Module 4: Coordination Best Practices and Capacity Building

Coordinating to Improve Family Experiences Toolkit: Resources for State and Local Human Services Agencies

This module provides guidance and resources on many of the elements that can get teams stuck when trying to advance coordination efforts: **organizing teams and integrating practices** to advance successful efforts and making sure individual programs and teams have the **capacity** to take on larger changes.

Navigating this Module

We organize this module into two sections:

- Coordination Best Practices**.** This section summarizes important practices and features of successful coordination efforts that are critical regardless of what your team is taking on. *The guidance and examples in this section can be helpful for new teams thinking about how they can set themselves up for success and for existing teams who are looking to strengthen their internal partnerships.*
- Building Coordination Capacity**.** This section provides resources on larger organizational change topics that support your team's efforts to coordinate in service of improved family experiences. These include areas for change that individual programs can take on to make them more ready to coordinate, as well as changes that teams can make together to set the stage for coordinating but don't, on their own, impact families. *The resources in this section can be helpful for teams taking on coordination where one or more of these elements is critical for implementation.*

Coordination Best Practices

Successful human services coordination efforts often share key features. This section describes these features and provides resources to help your team integrate them into your coordination efforts. The practices here reflect ways that program and agency leadership can set efforts up for success. These features include:

- A shared vision
- A culture that promotes change and continuous improvement
- Clear articulation of roles and responsibilities and communication practices to support them
- Family perspectives and voice
- Strong relationships and shared ownership of work
- Measuring success and focusing on continuous improvement

Develop a shared vision

Developing a shared vision is fundamental to any coordination effort that aims to improve family experiences. A shared vision represents the end goals of any change effort as conceptualized by all parties involved. Shared visions are typically described in succinct vision statements that are easy to understand both for those involved and external parties. An effective vision statement not only describes an end goal but also provides guideposts for the changes that are needed to get there. It is a resource for your team to revisit throughout the coordination effort to help ensure that your effort stays on track.

In a coordination effort, a strong shared vision will:

- Clearly articulate how the work will improve how families and/or staff experience service delivery
- Connect to your team's and agencies' mission statements and overarching goals
- Be clear and focused enough to operationalize
- Motivate staff at all levels to drive action[1]

Best Practices Spotlight: South Carolina's First Five for All Initiative

Context: South Carolina's Early Childhood Advisory Council sought to build an online portal to connect families to services for young children.

Vision: Their team was guided by an overarching goal and vision:

- Goal: "All children will reach their highest potential"
- Vision: "An online portal that families want, need, and deserve."

Vision in practice: The vision established by the First Five for All Initiative set the stage for the initial development of the self-screener and expansion of the online portal to include pre-filled applications for participating programs.

The exercise of crafting a shared vision statement is also an opportunity for team members to collaborate and build buy-in. The experience will highlight commonalities across team members as well as differences to reconcile. When each program is able to see their contributions to the vision, it will also help them identify the ways that they

[1] Hahn, H., Gearing, M., Katz, M., and Amin, R. (2015). Observations of Leaders Driving Changes in State Government. *Urban Institute.*

can maximize and build on their unique strengths and capacities to contribute to the overall goal of improving family experiences and outcomes.

In addition to the example included in the Best Practices Spotlight in this section, other examples of vision statements for coordinating supports across human services for parents and their children can be found here.

Tools to support this practice

Resource	Navigation
The University of Kansas' Community Tool Box website includes a guide for developing vision and mission statements for new efforts. It includes examples, guidance for how to gather input to guide creation and creating a vision statement, and how to build consensus around the statement.	The website includes a worksheet for guiding your team's development of a vision statement.
The Sharing Data for Social Impact: Guidebook to Establishing Responsible Governance Practices provides guidance for developing a shared vision for a data sharing effort. The guidebook describes how the shared vision outlines the goals and motivations that should inform implementation. It also provides primary motivations for sharing data.	See **pages 6-8** for guidance on developing shared vision for a data sharing effort.

➔ Elevate family perspectives and voice

Families can play a key role in decision-making processes for human services agencies. When government agencies seek to improve services, families can offer expertise based on their experiences. These families have the best understanding of the real-world barriers and challenges that people meet when seeking services.

The term "family engagement" is used here to describe state and local leaders partnering with families to plan, implement, or evaluate services, programs, or policies that impact them—not just decision-making for their individual cases throughout service delivery. Engaging families in program improvement can:

- Lead to programs and systems that work better for families
- Increase the use of services and family buy-in
- Build trust between families and agencies
- Have personal benefits for families and agency staff engaged in efforts to incorporate family perspectives, such as increased social capital for families and job fulfillment for staff

Best Practices Spotlight: Northern Kentucky Scholar House Two-Gen Initiative

Context: The Northern Kentucky Scholar House worked to build a state-wide two-generation self-sufficiency program.

Incorporating family voice in practice: In developing the program, the initiative incorporated family voice in several ways:

- Collaborative workshops with program participants, parents, caregivers, program staff, and technical assistance liaisons
- Intensive collaboration with select parents/caregivers who met with the larger group to prioritize options for processes changes
- Community assessment with input from parents and caregivers
- Intensive input from select parents and caregivers

Results: Staff and participants worked together to identify root causes of service integration issues, brainstormed potential strategies to improve family experiences, and identified preferences for strategies to pilot for rapid-cycle learning (see pages 6, 8, and 10 of the brief linked above).

Family engagement should be deliberately planned, appropriately scoped to meet your team's needs, and meaningfully center families' perspectives.

Resources to support this practice

Resource	Navigation
The Elevating Family Input in TANF and Child Support Programs toolkit provides guidance on various elements of engaging families to improve programs. For example, it includes resources on gathering input, building trust, sharing decision-making power, and collecting feedback from families.	See the following sections for resources on elements of family engagement: • **Section 5** for resources on building trust with families. • **Section 7** for resources on gathering input from families. • **Section 8** for resources on integrating family input into program improvement. • **Section 9** for resources on sharing decision-making power. • **Section 10** for resources on collecting and incorporating feedback.

➔ Develop a culture that promotes changes and continuous improvement

To move forward with a coordination effort, state and local agencies will need to ensure all parties involved are ready to take on the challenge of collaboration and prepared to make operational changes. Leaders of successful cross-agency change initiatives create an atmosphere of **risk-taking, transparency, ownership, honesty, and adaptability**.

The factors driving change readiness can be grouped into three categories:

- **Motivation** that change is needed, doable, and important and will have concrete outcomes.
- **General capacity** of programs and agencies involved in change, including appropriate leadership, innovativeness, shared beliefs and expectations about how things are done, staff perceptions of the work environment, resource availability, and staff capacity.
- **Specific project capacity**, including leadership buy-in and support, project champions, knowledge within the team of the changes that need to be made, support and structures for implementation change, and relationships and networks across and beyond the team.[2]

Best Practices Spotlight: Louisiana's Medicaid and CHIP Renewal Initiative

Context: Louisiana sought to streamline eligibility determinations for Medicaid and CHIP application and renewals using data matching from multiple human services programs and other sources.

Change leadership in practice: Louisiana's agencies **embraced experimentation and a willingness to make mistakes at all levels and** brought front-line staff into decision making when implementing changes.

Results: As the state often tests new approaches before beginning broader implementation efforts, this culture has **allowed them to learn from mistakes at a smaller scale to iteratively improve** before large-scale implementation. This culture has been critical to the success of their efforts (see pages 6-9).

Demonstrating progress towards your goals can lend validity to your work both within your team and externally, even when steps are small and incremental. As your team takes these small steps, a strong organizational culture grounded in transparency and problem-solving can improve change readiness. [3]

Resources to support this practice

Resource	Navigation
The Observations of Leaders Driving Changes in State Government brief provides key lessons and tools to support effective leadership in the context of implementing change. These insights are based on the experiences of state leaders and their colleagues.	See **pages 6-8** for three keys for leading strategic change in state government. See **pages 8-13** for leadership tools to be able to achieve the three keys for change. See **pages 14-16** for a discussion on the characteristics of leaders who were able to make change in state government.

[2] Capacity Building Center for States. (2018). *Change and implementation in practice: Readiness.* Washington, DC: Children's Bureau, Administration for Children and Families, U.S. Department of Health and Human Services.
[3] James, C. (2016). 12 Lessons on Program Integration and Innovation. *CLASP*.

➔ Build and reinforce relationships and shared ownership of work

Relationship building is a critical but easily overlooked aspect of coordination. Strong, ongoing relationships **are reciprocal and based on trust**. The Work Support Strategies initiative found that building trust—or rebuilding trust where there had been conflict between partners in the past—was necessary to move forward with the larger changes needed to help families they served.[4] This included building accountability between leadership and staff and between different levels of government. Leaders advance these trusting relationships by:

- Having a strong physical presence with local partners
- Keeping promises, even small ones
- Actively listening
- Bringing an understanding of both policy and practice
- Ensuring voices, including non-leadership staff and community partners, have a seat at the table from the beginning
- Celebrating the initiative's successes

Building these trusting relationships is even more critical when you are working with new partners or working with existing partners in a new way. Consider existing power dynamics with contracted service providers and grantees who may be dependent on funding from your program. They may be hesitant to openly discuss ways that families aren't fully served by the status quo.

Resources to support this practice

Resource	Navigation
The Fostering Partnerships for Community Engagement guidebook provides tips and considerations for building sustainable partners, finding the right partners for your project, and best practices for partnerships. The resource focuses on partnerships with community-based organizations.	See **pages 2-9** for the pillars of good partnerships. See **pages 10-13** for tips on building partnerships.

[4] Hahn et al. (2015). *Observations of Leaders Driving Changes in State Government: Leadership Tools and Lessons from Two Work Support Strategies States*. Urban Institute.

➔ Clearly articulate roles and responsibilities and develop communication practices to support them

Clearly articulating roles and responsibilities among partners, and key staff within those organizations, can help ensure your effort runs smoothly. This includes clarifying team members' specific duties, detailing who has the authority to resolve issues that arise, and which staff are supporting the effort. Your team may find it helpful to define roles formally (e.g., using a governance charter) or informally. Regardless of your approach, **clarifying what needs to get done and who will do it is critical for coordination efforts**. Clarifying roles on the outset has also been found to help dampen the potentially negative effects of power differentials between partners in coordination efforts.

In addition to the importance of clearly articulated roles and responsibilities across team members, team members also need to know how to communicate and cooperate effectively across their roles. Team membership and responsibilities can change and evolve over time, but keeping everyone up to date on progress and roadblocks will help everyone stay involved. In general, **staff at all levels benefit from stronger communication practices and overall increases in the level of communication.**[5]

Clear communication can support your team in:

- Sharing about and understanding one another's regulations, requirements, and practices
- Discussing existing systems and their constraints and flexibility
- Developing shared language across teams who use different terminology to discuss similar concepts
- Effectively collaborating during case consultations, referrals, or co-location[6]
- Having honest dialogue about capacity to take on coordination tasks and efforts

However, it is not as simple as just encouraging staff to communicate. Leadership should ensure and clearly convey that coordination is a priority, set up structures that promote communication, and dedicate time for staff to work together. In doing so, consider:

- Which staff are currently siloed?
- Where are there gaps in communication across teams?
- Which avenues are most appropriate for your communication needs—can you sufficiently communicate in writing (e.g., a weekly update email to the team or

Best Practices Spotlight: South Carolina application and policy integration

Context: South Carolina worked to reform, modernize, and align systems delivering work support services, with a focus on policy alignment and application integration.

Communication in practice: As part of their integration efforts, South Carolina instituted a **formal governance charter** to improve the functioning of their interagency work group when it was struggling with decision-making. The charter helped them overcome existing tensions between collaborating agencies in service of their effort.

Results: Developing a formal governance charter **clarified decision-making processes**, **set up structures for regular communication**, and **helped the teams overcome delays** (see page 27).

[5] James, C. (2016). 12 Lessons on Program Integration and Innovation. *CLASP*.
[6] Nava. (2013). Foster Collaboration Across Roles and Teams

shared system for managing tasks and responsibilities), or would a meeting be more effective (e.g., a monthly cross-team meeting)?

➔ Measure success and focus on continuous improvement

Developing shared accountability through continuous monitoring and improvement is another critical practice for successful coordination change efforts. This is discussed in greater depth in **Module 5**.

Building Coordination Capacity

Teams can build their capacity for coordination through individual program improvements as well as alignment of resources across partners. This section covers:

- Improve individual program processes
- Develop user-friendly outreach, messaging, and materials
- Improve digital services and modernize technology
- Blend, braid, and creatively use funding
- Prepare for effective and sustainable data sharing

Resources shared in this section focus on comprehensive guides and tools to support your efforts.

Improve individual program processes

In addition to coordination, strengthening processes for individual programs can be an effective way to improve family experiences with human services. For example, agencies can streamline paperwork, refine policies, or make technology platforms more user friendly for both staff and families. Improving individual program processes can also potentially better prepare programs to pursue coordination efforts down the line.

Business process management and human-centered redesign are two effective approaches for improving program processes.

Example approaches to redesign to improve program processes

Business process management (BPM) is an approach to making specific processes more efficient and effective for families and staff, leading to improved outcomes for families. BPM typically covers the full lifecycle of processes and can involve many phases, including discovery, modeling, analysis, implementation, monitoring, redesign, and transformation.[7]

Human-centered design (HCD) is a design approach that uses the needs and behaviors of end users—such as families and staff—to drive solutions and improve user experience. HCD typically includes phases for discovery, design, delivery, and measurement.[8] It is also guided by key principles that center the dignity of users and bring affected community members into the design process. These improvements make systems more usable for families and staff.

When improving individual program processes using these approaches, consider:

- Your agency or program's **readiness or capacity to make changes**
- The **root causes of problems** you are trying to solve (see **Module 1** for guidance on identifying root causes)
- **Procedures that are redundant or duplicative** or don't currently serve a clear purpose

Resources to support this practice

Resource	Navigation
The Business Process Management brief provides examples of human services programs that have applied various business process management strategies. It also discusses how programs can use similar approaches.	See **page 2** for a table with process management strategies, potential changes agencies can make to adopt these strategies, and why they help staff and families.

[7] Cflow. (July 2025). What is BPM Methodology in Process Management?
[8] Digital.gov. Introduction to human-centered design

Resource	Navigation
The Human-Centered Design Guide Series supports government agencies looking to engage in human-centered redesign. The series includes five guides that go through the first two phases of the human-centered design process—discovery and design. The guides vary based on topic but include background information, step-by-step guidance on various processes, and links to helpful resources.	See this link for an introduction to human-centered redesign. See this link to learn how to conduct discovery research. See this link to learn about methods for designing products, services and systems. See this link for guidance on using discovery research to inform design.
The Blueprint for a Human-Centered Safety Net webpage provides guidance for improving the social safety net using the five principles of human-centered redesign. Each principle includes a description, why the principle is important to clients, caseworks and state leaders, steps for adopting the principle, and metrics for measuring its success.	See this link to learn about providing many welcoming doors. See this link for guidance on how to make it easy for families to understand what assistance is available and what is required of them when engaging in safety net programs. See this link for guidance on making informed decisions. See this link to learn about being responsive to changing needs. See this link to learn about designing processes to be completed using simple actions.
The Going Big with Human-Centered Redesign guide provides guidance on using human centered-redesign to improve application, renewal, and correspondence with families. It includes a discussion on the types of design, guidance for identifying problem areas, and support for planning a redesign effort. It then provides checklists for accomplishing various steps of the redesign process.	This guide includes checklists on key elements of planning for and implementing human-centered redesign, including: • Leadership and operations (**pages 16-18**) • Conducting user research (**pages 19-20**) • Policy limitations and opportunities (**page 21**) • Technical implementation (**pages 22-23**) • Implementation (**pages 24-25**) • Evaluation (**page 26**) • Governance and sustainability (**pages 27-28**)

Develop user-friendly outreach, messaging, and materials

Public outreach is a key component of creating positive experiences for families interacting with multiple benefits. Effective outreach campaigns can help inform families what programs they are eligible for and how to access them. They can also keep families informed of important changes that may impact how they receive services. Outreach materials can also be a helpful resource to help staff and other partners understand and communicate important details about the programs they administer. Importantly, resources in outreach campaigns should be user-friendly, informative, and accessible to a wide audience to most accurately and effectively convey information.

Example approaches for developing user-friendly outreach, messaging, and materials

A language access plan can help ensure that your agency, program, and staff are prepared to work with individuals who speak limited English.

Conduct plain language reviews to ensure that resources are accessible to a wide range of audiences, are concise, and do not use unnecessary jargon.

In seeking to develop user-friendly outreach messaging and materials, consider the following:

- Understand **your audience's needs and preferences** (e.g., what languages are spoken in the communities you serve, what mediums will best reach your audience)
- Consider what outreach methods are **most appropriate for the information you are trying to convey**.
- **Clearly communicate any required next steps** such as deadlines and consequences of inaction and action.

Resources to support this practice

Resource	Navigation
Applying Behavioral Science to Improve WIC Outreach Messaging provides best practices for effectively designing messages for families who face chronic scarcity, strategies for increasing effectiveness, and ways to engage participants and test messages. While the resource is focused on WIC, the strategies included are relevant to outreach for many human services programs.	See **pages 1-2** for guidance on designing outreach messaging for families experiencing scarcity. See **pages 2-5** for guidance on crafting messages that inspire recipients to take action. See also the Developing Messaging Tool, an exercise for crafting and planning effective outreach messages. It includes key considerations, and templates with guiding questions to support your team's planning efforts.

Resource	Navigation
The Basics of Texting Safety Net Clients playbook offers guidance for texting families receiving services. Each section focuses on a different element such as text frequency, message length and language, and how to convey that your texts are not spam.	See **pages 4-8** for information on when to use texting. See **pages 9-15** for specific recommendations for effective text outreach and communication. See **pages 15-17** for information on collecting consent and contact information. See **pages 17-18** for guidance on two-way texting. See **pages 18-19** for guidance on how to communicate your texts are legitimate.
The Plain Language Web Writing Tips provide simple guidance for writing in plain language, particularly for online resources.	For more detailed guidance on writing with plain language, see the Federal Plain Language Guidelines.
The Guide to Developing a Language Access Plan helps service providers build a document to improve service provision to individuals who are non-English speaking or have limited English proficiency. This particular guide is for developing a plan for Medicare, but the model can be followed to create language guides for other programs and services. It includes guidance on assessing language needs, providing interpretation and translation, posting notices about language assistance resources, training, and evaluating your language access plan.	See **section 1** for guidance on developing a language needs assessment. See **section 2** for guidance on providing language services such as interpretation and translation. See **section 3** for information on developing notices about available language supports and resources. See **section 4** for guidance on providing trainings to staff who interact with individuals with limited English proficiency. See **section 5** for guidance on evaluating your language access plan.

Improve digital services and modernize technology

Improving digital processes and leveraging existing digital services can help agencies better meet the needs of families. Agencies can update systems used by families (e.g., applications, benefit management) and/or systems used by staff (e.g., eligibility determination, case management). Agencies can also find new ways to connect with families through technology. Ultimately, these updates can make it easier for agencies to coordinate and subsequently, serve families.

Additional support for improving digital services

In addition to the resources included below, consider looking for topics related to the systems or types of digital services you are looking to improve in the Digital Services Hub library hosted by the Beeck Center for Social Innovation + Impact. Content and resources in the Hub are continuously updated and include relevant topics like:

- Procurement for technology development services
- Digital identity management and proofing
- Hiring and talent development to support modern digital services

In improving digital services and modernizing technology, consider:

- Your agency or program's capacity for technological change
- The root cause of the technology problem you seek to solve
- The user experience you'd like to provide for both staff and families
- How technological change may impact users and how that may affect how you roll out changes.

Resources to support this practice

Resource	Navigation
The Digital Services Playbook provides 13 "plays," or tips to help government services build effective digital services for families. Each "play" has a description, checklist for completing the play, and key questions to get started. *This resource may be helpful for teams looking for ways to improve their family-facing technology more generally.*	See **play 1** for guidance on determining what people need out of your digital services. See **play 6** for guidance on assigning a team leader and holding them accountable. See **play 8** for guidance on choosing a modern technology stack to run software. See **play 9** for guidance on deploying your services in a flexible hosting environment. See **play 10** for guidance on automating testing and deployment to identify potential issues.

Resource	Navigation
The Technology, Data, and Design-Enabled Approaches for a More Responsive, Effective Social Safety Net report provides ten recommendations for using technology to improve social safety net benefits. Each recommendation includes a description, additional supporting resources, and brief case studies. The recommendations cover a broad range of topics from linking government data sets to using text and voice technologies for enrollment and recertification.	See **pages 9-43** for the 10 recommendations. You may want to focus on the following: **Pages 13-16** for guidance on activating policymakers to think like designers **Pages 17-26** for valuing user research throughout your work **Pages 40-42** for designing better approaches for delivering cash assistance.
The Improving Mobile Usability for Claimants resource provides best practices for developing mobile tools with usability by families in mind. It focuses on improvements to layouts, types and text, and form design. Each section provides actionable steps with visual examples and descriptions. Although this resource refers to the mobile experience for unemployment insurance claimants, the concepts of good mobile design are universal to all programs.	See this link for guidance on improving layouts. See this link for guidance on type and text. See this link for guidance on form design.
The Improving Customer Service in Health and Human Services Through Technology toolkit provides best practices for using web-based tools, mobile tools, and call center tools. It also has a section on considerations for implementing technology.	See **Part 3 Section A** for guidance on using web-based tools. See **Part 3 Section B** for guidance on mobile tools. See **Part 3 Section C** for guidance on call center tools. See **Part 4** for implementation considerations.

Blend, braid, and creatively use funding

Coordinating funding is a challenging but critical component of any cross-program or cross-agency coordination effort. Coordinating across separately funded programs introduces multiple funding sources with varying flexibilities and limitations. Even more, coordination efforts will have costs associated with the coordination itself (e.g., maintaining shared space). You may be able to fund these components through current funding streams, or they may require new ones. In this light, programs looking to coordinate should understand how they can (and cannot) use existing funding streams and how to identify new sources of funding.

Example approaches of funding to support coordination

Blend funding streams by pooling funds from different sources into one single source.

Braiding funding streams with specific reporting requirements or more restrictions by coordinating separate funds for the same purpose but tracking them separately.

Specialized funding such as grants or bond funding can help fund specific parts of coordination efforts.

When preparing to fund a coordination effort, consider:

- Staying up to date on **restrictions and flexibility in existing funding sources**
- Understanding how various funding approaches may affect **record keeping, management information systems, or accounting**
- Learning about **how different sources may be appropriate for different components or tasks** (e.g., start-up costs like capital investments, ongoing efforts like shared staffing)
- Pursuing **specialized funding for specific components** of your coordination effort that may not be fundable through existing funding streams

Resources to support this practice

Resource	Navigation
The Federal Funding for Integrated Service Delivery toolkit describes federal funding sources for various human service programs. It includes details about the flexibility and restrictions of funding sources. The toolkit is written to support program integration. Please note that descriptions of funding sources may not be up to date.	See **pages 7-9** for a description of TANF funding. See **pages 19-29** for descriptions of funding for education and training programs. See pages **39-47** for descriptions of SNAP, Medicaid, and CHIP funding sources.

Resource	Navigation
Putting it Together: A Guide to Financing Comprehensive Services in Child Care and Early Education provides innovative strategies to use funding to support early care and education systems. The guide goes beyond blending/braiding funding streams to describe policy changes that can support other models of integrating funds. The guide also includes short case studies of how states have integrated multiple funding streams to support early care and education programs.	See **pages 13-20** for examples of states' innovative funding practices. See **pages 22-24** for programs administered by the Administration for Children and Families such as Head Start, child care subsidies through the Child Care and Development Fund (CCDF), and TANF. See **pages 28-30** for information on Medicaid and CHIP funding. See **pages 33-34** for information on SNAP funding.
The Braiding Federal Funding to Expand Access to Quality Early Care and Education and Early Childhood Supports and Services tool provides guidance for the elements to consider in braiding funding streams to support early childhood programs. It includes guidance on identifying funding streams, reviewing requirements, developing shared goals, and other important elements of braiding funds. Each section includes a description of the element and links to resources for further support.	See **pages 1-3** for a step-by-step description of the braiding process. See **pages 5-12** for information on identifying funding streams. See **pages 21-26** for information on aligning requirements of funding streams. See **pages 31-36** for information on building programs using multiple funding streams.
Paving the Road to Access discusses different elements of aligning health, human services, and labor sectors. The report includes a section on using various funding models and resourcing streams to support program alignment. It includes promising practices for obtaining funds such as through federal grants and philanthropic investments.	See **pages 9-13** for a discussion of funding models and resourcing streams.

Prepare for effective and sustainable data sharing

Data sharing is an important component of coordinating programs to support whole families. Whether your effort is focused on integrating applications or coordinating case management, your team will need to share data about the families you serve. Data sharing can help ensure that eligible families get access to benefits and can make agencies more efficient in administering services. However, data sharing is complex and technical and requires planning and expertise.

Example approach to data sharing

Sharing eligibility data by using data linkages between programs. There are federal rules that allow programs to use eligibility determination findings from other programs (i.e., someone deemed eligible for one program is automatically eligible for another).[9] Use this tool to explore linkages of various federal programs.

When preparing to engage in a data-sharing effort, consider the following:

- Understanding **why you are sharing data** and what the primary goals are (e.g., joint outreach campaigns, eligibility determination)
- Clearly defining **what data** needs to be shared for your effort
- Understanding **who needs access** to shared data
- Defining **how frequently** you need to share data to meet your goals

It can also be helpful to assess the current context for data sharing, including:

- Understanding **regulatory requirements, including confidentiality, that govern data use** for all agencies and programs involved
- Considering your agency or program's **capacity to share data** with others
- Understanding **existing data linkages** that can be built on

Resources to support this practice

Resource	Navigation
The Considerations for Sharing and Matching Data resource offers considerations for data sharing efforts focused on outreach and enrollment. Each consideration has a brief description and high-level guidance. Considerations include examining data structure, using the correct personal identifiers for data matching, and many more.	We recommend reviewing all considerations in this brief, two-page resource.

[9] Center on Budget and Policy Priorities. (2017). Opportunities to Streamline Enrolment Across Public Benefit Programs

Resource	Navigation
The Data Sharing to Build Effective and Efficient Benefits Systems Playbook provides detailed guidance on using data sharing to make benefit systems more effective and efficient. The playbook is comprehensive and includes information on why data sharing is important for both analysis and outreach, legal aspects of data sharing, how to plan and launch a successful effort, and collaborating with other sectors. Each section includes concrete steps with instructions for completing them and case study examples of these steps in practice.	See **pages 14-18** for information on why data sharing is important for improving program analysis and outreach. See **pages 32-45** for guidance on planning, launching, and scaling a data sharing effort. See **pages 46-55** for guidance on collaborating with other sectors.
The Responsible Data Use Playbook for Data-Sharing Collectives provides guidance for forming a data sharing collective. It is organized into four strategic areas that cover building buy-in, avoiding legal issues, obtaining resources, and sustaining the effort. Each strategic area includes “plays” or specific steps accompanied by checklists and key questions. Although the playbook is addressed to Chief Data Officers, other leadership overseeing data strategy can benefit from this resource.	See **pages 5-9** for guidance on building buy-in. See **pages 10-13** for guidance on avoiding legal issues. See **pages 14-17** for guidance on obtaining resources to support the data-sharing collective. See **pages 18-21** for guidance on sustaining the effort.
The Confidentiality Toolkit provides support for state and local data sharing efforts around ACF-administered programs. It is meant to clarify rules that govern data sharing among these programs. Each chapter discusses a different program and includes guidance, implementation considerations, relevant federal regulations, brief examples, and links to other helpful resources.	This resource includes confidentiality guidance on specific programs including child welfare (**pages 9-26**), TANF (**pages 27-30**), child support (**pages 31-34**), child care (**pages 35-39**), Low Income Home Energy Assistance Program (LIHEAP) (**pages 40-42**), and SNAP (**pages 43-46**). Pages **47-55** provide technical recommendations to support confidentiality.

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