LEARNING REPORT

Toward Preventing Youth Homelessness

A Collaboration Pilot to Enhance Service Access

PolicyWise for Children & Families

PolicyWise for Children & Families is a registered charity dedicated to enhancing practices and policies that promote the well-being of children, youth, and families. For over 20 years, we have become known for our commitment to broad and inclusive engagement, leading to impactful collaborations with diverse partners. This includes Indigenous communities, non-profit organizations, academia, and all levels of government in Canada. Together, we strive to create a world where children, youth, and families thrive.

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Land Acknowledgment

PolicyWise for Children & Families acknowledges the lands on which our team gathers and resides are Treaty Six Territory, Treaty Seven Territory, and Treaty Eight Territory. Since time immemorial, these lands have been home to the nêhiyaw (Cree), Dene, Anishinaabe (Saulteaux), Nakota Isga (Nakota Sioux), and Niitsitapi (Blackfoot). We also acknowledge that we are on the lands of the Métis Nation of Alberta's North Saskatchewan River Territory, Battle River Territory, Peace River Territory, and Lower Athabasca River Territory.

We respect the histories, languages, and cultures of the First Nations, Métis, and Inuit, whose presence continues to enrich our communities.

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Canada

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Introduction

Background

Youth homelessness is a complex and urgent issue in Canada, affecting thousands of young people who often lack the necessary resources and support to transition successfully into adulthood. In 2024, the Government of Canada estimates that 44% of homeless adults had their first experience of homelessness before the age of 25. Youth homelessness is associated with poorer physical and mental health outcomes.[1]

For many young people, homelessness is part of a cycle of moving between systems. Breaking this cycle requires coordinated, youth-centred solutions that address both immediate housing needs and the long- term social and economic factors that contribute to homelessness. Currently, many social service agencies, shelters, and government programs operate in silos. This lack of integration can result in inconsistent services, repeated assessments, and gaps in care, making it harder for youth to access the support they need.

A more connected, collaborative system is essential. Responsible data sharing can enable informed referrals, streamline service access, reduce duplication, and identify at-risk youth earlier. Without data collaboration, youth often must repeat their stories to multiple providers, which can be retraumatizing and exhausting.

In 2025, PolicyWise for Children & Families, in partnership with the University of Lethbridge, co-created a national roadmap to support the prevention of youth homelessness by improving information sharing.[3] Based on the recommendations from youth who helped shape the roadmap, the Government of Canada funded a project to build and pilot a simple data collaboration initiative in Calgary, Alberta. The goal of the initiative was to use data sharing to support coordinated service access for youth who are homeless or at risk of homelessness, while generating lessons to inform similar efforts across Canada.

This report describes the community-based pilot and shares the lessons learned from initiating, developing, and implementing a data-sharing collaborative between agencies serving homeless youth. We outline key activities and roles, highlight important decisions and insights, and share recommendations based on the lessons we learned. We hope that the lessons and tools from this pilot extend beyond this partnership. Agencies and programs embarking on collaborative initiatives involving data sharing can use this report as a starting point for structuring early conversations and building a sustainable, secure partnership.

Project Objectives

This work focused on the following three objectives:

1. Perform an environmental scan of data-sharing collaborations that support vulnerable populations and identify promising practices.
2. Build and test a community-based collaborative data sharing approach to support coordinated service access among organizations supporting youth who are homeless or at risk of being homeless.
3. Conduct a developmental evaluation to support continuous quality improvement, monitor development, design, and early pilot implementation, and capture lessons learned to share across Canada.

In this report, we document the process and findings related to objective two and three. Objective one resulted in a separate report outlining key considerations for data collaboration. This foundational report, which informed the pilot project approach, can be found here.

The Pilot Project

Building and Testing a Community-Based Data Sharing Collaborative

This section outlines the journey of the community-based pilot project. We describe the work in three phases: initiating, developing, and implementing the data collaboration. While activities were not strictly split into these phases, they provide a useful framework for understanding how activities, decisions, and actions progressed.

For each phase, we provide a brief description of the criteria used to categorize activities. However, it is important to emphasize that the pilot was highly iterative and constantly evolving. Initially, we envisioned the pilot as a clearly defined approach or tool to support data collaboration between two partner organizations. We quickly learned that the pilot was not a single activity, but rather the ongoing process of building the collaboration itself.

Pilot Partners

Trellis Society is a non-profit organization located in Calgary, Alberta that works alongside young people, families, and communities to support growth in all areas of their lives. Their services address economic stability, well-being and mental health, and housing. Through these services, Trellis helps individuals and families exit poverty, navigate out of crisis, and move from isolation into community.

The Alex is a non-profit organization located in Calgary, Alberta that serves individuals with complex health challenges. This includes addressing poverty, trauma, financial and housing instability, food insecurity, and social inclusion. Through integrated health, housing, and social services, The Alex works to create a healthy and caring community where everyone is valued and able to thrive.

The Pilot Journey

In the image below, we outline the timeline and key steps of the pilot.

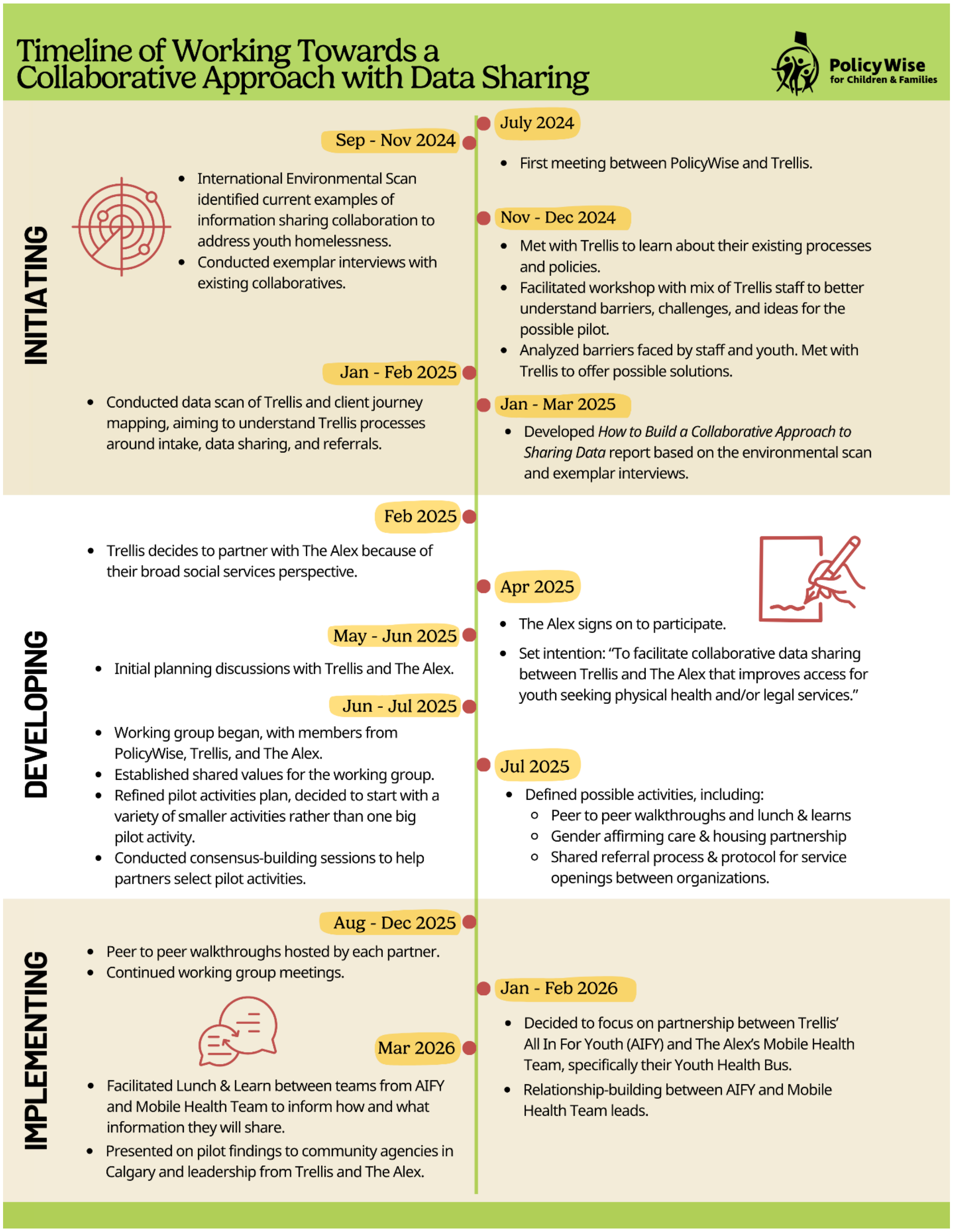

Image 1. Timeline of Working Towards a Collaborative Approach with Data Sharing

Initiating the Pilot

Purpose of this phase

The initiation phase was exploratory, focusing on conceptualizing what the collaboration could become. Given the pilot's broad and open-ended mandate, this phase centred on identifying direction and generating ideas while remaining within scope.

The primary goals were to:

- Understand the current landscape
- Identify opportunities to improve service coordination
- Establish trusting partnerships

Key activities included fact-finding, understanding the foundations for successful collaboration, documenting current processes, and reflecting on opportunities. Relationship building and knowledge sharing were central.

What we did

Conducted an environmental scan. To inform planning, we reviewed existing data sharing and collaboration initiatives across the mental health, housing, and youth-serving sectors. Through conversations with individuals directly involved in these efforts, we identified five key considerations that are foundational to strong data collaborations. We synthesized the insights into a report, *How to Build a Collaborative Approach to Sharing Data*, which informed the pilot's planning framework and design decisions.

Key Considerations for Strong Data Collaborations:

- Establishing purpose and intention
- Identifying and mitigating risk
- Promoting client-centred design
- Understanding and navigating capacity
- Prioritizing sustainability

Hosted exploratory meetings. This phase began with only one organization, Trellis Society. Initial meetings focused on understanding Trellis' internal and external data sharing practices, including referral pathways, intake processes, consent procedures, and data systems. These discussions revealed:

- Complexities and barriers to information sharing
- Administrative burden related to funder data requirements
- The importance of aligning collaboration with service realities.

As a result, we began with a single partner organization for the pilot to manage workload and develop a sustainable approach before scaling. Partnering with one organization also minimized the risk of further complexity, overwhelming staff, and delaying progress, while trying to coordinate with multiple partners within a one-year time frame. The Alex was identified as a suitable choice based on complimentary services, existing relationships, and shared values.

> **"I don't know that we'll get there in like the near future, but I do know that a large chunk, if not most of our client's access [other partner organization's name] already. And so, I know that my staff for example have relationships with like specific staff that work there. So in my brain it's already happening, but it's more the front line and maybe manager level."**
>
> \- Working group member

Supported onboarding & early planning meetings. Once The Alex joined, we onboarded their team to the pilot project to ensure a shared understanding of the pilot's purpose. Joint planning meetings allowed both organizations to map how client data is collected, used, and stored, and to identify shared interests. Many discussions extended beyond data to include services, programs, and pathways for youth. These conversations helped shape the collaboration's direction and informed our facilitation of staff engagement sessions in the development phase.

“But then I think for me it was also just remembering that people are in very different places and have different understandings of what a data sharing collaboration is or like what goes into that.”

- Working group member

What we learned

The initiation phase was intentionally exploratory, relational, and learning-oriented. Rather than starting with a predefined data solution, partners needed time to understand each other’s services, build trust, and clarify possibilities. The phase progressed gradually from single-organization exploration to multi-partner alignment at the pace and comfort of partners and participating staff. It could not be rushed or treated like a checklist of activities.

In addition to balancing timeline considerations and moving at the speed of trust and understanding, we encountered other challenges. One partner had been involved in the pilot for much longer and entered with greater familiarity and readiness. The other partner needed time to build baseline knowledge, identify the right staff to participate, and create capacity for the project. This highlights the importance of engaging all partners as early as possible. Despite these challenges, this phase established a strong foundation of shared purpose and trust. The pilot’s open-ended nature also surfaced other exciting opportunities for collaboration to better support youth.

“I’ve been surprised at how small we’ve had to start with building blocks to get where we are. I thought we wouldn’t be starting at the very beginning because there is common language and experience there… it’s also just remembering that people are in different places, have different understandings of what a data sharing collaborative is or what goes into that.”

- Interviewee

Key outcomes from this phase:

- ✓ Identified partner organizations for the pilot project.
- ✓ Prioritized starting with two organizations and learning from this environment before scaling.
- ✓ Created a preliminary list of youth-related service delivery challenges to address.
- ✓ Developed a shared understanding of a realistic scope aligned with project parameters.
- ✓ Clarified our role as facilitators, evaluators, and support for staff at partner organizations.
- ✓ Recognized the need to connect data discussions directly to day-to-day service delivery.
- ✓ Identified the need for consistent onboarding and shared language across partner organizations.

Developing the Pilot

Purpose of this phase

The development phase focused on refining ideas through an iterative process of learning, brainstorming, defining, and decision-making.

The goals were to:

- Identify programs from each organization that could benefit from stronger or more formalized collaboration.
- Determine the mechanism or activities needed to improve coordination.
- Assess the feasibility and potential impact of proposed pilot activities.

Key activities included mapping the client journey, identifying opportunities to coordinate specific services, and evaluating ideas based on potential impact and required effort.

What we did

Formed a working group. To support ongoing dialogue and maintain momentum, we formed a working group with representatives from Trellis Society, The Alex, and PolicyWise. These meetings provided a structured space to build relationships, learn from one another, ensure shared intentions, and make decisions about the pilot. Participation evolved as the scope became clearer. Initially, a wide range of roles participated, often requiring repeated onboarding and resulting in limited progress. Over time, the partner organizations identified staff best positioned to be involved.

During this phase, the working group:

- Set clear intentions, focusing on shared clients and service overlap.
- Defined how they wanted to work together - open-mindedness, shared values, and client-focused.
- Identified the need for structure, clear outcomes, and actionable steps.

Established shared values. Once alignment around purpose and the possibilities of partnership was established, the group identified shared values to support decision making and a culture of collaboration. Identifying shared values helped build trust and reinforced a shared commitment to improving client experience.

The group committed to the following shared values:

- **Client-centred:** Prioritizing client impact in all decisions.
- **Communication:** Maintaining clear, consistent communication within and between organizations.
- **Respect:** Honouring professional expertise and lived experience of staff and leadership at each organization.
- **Trauma-informed practice:** Reducing re-traumatization for clients and improving coordinated care.
- **Collaboration:** A willingness to learn from one another and work together towards common goals.

Facilitated staff engagement sessions. To help focus the collaboration and identify potential pilot activities, we facilitated engagement sessions with staff. These ensured that activities reflected day-to-day service delivery and organizational capacity.

Key sessions included:

Identifying barriers (Trellis Society). Staff identified barriers youth face when accessing services as well as challenges to providing coordinated, wraparound care. The session also explored where stronger external collaboration could improve continuity of care.

Client journey mapping (joint session). Staff from The Alex and Trellis Society mapped a typical client journey across five stages:

- Outreach/first contact
- Intake or referral
- Assessment
- Support and services
- Transition or exit

They identified what works well, pain points or gaps, and opportunities where data collaboration could improve the client experience.

Impact & feasibility decision making (joint session): We used an impact-effort matrix to assess collaboration ideas generated during the client journey mapping session. *Impact* was defined as the degree to which an activity would address staff and youth barriers. *Effort* considered the cost, time, and complexity of an activity.

This process led to consensus on a shortlist of pilot activities, including:

- A shared referral process
- Protocols for service openings
- A gender-affirming care and housing navigator partnership
- Lunch-and-learn sessions
- Peer-to-peer walkthroughs.

The group acknowledged that not all activities might be feasible within the pilot timeframe but could inform long-term collaboration.

What we learned

This phase required balancing enthusiasm with focus. While many promising ideas emerged, the pilot's limited timeframe required prioritizing activities that were realistic and actionable. Our role as facilitators also became clearer: to create structured, focused conversations that support commitment and action.

This phase highlighted the importance of:

- Clear intention and shared purpose.
- Structured facilitation to move from discussion to decision.
- Strategically designed and facilitated activities, as well as tangible tools (templates, matrices, reflective documents) to guide the process.

Key outcomes from this phase:

- ✓ Confirmed the purpose, key members, and roles and responsibilities of the working group.
- ✓ Identified barriers experienced by youth and staff at each organization.
- ✓ Identified complementary services across organizations that could support youth holistically and preventively.
- ✓ Selected potential core pilot activities, which were grouped into two categories:
    - **Relationship and awareness-building activities** – focused on strengthening relationships, building trust, increasing program knowledge, and understanding processes and policies related to information sharing, consent, and referrals.
    - **Tools and resources for data sharing** – focused on developing documents, procedures, and supports to formalize and sustain collaboration.

Implementing the Pilot

Purpose of this phase

The implementation phase marked the transition from planning and designing to active execution. The primary purpose was to implement the selected pilot activities, beginning with relationship and awareness-building activities. Communication, active implementation, and meaningful participation were central features of this phase.

Both organizations began launching activities while coordinating across busy teams, navigating unexpected challenges and changes, and introducing the pilot approach to staff beyond the working group. As knowledge and awareness increased, new connections and ideas emerged. This iterative learning often required revisiting discussions more closely aligned with the planning phase. However, these conversations were driven by insights gained through implementing the foundational activities focused on strengthening partnerships and increasing cross-organizational knowledge.

This phase reinforced that data collaboration is not linear. Backtracking and revisiting earlier conversations are natural parts of the process. Building in contingencies for reflection, providing tools or resources to support decision-making and commitments, and staying grounded in the original purpose and scope can help prevent confusion or overwhelm.

Following some of the initial activities, two programs were selected as the primary focus of the partnership: Trellis Society's All in For Youth (AIFY) program and The Alex's Youth Health Bus. Both programs focus on high school students and work with many of the same Calgary high schools, creating a natural opportunity to build on existing processes, connections, and shared clients.

What we did

Ongoing working group meetings. Working group meetings continued as a core implementation activity. These meetings provided structured space for partners to:

- Deepen their understanding of each other's programs
- Clarify priorities and expectations
- Narrow the scope of feasible data sharing within the pilot timeframe
- Identify requirements for sustainable collaboration.

These discussions helped move the group from broad exploration toward practical collaboration. This included bringing in staff with program-level decision-making authority. The meetings also created space to discuss current processes, whether informal or undocumented.

Peer walkthroughs. The first foundational relationship-building and implementation activity was peer walkthroughs. Each partner hosted a site visit, allowing staff to tour physical spaces, meet team members, and gain a deeper understanding of how programs and services operate day-to-day. The walkthroughs also included time for informal connection, which helped build trust and familiarity across organizations.

In advance, staff identified appropriate participants to ensure representation from relevant programs and roles. Post-walkthrough survey data showed strong impact: 91% of staff reported increased knowledge of how to contact staff at the other organization, 100% reported better understanding of the partner's programs and services, and 86% reported improved understanding of referral criteria.

> **"We went there and it was so lovely and so great, it was really cool to like get to know the people and get to know the spaces and what they do, the services they provide, the schedule, all of those pieces were really great and I walked out of there like feeling really good about like how this relationship was moving forward."**
>
> - Working group member speaking about the peer walkthroughs

Lunch and Learn sessions. The second planned foundational activity was a series of 'Lunch and Learn' information sessions. Initially, these sessions were intended to focus broadly on data sharing. However, after the peer walkthroughs and subsequent working group meetings, the potential for a partnership emerged between two programs: Trellis' All in for Youth (AIFY) and The Alex's Mobile Health Team, and more specifically, their Youth Health Bus. The teams then decided to host a lunch-and-learn specifically for the staff of these two programs.

During the session, both teams presented their services, answered questions, and planned how warm handoffs and other forms of collaboration could occur. Trellis and The Alex intend to continue hosting 'Lunch and Learn' sessions, including topics related to broader data sharing.

What we learned

As activities took shape, the pilot continued to evolve. Engaging additional staff with deeper knowledge of day-to-day operations highlighted the need for flexibility and responsiveness. Bringing new members into the process also emphasized the importance of intentional onboarding to ensure a shared understanding of both the project and the working group approach.

We were also reminded that each organization has its own risk tolerance, procedures, and accountability structures, which influence collaboration. Establishing a shared understanding of key terms, such as “data sharing”, was especially important, as agency culture and individual experiences influenced how members interpreted them.

While the initial focus was on identifying gaps in services that each organization could address, the partners decided that the most natural first step was to build on the areas where two programs overlapped most. As the project progressed, partner organizations began identifying next steps more proactively and independently. Once the two programs were identified, staff set up meetings outside of the working group to advance the collaboration.

Key outcomes from this phase:

- ✓ Developed new connections at the manager and frontline level across the two organizations.
- ✓ Increased knowledge about each other’s programs and referral criteria, to better inform what is available for clients.
- ✓ Identified two programs for a formalized partnership (AIFY and Youth Health Bus).
- ✓ Discussed funding contracts, existing partnerships, legislation, and consent procedures relevant to the collaboration.
- ✓ Identified additional support, guidance, and commitment needed to sustain the collaboration beyond the pilot period.
- ✓

Current State

Both organizations entered this pilot eager to improve the access to service for youth at risk of or experiencing homelessness. Together, they identified where their services diverged and overlapped and decided to formalize collaboration between two programs: All in for Youth (AIFY) and the Youth Health Bus.

Since the start of the work, the partnership has progressed in several key ways:

Increased ownership by partners. Early on, the work required significant facilitation by PolicyWise to keep conversations moving, support decision-making, and maintain commitment. By the later stages of the pilot, staff from Trellis and The Alex are driving the work themselves and planning activities beyond this short-term project, demonstrating a solid foundation for collaboration.

Shared understanding of one another's organizations. Frontline and managerial staff now have greater knowledge of each other's programs and funding. This enables staff to match youth with the most appropriate resources, use discretionary funding more efficiently, and extend the reach of available supports. Peer walkthroughs kick-started conversations that may not have happened otherwise. For example, staff at The Alex learned about Trellis' youth settlement services and have begun exploring coordination opportunities. The organizations also have a greater understanding of one another's approaches to collaboration, particularly when data sharing is involved.

Better connected teams. At the start of this work, staff struggled to maintain updated internal and external contacts. Since the Lunch & Learn session, staff have actively reached out to one another, building relationships and sharing information about client supports. The AIFY and Mobile Health Team leads have committed to maintaining updated staff contacts, supported by a SharePoint file. Up-to-date contacts streamline referrals and help youth access critical services, such as housing, quickly when in crisis.

Clearer pathways for referring clients. The two programs have determined how they will obtain client consent for warm handoffs. Trellis will include The Alex Mobile Health Team as an option on their universal Release of Information (ROI) form, and The Alex will obtain and document informed consent from clients before making referrals. Clear referral pathways reduce the need for youth to repeat their stories, enable staff to close the loop on referrals, and ensure youth receive the services they need.

Next Steps

We have summarized the decisions made regarding processes and provided recommendations on action items for the AIFY and Mobile Health teams. We have also documented opportunities for further collaboration that were identified by staff from Trellis and The Alex throughout the pilot. We have presented these in an internal document to senior leadership at both organizations to inform their continued collaborative journey.

Findings

To support continuous quality improvement, monitor pilot implementation, and capture learnings, we conducted a developmental evaluation. This involved embedding the evaluation team within the working group, engaging in ongoing reflection, sharing real-time reflections and learnings, and adapting approaches based on these learnings. To guide our approach, we created a reflection framework centred on three core questions: What? So what? Now what?

Developmental Evaluation Data Sources

Below is a summary of the data sources that informed the developmental evaluation and the findings shared in this report.

Meeting observation notes

We documented observations from Working Group meetings involving participants from PolicyWise, Trellis, and The Alex. These notes captured how the work evolved over time, including decision-making processes, key decisions, emerging challenges, and adaptations. Observation notes were coded to identify themes that supported continuous reflection and learning.

Reflective interviews

We conducted individual reflective interviews with working group members to gather reflections on the collaboration and inform future data-sharing initiatives. We asked participants about the clarity of the collaboration's purpose, areas of energy and momentum, communication processes, involvement and inclusion, meeting dynamics, integration with existing work processes, available resources, and sustainability.

Participants also reflected on unexpected developments, what they learned from them, and what takeaways they would share with others pursuing similar initiatives. Interview notes were coded to identify themes that informed continuous reflection throughout the project.

Evaluation team reflection meeting notes

As an evaluation team, we engaged in regular reflective discussions using guiding questions to identify emerging issues, key decisions, and areas requiring further exploration. Notes from these discussions informed follow-up questions for the working group, next steps to move the pilot forward, and captured ongoing learnings that supported analysis.

Post-walkthrough survey responses

We surveyed 21 staff members from Trellis Society and The Alex who participated in peer walkthroughs. The survey assessed the walkthroughs' impact on staff knowledge and guided next steps for collaboration. Questions asked staff to reflect on changes in their understanding of the other organization, including how to connect with staff, programs and services offered, and referral criteria. Participants also identified the other organization's key strengths, as well as any remaining gaps in knowledge or areas for further learning.

Lessons Learned

Beginning a data collaboration is rarely straightforward. Organizations bring different risk tolerances, data management procedures, funding requirements, and potentially different privacy legislation. Additionally, it involves individuals with varied beliefs, approaches, and capacities. These differences make it important to set realistic timelines and invest intentional effort in building relationships and shared understanding.

This section highlights key insights from the pilot project and offers practical recommendations for organizations interested in starting or strengthening a data-sharing collaboration.

Prioritize Relationships to Build Trust and Shared Understanding

Impactful, secure, and sustainable data sharing depends on strong relationships, trust, and shared understanding. In this pilot, building that foundation required time to learn about each other's organizations, programs, and processes.

At times, progress felt slow. Discussions surfaced new questions, uncovered differing assumptions, and highlighted areas requiring additional exploration. However, these conversations built the comfort and confidence needed to discuss complex and sensitive topics, including policies, legislative and funder requirements, and legal considerations. Recognizing that this early-stage work is necessary and takes time can help future data-sharing collaboratives approach it with greater intention and patience.

Recommendations

- **Prioritize relationship-building from the outset.** Create structured learning opportunities such as peer walkthroughs or program deep dives to help partners understand each other's services, constraints, and priorities.
- **Move at the speed of trust.** Trust-building and knowledge take time and may progress unevenly across partners. Build flexible timelines, especially if new individuals or teams join the work.
- **Make learning visible.** Acknowledge that early conversations may generate more questions than answers. Document insights, key decisions, and questions to maintain shared understanding and momentum.

- **Be intentional about how you meet.** Facilitate inclusive, well-structured discussions that create space for questions, differing perspectives, and collective sense-making.

Internal Readiness and Culture Shape External Data Collaboration

Effective data collaboration requires a clear understanding of one's internal capacity, existing practices, and staff perceptions. Throughout the pilot, differences in comfort, internal infrastructure, and collaboration approaches influenced the process. In some cases, internal data sharing was informal or inconsistent, and processes were not always documented. Hesitation around data, driven by privacy concerns, legislative ambiguity, or fear of making mistakes, added another layer of complexity. These factors directly shaped external data sharing efforts.

Even when partners share values or goals, their cultures or levels of readiness to share data may differ. Understanding each organization's starting point helped create a more realistic plan for moving forward.

Recommendations:

- **Assess internal readiness first**. Examine and reflect on current culture, data infrastructure, internal data sharing processes, data governance, and staff attitudes toward data and risk.
- **Map existing informal collaboration**. Ask frontline staff what information sharing is already occurring to support client needs.
- **Strengthen internal data sharing processes**. Consider how improved internal data sharing could support more coordinated or holistic client care. Identify current challenges and test and refine approaches before expanding to external data collaboration.
- **Build staff confidence and comfort**: Provide clear guidance on privacy, legislation, and acceptable practices, and create space for staff to discuss concerns.

Clear Purpose and Expectations Keep Collaborations Focused

Data collaborations require clear purpose, scope, and desired outcomes. These elements inform later decisions about governance, strategic frameworks, project outcome models, and formal agreements. This collaboration began with a very open-ended mandate. While this exploratory approach generated innovation and curiosity, it also introduced ambiguity. As new ideas emerged and participants joined the working group, discussions occasionally drifted without a clear reference point. Clarifying the collaboration's purpose and expected outcomes helped refocus the work and support decision-making.

Shared language was also important. Terms such as "data", "information sharing", or even "collaboration" were interpreted differently based on prior experience and risk tolerance. Without clear definitions, discussions could lead to confusion or concern. Establishing shared expectations provided structure while still allowing room for innovation.

Recommendations:

- **Co-create and document a clear intention and end state.** Develop a simple project charter or logic model outlining the problem, intended outcomes, scope, roles and responsibilities, and risks and mitigation strategies.
- **Define key terms explicitly.** Establish shared understanding of terms such as "collaboration", "data", "information sharing", or any others that may create uncertainty or hesitation. Revisit these terms regularly, especially when onboarding new participants, drafting documentation, or refining scope.
- **Clarify the intended level of collaboration.** Use the collaborative spectrum to identify how partners will work together.[2] For example, sharing a client's name for a warm handoff involves different data considerations than coordinated case management.
- **Start small**. Focus on achievable activities first to build momentum and demonstrate value. Distinguish between "must-haves" and "nice-to-haves" as the collaboration develops.

Engage the Right People at the Right Time

Successful data collaboration depends on engaging the right individuals at the appropriate stages of a project. This includes those with relevant knowledge, decision-making authority, operational insight, and implementation capacity. In this pilot, progress accelerated once the focus shifted from broad organizational participation to specific programs and involved team members with decision-making authority. Shifting to include the right participants often required pausing work to onboard new members, build trust, recap project history, and re-establish shared understanding. Power imbalances and varying levels of experience also affected engagement and efficiency. Some participants could not make firm commitments, while others joined later and lacked full context.

At times, new participants joined the working group later in the process. Bringing them up to speed required additional onboarding and recap discussions. While necessary, this sometimes reduced the time for advancing the work. This experience highlighted the importance of identifying key roles early and ensuring that responsibility for the collaboration is shared across teams rather than held by a single representative.

Recommendations:

- **Develop clear onboarding processes.** Maintain up-to-date written summaries of the project's purpose, history, scope, key decisions, and activities to help new participants efficiently integrate. Consider allocating separate time for onboarding so that collaboration time can focus on advancing the work.
- **Be deliberate about who joins and why.** Consider beginning with specific programs or teams rather than entire organizations.
- **Map roles, including authority and knowledge.** Identify who can inform, decide, implement, and champion the work within each organization. Ensure that decision-making authority is clear upfront.
- **Engage multiple roles, though not necessarily simultaneously.** Include frontline staff, program managers, leadership, and evaluation teams to surface diverse perspectives and reduce bottlenecks caused by silos, knowledge gaps, or power imbalances.
- **Dedicate collaboration capacity.** Avoid relying on “side-of-desk” efforts. Designate clear roles or resources to steward the work.

“I think that we potentially could have looked at it a little bit different if we did have that ‘who needs to be involved at what point’ talk and then potentially having real clarity from either like both agencies or who is the person who's continuing to drive forward the accountability of the things that need to happen?”

- Working group member

Simple Tools and Processes Facilitate Progress and Build Capacity

Throughout the pilot, partners identified many potential opportunities for collaboration and expressed a desire to learn and discuss more. However, uncertainty about the pilot’s direction and next steps sometimes slowed decision-making, particularly when new members joined.

To address this, we introduced simple tools and follow-up activities to support reflection, decision-making, and keep members on track. Structured meeting agendas, fillable templates, and decision-making tools helped summarize ideas, clarify priorities, and guide discussion. For example, the impact and feasibility matrix helped members assess which activities were realistic within the pilot’s timeline and capacity. This process fostered stronger buy-in and shared ownership as partners actively participated in prioritizing project activities.

Over time, facilitation shifted toward encouraging working group members to lead discussions and connect between meetings. This helped build ownership, accountability, and confidence.

Recommendations:

- **Document the process.** Circulate meeting notes summarizing key discussions, decisions, and next steps.
- **Be responsive to shifting needs.** Regularly check in on what members can realistically commit to and adjust support accordingly.

- **Use simple, transferable tools.** Use basic fillable forms or structured activities to facilitate initial discussions and provide templates that can be applied to future work.

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