Developing a Collaborative Planning Team

Steps for Managing Data Sharing

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A collaborative planning team (CPT) is essential for managing the data-related aspects of a project, including those funded through Pay for Success (PFS, discussed in box 1) or another performance-based financing structure. A CPT is composed of stakeholders with access to administrative data from multiple service systems and could be tasked with gathering and analyzing linked data, understanding population needs across systems or how services are used, or designing an intervention to address a social problem. The team shares data for a specific project and may disassemble once the data-sharing goals are accomplished. A CPT is different from a working group for integrated data systems (IDS), which establishes ongoing data sharing,[1] although a CPT can be useful for larger IDS efforts.

BOX 1

Pay for Success

PFS is an innovative financing mechanism that shifts financial risk from a traditional funder—usually a government—to a private or nonprofit funder. The new investor provides up-front capital to scale an evidence-based program to improve outcomes for a vulnerable population. If an independent evaluation shows that the program achieved agreed-upon outcomes, then the investment is repaid by the traditional funder with interest. If not, the investor takes the loss. This model shifts financial and reputational risk from the government to external investors and promotes rigorous evaluation and meaningful outcomes. By prioritizing evidence, outcomes, performance management, and the strategic deployment of resources, PFS has the potential to improve how social services are delivered to the most vulnerable, yielding benefits to individuals, governments, and society at large. To learn more, visit pfs.urban.org.

Leaders of state and local government agency departments usually spearhead a CPT and bring in cross-sector stakeholders from other agencies as well as representatives from private, nonprofit, community, and philanthropic organizations to serve as members. The team aims to combine resources, funding, data, and expertise toward developing carefully targeted, data-driven programs and policies. With this charge, the group meets regularly to handle all data-related components of an initiative, which may include signing memoranda of understanding, acquiring and sharing data, seeking Institutional Review Board approvals, identifying target populations, analyzing data, and reporting.

This brief provides recommended steps to form and lead a CPT as well as key considerations for those involved in a CPT. We also offer resources on various components of CPT activities, including managing data landscaping and confidential data, developing a communications plan, conducting a data walk, and writing joint objectives, a mission statement, and a vision for your group. Finally, at the end of the brief, we provide worksheets you can use to develop and organize your own CPT.

Our guidance is a product of lessons learned from the Urban Institute's PFS Administrative Data Pilot (box 2). For this effort, our experts provided training and technical assistance to governments and organizations to help improve their capacity to access and use administrative data as they considered potential PFS projects or supported existing programs.

BOX 2

Pay for Success Administrative Data Pilot and Products

This brief is part of a series designed to help states, municipalities, and local organizations identify, link, and analyze administrative data to better track outcomes of the social services they deliver. The guidance provided in each product emerged from training and technical assistance the Urban Institute provided to 28 communities during 2015–19 as part of our Pay for Success Initiative[a] and Pay for Success Administrative Data pilot. Funded by Arnold Ventures and the Corporation for National Community Service, Urban supported partners in addressing and overcoming barriers to administrative data access so that their communities will be better equipped to move toward implementing PFS and other performance-based strategies.

The additional products in this series provide recommendations on how to navigate some of the most vital processes undertaken by communities Urban worked with. They are as follows:

- **Guidance on Collecting Administrative Data for Pay for Success Projects,** which shares lessons from four organizations that tackled administrative data challenges as they carried out a PFS program.
- **Assessing Feasibility Studies**, which offers guidance on determining whether pay for success is a viable strategy for a specific intervention.
- **Understanding Community Resources**, which delivers step-by-step guidance for stakeholders who want to match data across agencies.
- **How to Launch a Supportive Housing Pay for Success Initiative**, which offers initial steps to get PFS supportive housing efforts off the ground and focuses on how to establish an evidence-based supportive housing PFS program that can measure and link payments to outcomes.

[a] "Frequently Asked Questions," Urban Institute Pay for Success Initiative, accessed September 5, 2019, https://pfs.urban.org/faq/.

Several participants in our pilot convened multisector or multiagency CPTs to address data availability and sharing with the goal of understanding clients that touch multiple service systems. The insights in this brief are a result of Urban's engagements with organizations that received our assistance, and they are intended to inform other communities interested in pursuing data sharing and linking as part of PFS initiatives and other performance-based programs that involve multiple service systems.

Step 1: Build or Leverage the Right Team

Ideally, your CPT should have a mix of people who can collect and analyze data and provide expertise on the problem being addressed (e.g., reducing recidivism, curbing homelessness, or increasing the use of health services). Given the sensitive nature of data sharing and the challenge of integrating datasets, it is important to assess each member's interest in the team and to understand their goals, motivations, and what they can offer to the effort. The person who creates and coordinates the CPT should also seek members who traditionally don't engage in policy work and have skills beneficial to data sharing, such as information technology data analysts.

Identifying the right combination of people and talents might involve talking to staff at key organizations to learn who is most involved with data collection or analysis. This could be a case manager or another frontline employee, people responsible for generating reports from administrative data, or people who interview organizations to learn about the services they provide. The CPT coordinator should also consider inviting a person who has received services and whose lived experience is reflected in the data. Another option might be someone from an advocacy group that supports vulnerable populations and communities. In Durham, North Carolina, for example, a CPT that is identifying a potential intervention for people leaving the Durham County Detention Center includes a member who was formerly incarcerated.

In some instances, a planning team, committee, or council may already exist that has many of the same stakeholders you would need for a CPT. In these cases, forming a new planning team is likely not necessary. Instead, the goals of the CPT can be incorporated into a preexisting planning body.

Ideally, CPTs should include a mix of individuals who

- are front-end users who regularly see and input data,
- are data analysts,
- understand the legal and privacy regulations that apply to data sharing,
- understand how their data might fit into a broader intervention or goal,
- see cross-departmental or cross-organizational work as a benefit to their work,
- have time to devote to the CPT and the support of their organization's leadership, and
- have content-area expertise related to the challenge being addressed.

Boxes 3 and 4 provide examples of the mix of members and roles on CPTs in two communities in which Urban is providing technical support. Neither CPT is part of a performance-based initiative at present; rather, each was formed to facilitate data sharing between organizations while they also explore the feasibility of adopting PFS or another financing model to expand services. **To start building your CPT, see Exercise 1 in the appendix of this brief.**

BOX 3

Snapshot: City of Durham, North Carolina

- **CPT Goal:** Lowering recidivism for people who are frequently booked in the Durham County Detention Center
- **Timeline:** February 2019 to September 2019
- **CPT Roles:**
  - Chair: *Colonel*, Durham County Sheriff's Office
  - Facilitators: *Executive Director*, City of Durham Innovation Team and *Director*, Durham County Criminal Justice Resource Center
  - Project Coordinator: *Executive Director*, City of Durham Innovation Team
- **Members:**
  - *General Manager of Community and Public Safety*, Durham County
  - *Representative*, Local Reentry Council
  - *Community Development Representative*, City of Durham
  - *Data Manager*, City of Durham Police Department
  - *Design Strategist*, City of Durham Innovation Team
  - *Faculty Member*, UNC School of Social Work
  - *Physician*, Duke University Health System
  - *Managed Care Administrators*, Alliance Health
  - *District Attorney*, Durham County
  - *Assistant Judicial District Manager*, North Carolina Department of Public Safety

Step 2: Communicate Regularly with Decisionmakers

Ongoing communication with government officials, nonprofit executives, funders, and other key decisionmakers involved in your project is critical to facilitating a productive CPT. Their insights can help you determine the direction, priorities, and scope of your work and help you arrange formal partnerships between data-sharing organizations through memoranda of understanding and data-sharing agreements.

BOX 4

Snapshot: Thomas Jefferson Area Coalition for the Homeless Pay for Success and Data Subcommittee in Charlottesville, Virginia

- **CPT Goal:** Share data to map service utilization of people experiencing homelessness in the Charlottesville area and assess PFS feasibility.
- **Timeline:** February 2019 to December 2019
- **CPT Roles:**
  - Chair: *Assistant Director*, Department of Social Services, City of Charlottesville
  - Facilitators: *Executive Director*, Thomas Jefferson Area Coalition for the Homeless and *Chief of Fire and EMS*, City of Charlottesville
  - Project Coordinator: *Student*, University of Virginia
- **Members:**
  - *Chief Operating Officer*, University of Virginia Department of Medicine
  - *Chief*, Division of General Medicine, Geriatrics, and Palliative Care, University of Virginia Department of Medicine
  - *Interim Assistant City Manager*, City of Charlottesville
  - *Criminal Justice Planner*, Thomas Jefferson Area Community Criminal Justice Board
  - *Systems Performance Analyst*, Charlottesville Fire and EMS
  - *Executive Director*, Partner for Mental Health
  - *Professors*, University of Virginia
  - *Community Relations Lead*, University of Virginia Health System
  - *Community Health Coordinator*, Thomas Jefferson Health District
  - *Training and Technical Assistance Manager, Policy Associates, and Policy Assistant*, Urban Institute

Decisionmakers will also need to be updated and consulted as you learn new information and need to make decisions about your PFS project. Your CPT should establish a structure for sharing information with decisionmakers, who can use what you provide to plan for, fund, and implement a proposed project. The structure should be flexible enough to meet the needs of the group as new information arises, but it could also include report-outs at regularly scheduled gatherings, such as those with the county commissioner, city council, or nonprofit board.

Finally, a CPT should anticipate changes in political administrations or agencies that may occur with elections and staff turnover. It is important to continue your work through these transitions while remaining flexible to respond to possible shifts in priorities. For example, although elected officials or political appointees may serve on the CPT, having members who are not politically affiliated will help ensure that the team's work can advance regardless of political leadership. And if political changes occur, you might consider meeting with newly appointed leaders to discuss your performance-based initiative, their potential role in it, and the department's previous contributions to the project.

Step 3: Develop Clear Expectations

After you form a CPT, you will benefit from developing a mission and vision statement that articulate why the group exists, the problem it aims to solve, and its specific objectives. Further, your CPT should develop shared values that transcend the goals of the individual organizations represented by members and that focus on the unique social problem the team aims to address (see box 5 for a sample mission statement). You may also consider creating a joint theory of change,[2] which requires partners to outline their goals and identify strategies to achieve them. For additional resources on developing a mission and vision statement, see Gibbs et al. (2017).

BOX 5

Sample Mission Statement

In the Thomas Jefferson Area Coalition for the Homeless (TJACH) Pay for Success and Data Subcommittee's first meeting, the CPT chair led members in writing a mission statement to guide their future work. This process produced the following statement:

"In support of TJACH's strategic goals of community education and long-term systems sustainability, the subcommittee will establish sustainable regional data-sharing connections in order to better understand and meet the needs of the region's vulnerable people, especially those experiencing homelessness. The subcommittee will explore financing methods, like PFS, to fund new services to meet those needs."

Next, you will need to determine team members' roles and responsibilities. This may involve delineating leadership roles, such as CPT chair or coordinator, or further dividing the team into subcommittees with defined charges (i.e., a data security subcommittee, data analysis subcommittee, or contracts subcommittee). There should be a clear structure for how decisions will be made and how often the group will meet with key decisionmakers. While agreeing on roles and responsibilities, team members should also identify people within their organizations they can go to for support during the engagement.

As part of setting expectations, your CPT should agree on how frequently to meet to keep the project moving forward through what can often be slow-moving processes. For example, getting memoranda of understanding signed can be quite onerous, particularly because they must go through an organization's internal or external legal team. The CPT should meet regularly enough to verify that such pieces advance, because a lag in the process could significantly disrupt your CPT's ability to collect and analyze data. Subcommittees can also meet more frequently to move essential items forward without requiring a larger CPT meeting.

Step 4: Determine Milestones and Activities

Each CPT will have different objectives and needs, but most often focus on similar activities. Here we outline several milestones and activities that CPTs may engage in; you can modify or reorder them to fit your needs. **To develop your project timeline, see Exercise 2 in the appendix of this toolkit.**

TABLE 1

Sample Milestones and Activities

Project milestone	Example activities
Identify community data-sharing and analysis efforts	▪ Interview other public-sector entities in your domain of work to discover ongoing or previous projects involving data sharing or linking. Schedule one-on-one calls with those who have in-depth knowledge of previous projects to understand challenges and successes. ▪ Survey relevant stakeholders to understand what datasets exist in your community, who owns them, how they can be used, and whether data sharing is already under way.
Have each CPT member conduct a data landscape of their own datasets[a]	▪ Once the CPT has been created, ask CPT members to conduct a data landscape of the dataset they plan to share in the project. » Understand the sophistication and accuracy of CPT members' data systems. For example, are there unique identifiers, and how often are the data updated? » Learn which data systems have the capability to speak to one another and which might make a data transfer more challenging. » Have CPT members build or update their data dictionaries or code books. A good data dictionary will list each data element in the system, document the accuracy and completeness of the system, identify gaps in the data, and provide a foundation for data-linking plans. » Have CPT members identify gaps in their data related to the project. Think about what information isn't collected by current systems and may need to be addressed before sharing data.
Create research questions that CPT stakeholders want data sharing to help answer	▪ Work with key decisionmakers and service providers to clarify research questions about service usage or what they would hope to see from a new intervention. ▪ Consider engaging a research partner to help develop your research questions. ▪ Assess whether data-sharing agreements and the data that emerge from these agreements can answer the questions you're asking. This is especially important for teams looking to accurately measure impact.
Develop and sign data-sharing agreements[b]	▪ Develop a clear understanding of privacy laws and make sure all CPT members agree to adhere to these laws. ▪ Find examples of local data-sharing agreements or ones relevant to your subject area. Ask knowledgeable individuals to review them.

Project milestone	Example activities
Collect and link data	▪ Confirm data-sharing protocol with information technology staff to determine how to securely share data. ▪ Determine how linked data will be stored during the project and how it will be archived and deleted once the project is finished. ▪ Clean and organize the data. ▪ Create a protocol for linking data. Establish whether there are unique identifiers that can be used across data systems and whether personal information such as dates of birth, addresses, and Social Security numbers are accurate.
Analyze the data	▪ Work with data analysts and/or outside evaluators to conduct analyses designed to answer your key research questions. » Develop a basic descriptive analysis about the populations who use multiple service systems. » Measure output *and* outcomes to the extent that you are able with your shared dataset. » Compare changes in the sample population against a benchmark or comparison group. ▪ Build in time and capacity for multiple rounds of analyses to address emerging issues identified by the CPT.
Share findings with key decisionmakers	▪ Every CPT will have its own set of research questions or interests it strives to answer. Once the CPT gleans findings from the data, it is important to share that information with key decisionmakers in the community. Keep in mind that the findings may trigger a new set of questions and that this process should be iterative.
Ongoing: Communicate your work to the public[c]	▪ Work with key decisionmakers to develop a communications plan for the public. The purpose of this plan should not only be to inform but also to gather input from community members on the use of the data and the results from the data analysis. You might consider conducting a data walk to preview research results with community members. ▪ If feasible, collect qualitative data from program recipients to inform your administrative data. Ask questions such as, "do the data reflect your lived experience?" ▪ Consider building a public-facing data dashboard. ▪ Distinguish your work from other data-driven organizations. As a project-specific team, the public will be unfamiliar with your work and will need to understand clearly how your work is different from what is done by organizations individually.

Notes:

[a] For an additional resource, see Brian Bieretz and Madeline Brown, "Understanding Community Resources" (Washington, DC: Urban Institute, 2019).

[b] For additional resources, see Robert Doar and Linda Gibbs, *Unleashing the Power of Administrative Data: A Guide for Federal, State, and Local Policymakers* (Washington, DC: Results for America, 2017); and John Petrila, Barbara Cohn, Wendell Pritchett, Paul Stiles, Victoria Stodden, Jeffrey Vagle, Mark Humowiecki, and Natassia Rozario, *Legal Issues for IDS Use: Finding a Way Forward* (Philadelphia: Actionable Intelligence for Social Policy, 2017).

[c] For additional resources, see Kelsey Finch, *Nothing to Hide: Tools for Talking (and Listening) about Data Privacy for Integrated Data Systems* (Philadelphia: Actionable Intelligence for Social Policy, 2018); and Brittany Murray, Elsa Falkenburger, and Priya Saxena, *Data Walks: An Innovative Way to Share Data with Communities* (Washington, DC: Urban Institute, 2015).

Overcoming Roadblocks

Working horizontally across organizations can present many roadblocks. Carefully selecting the right CPT members is the best way to mitigate potential obstacles, but you may also consider bringing in an outside advisor who has the expertise to address specific challenges as they arise.

In general, the process of collecting, sharing and analyzing data should be iterative, and your CPT should be comfortable talking through any challenges that emerge to find a solution. Next, we highlight a few common roadblocks and offer strategies for navigating them.

Political Challenges

If key decisionmakers responsible for forming your CPT do not have a mandate from elected officials, your CPT may face political roadblocks. As mentioned, this can also happen during changes in political leadership or administrative turnover. To ensure your CPT's work advances, consider meeting with newly appointed department heads to discuss the initiative, their potential role in it, and the department's previous contributions to the project. If new team members need to be added to the CPT, be sure to onboard them outside of regular meeting times so as not to negatively affect momentum.

Logistical Challenges

Accessing and standardizing data can also prove challenging. Your CPT may be required to go through the Institutional Review Board process with one or more of the data-sharing entities if you are using protected data. If new datasets are added later, you may need to amend data-sharing agreements and memoranda of understanding or resubmit your project to the Institutional Review Board. Having people on the CPT who are familiar with best practices for research, statistics, methods, and the law around sharing and using data can be integral to navigating this process. In many cases, it may be beneficial to partner with a local university or research organization to ensure you are following appropriate protocols.

Legal Challenges

If your CPT is using data covered by privacy laws and regulations, your data governance procedures must comply with them. These laws don't forbid sharing data with external organizations; rather, they define how to do so while protecting people's privacy and confidentiality. They define what data are protected, who can access them, how people consent to release data, what data can be shared, and how they must be safeguarded during use. Keep in mind that some data could be confidential or sensitive but not legally protected (as is sometimes the case with financial data).

There are many examples of responsible data sharing that comply with the terms and conditions in common privacy regulations, such as the Health Insurance Portability and Accountability Act, the Family Educational Rights and Privacy Act, and 42 CFR Part II.[3] Your CPT will benefit from bringing in members who have experience working with these privacy regulations, such as a lawyer or someone with a legal background or a data provider or administrator who works regularly with protected information. For more information on data privacy laws, see Hendey, Gold, and Pettit (2018).

Sustainability and Other Considerations

In most cases, CPTs will only exist around a specific project with a defined start and end date. In some instances, you may want to turn your CPT into a permanent data governance team that encourages ongoing sharing or ultimately creates an integrated data system. If you don't become a permanent team, you will need to carefully consider how to wrap up your project to protect shared data.

Even if the CPT's early work does not lead to a fully funded PFS project, the processes of forming the team and developing a data-sharing agreement have practical implications that live beyond the work of the team. CPT members should build in time throughout the project cycle to discuss lessons learned from their work and identify actions and process improvements they can undertake to strengthen collaboration among their organizations in the future. Being able to discuss challenges as well as successes is key to eliminating barriers to data access and sharing and may even lead to improvements in internal work flows or data quality within each participating entity.

Depending on the data sources you're working with, it may be beneficial to develop an open data portal to share data publicly. Many states and municipalities, including Massachusetts; Detroit, Michigan; the District of Columbia; and Tulsa, Oklahoma, already operate one.[4] Before taking such a step, be sure to first understand data privacy laws and consider how the public might consume your data.

Finally, you should archive your data-sharing agreements in an accessible way. If a new CPT forms in the future for a different project, having these agreements accessible to share will let the new project benefit from your time and efforts.

Conclusion

Given the complex nature of today's social challenges, collaborative planning teams for data sharing can help break down the silos between organizations, which often prevent innovative and comprehensive solutions from being explored. If done right, CPTs can bring new voices to solving problems, connect datasets to illuminate the populations you want to help, open lines of communication between organizations that work in the same field but rarely collaborate, and promote more data-driven policy. In doing this work, a successful CPT can better serve disadvantaged populations, identify cost savings, eliminate inefficient practices and overlapping work streams, and scale interventions with proven success.

Appendix: CPT Exercises

Exercise 1: Selecting Collaborative Planning Team Members

If you are interested in organizing a CPT, you will want to answer these key questions and identify potential roles and members for the CPT before scheduling your first meeting.

1. **Who or what inspired the creation of the CPT, and to what organizations/initiatives do they belong?**

2. **Who is the target population, and what service systems do they interact with?**

3. **What organizations and entities working within these domains in your community should be invited to join the CPT? Consider local government bodies including city, county, and state governments as well as local planning commissions, nonprofits and community development corporations, universities, hospitals and health systems, and philanthropic organizations.**

Organization name	Organization type (e.g., nonprofit, philanthropic, county)	Organization domain (e.g., criminal justice, health, homelessness)	What data does this organization have?	Organization lead

4. **Do you plan to engage a member of the general public, person represented in the data, or vulnerable population advocate to sit on the CPT? If yes, who and how will you responsibly engage them?**

5. **List the proposed members of your CPT, their expertise, and their possible role on the team. Consider members from local government bodies including city, county, and state governments as well as local planning commissions, nonprofits and community development corporations, universities, hospitals and health systems, and philanthropic organizations.**

Name	Title	Organization	What expertise do they bring to the CPT? (content, technical, methodological, legal, etc.)	Possible role on the planning team

6. **Do you plan to have subcommittees? If yes, what might they focus on?**

Exercise 2: Developing Your Timeline

Once you create your CPT, your first step is to define expectations of the collaboration. This includes developing your mission statement and vision and agreeing on roles within the CPT and on possible subcommittees. Your next step will be to develop a timeline for the engagement. To account for possible delays in accessing data, your team should remain flexible, while also working to address any roadblocks that may arise.

Time frame ***(e.g., March 2020 or by end of Q3 2019)***	**Project milestone**	**Proposed activities (select options from Step 4 above or write your own)**	**Person or subcommittee responsible**	**Will this activity require external approval? If so, from who?**
	Communicate your work to the public			
	Identify community data-sharing and analysis efforts			
	Have each CPT member conduct a data landscape of their own datasets			
	Create research questions that CPT stakeholders want data sharing to help answer			
	Develop and sign data-sharing agreements			

	Collect and link data			
	Analyze the data			
	Share findings with key decisionmakers			
	Communicate your work to the public			

Notes

[1] "Integrated Data Systems," Actionable Intelligence for Social Policy, accessed September 19, 2019, https://www.aisp.upenn.edu/integrated-data-systems/.

[2] For more information about joint theories of change, see Gallagher (2015).

[3] See "HIPAA: Business Associate Contracts," US Department of Health and Human Services, January 25, 2013, https://www.hhs.gov/hipaa/for-professionals/covered-entities/sample-business-associate-agreement-provisions/index.html; "Written Agreement Checklist," Privacy Technical Assistance Center," last revised July 2015, https://studentprivacy.ed.gov/sites/default/files/resource_document/file/Written_Agreement_Checklist_0.pdf; and "Disclosure of Substance Use Disorder Patient Records: How Do I Exchange Part 2 Data?" accessed September 23, 2019, https://www.samhsa.gov/sites/default/files/how-do-i-exchange-part2.pdf.

[4] See "Open Tulsa," City of Tulsa, accessed September 23, 2019, https://www.cityoftulsa.org/government/departments/information-technology/open-tulsa/.

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The Pay for Success Administrative Data Pilot is a direct technical assistance effort aimed at addressing the administrative data challenges commonly faced by communities pursuing pay for success projects. the goal of this effort is to support project stakeholders' access to and use of high-quality data for planning, implementation, and evaluation purposes. The pilot sites were Clinica Esperanza in Providence, Rhode Island; the City of Durham in North Carolina; the Connecticut Health and Educational Facilities Authority; the Thomas Jefferson Area Coalition for the Homeless in Charlottesville, Virginia; the Corporation for Supportive Housing in Oklahoma, Mary's Center in Washington, DC; and the Yakima Valley Conference of Governments in Washington state.

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