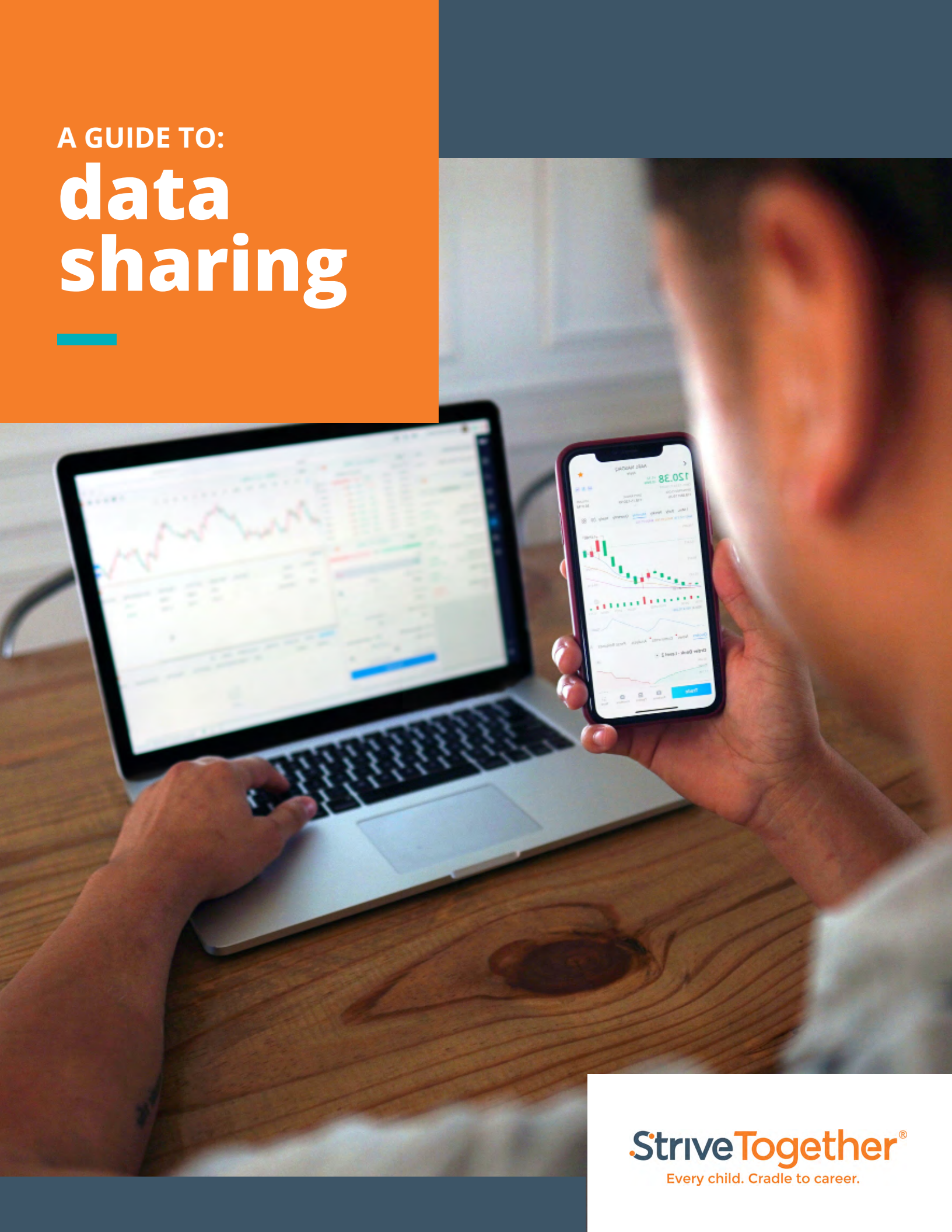


A GUIDE TO:

# data sharing

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# about this guide

Data sharing is key to the success of cradle-to-career partnerships that have many diverse partners across multiple sectors. In this guide, we explore: why data sharing is important; how and where to access local and national data; principles around building trust and relationships; navigating privacy laws and data-sharing agreements; various software and tools available; and ways to build capacity to do the work. This guide builds on a [previous resource](#) developed by StriveTogether on the key principles of data sharing.

Data sharing can happen across all types of partnerships — from those just starting out to those that are more advanced and have a robust data infrastructure, including people, processes and technology. In the earlier Exploring and Emerging gateways of the [StriveTogether Theory of Action™](#), network members are getting started on their data work by looking at local census data and bringing together publicly available education data to track progress on equitable outcomes. This is an immensely valuable starting point for building your data practices and strategy. Partnerships that are further along the Theory of Action are working on sharing data across sectors and building the capacity and systems that help to address the technical and adaptive challenges associated with sharing data across multiple partners.

It's important to note that this guide is NOT intended to serve as a comprehensive data strategy resource for cradle-to-career partnerships or place-based strategies. Although the content in here is broad, it does not cover the process to select outcome and indicators, identifying systems indicators or the development of a comprehensive data strategic plan for partnerships. Here are a few resources that focus on some of these aspects of a partnership's data strategy:

- [Cradle-to-career core outcome areas research](#)
- [A guide to accessing data on the digital divide](#)
- [A guide to centering racial and ethnic equity in data work](#)
- [A guide to racial and ethnic equity systems indicators](#)

In addition to the resources above, the Urban Institute has developed a number of resources related to their role as technical assistance provider to the [Promise Neighborhoods initiative](#) as well as a number of data-focused reports and briefs related to [local place-based strategies](#).

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# introduction



- 1. What is the need for data sharing?
- 2. How do different stakeholders benefit from data sharing?
- 3. What are the types of data that can be used for data sharing?
- 4. How do partnerships use shared data?



*Click the "■" to  
jump to that section.*

# introduction

Data sharing is key to the success of cradle-to-career partnerships that have many diverse partners across multiple sectors. In the introduction, we explore the need for data sharing, how different stakeholders benefit from data sharing, the types of data needed for data sharing and how cradle-to-career partnerships use shared data in their work.

## 1. What is the need for data sharing?

A shared vision for what's possible for every child, cradle to career, is at the heart of the work of all collective impact partnerships. The challenges are too large for any one entity to tackle on its own — it takes a collective approach to address the underlying challenges facing youth and families. Evidence-based decision making — the process of rigorously collecting, analyzing and sharing data (both quantitative and qualitative, as well as individual- and systems-level data) to make shifts in policies, practices, resources and power structures that produce equitable cradle-to-career outcomes — is a core pillar of the StriveTogether Theory of Action™.

Data sharing in particular allows for multiple sources of data to be pulled together to develop a more comprehensive understanding of the barriers to equitable outcomes. It helps partnerships prioritize strategies, evaluate policies and programs and better understand the factors contributing to their challenges and successes. Data sharing is crucial for:

- locally validating key drivers in order to co-design better solutions with partners;
- closing equity gaps at the intersection of race and gender — public data often does not disaggregate to this level;
- frequently adjusting strategies based on real time data for targeted populations, accelerating progress toward closing equity gaps; and
- holding partners accountable to shared goals.

In this guide, we explore key questions about data sharing across cradle-to-career partnerships.

### ■ Why do we need shared data?

What are the questions being asked that data can answer? What results do we hope to achieve?

### ■ What data is important and needed?

What data is needed and where is it available?

### ■ Who is involved in sharing data?

Who are the champions, who is leading the charge and carving the path? Who are the implementers waking up and thinking about this work each day?

### ■ How are we going to share data?

Who owns the data and where does it live? How will we build trust and navigate the legal aspects, and what data systems will we use? How is the data being used?

## 2. How do different stakeholders benefit from data sharing?

From students, families and community partners to funders and policymakers, every stakeholder has questions that partnerships can help answer through data sharing. Below we examine some of the primary stakeholders and examples of the types of questions that data sharing can answer.



### 3. What are the types of data that can be used for data sharing?

Different types of data are used in partnerships' work. The right data can tell us how students are doing and how systems, institutions and community organizations are supporting them from cradle to career.

#### DATA INSIGHTS

## Types of data used for data sharing

### How are youth doing from cradle to career?

Answered with data about youth and families: data (both qualitative and quantitative) that describes characteristics or outcomes for populations or subgroups of individuals — including youth and families.

#### Examples:

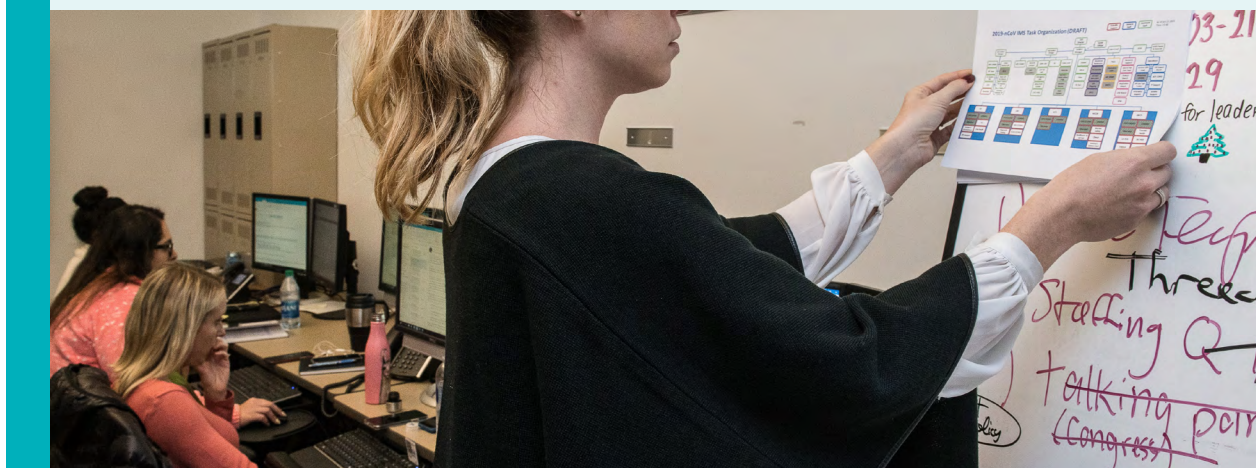
- Kindergarten readiness, early grade reading, middle grade math, high school graduation, postsecondary enrollment, postsecondary success and workforce success.

### How are systems, institutions, and community organizations supporting students from cradle to career?

Answered with data about systems: data (both qualitative and quantitative) that reveals how resources, decision-making power and opportunities are distributed to inform policies and practices within institutions, organizations and programs that are interdependent and/or related.

#### Examples:

- Systems – health care, education, public policy, housing, economic, social services, criminal justice
- Institutions – school districts, universities/colleges, foundations, regional nonprofits, hospitals, local government





Data about both youth and how systems support youth can be summarized at the population level, program level, and individual level. Below we look at each of these different levels of data and describe examples of each in how they relate to the core cradle-to-career outcome Kindergarten Readiness.

- **Whole population level** – data that summarizes characteristics or results for a specific geographic area (state, metro area, county, city, zip codes and neighborhoods — also tracts, block groups and blocks)

E.g., percent of students ready for kindergarten in Pierce County

- **Program level** – data that summarizes characteristics or results for a specific program or service (home-visiting, Head Start, preschool, Home Instruction for Parents of Preschool Youngsters, children on Medicaid health coverage)

E.g., percent of students participating in Head Start that are ready for kindergarten in Pierce County

- **Individual/student level** – data that describes an individual (child, adult)

E.g., an individual student's name, grade, school name and kindergarten readiness score

- **Personally Identifiable Information (PII):** includes information that can be used to distinguish or trace an individual's identity, either alone or when combined with other personal or identifying information that is linked or linkable to a specific individual.

- **De-identified (or anonymized) data:** de-identification is the process used to prevent someone's personal identity from being revealed. This kind of data is often used in research and evaluation efforts where knowing an individual's name isn't necessary. This differs from case management and service coordination where it is important to have personally identifiable information. More information on data de-identification can be found via the [U.S. Department of Education](#) and the [Future of Privacy Forum](#).

- **Systems level** – data that reveals how resources, decision-making power and opportunities are distributed to inform policies and practices within institutions, organizations and programs that are interdependent and/or related.

E.g., availability of quality preschools by neighborhood

## RESOURCE HIGHLIGHT

### Guide to racial and ethnic equity systems indicators



Interested in learning more about systems indicators? The Racial and Ethnic Equity Action Team developed a comprehensive resource that supports communities in identifying, collecting and taking action on racial and ethnic equity systems indicators.

**Explore this resource here**



## 4. How do partnerships use shared data?

We talked to a number of data managers and surveyed many more. Here are seven ways partnerships are using shared data in their work. [This resource](#) details how these ways show up across different partnerships.

Ways data is used	Questions and examples	Data types
<b>Public reporting</b> Publishing reports and dashboards on local outcomes and priorities for the partnership	How is our community doing as a whole related to kindergarten readiness, third grade reading and the rest of our core outcome areas? To what extent do racial disparities exist?	Population and systems level
<b>Prioritization of strategies</b> Helping to inform what outcomes the partnership should focus on and what strategies contribute to those outcomes	How can our data inform the priority outcomes we should focus on as a partnership or through our collaborative action network strategies? What target strategies should we focus on to advance racial equity?	Population, program and systems level
<b>Research and policy analysis</b> Performing research and helping to inform policy questions	Do health issues contribute to school attendance? To what extent does the number of years of preschool contribute to kindergarten readiness?	Individual and systems level
<b>Program evaluation</b> Analyzing what programs are effective	What local programs or practices help increase student well-being or achievement?	Individual and program level
<b>Community resource directories</b> Providing a directory of resources	What types of programs, services or activities are available across my community? How do we ensure the right mix of programs are in the right places?	Program level
<b>Service coordination and delivery/case management</b> Help ensure students get the services they need and help organizations access the data they need to support students	How do we help coordinate the right programs and services to the right children or students at the right time? How can community-based organizations access student data to better serve students?	Individual and systems level
<b>Continuous improvement</b> Helping ensure frequently reported data is available for continuous improvement projects	Are my rapid-cycle improvement interventions having the desired impact?	Individual and program level
<b>Providing data to partners</b> Providing data, analysis and/or reports and dashboards to local partners	What are the enrollment characteristics of my program? What are the needs of my target population? How are we making progress on our shared goals?	Population, program, individual, and systems level

## PARTNERSHIP HIGHLIGHT

## Thrive Chicago (Chicago, Ill.)



### **Thrive Chicago is leveraging data and data sharing in multiple ways to advance equitable outcomes.**

At Thrive Chicago, there is a strong belief that fully supporting Chicago's youth requires collaboration across organizations, systems and sectors. Data sharing is a key tool for coordinating and improving cradle-to-career supports. Their partnership relies on data to create a common understanding of the experiences, challenges and opportunities that young people encounter. It's also a means for them to identify and share practice-based insights and create high-quality partnerships across organizations and sectors that center the needs and interests of youth.

Data is also central to creating more equitable systems by increasing enrichment and learning opportunities for young people and helping close academic and attendance gaps. Socioeconomic and environmental factors that differentiate youth and impact a student's overall well-being are the underlying causes of many of the persistent academic outcome gaps we see. Community-based organizations (CBOs) play a critical role in addressing these disparities and share responsibility for helping young people to develop socially, emotionally and physically, become motivated and engaged in learning and prepare for key developmental transitions.

#### **Infrastructure for data sharing**

Investing in new ways for people to share data broadens their perspectives and helps them align outcomes and practice. Together with partners at Chicago Public Schools (CPS), Thrive created the Thrive Data Partnership to develop a citywide data infrastructure for greater transparency in in- and out-of-school involvements for CPS students. The goal of this endeavor was to build a shared data system allowing both CPS and Chicago's youth-serving community-based organizations insight into students' programmatic involvement and academic outcomes. This endeavor also gives children and families access to programming that is responsive to their needs and interests. Through the shared network, CBOs can provide information about student enrollment, attendance and programming and receive aggregate student data about academic engagement and performance. District and school personnel can identify gaps in programming at the student and school level. The partnership is equipped with the data and information needed to set equity targets and partner across settings to create population-level improvements for CPS students.

#### **Quality partnerships and warm handoffs**

While complex challenges require complex solutions, interventions also have to be engaging and feasible for youth participants. This requires coordination among groups of professionals and data sharing helps make that possible. At Thrive's Reconnection Hubs, navigators assess youth and work with them to create a service plan. Navigators work in a data system called NowPow that creates a client record and helps them document and prioritize needs, track services, coordinate referrals and securely share client information within a closed network.

## continued...



Additionally, Thrive's data team built a secure, web-based data app that allows navigators to generate custom client lists by youth need and characteristics to amplify opportunities within the referral network. Aggregate data views and monthly coaching help the hubs identify service gaps and build organization-to-organization partnerships for referrals and case coordination. Data sharing makes it possible for youth to see an organized service pathway and navigators to communicate and coordinate within and across programs and organizations.

### Common measurement for collective impact

Data sharing is only as good as the data being shared. Within its programs and portfolios, Thrive Chicago identifies key metrics and indicators to help measure and track program reach and impact across organizations. The partnership's employment portfolio coordinates a network of employers, postsecondary partners and workforce development organizations to create pathways to sustainable employment for Chicago's youth and to reduce the city's disconnection rate. To scale this work, partners are encouraged to collect information about youth employment and education status so they can support collaboration, warm handoffs and the right mix of employment, education and support services for different key sub-populations.

### Always learning

There's a reason Thrive calls its data operations the Data & Learning team. Their team integrates data from administrative and programmatic sources to provide a shared understanding of youth experiences and programmatic opportunities for improvement. The team provides coaching to organizations within the StriveTogether network, develops training on data interpretation and analysis, and builds interactive data tools to help programs and partnerships ground their work in data and shared understanding.

In 2020, Thrive provided continuous quality improvement professional development and innovation funding to neighborhood-level backbone organizations coordinating collective impact projects during the COVID-19 pandemic. Together with its partners at UpMetrics, Thrive built data collection and tracking dashboards for the organizations so that they could securely share data within their project networks for the purposes of evaluation, learning and improvement.





# resources

## **Data Can Help Every Student Excel, Data Quality Campaign**

Infographic on how data helps student excel.

[Click here to access](#)



## **Four Principles to Make Advanced Data Analytics Work Better for Kids and Families, Annie E. Casey Foundation**

Offers guidance to steer the use of big data in social programs and policy.

[Click here to access](#)



## **StriveTogether Theory of Action™**

Helps communities build and sustain cradle-to-career infrastructure.

[Click here to access](#)



# one good question is worth a dozen data points

- 1. What questions are you trying to answer?
- 2. What data is important?
- 3. What are key sources of that data?
- 4. Where are there local data hubs in your community?
- 5. Integrated data systems



Click the "■" to  
jump to that section.

# one good question is worth a dozen data points

The first step as you begin to explore the potential for data sharing is to understand the data landscape in your community. In this section, we go over the importance of establishing the questions you are trying to answer, identifying what data will help you answer those questions and what data sources already exist in your community.

## 1. What questions are you trying to answer?

The first step to sharing data is identifying what data is necessary to move your partnership to action. To do so, it's important to start with your results in mind — what do you want to accomplish as a partnership, and what data would you need to access and analyze in order to move on a strategy? Start by understanding your goals and asking the right questions. Then the process of getting to the right data will have a clearer focus for all partners

### PARTNERSHIP HIGHLIGHT

#### Achieve Brown County (Green Bay, Wis.)



#### Achieve Brown County prioritized identifying the right research questions to ask.

Constructing a set of research questions requires a clear objective and focus. Mary Klos, senior analyst at Achieve Brown County, conducted an iterative process with community partner input and feedback from the school districts when working on a local data-sharing agreement. “Of course, the school districts wanted to know what we were asking for before they would approve. We took our ideas to all eight superintendents, got their feedback and got to work on drafting our research questions,” said Klos. “We started with a long list of questions, but it got too overwhelming. Instead of shooting for the stars, we tightened our focus.” Now that a process is in place, Klos is confident it will be easier to gain approval on a next set of research questions so they can continue their work. As Achieve Brown County Executive Director Spencer Bonnie explained, “Our research may start with a set of questions, but part of the value is the other questions they lead to. Once you get the data and make sense of it, the process continues — but we never know where it’s going to lead us. What we’re going to find is a Pandora’s box of things that we didn’t expect to uncover, and our questions will vary accordingly.”

[View their final data request and research questions here](#)



## 2. What data is important?

Once your results or research questions are established, it is important to be thoughtful about what data is actually required to answer your questions or get to your results. The principle of data minimization involves limiting data collection to only what is required to fulfill a specific purpose. Often, there is a tendency of gathering a large amount of data to later determine what is useful. This approach can lead to uncertainty from data partners on how the data will be used and people may become overwhelmed. For instance, when going to the Department of Public Instruction hoping to access their data, Achieve Brown County learned that asking for everything available was not the best approach. “We were almost immediately shot down. First, we asked for way too much data. We didn’t know what to ask for, so we asked for everything,” said Executive Director Spencer Bonnie. Instead, it is best to narrow your focus and be clear about the intent of the request. “My advice is to ask for fewer data — bound to a specific research question or short set of questions — over a certain period of time,” said Bonnie. “We learned that less is more, and it helped to narrow our focus.”

Another key lesson is to start with data that is already available, rather than asking partners to collect additional data. In trying to negotiate a data sharing agreement with the school district, Summit Education Initiative Executive Director Matthew Deevers prioritized asking for data points that he knew districts already had in hand. “We had a rule that what we wanted was data that was commonly collected, easily understood and actionable,” said Deevers. “The last thing a school partner needs to hear is you’ve come up with this really cool idea where they need to collect more data, because they already have so much data and often they don’t have the capacity to do anything with it.” It’s good practice to start by asking for the metadata — a list of the existing fields available — to help craft the data request.

### RESOURCES HIGHLIGHT

## Results at the Center



To help you determine what data is important, keep your key result or research question at the center of the process. Think through what is the type of data that will help you answer your question or get to your result. The Results at the Center tool can be a great tool in supporting that process because it identifies the sectors with data that matters most to the result.

***Explore this tool here***



## 3. What are the key sources of data?

There are a number of sources of data that partnerships are using to access the data needed to answer the types of questions outlined in section one. A partnership might start by using publicly available and organization-reported program level data if it is available, but move to more efficient and consistent methods of data sharing over time. Below, we break down various national, state and local data sources that partnerships are accessing to do their work.



## National sources

There are a number of national sources for local population-level data. The Urban Institute also maintains a [\*listing of specific national small-area data files\*](#) with descriptions of each set that can give you head start in your search.

Source	Description
<b><u>U.S. Census Bureau</u></b>	The United States Census Bureau is a principal agency of the U.S. Federal Statistical System, responsible for producing data about the people and economy of the United States. It contains a wide variety of data on people and population, race and ethnicity, families and living arrangements, health, education, business and economy, employment, housing, income and poverty.
<b><u>Bureau of Labor Statistics</u></b>	The Bureau of Labor Statistics is a unit of the United States Department of Labor. It is the principal fact-finding agency for the U.S. government in the broad field of labor economics and statistics and serves as a principal agency of the U.S. Federal Statistical System.
<b><u>National Center for Education Statistics</u></b>	The National Center for Education Statistics (NCES) is the primary federal entity for collecting and analyzing data related to education in the U.S. and other nations. NCES is located within the U.S. Department of Education and the Institute of Education Sciences. NCES fulfills a Congressional mandate to collect, collate, analyze and report complete statistics on the condition of education nationwide; conduct and publish reports; and review and report on education activities internationally.
<b><u>National Student Clearinghouse® Research Center™</u></b>	The National Student Clearinghouse® Research Center™ is the research arm of the National Student Clearinghouse. The Research Center works with higher education institutions, states, districts, high schools and educational organizations to better inform practitioners and policymakers about student educational pathways. Through accurate longitudinal data outcomes reporting, the Research Center enables better educational policy decisions, leading to improved student outcomes. This data is typically available to school districts but also to non-district organizations working in this space for an affordable fee.
<b><u>USAFacts</u></b>	USAFacts provides a data-driven portrait of the U.S. population, U.S. government's finances, and government's impact on society. USAFacts is a nonpartisan, not-for-profit civic initiative without a political agenda. They provide vital spending, revenue, demographic and performance information as a free public service and are committed to maintaining and expanding their available data in the future.
<b><u>Urban Institute's Education Data Portal</u></b>	The Urban Institute organizes many of the federal government's education data sources, searchable by school, school district and college.

Source	Description
<b><u>Civil Rights Data Collection</u></b>	The Civil Rights Data Collection (CRDC) is a biennial survey required by the U.S. Department of Education's Office for Civil Rights since 1968. The CRDC collects data on leading civil rights indicators related to access and barriers to educational opportunity at the early childhood through grade 12 levels.
<b><u>Opportunity Insights</u></b>	Opportunity Insights is a non-partisan, not-for-profit organization based at Harvard University and directed by Raj Chetty, John Friedman and Nathaniel Hendren. They conduct scientific research using "big data" on how to improve upward mobility and work collaboratively with local stakeholders to translate these research findings into policy change.
<b><u>Prosperity Now Scorecard</u></b>	The Prosperity Now Scorecard is a comprehensive resource featuring data on family financial health and policy recommendations to help put all U.S. households on a path to prosperity. The Scorecard equips advocates, policymakers and practitioners with national, state and local data to jump-start a conversation about solutions and policies that put households on stronger financial footing across five issue areas: financial assets and income; businesses and jobs; homeownership and housing; health care and education.
<b><u>Racial Equity Data Hub</u></b>	Tableau Foundation is hosting the Racial Equity Data Hub to share insights from leading experts at the intersection of data and equity issues, and to inspire anyone to effectively and ethically use data to advocate for change
<b><u>National Equity Atlas</u></b>	The National Equity Atlas is America's most detailed report card on racial and economic equity. They equip movement leaders and policymakers with actionable data and strategies to advance racial equity and shared prosperity. The Atlas is produced by PolicyLink and the University of Southern California Equity Research Institute.



## State sources

There are also a number of state sources where data at the population level is made available via public websites. The type and amount of data varies by state. De-identified individual level data can also be available with data-sharing agreements in place. Some of the common sources are below. The Urban Institute also has a great resource that [catalogs state-level administrative data](#).

Source	Description
<b>State census data centers</b>	State-based agencies and organizations that provide expert analysis, training and extension of census products
<b>State departments of K-12 education</b>	School district, school, student and teacher enrollment, demographics, behavior and performance data
<b>State department of postsecondary education</b>	Postsecondary institution enrollment, demographics, behavior and performance data
<b>State departments of early childhood education</b>	Early childhood education, child care and public preschool data
<b>State departments of jobs and family services / children and families / workforce</b>	Family assistance programs, jobs services, foster care, adoption and child protective services data
<b>State departments of health</b>	Births, mortality, infectious diseases, health care facilities and other related health data
<b>State departments of law enforcement / corrections</b>	Uniform crime reporting data
<b>State longitudinal data systems and other state-level integrated data systems</b>	State-level data combined at the individual level and across sectors

## Local sources

There is a rich variety of local sources where partnerships are accessing population-level, program-level and individual-level data — both de-identified and personally identifiable information (PII).

Source	Description	Type of Data
<b>Local school districts and postsecondary institutions</b>	Sources for population-level outcome indicators for publication in reports and dashboards. Also sources for individual-level data, and for program-level data where students are participating in specific programs, services and interventions.	Enrollment, demographics, behavior and performance data
<b>Community-Based Organizations</b>	<p>Data on programs and services for students inside and outside of school buildings. They also have rich data on students' enrollment and attendance in these programs, and therefore sources of both individual-level and program-level data.</p> <ul style="list-style-type: none"> <li>■ Early childhood: these include home visitation and community support programs for parents of young children, as well as a variety of early childhood education and preschool programs for infants, toddlers and preschoolers</li> <li>■ K-12: these include tutoring, mentoring, afterschool, college prep and access and health/wellness supports and programs — and take place inside and outside of schools</li> <li>■ Postsecondary: these include college support, retention and success programs, usually within the college or university</li> </ul>	Program registration, attendance and other program-specific data
<b>Local government at the city and county levels</b>	A rich source of both individual-level and program-level data. These include: health and human services, juvenile welfare, head start, housing, public health, criminal justice, emergency medical services and municipal services	Program registration, attendance and program-specific data
<b>Hospitals / health systems</b>	Sources for individual-level and program-level data — and an important part of the ecosystem for the coordination of referrals for health and wellness services across health providers, including health systems, community health centers and schools.	Variety of program- and individual-level data
<b>Local open data portals</b>	Available in many communities, and great source for a wide variety of local data	Variety of population-level data



## 4. Where are the local data hubs in your community?

Most communities already have established sources of local data — organizations that collect, analyze and report on local data, as well as formal or informal networks of professionals who work with local data across multiple sectors. These data “hubs” often have some level of data governance and make data available via local web sites, dashboards and community reports.

Some, but not all, of these hubs are part of the Urban Institute’s National Neighborhood Indicators Partnership (NNIP). NNIP is a learning network, coordinated by the Urban Institute, that connects independent partner organizations in more than 30 cities that share a mission to ensure all communities have access to data and the skills to use information to advance equity and well-being across neighborhoods. [A list of NNIP partner sites can be found here.](#)

### DATA INSIGHTS

#### Examples of local data hubs within StriveTogether network sites



##### OnTrack Washington County

The Community Solutions Hub is a central source of information for OnTrack Washington County in Maryland. The mission of the hub is to centralize fragmented Washington County data from diverse social institutions in a convenient location to measure quality of life for residents, monitor progress in their strengths and needs and ultimately catalyze precise action to achieve community well-being. The overall goal is to become more data informed and have the state-of-the-art tools to work together across the region to address shared challenges.

[Click here to access](#)


##### Cradle to Career Cincinnati

Cradle to Career Cincinnati leverages the expertise of the Community Research Collaborative (CRC), based in the University of Cincinnati. The CRC produces Facts Matter, which houses a wealth of local data, dashboards and reports.

[Click here to access](#)


##### Impact East Idaho

In the Eastern Idaho region, United Way of Southeastern Idaho maintains a community indicators dashboard that collects data across the areas of education, housing, food security and access to health care.

[Click here to access](#)


Once you identify the potential data sources for the work, it is also important to identify who the key players and individuals are in each of those spaces and begin the relationship building (see next section for more information on building relationships and trust). This process can be formal or informal. Although not written for collective impact coalitions, the [Guide to Civic Tech and Data Ecosystem Mapping](#) has some tips and tools that can be

useful. At the end of the day, you will be negotiating data-sharing agreements with individuals on behalf of institutions, so it is important to identify the key players that need to be involved and contacts to reach out to. For each institution, take a moment to identify key individuals that will help you advocate for data sharing.

Many communities also have research committees or research councils made up of local experts that represent these sectors. They inform efforts to produce local data on a variety of topics. Although not a network site, the [Hartford Data Collaborative](#) is a robust example of how a community organizes and governs a strategy to democratize access to data. It might make sense to establish a new data advisory committee if none exists or if you need to focus on more specific data sharing efforts — committee members can lend expertise and help broaden support for your effort. A committee can also be part of the partnership's governance structure where it helps inform and supply data to the leadership table and collaborative action networks. Or it could be an ad hoc group to advance a particular project.

#### PARTNERSHIP HIGHLIGHT

## Generation Next (Minneapolis, Minn.)



### Interested in forming a data committee?

Network member Generation Next was founded nearly eight years ago with a data committee to support evidence-based decision making and continuous improvement. The committee provides guidance on data use and interpretation to its own members and the broader coalition, whose mission is to increase achievement and close gaps among students experiencing poverty and students of color in the Twin Cities. Members of the committee represent many organizations and perspectives — such as the school district, state education departments, local postsecondary institutions, research centers and community-based organizations.

In 2012, the committee took the lead in designing goals and measures for the new Generation Next partnership. It led a process to examine the work of StriveTogether organizations throughout the U.S. and to receive input from the Twin Cities community on appropriate goals and measures. After securing consensus on goals and establishing reliable measures, the committee's role evolved to enhance the way Generation Next could use data to strengthen its activities. Generation Next staff consulted with the committee when developing plans and monitoring progress. The committee offered its voice in advocating for valid, reliable measurement of student progress by school districts and the state.

Though there is no data sharing commitment required to serve on the data committee, many of the initial members were representatives of agencies that provided aggregate data for the partnership's data dashboards, analyses and evaluations. More recently, the relationships formed in the committee led to additional access to individual-level student data from the state's longitudinal education data system to support a postsecondary transitions project by the partnership. In sum, data committees can serve many important functions for the partnership, including the building of relationships that can open the door to numerous data sharing opportunities.

You can learn more about the committee by reading its mission statement and viewing its membership.

[Click here to access](#)



You can also learn more about Generation Next's data by visiting the Data Center.

[Click here to access](#)



## 5. Integrated data systems

Integrated data systems (IDS) link administrative and program data from multiple data sources, and may include records on child care, education, juvenile justice, vital statistics, workforce development, employment and earnings, child welfare and other social programs. They integrate data across agencies and institutions down to the individual level, and can aggregate data up to the level of the family, household, school, neighborhood and larger geographies. IDS may be hosted at city or county offices, state agencies, university centers or independent nonprofit organizations.

IDS require the linking of individual data across multiple independent data systems. This requires access to technology to store and link the data, and the technical expertise to clean, conform, link and analyze data. It also requires the capacity to manage the effort — to bring a wide variety of partners to the table, negotiate data-sharing agreements and implement basic data governance structures. However, there are a few defining characteristics that separate IDS from other data-sharing efforts:

- IDS are more sustainable. An IDS is a long-term proposition with a clear organizational home, defined governance structure, financial backing and charter. They permit data on individuals to be linked over time, and can retain historical data at the individual level.
- They are flexible, in that they are designed to answer a variety of questions based on local institutional, political and community interests. Rather than being associated with a single project or study, IDS serve as a kind of “public utility” for their stakeholders in this civic infrastructure.
- They have a robust governance structure. IDS must have a program governance team whose primary role is keeping confidential data secure and ensuring that data are used responsibly. The governance team, often comprised of representatives from key agencies and stakeholders who have contributed data to the IDS, typically oversees decisions and issues related to the design and implementation of the IDS. It also develops protocols for how research projects get chosen and to ensure that sensitive, personally identifiable information about program recipients would be used in a secure and responsible manner. The team’s role includes managing policies related to data use, compliance risk, data quality, technology architecture, data exchange standards and service levels.<sup>1</sup>

Actionable Intelligence for Social Policy (AISP), based at the University of Pennsylvania, leads a [network of sites](#) that are implementing integrated data systems at the state and local levels. They also provide a number of resources and supports to communities, from the [basics of IDS infrastructure](#) to the ins and outs of [IDS governance](#).



<sup>1</sup>The information on IDS is informed by interviews with Amy Hawn Nelson with AISP and Chris Kingsley with Annie E. Casey Foundation.

## PARTNERSHIP HIGHLIGHT

## Baltimore's Promise (Baltimore, Md.)



### **Baltimore's Promise is building an integrated data system for youth data through a racial equity lens.**

Prior to launching the development process of the Baltimore Youth Data Hub — a citywide integrated data system of individual-level data — the data infrastructure in Baltimore was fragmented. Bilateral memorandums of understanding (MOUs) were common, and little coordination existed across multiple entities and systems seeking to better understand the complex issues facing children and families in Baltimore. There were early demonstrations of multi-system integration, but these efforts still operated through bilateral MOUs and duplicated efforts. Importantly, data was not analyzed, visualized or presented through a racial equity and inclusion lens. More often than not, trend data was presented without context or “the story behind the curve” in public or private settings.

The Baltimore Youth Data Hub is an integrated data system in development that will enable public agencies and nonprofit service providers to share individual-level data with the goal of improving programs and policies designed to ensure Baltimore's young people have the resources they need to thrive. Baltimore's Promise, in partnership with Baltimore City Public Schools, the Baltimore City Health Department, the Mayor's Office for Children and Family Success, the Mayor's Office of Employment Development and the Family League of Baltimore work closely together as a leadership team to develop this secure, protected, individual-level information-sharing system that would allow Baltimore to strategically, effectively and equitably meeting the needs of the city's children, youth and families. The hub will provide a permanent and secure system of inquiry enabling agencies and policymakers to make decisions on the complex needs facing youth and families as they interact with multiple systems.

While the hub is still establishing its governance processes and enterprise-level data-sharing agreement across all participating entities, the planning and development work since 2017 has established trust, partnerships and practices across public systems necessary for the full infrastructure to be operationalized. As a part of its development, the hub is launching use cases to test the governance and decision-making structure on a smaller scale. They will also test the technical aspects of integrating individualized data from multiple systems in a secure, cloud-based setting and de-identifying it for analysis purposes.

**[Click here to access their governance processes](#)**



The Baltimore Summer Engagement Ecosystem (SEE) project is a use case of the hub, and will link data from more than 80 community-based organizations that offer summer programming, Baltimore City Schools and the Baltimore City YouthWorks program. The project aims to understand the unique number of youth participating in summer programs and whether there are gaps in participation across geographic space or gaps in service uptake by age, gender, race or ethnicity. SEE will help build the infrastructure for sharing data for actionable purposes. Over the past 10 years there have been several attempts to understand access to summer opportunities for youth in Baltimore to address and advance systems-level solutions that improve equitable access to summer opportunities across race, age, gender and place. However, these efforts struggled with



## continued...



maintaining a cross-agency data-sharing infrastructure that facilitated the integration, analysis, and dissemination of data to fully understand the summer ecosystem. SEE addresses these issues by creating a sustainable process for data integration that allows stakeholders access to data to inform summer programming on an annual basis.

SEE will follow the Baltimore Youth Data Hub Race Equity Data Use Framework. This framework — developed in partnership with leadership from the W. Haywood Burns Institute — intentionally places racial equity at the center of all aspects of a traditional data use cycle and adds important steps, such as intentional engagement and co-creation with impacted populations at the very beginning of the process (as opposed to during the dissemination process) and the evaluation and refinement of the process of data usage through a race equity lens. This work has advanced local infrastructure in terms of the application of a race equity lens to data use given the systems partners at the table for the hub and the potential to influence institutional and systemic practices around data collection and usage.

[Click here to access the Race Equity Data Use Framework](#)



To this end, Baltimore's Promise also convenes a workgroup of stakeholders to develop a set of best practices and approaches regarding the application of a racial equity and social justice lens to evaluative processes, including outcomes, impact and process evaluations. A goal of this group is to minimize the harm that traditionally-structured evaluations can impart on grassroots organizations and communities of color.

Another critical aspect of the Baltimore Youth Data Hub is its ability to be a resource for stakeholders to request and obtain access to aggregated data to inform their program implementation and design, make better decisions and refine services. Baltimore's Promise understands the struggles of smaller nonprofit organizations seeking to match data with public systems and who are unable to secure the MOUs needed to do so. As such, the Hub is establishing a transparent data-sharing infrastructure in which public service agencies, nonprofit organizations and community leaders will be able to obtain information to inform their understanding of issues and, importantly, know who to hold accountable.

As the Baltimore Youth Data Hub finalizes its governance structure and launches the SEE data integration project in 2021, Baltimore's Promise continues to work on establishing the legal framework with systems partners like city schools and the Mayor's Office of Baltimore. With the hub, initiatives and collaboratives focused on producing equitable outcomes across the cradle-to-career continuum will benefit from having their data integrated with data at the system level.



# resources

## Actionable Intelligence for Social Policy (AISP)

Explore data-sharing efforts across the United States.

[Click here to access](#)



## All In, Data for Community Health

Information on a learning network of communities that are testing exciting new ways to systematically improve community health outcomes through multi-sector partnerships working to share data.

[Click here to access](#)



## Centering Racial Equity Throughout Data Integration, AISP

Toolkit that describes positive and problematic practices for centering racial equity across the stages of the data life cycle.

[Click here to access](#)



## IDS Governance: Setting Up for Ethical and Effective Use, AISP

Guide that shares key lessons from those pioneering integrated data systems efforts.

[Click here to access](#)



## Improving Child and Family Services through Integrated Data Systems, Annie E. Casey Foundation

Highlights key case studies, resources, research, and real-world examples of integrated data systems in action.

[Click here to access](#)



## Integrated Data Systems: An Emerging Tool to Support Services for Low-Income Hispanic Families with Young Children, National Research Center on Hispanic Children and Families.

Research brief that explores how IDS data may be an important and cost-efficient resource for better understanding public service use among the Latinx population experiencing poverty in the United States.

[Click here to access](#)



# resources

## **Integrated Data Systems and Student Privacy, U.S. Department of Education**

Guidance document that clarifies how authorities can participate in an IDS while ensuring student privacy in compliance with FERPA.

[Click here to access](#)



## **Introduction to Data Sharing and Integration, AISP**

Toolkit on the basics of using, sharing and integrating administrative data.

[Click here to access](#)



## **National Neighborhood Indicators Partnership (NNIP)**

Lists the NNIP partner organizations, who share a mission to ensure all communities have access to data and the skills to use information to advance equity and well-being across neighborhoods

[Click here to access](#)



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## **Technology for Civic Data Integration, Metrolab Network**

Report that describes key considerations in building and sustaining IDS and the various technology approaches that may be helpful in overcoming challenges in data integration.

[Click here to access](#)



# data sharing moves at the speed of trust

- 1. Build your credibility in the community
- 2. Highlight the benefits of data sharing
- 3. Communicate best intentions and provide assurance
- 4. Have a clear plan to keep the data private and secure
- 5. Center an asset-based racial equity framework in your data work



*Click the "■" to  
jump to that section.*

# data sharing moves at the speed of trust

Time and trust is required to successfully execute a data-sharing agreement. Developing a baseline of community trust is essential for any kind of data sharing to flourish. Local stakeholders — including staff from backbone organizations, funders, educational institutions, service providers, youth and families — should be brought to the table from day one and be part of a collective effort to build a local data infrastructure. In this section, we highlight six key pieces of building trust and relationship with data partners.

Before getting into the relationship and trust building, it is good practice to take a moment to assess the existing relationships that your partnership holds. Here, we offer two tools that will help you identify the different stakeholder factions in your community, and who is operating in high action, high alignment.

## RESOURCE HIGHLIGHT

### Composition analysis tool



In working toward data sharing, it is important to map these relationships in your community to see how you can collectively work together and find common ground. Use this tool to identify the different stakeholder factions in your community.

[Explore this resource here](#)

## RESOURCE HIGHLIGHT

### High action, high alignment tool



For successful data sharing, it is important that all partners are operating in high action and high alignment. Use this tool to assess where there is potential for better alignment, or where action still needs to take shape.

[Explore this resource here](#)



## 1. Build your credibility in the community

Invest time and resources in showing up for your partners early and often. For years, as Achieve Brown County developed relationships with partners across different sectors, it built a solid reputation as an advocate for youth in Brown County. According to Christian Roovers, “The best way to show partners that you care is to persistently show up for them. I don’t think we could have accessed the data we did without showing we were a trusted collaborator.”

Another strategy is to build your credibility with one partner, so that partner can then advocate for you with other organizations. For network member Summit Education Initiative, it took building a credible relationship with one superintendent, who then became a champion of the partnership’s work and was able to pull other districts in. “We started with one raving fan — it took us months but we eventually got one school superintendent to trust us to work with us,” said Executive Director Matthew Deevers. At a subsequent meeting with additional school districts, Summit Education Initiative was presenting the possibilities of data sharing and invited that superintendent to speak about his experience working with them. “At that point, our raving fan took over, talked about how it’s been amazing to work with us, showed them what he had been doing with the data... It immediately brought the other superintendents along.” Soon after, they had another eight data-sharing agreements signed. Within months, Summit Education Initiative had signed on all 17 school districts within their geographic area to do data sharing work.

### RESOURCE HIGHLIGHT

## Engaging youth and families to build credibility



Engaging youth and families is key to building credibility in the community. Operate by the principle, “no data about us, without us” to center the voice of youth and families. The [\*\*Center for Democracy and Technology\*\*](#) provides resources to help leaders engage youth and families to ensure that data and technology meet the needs of students and families without sacrificing their safety and well being.

[Explore this resource here](#)



Racial and ethnic identity can also play a factor in building trust and credibility. This was clear in the work of network member Mission Graduate, who was trying to access data from partners in one of the sovereign Indigenous nations in New Mexico. “When you are seen as non-native, it becomes harder to enter that community and talk about data sharing,” said Research Scientist Ruth Juárez. “The best approach for us was to have someone Native American who was already bought into the idea of data sharing act as our advocate and approach nation leaders themselves,” Juárez explains. “This was essential in clearing a path, so to speak, which then allowed us to come in after a formal invitation to talk more about what our intentions were.”

Finally, credibility is built by establishing yourself as a true partner in the work. At the Commit Partnership in Dallas, when school district data is analyzed by staff at the backbone organization, the analysis is sent back to the district to ensure it was analyzed correctly and that all the numbers match up. This helps ensure nothing is missed, and the right context is taken in analyzing data. It also gives a heads up to the district before anything goes out publicly to make sure the right story is being told, regardless of what the data may indicate.

## 2. Highlight the benefits of data sharing

Successful data sharing efforts start with a shared vision. It's good practice to be able to address the “what’s in it for me?” question for each of the parties involved in addition to the collective benefit to the partnership. Below are a few strategies partnerships noted to help highlight the benefits of data sharing:

- **Share your work from other agreements**

It's impactful to share products or deliverables that came out of other data-sharing agreements so others can see the work you are able to produce with access to more data.

- **Ensure that you will be sharing the data back**

Let partners know that they will see and have access to the results of your work — you are not just asking for data, but rather accessing the data to then share out additional insights.

- **Call on someone from outside your organization to convince stakeholders**

If someone from another organization can highlight the cross-sector benefits, partners may be more inclined to think you are not asking for data just for your own work. Identify an ally of your work outside of your organization to make the pitch.

- **Have partners think of it as additional capacity**

Although your partners may have valuable data, they may not have the capacity to do something with it. If your partnership is in a place where it can do something with the data (conduct an analysis or develop a dashboard), highlight that what you are doing is providing the capacity to do something with the data they have.

### PARTNERSHIP HIGHLIGHT

#### Marin Promise (Marin County, Calif.)



#### **Marin Promise Partnership is highlighting the benefits of data sharing and working toward an equity-centered data infrastructure.**

To highlight the benefits of data sharing for their community, Marin Promise Partnership's backbone team created a short document to explain what data systems are most commonly used within their education ecosystem, and how student outcomes would improve if those data systems were better connected. They envision a collaborative data infrastructure that both meets students' immediate needs — ensuring an efficient process to refer students to the supports they need — and also enables policymakers to shift resources toward the interventions that are improving student experiences.

[Click here to access the document](#)



### 3. Communicate best intentions and provide assurance

Those who hold data need to know what your intentions are and whether the relationship may be harmful to them. Often, school districts or other partners may be fearful that you will use their data against them, or pit partners against one another. It's important to ease their fears by ensuring that your intentions are to help partners support youth and families, and not to punish partners for their work. Including an invitation to your data advisory committee can show that you value district input on how their data is used and communicated.

*The Data Quality Campaign offers a helpful framework in this space.* They note: “too often in education, data is seen as a hammer — a tool of accountability to ensure that targets are being met. While accountability is important, blame and shame often follow when results fall short. Shifting this paradigm and moving beyond accountability opens the door to a vast array of opportunities to use data as a flashlight, shining a light on what is working and fueling continuous improvement.” When building trust and relationships, think about how you are using data as a flashlight and not a hammer in your communications with partners.

#### RESOURCE HIGHLIGHT

### The consumer's guide to data by Data Quality Campaign



This guide provides tools for producers (state and district leaders) or consumers (individuals, parents, families and communities) of data, highlighting the ways you can build trust in data, how to become data savvy when consuming data, and how to build in asset framing to your data work.

[Explore this resource here](#)



## 4. Have a clear plan to keep the data private and secure

Organizations must be aware of and have a plan to address topics such as data privacy and security, to explain their adherence to federal and state laws like Family Educational Rights and Privacy Act (FERPA), and to provide the ongoing training to staff so that these policies are enacted consistently and ethically. In the next chapter, we go into more detail on the specific data privacy laws and how to ensure your staff and partners know the laws required to protect student privacy.

To build trust, each organization needs to be able to demonstrate a set of effective practices around the data they maintain. For network member Seeding Success, it was clear that this needed to be a priority at the onset of relationship building. “We have a partner that is agreeing to provide data *if* we have a security plan in place,” said Director of Performance Analytics Surayyah Hasan.

In Brown County, Wisconsin, an agreement with a public school district required a self-risk assessment of their custom data system to ensure data was being properly stored and secured. Achieve Brown County used a local accounting firm and a tool called [\*SIMBUS360 HIPAA Compliance Software\*](#), a complete HIPAA compliance privacy and security management software that is designed to help any size facility achieve and maintain compliance. When looking for technology solutions with existing vendors, be sure to ask about any existing security protections that you can then use to reassure your partners of your commitment to privacy.

### RESOURCE HIGHLIGHT

## Student privacy best practices



Previously, StriveTogether convened a task force whose purpose was to recommend a core set of practices related to data sharing across systems. These recommendations specifically address the practices of community-based organizations — including cradle-to-career collective impact initiatives, place-based initiatives and community school initiatives — that have access to personally identifiable information about students in the schools and districts in which they work. The task force produced a report that provided general guidance to enable cradle-to-career partnerships and community-based organizations to learn, employ and demonstrate best practices to protect student privacy.

[Explore this resource here](#)



## 5. Center an asset-based racial equity framework in your data work

Most importantly, partnerships need to build trust around HOW they use shared data — in particular racially disaggregated data. Far too often, this data is weaponized and used to generate deficit-based narratives that places blame on students — especially students of color. To build trust and allow for effective data sharing, it is imperative that partnerships demonstrate a commitment to center racial equity in their data work, to use data responsibly and within an asset-based framework. Using an asset-based framework when using data will help build support among parents and students for data sharing. Ultimately, students and parents are the owners of their own data and can influence data sharing through written consent and advocacy at the district level.

You can demonstrate this commitment by creating a set of principles or statements that your data work will follow, and ensuring that data products center the experiences and needs of youth and families of color. The [Racial Equity Data Lab](#) provides many resources on how to create data visuals and dashboards that support racial equity and inclusivity. Also, see this guide on [Centering Racial and Ethnic Equity in Data Work](#) that was compiled from insights from data managers across the Cradle to Career Network.

### PARTNERSHIP HIGHLIGHT

## The Road Map Project (Seattle, Wash.)



### The Road Map Project developed principles to center racial and ethnic equity in their data work.

The Community Center for Education Results (CCER), which houses the Road Map Project, developed principles to center racial and ethnic equity in their data work. CCER's data and research intends to support regional change through partnership, transparent data, rigorous methods and accessible tools. The principles read as follows:

Given data's potential to harm our communities of color, we must actively disrupt white-dominant norms and power dynamics across data and research strategies, resources, relationships, approaches, analyses, data stewardship and impact. In order to do work embedded in racial equity our:

- Projects must align with CCER's emerging anti-racism strategies
- Resources and staff time must be used to uplift those in the borderlands and to decenter whiteness
- Relationships must be mutual and work to build community trust and accountability
- Approaches and analyses must center communities, improve data access and expose systemic barriers for action
- Data use must be grounded in ethical and responsive data stewardship
- Regional impact must be connected to each project, co-created, sustainable and have clear community or partner accountability

[Click here to access](#)





# resources

## Youth and Education Privacy, Future of Privacy Forum

Organization that equips and connects advocates, industry, policymakers and practitioners with substantive practices, policies, and other solutions to address education privacy challenges at both the K-12 and higher ed levels.

[Click here to access](#)



## Resource Guide to Data Governance and Security, NNIP

Guide that presents advice and annotated resources for protecting privacy and human subjects, ensuring data security and managing the data life cycle.

[Click here to access](#)



## Safeguarding Student Data at Every Level, Data Quality Campaign.

Lists resources on how everyone with a stake in education can take steps to ensure that data can effectively and securely play a role in helping students succeed.

[Click here to access](#)



## Student Data Principles, Data Quality Campaign

Ten foundational principles for using and safeguarding student's personal information.

[Click here to access](#)



## Student Privacy Compass

Website that provides tools for finding information, news and opinions on maintaining student data privacy.

[Click here to access](#)



## Data Use in Promise Partnerships, United Way of Salt Lake

Report that describes key considerations in building and sustaining IDS and the various technology approaches that may be helpful in overcoming challenges in data integration.

[Click here to access](#)



## Equitable Data Practice, Urban Institute

Provides resources, principles, guidance, and templates for equitable data practices.

[Click here to access](#)



## Data Governance Checklist, U.S. Department of Education

Provides timely information and updated guidance on privacy, confidentiality and security practices through a variety of resources.

[Click here to access](#)



# centering youth privacy when drafting data-sharing agreements

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- 1. Going deeper on FERPA and other data privacy laws
- 2. Best practices for drafting data-sharing agreements
- 3. Sample data-sharing agreements



*Click the "■" to  
jump to that section.*

# centering youth privacy when drafting data-sharing agreements

It's crucial to know the laws governing data sharing. The Family Educational Rights and Privacy Act (FERPA) governs educational records and is the law that most education-focused partnerships will need to navigate first. There are many state laws that also work to protect youth and families.

## 1. Going deeper on FERPA and other data privacy laws

The Family Educational Rights and Privacy Act (FERPA) is the foundational federal law on student privacy. It establishes student rights by restricting with whom and under what circumstances schools can share students' personally identifiable information. Some FERPA provisions are very simple, like its guarantee that parents can review their child's education record. Others are a little more complex, but the law does allow for reasonable data sharing. **Before going much further, it's important to note that this guide is intended to provide general guidance around FERPA and other privacy laws. It is not legal advice, and it should not be treated as such.**

FERPA can sometimes be a scapegoat for communities that have failed to build a level of trust or partnership with their schools, for districts lacking the capacity to meet these kinds of informational demands or for lack of public understanding about how the law protects student records. However, when it is in the student's best interest, very little legitimate data sharing between schools and communities is prohibited by FERPA or the array of state laws that extend it. In a nutshell, FERPA states that personally identifiable information about students is confidential and may not be shared without consent. Personally identifiable information, or "PII," can include: name, student ID, social security number and street address.

FERPA is a privacy law, and the default is that no disclosure is allowed unless you obtain written consent from a parent or guardian. The consent must be signed and dated, and specify the records that may be disclosed, the purpose and the partner or parties to whom the information is being disclosed. There are also a few FERPA exceptions that partnerships can use to share student-level data that contain personally identifiable information without written consent. The most relevant exceptions that partnerships might use are:

- **School officials** — student data can be disclosed to other school officials, including teachers and contractors that perform institutional services or functions. Partnerships using this exception act on behalf of a school, performing a service that the school would ordinarily use employees to complete
- **Research studies** — Organizations may receive personally identifiable information if they are conducting a study "for, or on behalf of" educational agencies or institutions to: a) develop, validate or administer predictive tests; b) administer student aid programs; or c) improve instruction
- **Audit/evaluation** — this exception is used when auditing or evaluating a federal or state-supported education program, or to enforce or comply with federal legal requirements relating to an education program.

### Written consent

Written consent is the clearest and preferred way to share data in the eyes of the law. Consent forms are used to directly authorize the disclosure of personally identifiable information about students. Written consent is most often used when sharing data with community-based organizations providing programs and services to students inside or outside of school, such as tutoring, mentoring and afterschool enrichment programs.

Where written parent/guardian consent governs the sharing of data, the process of obtaining consent is owned by the school district, but often managed by districts and community-based organizations together. Data custodians in community organizations will work with districts to develop processes, procedures and documents for securing written consent as needed. Where possible, data systems will accommodate parent consents.

### School official

Partnerships also frequently use the school official exception, where a partnership staff member serves as a contractor, consultant or volunteer who has a legitimate educational interest and to whom the school district has outsourced services. In this case, contractors are under the direct control of the school district and are subject to guidelines for use and redisclosure of personal identifiable information. The school official exception is often used where there is a shared staff position between the backbone organization and a school district, or when staff from the backbone organization are co-leading or supporting a project sponsored by the school district (e.g., development of a school/community data-sharing solution).

### Research studies

The research studies exception is also often used for research questions and short-term projects. There are three primary requirements to this exception: 1) When using this exception, the study must not permit personal identification of parents or students except by representatives of the organization with a legitimate interest in the information. 2) The information must be destroyed when no longer needed for the purposes of the study. 3) And finally, the organization must enter into a written agreement with the educational agency or institution. This exception is often used when staff from a backbone organization or independent researchers are performing an evaluation or analysis of a specific program or set of programs. The study must be in one of the following areas:

- Developing, validating or administering predictive tests
- Administering student aid programs
- Improving instruction

### Audit/evaluation

The audit/evaluation exception is the exception most often used for evaluating program effectiveness and is a useful avenue when working on understanding the impacts of federal or state-supported education programs. Note that community partners generally may not use this exception to audit or evaluate their own programs.

#### RESOURCE HIGHLIGHT

## FERPA concepts, simplified



The information on this section was adapted from a wonderful resource from the United States Department of Education that goes deeper on how to protect student privacy compliant with FERPA. If you want more in depth information on this area, it is worth taking a look!

**Explore this resource here**



In all cases where student data is being accessed, it's good practice to have staff confidentiality or acceptable use agreements in place: These agreements are generally signed by all who have access to PII that is accessible by the organization, identifying appropriate uses and standards of conduct. It's also best practice to provide some degree of training to individuals accessing data so they know what to do and what not to do when working with student-level data. We'll explore this more in section 6.

Examples of parent consents, data-sharing agreements and confidentiality agreements can be found in the resource section that follows.

### Other privacy laws

FERPA is not the ceiling for protecting data. States often take additional actions to safeguard student information while promoting effective data use to improve student achievement.

In 2017 more than half (93 of 183) of the state bills on education data that were considered addressed the issue of student privacy. States are increasingly using legislation to address how they collect, use and report education data in addition to how they safeguard it. The Data Quality Campaign breaks down state legislation related to education data each year. Explore the full [Education Data Literature Review: 2020 State Activity](#).

Other federal laws extend protection of student data. In the increasingly wired classroom, the Children's Online Privacy Protection Act (COPPA) regulates how companies can collect and use data from young students. Other federal laws offer funding to improve school internet safety policies and define the parameters for using student data in research. Individual rights are always held high. Two core principles in all student data legislation are the requirement to disclose to parents all potential uses of student information, and provisions for parents to opt their child out of these data-sharing activities.

Outside of student data, there are many other data privacy laws that partnerships should be aware of. The Department of Agriculture has even stricter sharing guidelines for the data related to the National School Lunch Program, while McKinney-Vento Homeless Assistance Act puts restrictions on sharing data concerning youth homelessness. When working with health sector data, partners will need to be aware of the Health Insurance Portability and Accountability Act (HIPPA). This Legal Guide to Privacy and Data Security outlines the basis of many different federal data privacy laws.

## DATA INSIGHTS

### Legal expertise in data privacy laws

It is not reasonable to expect that staff at a backbone organization will become experts in every data privacy law out there. Here are a few ways to develop baseline knowledge of data privacy laws given your capacity:

- Send your staff to data privacy trainings.
- Access resources that provide quick summaries or highlights of privacy laws.
- Contact the legal counsel in the institutions that are part of your data-sharing effort. For instance, if working with a health system, reach out to their legal counsel for support. Most school districts will also have one or more legal counsel, and you'll want to get them on board early as partners in the work.
- Contact the legal counsel of the anchor organization your backbone organization is based in.
- Enlist a paid or pro bono lawyer who can support this work, possibly from the board of a partner organization.

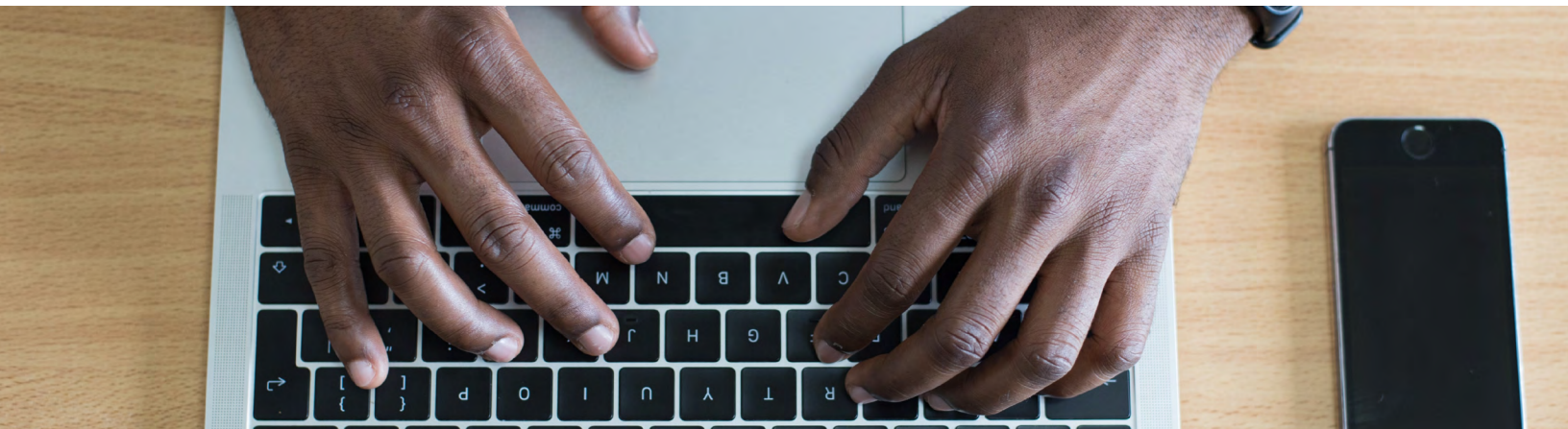


## 2. Best practices for drafting data-sharing agreements

All formal data-sharing practices will require a legal data-sharing agreement to be drafted and signed by all interested parties. You may need to work with a lawyer to develop this, or you can use an example and adapt it to your context. School districts often have their own data-sharing agreement templates to start from, but there are a growing number of example agreements across a number of partnerships as well. Example agreements can be found in the resource section that follows.

There are a number of best practices related to drafting data-sharing agreements:

- Clearly stated purpose of data sharing
- Signature from the owners of the data
- Explanation of how data use will be limited to a specific educational purpose
- Explanation of how to enable sharing PII only with people who have legitimate interest in supporting that purpose and for no other purpose
- Retention and destruction clause that limits the retention of student data beyond the required period of use, and requires destruction of data at that point (for the school official exception, it may be helpful to include means by which the district may require the destruction of data for any reason)
- “Project authorization” forms for each project identifying the specific variables, years, levels of observation and files names if known
- Explanation about the frequency of data updates (in cases where data will need to be updated on an ongoing basis)
- Statement that the receiving organization will not enter into a third party data-sharing agreement unless explicitly stated, and where the third party is identified and held to the stated educational purpose
- Disclosure and dissemination rules that identify what happens to derivative products of the covered data sets (what is learned from the data)
- Statement on providing data analyses and learnings back to the school district, unless agreed otherwise
- Clear legal ramifications outlined if data users do not comply with terms of data-sharing agreements, including possible financial penalties and legal action
- A period of agreement and a process to amend the agreement — ideally an agreement would be in effect for the duration of the initiative or until terminated by either party
- Secure data transfer and storage procedures
- Names and contact of individuals responsible for receiving and delivering data
- Identify any FERPA exceptions used and the criteria met



### 3. Sample data-sharing agreements

Partnership	Data-sharing documents
Aspire Toledo	<ul style="list-style-type: none"> <li>■ <a href="#">TPS Partner or Contractor Confidentiality and Nondisclosure</a></li> </ul>
Achieve Brown County	<ul style="list-style-type: none"> <li>■ <a href="#">Data Processing and Services Agreement — All Districts</a></li> <li>■ <a href="#">Data Use Agreement — All Districts</a></li> <li>■ <a href="#">Otava (data warehouse) and Syslogic (technology consultant) Agreements</a></li> </ul>
Baltimore's Promise	<ul style="list-style-type: none"> <li>■ <a href="#">Baltimore Youth Data Hub — Data Use License</a></li> <li>■ <a href="#">Memorandum of Understanding</a></li> </ul>
Bright Futures of Monterey County	<ul style="list-style-type: none"> <li>■ <a href="#">Consent to Participate, and Data-Sharing and Use Agreement, Kindergarten Readiness Pilot Project</a></li> </ul>
StrivePartnership <sup>2</sup>	<ul style="list-style-type: none"> <li>■ <a href="#">Data-Sharing Agreement, between backbone organization and school district</a></li> <li>■ <a href="#">Parent Consent Form — Partner</a></li> </ul>
Higher Expectations of Racine County	<ul style="list-style-type: none"> <li>■ <a href="#">Data-Sharing Agreement, between school district and postsecondary partner</a></li> </ul>
Marin Promise Partnership	<ul style="list-style-type: none"> <li>■ <a href="#">Data-Sharing Agreement</a></li> </ul>
Promise Partnership of Salt Lake	<ul style="list-style-type: none"> <li>■ <a href="#">Utah 211 Data Confidentiality Agreement</a></li> <li>■ <a href="#">Data-Sharing Terms and Conditions</a></li> <li>■ <a href="#">Promise Partnership Agreement — between backbone organization and school district</a></li> <li>■ <a href="#">Data-Sharing Agreement – between backbone organization, school district and department of human services</a></li> <li>■ <a href="#">Interagency Agreement and Amendment, between backbone organization and state board of education</a></li> </ul>
Additional Resources	<ul style="list-style-type: none"> <li>■ <a href="#">Data-Sharing Agreement using the audit/evaluation FERPA exception</a></li> <li>■ <a href="#">Data-Sharing Agreement using the research studies FERPA exception</a></li> <li>■ <a href="#">Full data plan for executing and implementing data sharing agreement</a></li> </ul>

<sup>2</sup> These resources were developed by StrivePartnership. In 2020, StrivePartnership relaunched as Cradle to Career Cincinnati.

# resources

## **FERPA Exceptions Summary**

Summary of FERPA exceptions.

[Click here to access](#)



## **A Legal Guide to Privacy and Data Security**

Comprehensive guide reviewing several data privacy laws.

[Click here to access](#)



## **FERPA Guide to Parents and Students**

Two page FERPA summary for parents and students.

[Click here to access](#)



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## **Joint Guidance on the Application of the FERPA and HIPAA**

Discuss HIPAA compliance in the education context.

[Click here to access](#)



## **Student Privacy at the Department of Education**

Resources to learn more about data privacy laws.

[Click here to access](#)



## **A Stoplight for Student Data Use, Data Quality Campaign**

Summarizes FERPA provisions and how to securely get students' personally identifiable information.

[Click here to access](#)



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## **Key Elements of Data Sharing Agreements, NNIP**

Highlights key elements of data-sharing agreements.

[Click here to access](#)



## **Sample Data Sharing Agreements, NNIP**

Catalog of data-sharing agreements.

[Click here to access](#)



# tried-and-true tools for building data infrastructure

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- 1. Tools for data collection, storage, preparation, analysis and visualization
- 2. Case management and service coordination solutions
- 3. Steps to choose a vendor or consultant to work with
- 4. Different approaches to developing technology solutions



Click the "■" to  
jump to that section.



# tried-and-true tools for building data infrastructure

An important step in the data sharing process is ensuring you have the data infrastructure necessary to collect, store and share data. In this section, we highlight the different technology infrastructure needed for a successful data-sharing partnership.

## 1. Tools for data collection, storage, preparation, analysis and visualization

Partnerships are using a variety of data software tools and technology solutions within their backbone organizations and across local partners. There are a wide variety of tools for data collection, warehousing and storage, preparation, analysis and visualization:

- Data collection tools help partnerships develop and administer surveys and other types of primary data collection from youth, families and partners.
- Data warehousing and storage tools are a place to keep your data.
- Data preparation tools help organize and connect data together before running data analysis and visualizations.
- Data analysis and visualization tools are the statistical, tabulation and functional tools to analyze and visualize your data.

We surveyed data managers in early 2021 and all of the tools listed below are being used by their partnerships. **Tools highlighted in bold font were the ones that came up most frequently.**





## Tools used for data work

Type of data functions and activities	Data software tools and solutions being used	
Data collection	<ul style="list-style-type: none"> <li>■ <b>SurveyMonkey</b></li> <li>■ <b>Google Forms</b></li> <li>■ Qualtrics</li> <li>■ Formstack</li> <li>■ SurveyGizmo</li> <li>■ Alchemer</li> </ul>	<ul style="list-style-type: none"> <li>■ Formsite</li> <li>■ Microsoft Forms</li> <li>■ UpMetrics</li> <li>■ Aperture EVO</li> <li>■ PEAR Qualtrics</li> </ul>
Data warehousing and storage	<ul style="list-style-type: none"> <li>■ <b>Microsoft Access</b></li> <li>■ Database management systems software (DBMS), such as MySQL, Oracle, PostgreSQL, Microsoft SQL Server, MongoDB, and others</li> <li>■ <b>Low code development platforms, such as Salesforce, Airtable, and Caspio</b></li> </ul>	<ul style="list-style-type: none"> <li>■ <b>Spreadsheets and other file-based solutions such as Google Suite, SharePoint, and Dropbox</b></li> <li>■ Vendor-managed solutions (described in more detail below)</li> </ul>
Data preparation	<ul style="list-style-type: none"> <li>■ <b>Microsoft Excel</b></li> <li>■ <b>Tableau Prep</b></li> <li>■ <b>Stata</b></li> <li>■ R</li> <li>■ Python</li> </ul>	<ul style="list-style-type: none"> <li>■ Alteryx</li> <li>■ Microsoft PowerBI</li> <li>■ DBT</li> <li>■ Google Sheets</li> </ul>
Data analysis and visualization	<ul style="list-style-type: none"> <li>■ <b>Microsoft Excel</b></li> <li>■ <b>Tableau</b></li> <li>■ <b>Stata</b></li> <li>■ SPSS</li> <li>■ R</li> <li>■ Python</li> </ul>	<ul style="list-style-type: none"> <li>■ JASP</li> <li>■ Microsoft PowerBI</li> <li>■ ESRI/ArcGIS</li> <li>■ Atlas.ti (Qualitative)</li> <li>■ Dedoose (Qualitative)</li> <li>■ MAXQDA (Qualitative)</li> </ul>

## PARTNERSHIP HIGHLIGHT

## Norwalk ACTS

(Norwalk, Conn.)



### Norwalk ACTS is leveraging Tableau to go deep into neighborhood data mapping.

Thanks to a partnership with the Tableau Foundation, many StriveTogether network members across the country have benefited from having access to Tableau software, training and support. Norwalk ACTS is one such partnership that has been doing this work long-term, and has built the infrastructure for sophisticated mapping work.

Paula Palermo and Ray Leslie, the data team at Norwalk ACTS, have been leveraging Tableau to map student attendance and population densities as well as other related demographic and indicator data by census tract. The dashboard will help those who use it go beyond traditional geographic analysis. For example, the Census Dashboard allows users to layer food and transportation information on top of demographic data, which can reveal which neighborhoods, or parts of neighborhoods, are deserts in terms of transit services or food. Armed with this information, the community can then advocate for change, arguing for more and better services such as the relocation of bus stops and increased access to food in their neighborhoods.

Norwalk has been able to do this by building the trust to access student-level data and assembling a library of census data and shapefiles. In addition to the boundary files with census geography, they have been able to compile parcel data to look at specific address locations.

Explore Norwalk ACTS' Census dashboard

[Click here to access](#)



Access Norwalk ACTS' tip sheet on techniques for mapping neighborhood data in Tableau

[Click here to access](#)



## RESOURCE HIGHLIGHT

## Data tool directory



Interested in knowing exactly which partnerships and network staff are using each of the tools outlined above? Check out the network data tool directory and reach out to individual staff to learn more!

[Explore this resource here](#)



## 2. Case management and service coordination solutions

In addition to the data work described above, a number of partnerships are also leading or helping to support the development of case management systems that help with program registration and attendance, as well as service coordination across multiple local partners and sectors.

### ■ Case management systems

Case management systems provide one central location to store and track sensitive “client” data, including things like case notes, appointment scheduling and history, and client communications.

### ■ Program registration and attendance systems

Most case management systems also include the ability to collect program registration and attendance — for example enrollment in a tutoring program and the number of hours students attend the program (or dosage). It is also possible to use stand-alone products such as EventBrite, Cvent, and spreadsheets and paper sign-in forms.

### ■ Service coordination systems

Most case management systems also have the potential to be customized to help coordinate service requests and service referrals across multiple partners, including schools, community-based organizations and other cross-sector partners including health systems and government agencies.

Building this kind of local data infrastructure supports a variety of local partners to better connect and analyze their data to ensure that the right students are getting the right services at the right time. These systems often:

- Prioritize real-time data so you have access to timely information to act quickly.
- Give community partners direct access to the data they need with the appropriate student privacy precautions. Student-level data enables partners to better support students and improve programs.
- Give schools a better understanding of which partners are serving the students in their buildings including dosage of the service, or how often students attend: enables more targeted supports to students based on interest or need.
- Help align stakeholders across sectors, including healthcare, government and education to improve shared outcomes.

In addition to case management and service coordination, most of these tools will also incorporate multiple aspects of the function and activities described above, such as data collection, storage, analysis and visualization.

## DATA INSIGHTS

## Student-level data system use cases

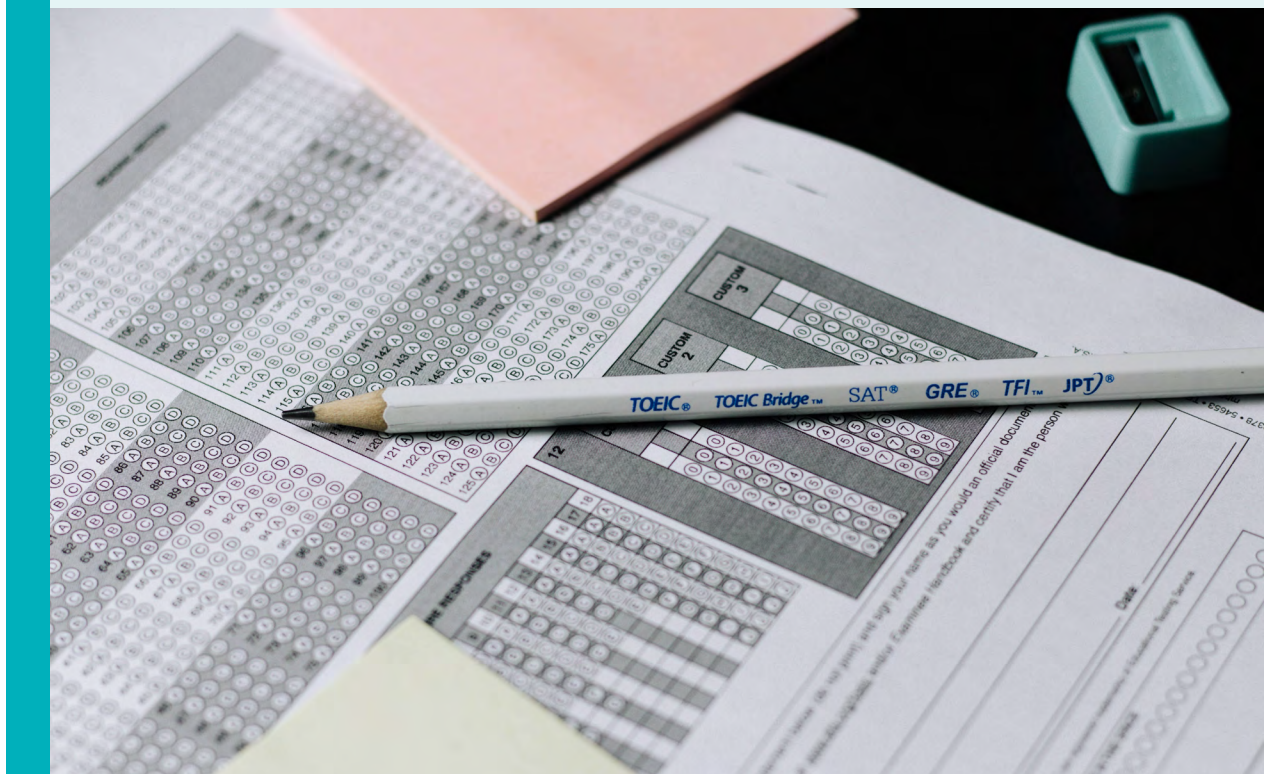


### Aspire Toledo

Aspire Toledo is leveraging the **Comet** software tool to build a student-level data system that will improve access to data for partners. Partners will have increased access to student data as well as comprehensive longitudinal information on youth. The system will facilitate the combination of key academic indicators with program and community data, which in turn creates improved measurement of progress toward community outcomes.

### Learn to Earn Dayton

Learn to Earn Dayton engaged **Learning Circle** to build a shared data system in cooperation with the Montgomery County Educational Services Center. Learning Circle serves multiple school districts and community-based organizations to connect academic and non-cognitive metrics in after-school and out-of-school programs. Comprehensive data across a purposeful sample of four school districts in Montgomery County, including Dayton Public Schools, informs the effort. Since an organization that houses data for multiple school districts hosts Learning Circle, the database provides critical information on student and school performance and the programs and interventions students receive from out-of-school providers. It also helps community organizations understand the needs of the students they serve to provide coordinated and quality services to promote improved student outcomes.



## Case management products in the market

In a survey to data managers in February 2021, we asked about the use of service coordination and case management solutions. There are a wide variety of systems being used, the majority of which are licensed vendors. Below are some of the most prevalent solutions that partnerships are using. The descriptions below were taken from each provider's website.

The following three solutions are being used by multiple partnerships across the Network:

- ***Social Solutions — Apricot 360 (or the legacy ETO platform)***  
Case management, billing capabilities, engagement, communications, outcomes and impact (used by five partnerships)
- ***Learning Circle***  
Schools and community organizations can view trends in attendance, behavior and core academics; schools can see involvement in both in-school and out-of-school programs (used by four partnerships)
- ***City Span***  
Recording participant information, tracking enrollment and attendance and measuring outcomes; enabling multi-partner organizations with unique data requirements to share data through a common platform (used by four partnerships)

Other similar solutions that are being used effectively by network members are:

- ***Abre*** — A platform that holds a suite of education and community apps, for use by students, family members, staff, and community partners.
- ***Comet*** — founded as a tool for measuring outcomes. This information can be used by your team to provide appropriate intervention. At its core are features to assess and understand the progress of children in your programs, to identify gaps, and report the gains.
- ***Cayen*** — includes the ability to track attendance; participant registration and importation; activity/session setup; daily, weekly and monthly rosters, online registration, and reports.
- ***Salesforce, Exponent Case Management App*** — Exponent Case Management is next generation case management designed for your Human Services agency. Ideal for case workers, program managers, and agency leaders, the application is a fully-featured, customizable solution with intake, assessment, service tracking, case records, outcomes reporting, referral tracking, and more
- ***LUCA, by Improvement Assurance Group*** — a continuous improvement, results based, accountability software used to streamline your work, provide transparency and share success
- ***Ascend Goals*** — Ascend helps schools and out-of-school-time programs launch social-emotional learning, career and college readiness, and educational programs digitally. Through the Ascend platform, schools and youth programs can: deliver program content, track student progress, monitor engagement, and evaluate program outcomes
- ***Unite Us*** — Aligns all stakeholders from healthcare, government and the community around a shared goal to improve health. Our proven infrastructure provides both a person-centered care coordination platform and a hands-on community engagement process

The ways partnerships are using these systems and the way they function can look very different, depending the sectors involved, the type of data being integrated and the particular focus in any given partnership.



For example, some solutions thrive when operating within the context of a community-based organization. Apricot 360, CitySpan, Salesforce Exponent Case Management App and Comet have a long history of helping community organizations track programs and participants, connect data across systems such as school districts and help measure outcomes.

Other solutions are built to operate in a school district-centric environment and connect out to community partners. Abre was built originally for school districts to be able to better manage their own data internally and has since expanded to include community-based organizations and nonprofit partners. Similarly, Learning Circle was first developed as a tool for use in a school district, and later expanded to be able to incorporate community partners. Both also have the capability to operate across one or multiple school districts in a given community.

Others enter the picture because they address a specific need or function. Cayen started as a tool to help manage after-school program attendance. Unite Us caters to the health care sector as a tool to help manage closed-loop referrals across health systems and community partners.

Each of these systems has their own areas of strength and focus, including connections across systems, measurement of programs and interventions, attendance/dosage tracking, service referrals, reporting and analytics. Working with a vendor provides the benefit of having the software and data integration managed by a company or consultant. Partnerships don't need technical capability on staff and don't need to worry about what happens if or when those staff leave the organization. However, a constraint can be having to operate within the bounds of the software solution that you are purchasing. The custom features you need may not always be a priority for the vendor who is managing the product. As a result, it is important to have a very clear and specific set of requirements and functionality in mind when you are searching for a solution.

#### DATA INSIGHTS

### Data-sharing technology costs



The costs for these solutions can vary by the number or sizes of the partners or school districts and the complexity of the data integrations. Based on our survey, **partnerships are typically able to license a system for \$50K per year or less**, with only a few going much higher than that. This does not include internal staffing costs dedicated to the effort.

#### Custom solutions for data sharing

There are also some examples of custom in-house and developer solutions. Partnerships are developing custom solutions in-house using a combination of Excel, Salesforce, Tableau, Google forms and many of the tools identified above. There are also consultant-built solutions such as the work of Achieve Brown County partnering with [Syslogic](#) to build a custom solution to meet their specific needs.<sup>3</sup>

Additionally, there are solutions geared toward the development of integrated data systems, as described in section 2. [Open Lattice](#), used by the Baltimore Youth Data Hub, is one such example. Open Lattice “set out to build a secure, scalable cloud-based data platform that empowers civil servants, researchers and policy makers to work together on society's toughest challenges.”

<sup>3</sup> SysLogic is an information systems consulting and services firm dedicated to helping clients large and small conduct business more effectively. The firm delivers solutions using leading-edge technology and sound business processes. SysLogic has acted as a partner by housing, merging and then de-identifying data at the individual level for community use.

### 3. Steps to choose a vendor or consultant

Like much of the work across partnerships, the first step is to start by identifying your results: What questions are you trying to answer and what kind of technology do you need to help answer them? Building a system for research and policy analysis won't look the same as building a system for program evaluation and service coordination.

Once you get clear about your overall purpose, it's important to articulate the specific requirements for your data system, as detailed as you can get them. This point cannot be overemphasized! Data sharing system implementation succeeds or fails miserably based on: 1) the ability of partnerships to become clear on the requirements about what they want the system to do and how users should interact with it, and 2) the ability to communicate these requirements to vendors and consultants. Consider the following questions:

- What is the specific functionality that you need?
- Who are the different user roles and what should they be able to do in the system?
- What data needs to come into the system, and how does it need to get there?
- How do you add, edit and delete data in the system?
- Who can perform these functions?
- What kind of analytic tools and reporting do you need?
- Does your data need to be exported to another location?

Once these questions are understood and articulated, you'll be much better equipped to approach vendors (if you're buying) or software consultants (if you're building) and communicate what you need. Also recognize that you'll need to dedicate staff time to support the development of a custom solution. Staff will need to act as a subject matter expert and possibly a project manager if there isn't a dedicated person for this role. It will be important to budget a good amount of time translating requirements to the vendor/consultant that may not be familiar with the nature of the work.

The software you choose has to be great. It must have the functionality you need as well as an intuitive user interface that drives adoption of the tool. You'll also need the training, support and business processes to make it an indispensable tool.



## 4. Different approaches to developing technology solutions

To summarize, we outline some of the key approaches to developing technology solutions for data sharing along with advantages and disadvantages of each.

Type of approach	Example	Advantages	Disadvantages
<b>Custom-built in-house — basic</b>	Use of Google Suite, spreadsheets, Tableau and other tools to manually organize, analyze and share data	<ul style="list-style-type: none"> <li>■ Very cost effective</li> <li>■ Easy to learn</li> <li>■ Helps identify needs before adopting more expensive systems</li> </ul>	<ul style="list-style-type: none"> <li>■ Limited functionality</li> <li>■ Less sophisticated</li> </ul>
<b>Custom-built in-house — complex</b>	Building a large data warehousing infrastructure with custom code, user interfaces and different levels of user permissions	<ul style="list-style-type: none"> <li>■ Can get the exact features and functionality you need</li> </ul>	<ul style="list-style-type: none"> <li>■ Higher cost</li> <li>■ Hard to find expertise to implement</li> </ul>
<b>Custom-built by information technology solution provider</b>	Partnering with an information technology company to build a custom software application to meet specific data-sharing needs	<ul style="list-style-type: none"> <li>■ Can get the exact features and functionality you need</li> </ul>	<ul style="list-style-type: none"> <li>■ Higher cost</li> <li>■ Must be able to communicate clear software requirements</li> <li>■ Must determine sustainability plan</li> </ul>
<b>Customizing an existing platform</b>	Customizing Salesforce, Caspio or Airtable to meet specific data-sharing needs	<ul style="list-style-type: none"> <li>■ Can customize most of the features you need</li> <li>■ Mid-range cost</li> </ul>	<ul style="list-style-type: none"> <li>■ Mid-range cost</li> <li>■ Must have staff to build out, or be able to communicate clear requirements for external customization</li> </ul>
<b>Existing product managed by a vendor</b>	Licensing a case management or service coordination system such as Apricot 360, City Span, Learning Circle, Comet or Abre	<ul style="list-style-type: none"> <li>■ Mid-range cost</li> <li>■ Many great features, functionality and support</li> </ul>	<ul style="list-style-type: none"> <li>■ Established product features and roadmap may not fit your exact needs</li> </ul>

## PARTNERSHIP HIGHLIGHT

## Every Hand Joined (Red Wing, Minn.)



### Every Hand Joined has developed a data infrastructure that helps partners make adjustments in real time.

Network member Every Hand Joined contracted with [\*Information, Insight and Impact Works \(i3Works\)\*](#) to help develop long-term solutions to increase efficiency and effectiveness in data sharing with community partners.

Through this contract, i3Works has assisted with planning and building a data infrastructure that is called a data mart. The primary purpose of the data mart is to build a better understanding of the factors that drive positive academic outcomes and to provide practitioners with the information they need to increase success for all Red Wing youth, both inside and outside of the school district. The data mart is an efficient solution to collect, connect and share data with community partners. The type of data included is related to youth-centered strategies, such as parent or family activities contributing to an academic outcome. In addition to building capacity by providing the tool (i.e. creating the infrastructure), Every Hand Joined is also ensuring its sustainability by offering support and training to local partners. This training is focused on how to use the data mart through a common set of business practices.

The data mart has been crucial in supporting better outcomes for youth of color in the Red Wing community. Two organizations serving primarily Latinx and Indigenous students have used this data infrastructure since the fall of 2019 — Hispanic Outreach and Prairie Island Indian Community. In the fall of 2019, one of the Indigenous liaison partners were evaluating the needs of one of their students at the local middle school. By using the data mart, staff were able to quickly review past academic performance and examine recent FastBridge data (i.e., district assessment data) for a real-time evaluation of the student. Staff were able to recommend a schedule change and offer new interventions. Before the data mart, this corrective steps would have been time consuming and likely not have occurred so early in the school year.

Every Hand Joined's data staff are seen as the leading credible data source in Red Wing and are sought out for data knowledge, infrastructure resources and assistance. The Data Mart infrastructure has delivered a high quality, accessible and sustainable information source for youth-serving programs in Red Wing. The program staff within these organizations now have increased confidence, willingness and capacity to make data-driven decisions while using data more consistently. This will lead to improved services for youth along with better academic and social-emotional outcomes.<sup>4</sup>

<sup>4</sup> Additional questions about the data mart can be directed to [info@i3.works](mailto:info@i3.works).

# resources

## **The Road Map Project: Student Success Link – Project Recap & Lessons Learned Report**

Provides an account of how a data sharing project came to be and the lessons learned along the way.

***Click here to access***





# invest in the people who will do the work

- 1. Building data capacity
- 2. Sample data job descriptions
- 3. Building data competencies



Click the “■” to  
jump to that section.

# invest in the people who will do the work



Cradle-to-career partnerships work to build both the capacity and competencies to use data in furthering the goals and results of the partnership. Building the capacity to use data means having people who are dedicated to the tasks of building data infrastructure and making sure data is used effectively. Building data competencies means increasing the knowledge and skills of people — both within the backbone organization and across partners — through trainings, technical assistance, communities of practice and other efforts designed to build a culture of data use. In this section, we highlight some key ways to address issues of capacity and capability in collective impact data work.

Before we get into the ways partnership are building data capacity and capabilities for their work, it's important to distinguish between the work of data and technology strategy and the work to build a culture of data use across the partnership. The work to build technology infrastructure and to collect, store, analyze and visualize data requires specific skillsets, which we'll get into more in the sections below.

However, the work to build a culture of using data across the partnership must not be limited to these “data roles.” Staff across the backbone organization must be comfortable facilitating conversations around data and developing strategies to promote evidence-based decision making across the work.

## 1. Building data capacity

Building the capacity of your partnership to use data means having people who are dedicated to the tasks of building data infrastructure and making sure data is used effectively. This could be a combination of backbone organization staff, consultants, data fellows, loaned executives or staff based at partner organizations. Unlike other roles at backbone organizations, the data-related responsibilities may be shared between members of a team as large as nine people, or they may be accomplished by one person alone.

### The ‘data manager’

The data manager is the first and minimum role for backbone organizations. This individual is leading the data strategy for the backbone organization. This includes, but is not limited to, the responsibilities of facilitation and trust building, data landscape and strategy, data collection and analysis, data communication and coaching, and translating data insights into action. If there is only one data-specific role at the backbone organization, this individual will fulfill all of these roles — and sometimes continuous improvement strategies as well. If there are other data-specific roles at the backbone organization, this individual is also usually responsible for managing that team.

### Additional roles and staffing structures

Medium- to larger-sized partnerships often have between two to four staff, consultants or fellows dedicated to data roles. Some of the largest partnerships have even more.

Often, the next role that might be added to the team is a data analyst who focuses on the more technical aspects of the work — i.e., data collection and quality control, data cleaning and storage, descriptive analysis and data visualization. Additional roles may sometimes be filled by consultants or short-term data fellows, such as an [\*AmeriCorps Data Fellow\*](#) or an [\*Education Pioneer\*](#).

A number of partnerships also have shared staff positions — often analyst roles shared with a school district — where a person splits their time between working on school district projects and in supporting the partnership as a staff member of the backbone organization. This is a good strategy to share resources and expertise, as well as foster relationships and trust across partners.

#### PARTNERSHIP HIGHLIGHT

## Higher Expectations for Racine County (Racine, Wis.)



### Shared positions with school districts

Higher Expectations for Racine County collaborated with the Racine Unified School District to bring in a data fellow into their work. In this partnership, the fellow worked with the district and Higher Expectations to collect and organize data to uncover challenges for Racine County and put a spotlight on solutions working to solve them. Two of the fellow's biggest projects were a sustainable wage tool and a comprehensive look into barriers to reading growth and reading support programs.

Learn more about this position by reading a spotlight blog

[Click here to access](#)



See the job description for the shared position

[Click here to access](#)



**Additional technical data roles might include additional analysts, data architects and/or programmers.** Another common non-technical role is to have someone tasked with managing work with external partners — including navigating data-sharing agreements, facilitating communication and to more broadly improve data literacy among partners. This is a role that requires understanding of how data can be collected, how to communicate effectively with clients and how to facilitate — it would also require excellent project management skills.

#### RESOURCE HIGHLIGHT

## Data competencies matrix



In partnership with ED Fuel Data, Ballmer Group and the Cradle to Career Network, we developed a core data competency matrix that outlines competencies for data strategists at backbones organization.

[Explore this resource here](#)



## 2. Sample data job descriptions

Partnership	Job descriptions
Achieve Brown County	■ <a href="#">Evidence-Based Decision Making / Community Information System Manager</a>
Building Our Future	■ <a href="#">Data Manager</a>
E3 Alliance	■ <a href="#">Research and Analytics Lead</a>
Higher Expectations for Racine County	■ <a href="#">Data Impact Manager</a>
Promise Partnership of Salt Lake	■ <a href="#">Data Manager</a>

## 3. Building data competencies

In order to promote the effective use of data across the partnership, backbone organizations are providing data literacy training and related technical assistance for staff and partners. This can take many forms, including a full-blown data literacy training series, ad hoc trainings on specific topics such as data privacy, and program assessment planning and technical assistance.

### Data use and literacy training

Data literacy trainings can take many forms — some topics include FERPA, student privacy and security. Others offer comprehensive training around these topics as well as continuous improvement, data use, interpretation and acting on data.





## PARTNERSHIP HIGHLIGHT

## Seeding Success (Memphis, Tenn.)



### Data use and literacy training series

Seeding Success has worked to build partner capacity to engage in continuous improvement and access data under master data-sharing agreements with both Shelby County Schools and Achievement School District. In alignment with this, all organizational staff are required to complete four online modules of training to ensure standards of ethical and effective use. The modules cover understanding the project mission within the context of outcomes and indicators, accessing and interpreting data, using data to engage in continuous improvement and understanding FERPA and the ethics of data use. Upon completion of the online modules, participants must attend a three-hour virtual workshop to demonstrate application of concepts learned through the online modules. These modules and the workshop are summarized below.

#### *Mission to outcomes*

This module explores how to translate a mission into the context of measurable outcomes and three indicator types.

#### *Data interpretation*

This module explores the various ways in which data can be visualized, covering the different chart and graph types, their purpose and how to properly read and interpret them to inform practice.

#### *Data use for continuous improvement*

This module ties together concepts explored in the mission to outcomes and interpretation modules introducing the Plan, Do, Study, Act (PDSA) continuous improvement framework. This allows participants to better understand how aggregate data, and individual-level data informs each step of the process.

#### *Ethics and FERPA*

This module introduces the ethics of data use, including principles and organizational practices, and FERPA and data security.

#### *Act effectively workshop*

This three-hour virtual workshop provides participants an opportunity to apply the concepts covered in the online modules, leveraging the B/ART (boundary, authority, role and task) framework to better understand what it means to be an authorized data user. Participants engage in scenario-based FERPA and ethics activities, and work through the PDSA cycle using example student data.

In addition, Seeding Success has partnered with Curriki Studio to enhance the interactivity of the online modules. Those new modules are set to be released in early fall 2021.

### Program assessment and planning

Program assessment and planning tools are also being used to assess partnerships' practices related to data use in the programs and services they deliver. The results can then be used to provide recommendations to partners on how to strengthen their evidence-based practices.



## PARTNERSHIP HIGHLIGHT

## Aspire Toledo (Toledo, Ohio)



### Data use and literacy training series

Aspire Toledo's Partners with Purpose training builds the capacity of community partners on how to establish program goals, create program plans (i.e., logic models), measure and track progress toward goals and adjust program delivery through the monitoring of academic and program data.

Aspire Toledo uses a locally-developed program assessment tool to provide recommendations for improvement to community partner practices based on the following questions:

- How is data tracked? Is it tracked on the individual and/or aggregated level?
- Is an electronic/computerized systematic process in place to collect data?
- Are program outcomes, goals and/or objectives being tracked?
- What data collection strategies are in place to support programming?
- Do programs have a formal plan to identify inputs, goal, activities, objectives and measures?
- Is there a formal logic model in place?
- Does student/participant input inform practice?
- Does parent input inform practice?
- Does partner (i.e., mentors, staff, teachers, administrators, etc.) data inform practice?
- Is there a continuous improvement plan in place?
- What is the data collection strategy and frequency?
- Are there outside evaluators or a benchmarking process?
- Are there feedback loops between program staff and program participants/parents?

Upon completion of the program assessment, programs are given a continuous improvement report. Areas of improvement are identified along with bright spots. Partners with Purpose booster trainings are also offered to allow programs to re-train in areas identified through the Program Assessment process.

In order to further build the capacity of community partners to use data, both the Anderson Foundation and the Toledo Community Foundation have designated local financial resources to support programs in meeting their data needs. Based on recommendations from Aspire Toledo, the Anderson Foundation funds numerous programs in building data capacity. This includes training, purchasing of data systems, infrastructure improvements necessary to support data systems and purchase of curriculum and assessment instruments. The Toledo Community Foundation established a fund specifically to support data-driven innovative practice in support of recommendations generated by Aspire Toledo.

# resources

## ED Fuel Competency Map

Represents the functional abilities necessary for the breadth of data roles typically within school districts or networks.

[Click here to access](#)



## Data and Tech Training Dialogue, NNIP

Highlights examples of training courses from around the country that advance data and technology literacy.

[Click here to access](#)



## Commit Partnership FERPA Training

Training slides for partners on FERPA.

[Click here to access](#)



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## Summit Education Initiative FERPA Training

Training slides for partners on FERPA.

[Click here to access](#)



# conclusion

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# conclusion

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Numerous examples of data sharing across the StriveTogether Cradle to Career Network have demonstrated that successful data-sharing partnerships are possible! By interviewing experts in and out of the Network and reviewing the best resources in the field, we've learned that data sharing for collective impact comes with technical and adaptive challenges that can be overcome. Network members shared inspiring examples of the kind of data sharing coordination that is making evidence-based decision making possible at a systems level. Effective data-sharing partnerships start with the end in mind, by engaging stakeholders early and communicating clearly how data will be used. They know where to go for consistent and credible data in their communities and they know what is publicly available.

Data-sharing laws and agreements can be complex, but knowing the three FERPA exceptions and strategies used to protect personally identifiable information go a long way toward building confidence with partners. Knowing the conditions under which data can be shared opens the door for negotiations with data providers; however, providers are not required to share data. Partnerships that take the time to build their credibility and value to data providers — and engage youth and families — will ultimately meet fewer obstacles. Data-sharing partnerships are as much about consistent communication and follow up, investment in technology infrastructure and staff capacity, and demonstrating results, as they are about the content of a written data-sharing agreement.



# StriveTogether<sup>®</sup>

Every child. Cradle to career.

StriveTogether partners with nearly 70 communities across the country, providing, coaching, resources and rigorous approaches to create opportunities and close gaps in education, housing and so much more. Together, the StriveTogether Cradle to Career Network impacts the lives of more than 11 million youth, including 7 million children of color.

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