an informal cost-benefit analysis: if a broad or external audience cannot realistically interpret or act on complex data, it may not be worth the additional development effort.
- Consider usability and data literacy for external users from the beginning, not as an afterthought.

Looking back, what aspects of the dashboard delivered the most strategic value relative to the effort required?

The largest return has come from:

- Efficiency gains, particularly eliminating the need to pull recurring reports manually.
- The ability to view housing program data holistically in one place and identify system-level trends that would be harder to see otherwise.

Are there any cautions you would share with an organization considering a similar dashboard in a different nonprofit space, such as animal welfare?

Many of the same cautions apply regardless of sector:

- Keep the design simple and focused.
- Be explicit about whether the dashboard is primarily for internal use, external use, or both.
- Align the level of effort with the actual value and decision-making power the dashboard will support.

Which software or BI tool is the dashboard built on, and why was that platform selected?

Our dashboards are built using Qlik. At the time, we selected it because our HMIS database provider had plans to integrate with Qlik technology, and we wanted to align with that direction. Ultimately, that integration was not fully realized, and with hindsight, we may have chosen a different platform. That said, Qlik continues to function well for our needs.

Did you build the dashboard in-house or outsource the work?

We built the dashboards internally by hiring a dedicated staff member who designed, developed, and maintained them. That individual later moved to another organization, and responsibility has since shifted to the broader data team.

Overall, having the expertise in-house was very beneficial. It allowed us to:

- Make changes quickly without paying external vendors.
- Troubleshoot issues efficiently.
- Build dashboards that reflect how staff actually use the data day-to-day.

Appendix G: Essential facts and assumptions necessary for a proposed initiative

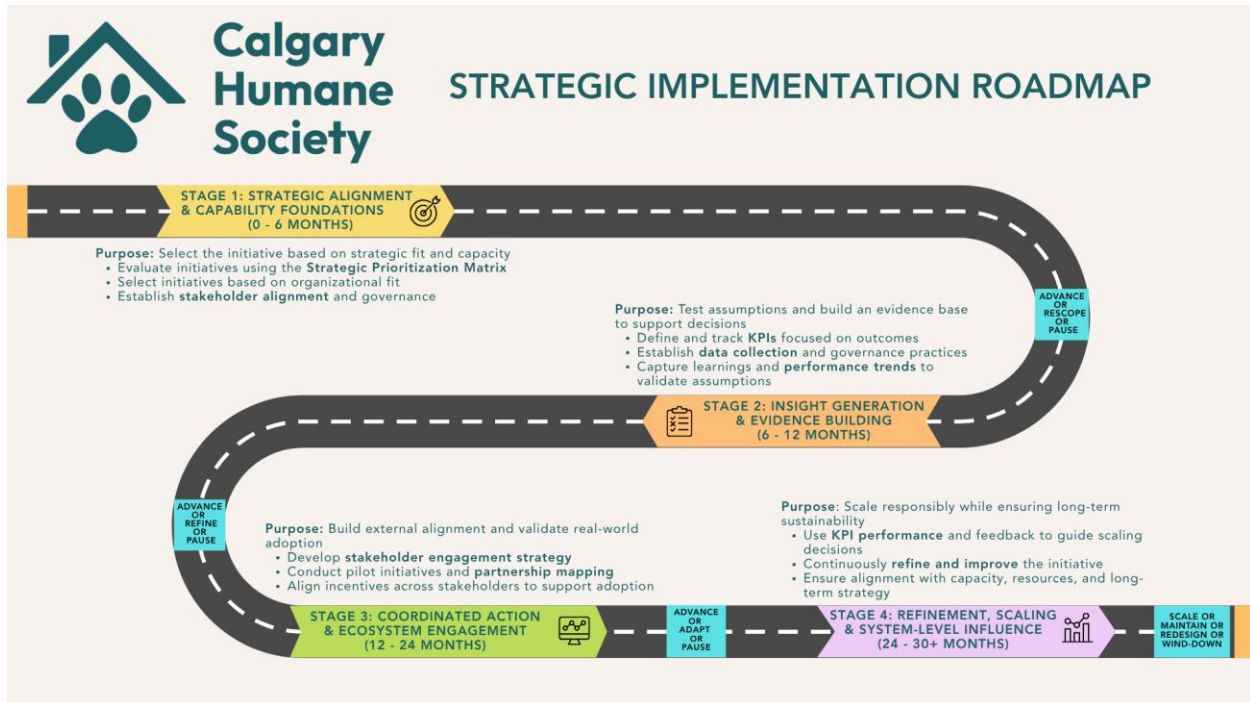
The essential points are:

1. Problem statement
 - a. A sentence or two describing the issue the initiative addresses.
2. Strategic alignment
 - a. How the initiative aligns with Calgary Humane Society's goal/mission/priority.
3. Key assumptions
 - a. Staff availability - Are there any staff members or available team members that can dedicate time to this initiative without hindering their current workload?
 - b. Funding secured/expected
 - c. Dependencies on partners – Does this initiative require input or development from partners? Who are they, and what is their availability, work quality and cost?
 - d. Timeline constraints - the duration of developing, testing and implementing the initiative and how that compares to current strategic/funding/resource timelines
4. Estimated budget range
 - a. Price estimates range from basic/low quality to detailed and high-end
5. Required staff and resources
 - a. Hours, roles, equipment
6. Timeline/duration
 - a. Start and end dates (rough estimate)
7. Dependencies/constraints
 - a. Major dependencies that impact feasibility - what needs to be done for this initiative to be successful
8. Known risks
 - a. Not severity, just risk statements
9. KPIs/expected outcomes
10. What will be measured, not the success level (example: number of users, not the goal of 1000 users)

Appendix H: Visualization of CHS Strategic Plan

Pillars	Our Community	Our Animals	Our People	Our Foundation
Goals	To foster partnerships, engage our supporters, and influence decision makers to maximize our impact and create meaningful change in animal welfare	To enhance the well-being and welfare of animals through proactive engagement with our community to develop new and improved programs that promote the human-animal bond	To foster a thriving and empowered community of team members, volunteers, and foster families, ensuring their engagement, development and recognition to create and retain a strong foundation of support for our Society	To secure the resources needed to support our activities now and into the future, providing the opportunities for all demographics to support the Society in the way that is most meaningful for them
Objectives	- Embolden our story to build awareness, demonstrate impact, and deepen the connection with our supporters - Cultivate strong community partnerships to create opportunities for collaboration - Create programming designed to reach new and diverse audiences.	- Develop and enhance programming that supports companion animal families - Exemplify animal sheltering best practice - Create partnerships with organizations that can improve organizational capacity and animal welfare in the community	- Expand the capacity of our staff, volunteers and foster families through targeted and proactive recruitment plans - Build engagement and job satisfaction to improve overall retention - Build a succession plan that ensures ongoing success of organization and continuation of positive relationships	- Invest in the growth of our donor base to support them through their philanthropic journey - Investigate innovative social enterprise initiatives to diversify revenue streams and build community engagement - Inspire confidence through transparency in reporting and responsible use of organizational assets
Measures	- Collaborative programming utilized by our Calgary community - Increased government focus on animal welfare issues with a demonstrated interest in policy and legislative changes that promote a more humane world - Strong collaboration with community partners to ensure all lives are treated with respect and compassion	- Programs are in place to support pet families designed to strengthen the human animal bond - Continued excellence in the standard of care of all animals to ensure all adoptable animals get a second chance - Strong partnerships with our veterinary community to ensure equitable access to veterinary care	- A positive workplace culture with a high level of pride and personal satisfaction from the contributions offered - An environment of continuous learning to ensure a team of collaborative professionals working to realize the mission of the Society - An expanded and engaged group of volunteers who share a passion for animal welfare and a foster home for every animal who needs one	- Increased community support to ensure the ongoing success of the Society - Strong donor stewardship practices that encourage continuous engagement with Calgary Humane Society - A high level of stakeholder confidence built through a culture of transparency and fiscal responsibility

Appendix I: Strategic Implementation Roadmap



Appendix J: Stakeholder Identification Table

Stakeholder Group	Role in Initiative	Level of Influence	Level of Interest	Alignment Needed	Engagement Strategy
Example	How the stakeholder fits into the initiative in terms of decision making, impact, resource allocation, direction, etc.	How much the stakeholder can influence the initiative and its outcomes and goals	How interested the stakeholder is in the success or work of the initiative	How much does CHS align with this stakeholder in relation to the initiative	How often should the stakeholder be engaged with, what kind of information, providing service vs collecting information
CHS Leadership	Responsible for setting strategic direction, approving resource allocation, and making final decisions on initiative scope, priorities, and investment levels	High	High	Full alignment is required at all stages. Leadership approval is needed for strategic direction, funding decisions, and any major scope or priority changes throughout the initiative lifecycle.	Engage weekly through concise progress updates (email or dashboard reporting), with bi-weekly formal check-ins to review performance, budget tracking, risks, and key decisions requiring approval.
CHS Operations (Staff)	Responsible for executing the initiative, maintaining operational processes, and capturing insights to inform leadership decisions and	High	High	High alignment is critical to ensure consistent execution, prevent scope drift, and drive sustained adoption of	Ongoing engagement through weekly updates, regular check-ins, and implementation reviews to ensure clarity, resource availability, and

	future improvements			tools and processes.	adherence to scope
Small/Medium Landlords	A smaller but critical subgroup acting as end users and validation partners, providing input to ensure the dashboard reflects real-world landlord constraints and decision-making needs.	Low	Low / medium	Alignment is required to ensure information is practical, unbiased, and directly supports landlord decision-making.	Early engagement through consultations and pilot testing, followed by feedback loops during rollout to ensure ongoing relevance and usability.
Large Landlords	Represent a large portion of the landlord market; key users of the dashboard, where adoption at scale influences overall system impact.	Medium/high	Medium/high	Alignment is required to ensure insights are scalable, relevant across larger portfolios, and aligned with operational and risk management priorities.	Engagement through targeted consultations and validation sessions, with ongoing communication during rollout to support adoption at scale
Municipal housing officials	Key policy and system-level stakeholders influencing housing regulations, affordable housing development, and pet-friendly	High	Medium/high	Strong alignment is required to co-develop policies, best practices, and frameworks that support pet-inclusive housing	Early and ongoing engagement to align on long-term objectives, policy direction, and opportunities for collaboration and system-level impact

	housing standards				
Pet owners	Primary beneficiaries of the initiative are directly affected by the outcomes but are not involved in decision-making.	Low	High	Alignment focused on ensuring initiatives address real needs and improve housing stability for pet owners.	Primarily informed through communications and awareness efforts, with limited consultation where user feedback is required.
Small and medium funders	Provide financial support with limited involvement in strategic decision-making.	Low	Medium	Alignment required to ensure initiative outcomes meet funder expectations, branding considerations, and reporting requirements	Early engagement to secure funding, with periodic updates to maintain transparency and demonstrate impact
Large corporate funders	Strategic funding partners with potential influence on initiative scope, visibility, and scaling opportunities	Medium/high	Medium/high	Alignment with funder goals and requirements to maintain funding	Ongoing engagement through regular reporting, performance updates, and strategic check-ins to maintain partnership alignment
City of Calgary	System-level stakeholder acting as regulator, data provider, and potential strategic partner,	high	Medium/high	Strong alignment is required to ensure regulatory support, data sharing, and broader	Engage as a strategic partner, leveraging their role as a connector, credibility builder, and

	influencing policy and ecosystem alignment.			system integration	potential facilitator of cross-sector collaboration.
Community Organizations	Frontline partners support implementation, identify community needs, and deliver direct services.	Medium	High	Moderate alignment is required to ensure services complement the initiative and support consistent delivery	Ongoing engagement post-development to support adoption, coordination, and feedback from frontline implementation

Appendix K: Influence–Interest Matrix

Quadrant	Description	Stakeholders	Engagement Approach
High Influence / High Interest	Stakeholders who shape direction and outcomes must be closely aligned and engaged at all times.	CHS Leadership, City of Calgary, large landlord organizations/housing providers, and key funders or strategic partners	Deep collaboration, frequent communication, and active involvement in decision-making and strategic direction
High Influence / Low Interest	High-power stakeholders who must remain supportive, even if not actively engaged in day-to-day initiative development	Senior government officials, policy makers outside the immediate housing scope, and large developers not currently focused on pet-friendly housing	Targeted, high-level updates that emphasize alignment with their priorities, focusing only on key decisions, risks, and opportunities requiring their support
Low Influence / High Interest	Highly engaged stakeholders who contribute valuable insight, support adoption, and help drive grassroots or community-level change.	Pet owners/tenants, community organizations, advocates, small/medium landlords and service providers	Regular communication and feedback loops through consultations, surveys, and pilot participation to gather insights and support advocacy and adoption
Low Influence / Low Interest	Stakeholders with limited current impact or interest, requiring minimal engagement unless their role or relevance changes.	General public and unrelated or indirectly connected industry stakeholders	Minimal communication, with periodic updates as needed to maintain awareness and transparency

Appendix L: Needs & Incentives

Stakeholder	What They Care About	Value Proposition
CHS Leadership & Internal Teams	Mission alignment, operational feasibility, resource capacity, reputation, and clear strategic prioritization	Clear prioritization of initiatives, practical and usable tools, reduced operational burden, and a structured roadmap to support decision-making and implementation
Housing providers (Landlords & Developers)	Property risk, cost and profitability, tenant stability and turnover, and clear, enforceable policies	Reduces perceived and actual risks of pet-friendly units, provides practical tools and guidance, and supports improved tenant stability and reduced turnover
Government and public officials	Housing stability and affordability, reduced strain on social services, policy alignment, measurable outcomes, and community well-being	Reduces pet-related housing instability, provides actionable data and insights, and supports system-level solutions through cross-sector collaboration
Pet Owners / Tenants	Access to pet-friendly housing, affordability, reduced barriers or discrimination, and the ability to keep pets and families together.	Increased access to pet-friendly housing, improved access to resources and supports, and reduced risk of pet surrender
Non-profits and Social Services	Client outcomes and stability, reduced crisis occurrences, efficient service delivery, and strong collaboration	Access to tools and partnerships, reduced pet surrenders and crisis cases, and improved coordination through shared data and collaboration.
Funders, Sponsors, and Strategic Partners	Measurable impact, efficient and well-documented use of funds, alignment with strategic goals, and visibility and reputation	Clear impact metrics, scalable and sustainable solutions, and strong data-driven storytelling to demonstrate outcomes

Appendix M: Engagement Strategy Framework

Engagement Type	When to Use	Example
Inform	Used to share information, updates, and outcomes where no input or action is required from stakeholders	One-way communication is used to build awareness, share updates, and convey results without expecting feedback.
Consult	Used when stakeholder input is needed to inform decisions, validate assumptions, or refine solutions	Gather stakeholder input to shape solutions while maintaining decision authority, helping validate assumptions and refine tools.
Collaborate	Used when stakeholders are actively involved in planning, design, and development of solutions	Work directly with stakeholders to co-design and refine solutions, ensuring practicality and supporting adoption through shared ownership.
Partner	Used when stakeholders share responsibility for implementation, delivery, and outcomes	Shared responsibility for delivering outcomes, including pilot implementation, evaluation, and scaling if successful

Appendix N: Stakeholder Alignment Roadmap

Stage	Objective	Key Activities
Stage 1	Identify and categorize stakeholders based on influence, interest, and role in the initiative. Identification	Identify all relevant stakeholders across the ecosystem, map stakeholders based on influence and interest, and assess stakeholder needs, incentives, and potential risks
Stage 2	Establish early alignment with key stakeholders and validate initial assumptions.	Engage high-influence and high-interest stakeholders to align on direction, validate assumptions, and gather early feedback; initiate pilot discussions where appropriate.
Stage 3	Co-develop the initiative design and implementation approach with key stakeholders.	Collaborate with stakeholders to refine solutions, develop implementation plans, define roles and responsibilities, and align on success measures.
Stage 4	Support coordinated implementation and ensure stakeholder alignment during rollout.	Support launch and rollout through communication, stakeholder coordination, performance monitoring, and issue resolution
Stage 5	Evaluate outcomes and gather stakeholder feedback to inform continuous improvement.	Collect feedback from directly and indirectly impacted stakeholders, evaluate outcomes against objectives, and identify opportunities for refinement or scaling.

Appendix O: KPI Framework & Definitions

This appendix provides the full KPI definitions, measurement methodology, reporting cadence, and suggested data ownership for each KPI in the CHS framework. KPIs are organized by the four categories introduced in Section 6.2. All KPIs use a 1–5 rating scale where applicable, consistent with the scoring methodology established in the Strategic Prioritization Matrix. Threshold definitions (on-track, emerging concern, off-course) should be set collaboratively by CHS leadership during initial dashboard configuration and revisited annually.

Category 1: Surrender Prevention Outcomes

KPI Name	Definition & Measurement	Data Source	Cadence	Suggested Owner
Housing-Related Surrender Rate	Number of intakes coded as housing-related as a percentage of total intakes in the period. Requires consistent intake coding definitions to be reliable.	Intake management system	Quarterly	Operations/Program Lead
Surrender Diversion Rate	Percentage of housing-related surrender inquiries resolved without intake (owner retains pet, referred to community support, or situation resolved). Numerator: diverted cases. Denominator: all housing-related inquiries.	Response Hub case records	Quarterly	Response Hub Lead
Repeat Crisis Contact Rate	Percentage of housing-related inquiries in a given quarter from households that contacted CHS in a prior quarter. A declining rate indicates durable prevention; a rising rate signals recurrent housing instability.	Response Hub case records; intake system	Quarterly	Response Hub Lead
Pet-Friendly Rental Listing Rate	Percentage of rental listings in Calgary that permit pets. Measured through periodic sampling of major rental platforms (e.g., RentFaster.ca, Rentals.ca). Where feasible, this may be supplemented by tracking voluntary landlord participation mechanisms such as pledges or	External rental platforms; potential landlord registry/pledge data	Semi-annually (or quarterly if feasible)	Strategy / Data & Analytics Lead

	registrations. This KPI serves as a proxy for system-level housing accessibility for pet owners.			
Housing-Related Surrender Sub-Reason Tracking	Percentage and number of housing-related surrenders specifically attributed to inability to find pet-accommodating housing (e.g., landlord refusal, no pet-friendly units available). Requires enhanced intake categorization and consistent coding standards. Enables more granular analysis of housing-driven surrender patterns.	Intake management system (enhanced categorization); potential alignment with Animal Services data	Quarterly	Operations / Program Lead

Category 2: Initiative Readiness and Progress

KPI Name	Definition & Measurement	Data Source	Cadence	Suggested Owner
Toolkit Content Completion Rate	Percentage of planned Tenant and Landlord Toolkit content modules that have been drafted, reviewed, and approved. Tracks progress toward distribution readiness.	Project tracker/internal milestone log	Monthly during the build phase	Initiative Lead (Toolkits)
Response Hub Staff Training Completion	Percentage of relevant CHS staff who have completed updated Response Hub protocols and training. Target scope defined by roles with surrender inquiry touchpoints.	HR/training records	Quarterly, annually post-launch	Response Hub Lead / HR
Triage Protocol Adoption Rate	Percentage of housing-related surrender inquiries that are processed through the formalized Response Hub triage workflow rather than ad hoc handling. Distinguishes implementation from mere training completion.	Response Hub case records	Quarterly	Response Hub Lead
Dashboard KPI Data Readiness Score	Percentage of dashboard KPIs that have clear data sources, are tracked regularly, and have someone responsible for maintaining them. If fewer than 70% of KPIs meet these	Data governance log	Quarterly (dashboard pre-build phase)	Data / Analytics Lead

	conditions, CHS should pause building the dashboard until the data is reliable enough to support it.			
Active Partner Organizations (Ecosystem)	Number of distinct external organizations that have participated in at least one structured Partnership and Ecosystem engagement activity in the trailing 12 months. "Participated" requires defined criteria (e.g., attending a convening, sharing data, or completing a referral).	Partnership engagement log	Semi-annually	Partnerships Lead

Category 3: Stakeholder Engagement

KPI Name	Definition & Measurement	Data Source	Cadence	Suggested Owner
Unique Landlord / Housing Provider Contacts Reached	Count of unique landlords or property managers who have received, downloaded, or been directly presented with the Landlord Toolkit. Deduplication is required across channels.	Distribution records; web analytics	Quarterly	Initiative Lead (Toolkits)
Inbound Toolkit Inquiries	Volume of inbound questions or follow-up contacts generated by Tenant and Landlord Toolkit recipients per quarter. A proxy for active engagement versus passive receipt. Tracked separately by toolkit type.	CHS contact log/CRM	Quarterly	Initiative Lead (Toolkits)
Referral Outcome Follow-Up Rate	Percentage of Response Hub referrals for which CHS has recorded a follow-up outcome (e.g., confirmed connection with referred service, no contact, returned to CHS). A low follow-up rate indicates a data capture gap rather than a poor outcome.	Response Hub case records	Quarterly	Response Hub Lead

Category 4: Sustainability and Scalability Indicators

KPI Name	Definition & Measurement	Data Source	Cadence	Suggested Owner
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Staff Hours per Initiative vs. Budget	Actual staff hours logged per initiative per quarter compared to the budgeted allocation. A variance exceeding 20% for two consecutive quarters triggers a leadership scope review. Tracked per initiative to prevent cross-subsidization.	Timesheets/project management tool	Quarterly	Finance / Program Leads
Funded vs. Unfunded Initiative Cost Coverage	Percentage of projected initiative costs covered by confirmed funding (grants, donations, or allocated reserves) versus costs that are unfunded projections. Initiatives with less than 60% confirmed coverage should not advance to the next implementation phase.	Finance/budget records	Quarterly, at each decision gate	Finance Lead / Executive
Toolkit Content Review Frequency	Number of times Tenant and Landlord Toolkit content has been formally reviewed and updated for accuracy in 12 months. Reflects maintenance discipline. A rate of zero over 12 months is a sustainability risk signal.	Version control/content log	Annually	Initiative Lead (Toolkits)
New Distribution Channels Added (Toolkits)	Count of new channels (partner organizations, platforms, community touchpoints) through which toolkit materials have been distributed in a given period without a proportional increase in CHS staff cost—a scalability indicator: growth in reach without growth in overhead.	Distribution records; partnership log	Semi-annually	Initiative Lead (Toolkits)

Appendix P: Dashboard Best Practices Guide

Nonprofit Dashboard Design Best Practices

1. Build the dashboard on strong data governance

Nonprofit data visualization requires standards and procedures to ensure accuracy (Simpson, 2015). CHS needs formalized data governance, standardized practices, and routine validation processes to ensure the dashboard delivers credible, actionable insights. In practice, the dashboard cannot operate as a stand-alone visual product. It must rest on clearly defined internal processes for capturing, coding, reviewing, and updating data.

CHS should establish common definitions for key fields, including housing-related surrender, affordability barrier, landlord restriction type, diversion attempt, and referral outcome. Ownership of each metric should also be assigned so staff know who is responsible for entering, validating, and interpreting the data. This directly supports long-term trialability: if early users perceive the dashboard as unreliable, adoption will stall.

2. Design for decisions, not for data display

Dashboards are named for their automotive counterparts, providing condensed overviews that keep decision-makers on track (Buhler, 2025). A dashboard should not display everything; it should surface only the vital signals that help users prioritize attention, intervene when necessary, and measure progress. Before choosing metrics, a nonprofit dashboard must align with organizational priorities, specifically the decisions leaders and stakeholders need to make (Landles-Cobb et al., 2023). For CHS, that means selecting indicators based on real use cases.

3. Keep the dashboard focused and intentionally limited

Successful nonprofit dashboards do not attempt to track everything. Organizations should start small and track a focused set of actionable metrics rather than overwhelming staff with dozens of data points (Bassett & Manchester, 2025). This is vital for CHS, as housing-related surrenders are complex and systemic. Adding more data often increases complexity, making the dashboard harder to interpret and less likely to be used. A practical best practice would be to structure the dashboard around a small number of metric families. Within each family, CHS should prioritize a small number of high-value KPIs rather than a long list of secondary measures. This will make the dashboard more usable for leadership, easier to maintain, and more credible as a long-term management tool.

4. Use stakeholder-specific views rather than one generic interface

Dashboards democratize data, meaning stakeholders without specific technical skills can interact with data from their own perspective (Simpson, 2015). Enabling stakeholders to access data from their own perspective strengthens engagement and broadens organizational insight. Leadership needs high-level trends and alerts; frontline staff need operational details such as intake and referral patterns; and external stakeholders need a selective, public-facing view of system-level trends that protects client privacy. A key strategic purpose of the CHS dashboard is to bridge internal learning

and external awareness. Tailoring dashboards to specific user needs ensures they become ongoing decision tools rather than one-time reports.

5. Make geographic patterns visible where they are decision-relevant

Using geographic data to visually map out service areas against community needs and demographic data to identify gaps (Simpson, 2015). While potentially challenging, an interactive map of Calgary broken down by neighbourhood would allow stakeholders to see which data and KPIs are linked to specific areas. The value of mapping is not aesthetic, but strategic. This visualization can reveal where housing barriers, pet-friendly supply issues, affordability pressures, or service gaps cluster. This supports more targeted outreach, better partner coordination, and stronger external storytelling.

CHS should treat the map as a pattern-recognition tool rather than a precision instrument. Even directional geographic insight can create value if the dashboard clearly communicates the data's limits. A map could be especially valuable for determining where pet-friendly developments are located, whether they are evenly distributed across Calgary, and where housing-related surrender pressures appear to be most acute.

6. Use thresholds and status signals to prompt action

Colour coding (e.g., stoplight red, yellow, and green), in addition to aligning with the map concept above, helps focus attention on areas of concern (Polanco & Walker, 2019). The goal of colour coding is to prompt action rather than passivity (Smith, 2022). A dashboard that only describes trends without signalling significance will create observation without accountability.

Thresholds should be explicitly defined in advance for CHS, including what level of increase constitutes a watch signal, what change warrants outreach attention, and what decline triggers review. Nonprofit dashboards must be explicit and engage staff when defining targets to create clarity and accountability (Polanco & Walker, 2019). Thresholds should be set collaboratively with staff so there is a shared understanding of what on-track, emerging concern, or off-course means. This design choice enhances usability by providing clear visual signals that quickly highlight where collective action or intervention is most needed.

7. Tie KPIs directly to mission drivers and strategic levers

KPIs monitored through dashboards must link directly to specific levers that drive program delivery and be chosen through a team-based process (Polanco & Walker, 2019). Dashboards should be customized to reflect the organization's objectives (Buhler, 2025). KPIs should link directly to mission fulfilment, particularly CHS's ability to prevent avoidable surrenders and keep people and pets together. CHS must avoid generic nonprofit reporting and instead select measures that reflect how housing-related barriers shape outcomes. The dashboard should make visible the causal chain between external pressure, internal response, and mission-relevant results.

Metrics can be impact measures (mission-driven outputs and outcomes) or foundational measures (including financial, efficiency, and partnership metrics) (Manzetti & Mehta, 2015). For CHS, impact measures might include housing-related surrender trends, successful diversion outcomes, or repeat

crisis prevention. Foundational measures might include referral turnaround time, partner engagement activity, completeness of housing-related intake fields, or the percentage of cases with follow-up outcomes recorded. This helps CHS avoid a common pitfall: prioritizing easily counted data over strategically vital insights.

8. Emphasize outcomes over outputs while allowing for interim indicators

Effective nonprofit dashboards focus on outcomes over outputs (Bassett & Manchester, 2025). Outputs measure immediate, tangible results which, while relevant, do not demonstrate systemic impact. Outcomes, by contrast, capture the short- and medium-term changes that better show whether an organization is creating meaningful change. This approach will allow the dashboard to measure effectiveness more credibly, demonstrate accountability to donors, and help CHS maintain a strategic focus.

Interim indicators are acceptable when perfect outcome data is hard to collect (Landles-Cobb et al., 2023). This is vital for CHS as long-term outcomes are often delayed. A layered model using direct mission outcomes where possible and interim proxies where necessary balances precision with feasibility.

9. Present data in context, not in isolation

Data should be presented in context rather than in isolation, so visualizations should incorporate relevant references such as budgets, historical performance, and benchmarks (Manzetti & Mehta, 2015). For CHS, contextualization is essential because a single measure carries little meaning on its own. A rise in housing-related surrender may signal one issue during a period of worsening affordability and another during a period when intake coding has improved. Similarly, a decline in a metric may reflect real improvement, a seasonal shift, or reduced data capture.

10. Link the dashboard to the theory of change

The theory-of-change framework is the best way to show how specific initiatives, in CHS's case, reduce housing-related surrenders (Bassett & Manchester, 2025). A theory-of-change lens would help CHS show how upstream indicators connect to downstream mission outcomes. For example, improved housing-related intake capture may support better pattern recognition; better pattern recognition may support stronger referral targeting or external partnership action; stronger intervention may reduce avoidable surrender. This makes the dashboard more than a reporting device. It becomes a visual representation of how CHS believes change happens.

11. Include external environment indicators, not just internal operations

In strategic management, including dashboard development, organizations often fail to consider the external environment (Buhler, 2025). CHS's dashboard will fall short if it only tracks internal intake numbers without also monitoring external trends such as pet-friendly housing availability and relevant community support signals. This is critical, as the dashboard is meant to address a fundamentally systemic issue. Internal data alone can show what CHS is experiencing, but not why

those patterns may be shifting. External data can strengthen risk interpretation and improve the timing of interventions or advocacy.

12. Use the dashboard to support accountability and execution

Dashboards help to bridge the gap between current organizational standing and desired strategic goals (Smith, 2022). They should not just track daily operations but also strategic objectives, which can be achieved by assigning deadlines, owners, and completion percentages to individual activities (Smith, 2022). A CHS dashboard should not only track environmental indicators and present trends. It should also support the execution of CHS's response. That may include status tracking for pilot initiatives, dashboard data quality milestones, partnership development, or rollout of related tools such as the response hub initiative.

Appendix Q: Dashboard Platform & Supplier Comparison

Internal Dashboard Platform Comparison

Google Looker Studio <https://lookerstudio.google.com/navigation/reporting>

Key Benefits:

- No cost: Free to use, making it ideal for nonprofit budgets
- Ease of use: Intuitive interface requiring minimal technical expertise
- Data connectivity: Integrates with spreadsheets, databases, and common data sources
- Real-time reporting: Automatically updates dashboards as new data is added
- External sharing: Simple link-based sharing for stakeholders and public transparency

Use Cases for Calgary Humane Society:

- Animal intake and adoption metrics
- Donation and fundraising performance
- Operational KPIs (e.g., capacity, length of stay, outcomes)
- Public-facing impact dashboards

Consideration:

- While highly effective for most needs, Looker Studio has limited advanced analytics capabilities compared to enterprise tools.

Microsoft Power BI: <https://www.microsoft.com/en-us/power-platform/products/power-bi>

Key Benefits:

- Advanced analytics and data modelling
- Strong integration with Microsoft Excel and Office tools
- Affordable nonprofit pricing
- Suitable for multi-source and more complex datasets

Use Cases for Calgary Humane Society:

- Existing team member has experience with dashboards, or current dashboards are developed using Power BI, and expansion of modelling and displays is needed

- Existing internal data has matured enough to require intermediate to advanced levels of forecasting or reporting

Consideration:

While Microsoft Power BI offers an intuitive interface for basic use, it requires technical expertise for advanced functionality, and integration with non-Microsoft systems can be less seamless, often requiring additional data preparation and configuration.

External Dashboard Partnership Alternatives

Purpose Analytics: <https://www.purposeanalytics.ca/>

Overview:

Purpose Analytics is a Canadian consulting firm specializing exclusively in data, dashboards, and impact measurement for nonprofit organizations. They operate as a nonprofit, reinvesting revenue into tools and resources that strengthen the sector. When you work with them, you help build data capacity for other nonprofits, too.

Key Strengths:

- Deep expertise in nonprofit KPIs and reporting requirements
- Experience translating data into clear stakeholder and donor insights
- Ability to define meaningful impact metrics—not just visualize data
- End-to-end support: strategy, design, and implementation

Why This Is a Good Fit:

Purpose Analytics aligns closely with the Calgary Humane Society's needs by combining technical dashboard development with an understanding of nonprofit impact measurement. This ensures that dashboards are not only functional but also meaningful and aligned with organizational goals.

Dakota Analytics (Local Option): <https://dakotaanalytics.com/>

Overview:

Dakota Analytics is a Calgary-based data consulting firm specializing in business intelligence and KPI development.

Key Strengths:

- Local presence enables in-person collaboration and workshops

- Strong technical expertise in dashboard tools such as Power BI
- Experience building customized KPI reporting systems

Why This Is a Good Fit:

Dakota Analytics is well-suited for hands-on implementation and staff training. Their local presence makes them a strong partner for ongoing support and iterative dashboard development.