I. Project Information*

Project Director	Lamar Gardere
Project Title	Democratizing Data for Equitable Recovery
Project Location	Liberty and Calhoun Counties, Florida
Project Summary	Disasters exacerbate inequity: people with fewer resources struggle most to recover, and recovery programs have high barriers such that only applicants with the greatest capacity can successfully secure resources. Advancing equity in the context of climate hazards requires identifying communities with the greatest needs and prioritizing them for investment. The Data Center and Shimburg Center propose to work with the Appalachee Regional Planning Commission to increase the capacity of the Apalachee Regional Planning Council (ARPC) in the Florida panhandle to gather and disseminate data that will move the region toward a more equitable recovery (following Hurricane Michael) and greater resilience. ARPC will enhance their climate/disaster relevant data intermediary function for their 9-county region with a specific focus on Calhoun and Liberty counties. This team proposes to employ user centered design concepts to transform the existing Long-term Recovery Plans (LTRP) for each county into forward-thinking equity-based plans leveraging novel data resources. This project will leverage Shimberg's extensive Clearinghouse of statewide data and The Data Center's expertise in democratization of actionable, data to in catalyze major local decisions addressing inequities. Innovative outreach efforts that reach beyond digital will be employed to hear voices of most disadvantaged. This project will exceed similar data dissemination efforts by ensuring community and decisionmakers are able to directly utilize the data and to catalyze a common understanding of needed actions and priorities. Many communities have asked for guidebooks on how to replicate The Data Center's capabilities in democratizing data. The case study would meet this demand.

II. Progress Report Questions

1. Please revisit your proposal and review your goals and the outcomes you were seeking to achieve through this grant. How successful were you in meeting your goals? Please assess your success against the criteria you set in your proposal and use any combination of anecdotes, stories, graphs, charts, visuals as well as data to explain your success. Upload supporting files if you choose.*

The Data Center of Nonprofit Knowledge Works is honored to have been awarded funding as part of the National Academies of Sciences' Gulf Research Program (NAS-GRP)'s initiative entitled, Bridging Knowledge to Action: Using Data to Develop Equitable Outcomes or Solutions to Climate Hazards and Other Disasters.

Included in this report are the below described required deliverables:

1. A case study that documents the collaborative planning process of using data to:
a) Inform decision making, and
b) Apply an equity lens to an existing plan, policy, strategy, program, etc.
The case study should identify lessons learned (both successes and challenges) about and effective strategies for engaging local government and other stakeholders; using data to inform decision making; applying an equity lens to an existing plan, policy, strategy, program, etc. [Attached]

2. An equity-informed plan, policy, strategy, program, etc. that was developed through the proposed project. [Attached]

3. An analysis that examines the similarities and differences between the original and equity-informed plan, policy, strategy, program, etc., including a discussion about the government partners' reflection on the planning process, output, and potential outcomes (e.g., did the project enhance, improve, or influence their decision making? Could the implementation of the equity-informed plan, policy, strategy, program, etc. produce better outcomes for community?). [Attached]

In meeting our goals for this project, The Data Center, in collaboration with the Shimberg Center of the University of Florida and the Apalachee Regional Planning Council (ARPC), produced the following actions and work products:

TOOLS:
Tools developed The Data Center in partnership with ARPC and Shimberg include:
• Project portal in SharePoint that served as the central clearinghouse for team members contact information, documents, meeting notes, presentations.
• Presentation materials and video recordings of training sessions and workshops.
• Preliminary examples of publicly available data that could be of use to stakeholders.
• Sample data product modeled after The Data Center's Who Lives product, localized for Calhoun and Liberty

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Counties.

• Data Assessment forms and worksheets.

• Project tracker for indicator data for Long Term Recovery Plans.

• Data Intermediary task descriptions and worksheets.

LEARNING SESSIONS:

Training for the NAS-GRP grant included six, 90-minute presentations and a series of workshops covering the following:

"Why be a data intermediary?"

A history of The Data Center and its impact in the recovery from Hurricane Katrina in 2005. This session examines questions of importance to stakeholders after the disaster and how The Data Center determined which data was the highest priority for recovery as well as important steps to make sure data is used for a more equitable recovery.

"Website Show and Tell: The Data Center demonstrates website features"

The Data Center's website answers 80% of the questions faced by communities. This session reviews the product and how usability and use case influence the development of the website. Also covered are tactics for driving web traffic and using web stats as evaluation metrics.

"Who Lives: How we do it"

How The Data Center put together one of their most popular recurring data products and the steps needed to implement something similar for Liberty and Calhoun County. This session covers important information on the evolution of technology products and web services that have been used as well as steps that need to be taken to ensure a quality product reaches the intended audiences.

"Equity data for disaster recovery and starting a data intermediary"

What data can be used to inform more equitable strategies to ensure fairness, equality, and inclusivity when building resilience against climate shocks. This sessions covers factors such as social cohesion, community problem-solving skills, and trust in governance for decisionmaking and recommended equity-informed data for Liberty and Calhoun Counties.

"Data dissemination for informed decision making"

Important principles for disseminating data to the public, engaging in the conversation, and consistently working with the community to connect to existing conversations and build interest in data. This session focuses on how to build trust and a reputation through reliability, consistency and neutrality that leads to a foundation for groups to engage in conversation.

"Ask an Expert feature"

How The Data Center's one-on-one web interface feature, Ask an Expert (formerly "Ask Allison"), helped build community trust and gain intelligence from our community about what data they needed. This session covers how regularly responding to data inquiries helps gain key insights about what data the community needs. Also covers how to build data capacity and data literacy by teaching nonprofit and government officials how to find the data themselves.

PEER LEARNING:

Peer learning included two presentations and discussions about data facilitated by ARPC and Shimberg, as well as field observations during the in-person retreat, organized by ARPC.

1) Shimberg and ARPC - Long Term Recovery Plan Review

ARPC and Shimberg Reviewed the current long-term recovery plan showing the data currently included and the importance of data points currently included. Additional focus on data that could be added to the recovery plan with a focus on equity. Examine based on use and availability.

2) Shimberg – Housing Data Clearinghouse

Shimberg Center for Housing Research reviewed the data available in their data clearinghouse with a special focus on the conditions in Liberty and Calhoun Counties. Data highlighted showed disparities in mobile home and age of housing stock in these areas. Discussions focused on how data could be used during disaster recovery and what additional measures could be used to help local governments and stakeholders better understand the housing stock in their area.

DATA:

The Data Center pulled data for both Liberty and Calhoun counties using a two-pronged approach. The first is a base set of data highlighting population-level realities used to identify any underlying trends and then analyzing why those trends may be important. The second approach is to work with partners to identify relevant equity measures and data to inform implementation of the long-term recovery plans. The goal is to identify mismatches between the lived experience, the data, and existing recovery plans for the most disadvantaged residents as identified by the partners. This initial set of curated data provides a basis for stakeholder engagement activities.

IN-PERSON WORKSHOP AND COMMUNITY MEETINGS:

During the September 2023 in-person workshop, ARPC leveraged their relationships to set up meetings and listening sessions between members of The Data Center, Shimberg, ARPC and government officials in Liberty County, Calhoun County and local governments. During these meetings staff from ARPC, Shimberg, and The Data

Center listened to local community leaders and their challenges related to hurricane recovery, housing, infrastructure, and economic development. Meetings and community engagement helped participants build working relationships and gain knowledge that will be instrumental to creating future data products and work as a data intermediary.

Optional File Upload

NAS-GRP_Clarity_Democratizing Data Case Study Report_Final.pdf

Filename: NAS-GRP_Clarity_Democratizing Data Case Study Report_Final.pdf **Size:** 391.4 kB

2. How has your work benefited your organization, professional field, community, or other stakeholders?*

The Long-Term Recovery Plans are comprehensive plans that describe how Liberty and Calhoun counties would like to redevelop following Hurricane Michael. They include a list of all the major projects that the community hopes to accomplish, along with detailed funding strategies for achieving those goals. Following a major disaster there are a lot of federal and state grant funds available to local governments to help them rebuild and come back stronger than ever. This is an opportunity for a community to re-think their long-term vision for the future and, through action planning, implement it on a faster timeline to enhance recovery from Hurricane Michael.

In hindsight, most locals agree that the experience of Hurricane Michael was a learning experience. There had not been a storm of this magnitude in this Florida region in nearly 100 years, so there was little local knowledge on how to proceed and what new challenges might arise during the recovery process. Additionally, local leaders have faced exhaustion from the stress and complexity of carrying forward recovery efforts and staff turnover has been common.

This project produced a supplement showing progress mid-way through the estimated 10-year recovery period, at a time when state and federal support for recovery is less available. This supplement focuses on what has been accomplished so far, projects that still need to be undertaken, any new priorities for recovery, and additional funding sources that can help carry through the initiatives for both Liberty and Calhoun counties. A new infusion of technical support can help bolster this mid-stage recovery period and this document can serve as a guide moving forward.

3. Are there any other successes related more broadly to this project that you would like to share with us?*

The Data Center provided a series of trainings and presentations to ARPC and Shimberg demonstrating The Data Center's approach to becoming a user-centered data intermediary serving New Orleans and Southeast Louisiana both pre- and post-Katrina, and the demonstrated equity impacts of this work. Then in September 2023, all three organizations convened in Liberty and Calhoun counties and engaged together in ethnographic community listening activities to identify the community's highest priority data needs. These listening sessions revealed that local officials lacked evidence-based situational awareness about local economic, demographic, housing and other trends. Instead, they relied on anecdotes, which are particularly unreliable in a post-disaster setting. We also learned that data dissemination via the internet would not be optimal as local officials admitted, "We don't use the internet much. We prefer paper."

After these listening sessions, The Data Center guided ARPC and Shimberg through an interactive card-sorting exercise to identify high priority data. Finally, we led a brainstorming session on creative, non-internet-based modes of disseminating this data. These actions laid a solid foundation for the ultimate development of an ARPC-Shimberg, community-oriented data intermediary that over time could increase trust in expertise and decision making in the region.

But the available funding was not sufficient to fully launch usability test and maintain the data intermediary capacity. Such capacity would be a strong contributor toward building the needed trust in open and accessible data that can catalyze additional equitable outcomes for Liberty and Calhoun counties.

4. What did you learn (positive or negative) as a result of this grant? What lessons would you share with other organizations or the field at large?*

A user-centered data intermediary does more than provide open and accessible data. A user-centered data intermediary builds trust in a marginalized community by listening to community members to learn about their information needs and presenting data that is relevant to these needs in formats that are usable for community members.

A user-centered data intermediary makes explicit the relevance of each data point to stated community concerns and information needs, provides data explanations and data analysis in plain language, and disseminates data in formats that are usable for community members.

But open data will only build trust and a shared understanding if it amplifies community knowledge and is presented in language and formats that are usable to community members.

Developing the capacity of data intermediaries to take a user-centered orientation is a critical step in leveraging open data to catalyze equitable outcomes. Our work on Bridging Knowledge to Acton revealed that developing such capacity will require additional skill-building approaches and confirmed that focused and sustained investment will be necessary.

Notably, The Data Center itself is the result of a 10-year investment in building community capacity to use information effectively in decision making. This 10-year investment was initiated in 1999, by Baptist Community Ministries (BCM), a hospital conversion foundation that was formed in New Orleans in 1995. For the first three years of the 10-year investment, BCM contributed 95% of The Data Center's $650,000 annual budget. For the 4th through 10th years, BCM contributed 50% of The Data Center's $650,000 annual budget. This $4,000,000 investment over 10 years was foundational to The Data Center's ability to supply open and accessible data that catalyzed multiple large-scale equitable decisions in pre- and post-Katrina Southeast Louisiana. Among other impacts, The Data Center's data dissemination helped the State of Louisiana to advocate for billions more in federal recovery (CDBG-DR) funding, helped nonprofits to convince funders to support the recovery of renters not just homeowners, persuaded housing developers that demand for low-income housing remained high despite the evacuation of many low-income New Orleanians, and persuaded City Hall to create an entire department to increase employment for Black men.

One additional challenge in developing a user-centered data intermediary is the need for novel skill development among data experts in communities. The Data Center, Shimberg Center of the University of Florida, and the Apalachee Regional Planning Council identified an opportunity to invest in equitable recovery, by working with two of the poorest counties in Florida—Liberty and Calhoun counties—both of which were devastated by Hurricane

Michael in 2018. The decision to focus on these poor, rural counties was itself an equitable approach to the Bridging Knowledge to Action initiative, given that rural counties have the least staffing or capacity to write recovery plans, apply for federal funding, and execute these plans. There is a need for data experts trained to identify information needs of their field or peers in their field (e.g.: academic peers, planning peers, and government bureaucrats), rather than through community members. These data experts are also capable of writing analyses and explanations in technical terms, and their data displays often assume the availability of high-speed internet. This can be a highly skilled and resource intensive requirement that may not be present in more rural communities. Given the limitations faced by these communities, the Southern Economic Advancement Project was consulted to provide technical assistance and to serve as an advisor to ARPC and the Shimberg Center on data dissemination tactics. Their support would include a community engagement document that would align with the data required to ensure equity informed decisionmaking in the region and across the state. Unfortunately, due to the time limits of the grant, cost constraints, and the difficulty working remotely and across multiple states, the consultancy with SEAP was cut from the project.

5. How do you characterize your relationship with the GRP and what suggestions do you have for improvement?*

The Data Center characterizes our relationship with the Gulf Research Program as a funding partnership regardless of whether The Data Center is being directly funded. In early 2020 The Data Center and leaders at NAS-GRP were already working together to design solutions for data access and use that could provide more equitable policy and disaster recovery for gulf coast communities. During our most recent grant, NAS-GRP staff were highly engaged with The Data Center as a grantee and were very responsive to requests. The materials provided leading up to the application were clear, communications and peer networking with other grantees was timely, and management through the grant process was helpful and accountable. In addition to this, The Data Center maintained a helpful posture toward NAS-GRP beyond the grantor/grantee relationship, helping to provide subcontracted support for other NAS-GRP grant initiatives based on our regional and data and research-oriented expertise. As a result, we do not have any suggestions for improvement.

6. Please provide any other feedback or comments you have for the GRP.*

In November of 2020, The Data Center proposed that NAS-GRP invest $933,000 annually for the development and operation of a user-centered Gulf Regional Longitudinal Data Platform, plus a pilot user-centered data intermediary function with ARPC and Shimberg. The pilot proposed to identify the curricula, training modules, coaching approaches, support frameworks, and/or licensing arrangements that might most effectively scale The Data Center's outstanding model to other Gulf Coast communities. [See attached.]

Building data intermediary capacity, and the trust of the community in that data intermediary, is a long-term process that is best done before a disaster. The goal of drafting a data product creates opportunities for working together and should be the first step towards understanding the roles needed to operate a data intermediary. Co-production of research and partnership between ARPC and Shimberg is working and in search of future funding.

Through this grant for "Building Knowledge to Action," NAS-GRP made a smaller-scale, one-time investment of $300,000 in 2022. This investment yielded important insights about additional skill-building approaches that are necessary to develop novel skills among data experts and confirmed that additional investment is needed to support open data systems that can effectively catalyze equitable decision making. Importantly, however, the project accomplished the goal of producing an equity-informed supplement to an existing Long-term Recovery Plan that has the potential to increase equitable outcomes in Liberty and Calhoun counties.

7. If applicable, please identify and describe the ways you or your organization leveraged GRP's grant (e.g., other funders, volunteers who worked on the program, in-kind donations etc.) Please specify the value and/or number/hours of volunteers if possible.

Since Hurricane Katrina, The Data Center has tracked disasters to inform decisionmakers on its economic and social impact that will build resilience capacity needed to rebound from shocks and stressors – whether natural, man-made, biological, economic, or political – that are occurring with greater frequency than ever. During COVID-19, The Data Center developed a site with this same goal, featuring data specific to the pandemic and the demographic and economic data making it more possible to design solutions and strategies that prioritize the most vulnerable in our community. For the first time, this data was available by parish and not just the New Orleans metro. Our Parish Resiliency Maps provided side-by-side maps to see where people may be struggling the most to recover from the challenges faced under the pandemic.

To expand these efforts and to connect to our work on the "Building Knowledge to Action" project, The Data Center received a $200,000 grant from the J.P. Morgan Chase Foundation to develop a new data product and site called L.E.A.D (Leadership in Equity Across Data) that would include a new set of web interfaces and indicators that would expand The Data Center's Louisiana COVID site to provide more insight on economic, disaster, and resilience issues and scaling the site for use by ARPC and the Shimberg Center. This project set out to:

• collect new statewide parish and census tract level data and perform any required statistical analysis or processing through our data warehouse for the extended Louisiana COVID site,
• analyze the results and write appropriate narrative content for these additional datasets for all 64 Louisiana parishes,
• develop the web site templates and database resources necessary to support the maintenance and development of both the enhanced Louisiana COVID site and the data tool used to provide data for the appropriate Florida counties,
• collect new census tract level data for the appropriate Florida counties and perform any statistical analysis or processing that might be required to produce reliable data for sparsely populated rural areas,
• connect The Data Center's date warehouse to Shimberg's data clearinghouse and ARPC's databases so ARPC's local resources can support the region's data site, and
• creation of any graphics or media required for social media and other aspects of our dissemination strategy.

The primary challenge of this project was that it was far more complex than initially imagined. While The Data Center has successfully produced many complex research projects in the past that respond to disasters, including our COVID-19 (https://www.datacenterresearch.org/covid-19-data-and-information/) and related statewide data site with data at the census tract level by each parish (https://dev.datacenterresearch.org/covid-19-statewide-site/dist/index.html), the complexity of the web interface and data warehouse platform needed to make

this project successful was beyond what we could accomplish with internal human capital resources. The data and research needs alone required to produce a useful site took a significant amount of time and effort to gather, vet, and prepare for production. Designing a site that could hold information on a variety of past disasters as well as have templates at the ready to be deployed for future disasters was a difficult design task requiring the support of professional website designers and user experience experts. We were able to produce mock-ups of the look, feel, and functionality of the site, but these were not sufficient to build the site. In addition, The Data Center staff were still remote and stakeholder engagement was less efficient because of the virtual environment. This was even more problematic with our partners in Florida. This project did however include production of data for ARPC and the Shimberg Center (both in Florida) in support of their disaster recovery efforts. This information, along with tutorials on how to use the data was presented to these stakeholders during the spring and summer of 2023.

Democratizing Data for Equitable Recovery

Prepared for: Katrina Andry, Lamar Gardere, and Allison Plyer, The Data Center
Prepared by: Candace E. West and Aasha Joshi, Clarity Writing & Research
Date: April 1, 2024

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SUMMARY

The Gulf Research Program (GRP)'s *Bridging Knowledge to Action: Using Data to Develop Equitable Outcomes or Solutions to Climate Hazards and Other Disasters* funding opportunity called for collaborations between local governments and subject matter experts on projects demonstrating how an equity-focused use of open and accessible data might help state, local, and tribal governments achieve more equitable outcomes from existing plans and policies. The Democratizing Data for Equitable Recovery (*Democratizing Data*) project, one of six recipients of the grant, was a joint effort between The Data Center in New Orleans, LA; the University of Florida Shimberg Center for Housing Studies at University of Florida (Shimberg) in Gainesville, FL; and the Apalachee Regional Planning Council (ARPC) in Tallahassee, FL. The project's goals were to bring about the development of equity-focused data supplements to the long-term recovery plans (LTRPs) for Florida's Liberty and Calhoun counties and the joint creation of a local data intermediary.

The Data Center engaged Clarity Writing and Research (Clarity) to contribute to their creation of a case study by creating a report with two goals: first, to document the three organizations' collaborative process of developing the equity-informed supplements to the LTRPs and creating the local data intermediary and second, to document The Data Center's process for building a local data intermediary with an eye toward replicability. To meet those goals, Clarity collected and analyzed data by attending meetings as invited by The Data Center, reviewing materials as provided by The Data Center, conducting a survey of ARPC and Shimberg participants in which they were asked to reflect on their experience of The Data Center's process for

guiding ARPC and Shimberg as they worked toward the project's goals, and conducting interviews with key informants who were self-nominated from each of the three organizations. Clarity's findings from its activities are included in this report, which has six sections: Section 1 provides a description of the project and the members of the grantee group; section 2 is a contextual scan of best and promising practices intended to help situate the project's process in the context of relevant frameworks for innovation implementation, collaboration, and collaborative data initiatives; section 3 provides an inventory of the strategic supports and activities offered by and to the grants collaborators and the data supplements produced; sections 4 and 5 examine data collected about these supports and the supplements and discuss relevant findings; and section 6 offers targeted recommendations for process improvement.

BEST AND PROMISING PRACTICES

Democratizing Data is an innovation involving three organizations attempting to work together to improve outcomes for vulnerable communities, using a specific approach to community data, and the hope of creating something new. Clarity chose the following four questions to help frame our observations of the process:

1. How do you successfully implement an innovation?
2. How do you work together to create change?
3. How do you democratize data?
4. How do you start a local data intermediary?

The scan of best and promising practices is intended to help situate these foundational aspects of the *Democratizing Data* project in the context of broader

frameworks for innovation implementation, collaboration, collaborative data initiatives, and creating the necessary conditions for a successful data intermediary.

STRATEGIC SUPPORT FOR DEMOCRATIZING DATA

The *Democratizing Data* project is designed as an innovation, a strategic change that intends specific, deliberate goals (e.g., updated disaster recovery plans). Meeting these goals is affected by the strategic support used to bolster the change (Leeman et al., 2015). The *Democratizing Data* project used three particular strategic support strategies (Leeman et al., 2015): peer learning, tools, and training.

DATA COLLECTION AND EXAMINATION OF THE PROCESS TO DEMOCRATIZE DATA

In addition to reviewing the materials provided by The Data Center, Clarity collected and analyzed data through surveys from ARPC and Shimberg participants and interviews with four of the collaborative's team members. The surveys and interviews focused on participants' experiences of the process and using the strategic support offered as part of the project. By examining these materials and data sets, Clarity documented participants' impressions of their own learning from the process and progress toward grant goals.

FINDINGS

Participants from all three entities identified successful aspects of the project in several areas, especially the training presentations, data products created, and peer learning. Challenges commonly noted were largely issues concerning communication, expectations, and capacity. While the project did not accomplish all of its stated goals, multiple lessons were learned that can be used to increase the likelihood of greater future success.

RECOMMENDATIONS FOR PROCESS IMPROVEMENT

In this final section of the report, Clarity identifies potential areas of process improvement. These recommendations are based on Clarity's analysis and synthesis of the data detailed in the preceding sections (frameworks for effective innovation, collective impact, data collaborations, and local data intermediary formation), review of materials provided by The Data Center, and findings from the survey and interviews, including recommendations and requests from interviewees.

PROJECT AND GRANTEE DESCRIPTIONS

BRIDGING KNOWLEDGE TO ACTION: USING DATA TO DEVELOP EQUITABLE OUTCOMES OR SOLUTIONS TO CLIMATE HAZARDS AND OTHER DISASTERS

Data Center staff said in interviews that they began talking with the Gulf Research Program (GRP) of the National Academies of Sciences, Engineering, and Medicine (NAS) about data intermediaries and how to make better decisions after a disaster in early 2020. Prior events, including the Deepwater Horizon oil spill in 2010, had driven home for GRP the point that both safeguarding communities and helping them recover after a disaster are likely to have better outcomes when there is good data on community needs and conditions before a disaster happens. Noting that many cities—especially smaller, rural cities with fewer resources—have "limited data capacity," Data Center staff suggested the possibility of "establishing a network of data intermediaries across the Gulf South that could be operating in those regions, using data to describe and understand life in the region. A little more than a year after we first had that conversation, we noticed an RFP on NASGRP's website that proposed to understand how one might do the thing we suggested." According to Data Center staff, GRP had added an additional layer to the suggestion, namely the idea of "taking an existing policy or plan and finding a way to [make that] more equity-based" as a way to test how bringing data to bear on the policy or plan in question might produce more equitable outcomes for a community.

In 2021, the Gulf Research Program (GRP) sought to explore effective ways to prioritize the health and community resilience needs of "vulnerable, underserved, under-resourced, or otherwise marginalized" communities disproportionately threatened by climate hazards or other disasters in the Gulf coast region and the Southcentral region of Alaska. GRP's *Bridging Knowledge to Action: Using Data to Develop Equitable Outcomes or Solutions to Climate Hazards and Other Disasters* funding opportunity called for collaborations between local governments and subject matter experts on projects demonstrating how an equity-focused use of open and accessible data might help state, local, and tribal governments achieve more equitable outcomes from existing plans and policies (Gulf Research Program, 2021). In 2022, the Democratizing Data for Equitable Recovery (*Democratizing Data*) project was named one of six recipients of the grant.

DEMOCRATIZING DATA FOR EQUITABLE RECOVERY

Socially vulnerable groups in the United States (e.g., racial and ethnic minorities, low-income communities, communities in rural areas, adults without a high school diploma or equivalent) are disproportionately impacted by climate hazards and other disasters due to a variety of factors, including lack of healthcare access, precarious employment, transportation, and housing situations to name a few (EPA 2021). Because of systemic racism and its compounding effects, the most vulnerable residents are people of color. In a disaster, low-income jobs and low-income housing are typically hit the hardest, and community members without savings can't afford costs associated with evacuation, home rebuilding, or job loss. Those who have the greatest need struggle most to recover and often lack the capacity to clear high

barriers to securing government aid and other post-disaster resources. Disasters exacerbate inequity. And while resilience requires more than equity, equitable recovery is critical for resilience. Disaster recovery that fails to focus on equitable recovery leaves the needs of the most vulnerable unmet and leaves them even more vulnerable to the next disaster (The Data Center, personal communication, 2022).

How can data help mitigate these compounding factors?

Advancing equity in the context of climate hazards requires identifying communities with the greatest needs and prioritizing them for investment, but the limited data capacity of vulnerable communities means that when decisions are made about how to allocate resources or how to plan to avoid, mitigate, or recover from the impacts of the climate hazards and other disasters to which these communities are more susceptible, "those decisions may be based on incomplete, insufficient, or inappropriate data which could produce plans, policies, strategies, programs, etc. that do not adequately address the priorities or needs of at-risk communities…[leading to] negative, unintended consequences" (Gulf Research Program, 2021). A local data intermediary can bolster the capacity of local governments to use trustworthy, regionally-focused data for planning and decision-making and thereby have a broad, long-term impact on regional decision-making in ways that can lessen the disproportionate impact of climate hazards and disasters on vulnerable communities. Accurate, trustworthy, population-level data can help shed light on where the greatest needs are, combat some of the confusion and misinformation common during and after a disaster, and "foster a common

understanding that moves both decision makers and residents toward a more equitable recovery" (The Data Center, personal communication, 2022).

With this in mind, the goals of the *Democratizing Data* project were to bring about the development of data supplements to the long-term recovery plans (LTRPs) for Florida's Liberty and Calhoun counties and the joint creation of a local data intermediary, with ARPC taking the lead as the neutral entity and Shimberg providing regional data and research and writing support. "The Shimberg Center was already in contact with us and was interested in partnering with us on this particular RFP and thought ARPC would be a good partner, as well, given that Hurricane Michael had happened not too long prior to that and that there was a set of government plans that were created as a result of that disaster…[that] might provide an opportunity to take an existing plan and figure out how to add equity to it [by] helping ARPC with their data needs from both the capacity and infrastructure perspectives."

Data Center staff also hoped the project would serve as "a pilot…an experiment, if you will, to try to take our model and distill it down" to what they knew people needed from their own experience in New Orleans and from their expertise in disaster recovery and regional economic analysis and use that as a template, thereby "[learning] a lot about how to replicate The Data Center's capabilities across the region."

Apalachee Regional Planning Council (Tallahassee, Florida)

Created in 1977, The Apalachee Regional Planning Council (ARPC) is one of Florida's ten regional planning councils (RPCs), which connect state and local governments to promote collaboration addressing concerns such as economic development, housing, planning, and infrastructure across areas of "mutual resources, characteristics, and issues" (ARPC, n.d.-a). Florida's RPCs work together "to protect and enhance the quality of life in Florida" (ARPC, n.d.-a) by facilitating cooperation and information sharing among regional stakeholders and the network of RPCs and providing technical assistance, implementation support, and "comprehensive planning and intergovernmental coordination for managed, responsible growth" (ARPC, n.d.-a). ARPC serves a nine-county region comprising Calhoun, Franklin, Gadsen, Gulf, Jackson, Jefferson, Leon, Liberty, and Wakulla counties and their incorporated municipalities. In addition to technical assistance, ARPC serves its constituents as "a forum for communication and collaboration to preserve and enhance the economic, natural and social environments of the Apalachee region" (ARPC, n.d.-b).

On October 10, 2018, category-5 Hurricane Michael made landfall west of Calhoun and Liberty counties, small rural areas with lower median income and lower rates of health insurance coverage and high school graduation rates compared to the rest of the state and "very limited capacity for community planning and local government operations" (The Data Center, personal communication, 2021). Hurricane Michael left nearly 1500 businesses damaged and "roughly a quarter [of] Calhoun and Liberty

counties' 9,500 homes...requiring extensive repair or replacement" (The Data Center, personal communication, 2021). The counties' combined unmet needs in the wake of Hurricane Michael totaled approximately $233 million; in 2021, Liberty and Calhoun counties' operating budgets were roughly $7 million (The Data Center, personal communication, 2021) and $20 million (ARPC, personal communication, 2020).

The Data Center (New Orleans, Louisiana)

Founded in 1997 as The Greater New Orleans Community Data Center, The Data Center is a neutral and independent nonprofit that fosters the building of "prosperous, inclusive, and sustainable communities" (Nonprofit Knowledge Works, 2024) in New Orleans and Southeast Louisiana by providing reliable data and rigorous analysis to support informed decision-making. "A core part of The Data Center's mission is to transform local culture from being data–adverse to *embracing data* as an intrinsic component of sound policy development" (The Data Center, personal communication, 2021).

After Hurricane Katrina in 2005, The Data Center became the local authority for tracking progress toward recovery and prosperity. The Data Center monitors and analyzes key regional demographic trends and indicators in areas such as race, age, ethnicity, national origin, education, homeownership, income, poverty, and inclusive growth; uses action-oriented research to examine issues of community interest within its areas of expertise (e.g., disaster recovery, regional economic analysis, and affordable housing); and disseminates findings to local, regional, and national stakeholders including elected officials, business and community leaders, and

members of the media, thereby providing tools for strategic, programmatic, and fiscal decisions (Nonprofit Knowledge Works, 2024).

UF Shimberg Center For Housing Studies (Gainesville, Florida)

Established in 1988 as the Center for Affordable Housing at the University of Florida Rinker School of Construction Management, the Shimberg Center for Housing Studies (Shimberg) "conducts research into housing policy and planning, with a special focus on housing affordability for Florida residents" (University of Florida, n.d.). Shimberg works with those shaping housing policy in Florida, including providing data and applied research to a variety of stakeholders in the Apalachee region. In 2020, Shimberg worked with city officials in Port St. Joe (Gulf County) and residents of North Port St. Joe, an historically Black, low-income neighborhood, through the Florida Resilient Cities program, focused on challenges such as "affordable housing, environmental management, and policies for adaptation to sea level rise" (The Data Center, personal communication, 2021). Shimberg has worked with ARPC in the past through the Flood Hazard Management & Practitioner Information Network for Florida Coastal Communities, part of Shimberg's Disaster Resilient Florida initiative.

BEST AND PROMISING PRACTICES: FRAMEWORKS FOR INNOVATION IMPLEMENTATION, COLLABORATION, AND DATA INTERMEDIARIES

Democratizing Data is an innovation involving three organizations attempting to work together to improve outcomes for vulnerable communities, using a specific approach to community data, and the hope of creating something new. Clarity chose the following four questions to help frame our observations of the process:

1. How do you successfully implement an innovation?
2. How do you work together to create change?
3. How do you democratize data?
4. How do you start a local data intermediary?

The following scan of best and promising practices is intended to help situate these foundational aspects of the *Democratizing Data* project in the context of broader frameworks for innovation implementation, collaboration, collaborative data initiatives, and creating the necessary conditions for a successful data intermediary.

INNOVATION AND IMPLEMENTATION

How do you successfully implement an innovation? Given the structure of the project, Clarity's approach to successful innovation implementation is undergirded by implementation science and has five key principles of best practice:

1. When we say "innovation," we are referring to the development, design, and implementation of new projects, policies, programs, processes, or practices with the intention of bringing about identified, deliberate changes within a specific sphere (e.g., individual behaviors, organizational systems, service environments). Development, design, and implementation are stages of innovation (Bertram et al., 2014); they do not happen all at once, and each requires planning, refining, and testing. In short, effective innovation is a commitment to continuous improvement (Smith et al., 2012).

2. To consistently effect change, an innovation must be usable (NIRN, & SISEP, 2013)—that is, it must be teachable, learnable, doable, and readily accessible.

3. To make an innovation usable, designers should be able to succinctly and clearly describe the innovation, define its core components, identify essential indicators of practice in practice profiles (NIRN, 2013), and verify whether successful delivery and implementation of the innovation actually leads to the intended changes.

4. To successfully deliver a usable innovation, strong strategic support (Leeman et al., 2015) is critical. Strategic support for innovation is typically offered in six ways: knowledge management (tools), direct instruction (training), individualized coaching (technical assistance), data (especially feedback and assessment), opportunities for collaborative growth among colleagues (peer learning), and particular encouragement (incentives).

5. To successfully implement and sustain innovation, designers must consider an organization's readiness. **Readiness is both an organization's capacity and its commitment to an innovation.** The greatest innovation in the world will not work in an environment that doesn't have sufficient capacity for implementation. And even in an environment with sufficient capacity, innovation will not happen on its own: committed teams (Peckoo et al., 2020) are needed to enable an organizational context that drives implementation; (AIRN, n.d.) such a context includes decision support data systems, facilitative administration, and systems intervention.

The *Democratizing Data* project's aims and the strategic supports offered to and by the collaborators (which will be discussed in more depth in section 3) align with three research-based capacity-building innovation strategies: knowledge management (tools), direct instruction (training), and opportunities for interactive growth among the participants (peer learning).

COLLABORATION FOR COLLECTIVE IMPACT

How do you work together to create change? In 2011, the Stanford Social Innovation Review (SSIR) published "Collective Impact" (Kania et al., 2011), in which John Kania and Mark Kramer put forward a framework for designing and implementing collective impact initiatives—a specific type of collaboration among groups committed to a common agenda and goals in response to wide-scale social issues. Kania and Kramer emphasize the importance of alignment for effective collective impact and lay out five fundamentals for success:

1. A common agenda shaped by collectively defining the problem and creating an explicitly shared vision of how to solve it
2. Shared measurement based on an agreement among all participants to track and share progress in the same way, allowing for continuous learning, improvement, and accountability
3. Mutually reinforcing activities that maximize impact by coordinating participants' different strengths
4. Continuous communication, which helps to build trust and forge strong relationships
5. A "backbone" team dedicated to planning, coordinating, and facilitating the work of the group.

In 2016, Sheri Brady of the Aspen Institute's Forum for Community Solutions and Jennifer Splansky Juster of the Collective Impact Forum—a collaboration between FSG and the Aspen Institute's Forum for Community Solutions launched in 2014—expanded on these five "core elements of a rigorous and disciplined, yet flexible and organic, approach to addressing complex problems at scale" with a set of experience-based best practices for implementing the approach that highlight the importance of 1) equity focus; 2) community engagement; 3) cross-sector partnerships; 4) data-driven continuous improvement; 5) system leadership skills; 6) system-level strategies; 7) building relationships of trust and respect; and 9) shaping the work to the specific local context (Brady and Juster 2016).

In 2022, Kania, Brady, Kramer, and Splansky were joined by Senior Advisors to the Collective Impact Forum Junius Williams and Paul Schmitz for a follow-up article on the evolution of the collective impact framework since Kania and Kramer's article. The authors revised the definition (of collective impact to reflect a decade of learning from application of the framework. Having observed that "the single greatest reason why collective impact efforts fall short is a failure to center equity," the authors redefine collective impact as follows : "*Collective impact is a network of community members, organizations, and institutions that advance equity by learning together, aligning, and integrating their actions to achieve population and systems-level change*" (Kania et al. 2022; emphasis theirs).

According to the authors, five strategies have emerged as fundamental to centering equity in collective impact initiatives, which is, in turn, "a prerequisite" to successful collective impact:

1. Ground the work in data and context, and target solutions.
2. Focus on systems change, in addition to programs and services.
3. Shift power within the collaborative.
4. Listen to and act with community.
5. Build equity leadership and accountability.

The *Democratizing Data* project is well-suited to collective impact framing, e.g., "The Data Center, Shimberg, and ARPC seek to advance equity by working collaboratively toward the common goals of producing equity-focused data supplements for the Liberty's and Calhoun Counties LTRPs and co-creating a data intermediary driven by strong engagement with community needs." The details of how to effectively work collaboratively laid out in the three articles discussed here provide strong, concrete guidance for implementation of such an innovation, and we will point to a few specific suggestions for the grantee group's consideration in the final section of this report.

DATA COLLABORATION FOR THE COMMON GOOD

How do we democratize data? In 2019, The World Economic Forum (WEF) released a report on public-private data partnerships that shares insights from "an in-depth review of case studies, expert interviews," and a series of meetings with "a diverse community of commercial, government, academic, and civil society leaders" (Hoffman et al. 2019). WEF's findings highlight five areas of critical focus for collaborations seeking to maximize the potential of data as a powerful tool for effective large-scale social innovation while avoiding both missed opportunities and the potentially "dangerous and unwelcome" consequences of the misuse of data. Collaborators must "1) ensure that all relevant stakeholders are committed to shared

outcomes; 2) operationalize the principles of responsible data governance; 3) deliver insights that are achievable, accurate, fair and explainable; 4) support both senior leader decision-makers and front-line users with the skills and resources to use data; and 5) establish sustainable economics to ensure long-term impact" (Hoffman et al. 2019). These principles align with the frameworks for innovation and collaboration discussed above in a variety of ways—for example, highlighting the need for and importance of shared commitment to clearly articulated outcomes, methods of measurement, and principles of accountability; strategic support, including proper knowledge management and skill building; and a ready environment with sufficient capacity to support the endeavors to which all parties are committed.

In addition, WEF lays out six dimensions of trust specifically for "diverse stakeholder communities...[using data] to pursue common goals in concrete ways": security, accountability, transparency, auditability, fairness, and ethics (World Economic Forum, 2018). While all six dimensions of trust are important, the areas of transparency and fairness align particularly well with the *Democratizing* Data project's focus on equity and the importance of building trust with the community being served, as highlighted by the final framework, put forth by the National Neighborhood Indicators Partnership.

STARTING A LOCAL DATA INTERMEDIARY

How do you start a local data intermediary? The National Neighborhood Indicators Partnership (NNIP) is a peer learning network of independent partner organizations in more than 30 cities across the United States. NNIP's mission is to ensure that "their communities have access to data and the skills to use information to advance

equity and well-being across neighborhoods" (NNIP, 2024) To advance this mission, NNIP partners—including The Data Center—use their expertise to "connect residents, nonprofits, government, and other stakeholders to build a shared understanding of community issues and develop solutions together" by helping local organizations expand their use of data, participating in a community of learning and practice that includes other NNIP partners and other experts, and sharing what they learn both locally and nationally. The NNIP model provides concrete guidance in three foundational areas: mission, backbone support, and institutional home.

First, the NNIP model (Hendey et al., 2016) defines the mission of a local data intermediary and how to carry it out. A local data intermediary should provide usable, updated, neighborhood-level data on a variety of topics; actively facilitate local stakeholders' "direct, practical use of data"; and support building the capacity of stakeholders in low-income neighborhoods to use local data to improve their neighborhoods. The three primary activities for doing this are assembling, transforming, and maintaining data; disseminating information and applying data to achieve impact; and using data to strengthen civic capacity and governance.

Second, the NNIP model emphasizes the importance of backbone support, which is critical, especially in the form of a dedicated planning team to carry out the core activities such as finding an institutional home for the data intermediary, assessing the needs of the local community, and putting together a concrete, customized plan that is firmly based in the community's needs. The planning team should carefully assess the local data environment "not just [as] an academic exercise…[but as an]

opportunity to explain the potential value a local data intermediary and the NNIP model can bring to the community and to hear from stakeholders how they would shape a data intermediary's activities and mission to suit the local context."

Third, The data intermediary's institutional home should be an organization that either has or can build a good reputation for working collaboratively with a variety of stakeholders and both with and in the interest of community groups. The local community must trust that the local data intermediary will use data objectively, in an unbiased manner, and, as above, in the public interest. And the intermediary should be prepared to commit to their role in the community for the long term, rather than for a single project.

The frameworks in this section provide useful context and language for principles observable in the framing of the *Democratizing Data* project's aims, the design and delivery of the strategic supports offered to and by the collaborators, and the data products created, which will be discussed in the next section. They can also provide ways to constructively reflect on ways to strengthen future attempts to continue the work of the project, both in the continuing partnership between Shimberg and ARPC and for future attempts to employ similar processes to start local data intermediaries, which we will return to in the final section.

STRATEGIC SUPPORT TO DEMOCRATIZE DATA

SUMMARY OF THE DEMOCRATIZING DATA PROJECT

This summary has four parts. "Goals" outlines the goals of the project; "Resources" lays out what is available to implement the project; "Strategic supports" documents the support offered to and by the collaborators, and "Project deliverables" describes the outputs of the grant .

Goals

The *Democratizing Data* internal project portal and full grant proposal both describe the project's goals as:

1. Increasing ARPC's capacity to gather and disseminate data that will move the region toward a more equitable recovery from Hurricane Michael and toward greater resilience

2. Strengthening ARPC's role as a regional climate and disaster data intermediary

3. Employing user-centered design "to transform the existing Long-term Recovery Plans (LTRP) for each county into forward-thinking equity-based plans" (Data Center, personal communication, 2021)

Internal Data Center project communications and documentation describe plans to accomplish these goals through multiple avenues of coaching, training, mentoring, and capacity-building.

Resources

Democratizing Data's human resources include staff from The Data Center, Shimberg, and ARPC, as well as external partners such as the Southern Economic Advancement Project (SEAP); organizational resources from The Data Center, ARPC, and Shimberg, including explicit commitment to the project from all three organizations and implementation planning from The Data Center; and informational resources including Shimberg's clearinghouse of local data, data summaries from The Data Center, Shimberg, and ARPC, and the LTRPs authored by ARPC.

Long-term recovery plans

One key implementation resource for the project was the initial long-term recovery plans created by ARPC. The *Democratizing Data* project set out to show how local governments can achieve more equitable results by incorporating data on social conditions and equity into recovery plans. For example: Given the compounding negative effects of systemic racism, the most vulnerable residents in a disaster tend to be people of color. The Data Center proposed using indicators chosen to assist communities in recovering from disasters while reducing displacement of distressed and historically vulnerable communities of color, leading to "mitigation, preservation, and anti-displacement activities geared toward housing affordability, improved housing and infrastructure quality, and resilience against flooding and storm risks" (Data Center, personal communication, 2021). Early in the project, it became clear that the plans themselves could not be directly transformed, and the focus shifted to

creating what were alternately described as "equity-focused implementation plans" and "equity-focused data supplements" to inform the implementation of the LTRPs.

The LTRP for Calhoun County (2020) noted that Calhoun County has a low median income, and, in comparison to the State of Florida, high health uninsured population and lower high school graduation rate. Over 30% of the county's housing stock required extensive repair or replacement after Hurricane Michael, and nearly 1000 businesses reported some level of damage to their structure, contents, or operations. As of 2020, the estimated unmet need for the county was $172 million, while the annual budget was roughly $20 million.

The LTRP for Liberty County (2020) noted that Liberty County also has a low median income, a higher than state-average population without health insurance, and a lower than state-average high school graduation rate. Over 12% of the county's housing stock required extensive repair or replacement after Hurricane Michael, and the estimated unmet need for the county was more than $61 million, "a tremendous amount of unmet need that dwarfs their annual budget by nearly 800%."

Both LTRPs prioritized the following restoring the timber industry, crucial to the area's livelihood; restoration and expansion of the Calhoun-Liberty Hospital; restoration of housing stock damaged by Hurricane Michael; incentivizing the development of new single-family housing; updates and enhancements to public facilities, including ambulance stations and a new jail; update and expansion of sewer infrastructure to ensure resiliency and offer opportunities for economic growth; seeking cost-share matching for recovery funding; supporting growth and

expansion of small businesses through revitalization of downtowns and commercial corridors. Liberty County also prioritized agricultural diversification.

Strategic supports

The *Democratizing Data* project used three primary strategic support strategies: tools, peer learning, and training.

Tools

Tools are defined as informational resources designed to organize, summarize, and/or communicate knowledge. Tools offered by The Data Center to ARPC and Shimberg include:

- Project portal in SharePoint

- Data assessment form, intended for participants to inventory the public data they currently collect and publish

- A tracker template for indicator data for LTRPs

- Data intermediary task descriptions

Peer learning

Peer learning offers opportunities for peers to learn from one another in formal or informal ways; peers serve as both teacher and learner. Opportunities for peer learning in the NAS-GRP grant included two presentations and discussions about data facilitated by ARPC and Shimberg, as well as field observations during the in-person retreat, organized by ARPC.

Training

Training is planned, instructional activity intended to facilitate the acquisition of knowledge, skills, and attitudes in order to enhance learner performance. The Data Center's training series on why and how to be a data intermediary was the central strategic support for the *Democratizing Data* project. The series, detailed in Table 1, included five 90-minute training presentations, held between May and July 2023.

In addition to the training presentation series, The Data Center assigned follow-up activities intended to guide ARPC and Shimberg through the steps necessary to make progress on the LTRP data supplements and the creation of the data intermediary. In interviews, Data Center staff stated that they intended the follow-up exercises to help Shimberg and ARPC learn and adopt a new way of thinking about data, keeping the focus on community needs: "[The] orientation needs to be toward the community, not toward data availability…. At the start of every single meeting, say that you will be a partnered data intermediary and what that means is that you are listening to the community and getting insight into getting what you need to do to meet community needs." The intention was to build this understanding from the presentations while reinforcing and putting it into practice through the follow-up activities and tasks.

Table 1. Training meetings and presentations and follow-up assignments

Meeting/presentation topic	Presentation date	Assignment	Due date	Notes
Ask an expert	May 11, 2023	"Ask an Expert follow-up tasks for FL partners" (May 24, 2023)	June 1, 2023	No record of completed assignments in portal
Website show and tell	June 1, 2023	"Website show and tell homework" (June 5, 2023)	June 15, 2023	This is the only completed assignment evident in portal
"How-to on 'Who Lives?' tracker"	June 15, 2023	"Create an indicator tracker" (June 15, 2023)	July 6, 2023	No record of completed assignments in portal
"Data dissemination"	July 6, 2023	"Data dissemination questions to answer" (July 12, 2023)	July 28 , 2023	No record of completed assignments in portal
Gaming the Conversation	July 19, 2023	No assignment recorded	N/A	N/A

According to Data Center staff, the majority of the assignments were not completed as scheduled, likely due to time constraints on Shimberg and ARPC staff. Several of the postponed tasks, such as determining data intermediary roles and responsibilities, developing research questions and data paths, and planning future stakeholder engagement, were, instead, accomplished during a series of workshops held during the two-day, in-person convening in September 2023. The convening's

activities are detailed in Table 2. The in-person meeting also provided a chance for ground truthing data and stakeholder engagement.

Table 2. In-person meeting activities

DAY ONE – SEPTEMBER 18, 2023
- Tour of Liberty and Calhoun counties   - Onboard discussion of Long-Term Recovery Plans and local context   - Local stakeholder engagement
DAY TWO – SEPTEMBER 19, 2023
- Preliminary planning: Roles and responsibilities, capacity, capabilities, focus areas, audiences, geography, funding opportunities   - Organizational details and data sharing
- Plan to Action - LTRP   - Ideating user-centered data intermediary products
Confirm roles and assign tasks based on roles and desired data
- Plan future stakeholder engagement   - Plan timeline

Project Deliverables

The *Democratizing Data* project aimed to create two final deliverables: a data supplement to the Liberty and Calhoun Counties LTRPs and a joint data intermediary.

Draft data supplement

The draft data supplement to the LTRPs for Liberty and Calhoun Counties (ARPC 2024) provides data on housing and county demographics not included in the

original LTRPs. This data can shed light on progress toward recovery and can also be used to support applications for new funding for both outstanding and new projects. The supplement also lists funding sources for each project. The draft supplement includes three broadband connectivity projects identified as "key for equitable recovery and community resiliency."

Data intermediary

The project had as a primary goal the joint creation of a local data intermediary, with ARPC taking the lead as the neutral entity and Shimberg providing regional data and research and writing support**.** Data Center staff currently report being unsure what ARPC and Shimberg's next steps toward a data intermediary are but have strongly suggested formalizing the partnership as a 501(c), which would provide "structure for fundraising and longevity serving communities."

DATA COLLECTION AND EXAMINATION OF THE PROCESS TO DEMOCRATIZE DATA

In addition to reviewing the materials provided by The Data Center, Clarity collected and analyzed data through surveys from ARPC and Shimberg participants and interviews with four of the collaborative's team members. The surveys and interviews focused on participants' experiences of the process and using the strategic support offered as part of the project. By examining these materials and data sets, Clarity documented participants' impressions of their own learning from the process and progress toward grant goals.

Interviews

To learn more about participants' experiences of the Democratizing Data project, Clarity developed two semi-structured interview protocols. The first protocol asked about the challenges participants faced meeting the data needs of their target population prior to engaging in the grant, the perceived effects of participating in the grant, and the grant's implementation process. The second protocol asked participants to reflect on the progress and process of Democratizing Data as the project drew to a close. Using the protocols, Clarity conducted 60-minute interviews with three of the collaborative's team members, one from each organization. Each of the three team members was interviewed twice, in October 2023 and January 2024.

In March 2024, Clarity conducted an additional, informal interview with a fourth team member.

The Data Center approved the two interview protocols and nominated three people to be interviewed (one from each organization). Clarity emailed nominated interviewees to schedule the interviews. The interviews, which were conducted virtually, were audio recorded and digitally transcribed with participants' consent. Interviews were conducted with one primary interviewer and one primary notetaker, and after each interview, the interviewer and notetaker discussed and documented their reflections. These reflections, along with reviews of the interview transcripts, guided our analysis of the interviews, in which we identified major pertinent themes present within and across the interview responses.

Feedback Surveys

To assess participants' self-perceived project progress and satisfaction with the process, Clarity designed a general feedback survey and administered it from December 2023 to January 2024. The survey contained 31 closed-ended questions, including a commitment check. Clarity emailed an explanation of the purpose of the online survey, a request for participation, and an accompanying link to nine of the nine team members from ARPC and Shimberg, all of whom are listed in the NAS-GRP application. The Data Center also sent a request for participation. Of the nine recipients, six remained employed by either of the organizations at the end of the grant period. The overall response rate for the survey was 33 percent (N=2), with one team member each replying from ARPC and Shimberg.

By examining the materials provided by The Data Center and the data sets we collected—with heavier emphasis on the interviews, given the low participation rate for the survey—Clarity was able to learn about some of the perceived successes of the grant, challenges faced, and lessons learned. These findings, which we will discuss in the next section, provide the basis for Clarity's recommendations for process improvement, which we include in the final section.

FINDINGS

Participants from all three entities identified successful aspects of the project in several areas, especially the training presentations, data products created, and peer learning. Challenges commonly noted were largely issues concerning communication, expectations, and capacity. While the project did not accomplish all of its stated goals, multiple lessons were learned that can be used to increase the likelihood of greater future success.

SUCCESSES

Strategic Support: Training

ARPC and Shimberg staff spoke highly of the training presentations—one interviewee stated that it was "inspirational" to see what an impact a local data intermediary could have.

Resources

Data Center staff view it as a success that they "were able to produce some useful and interesting data elements to share with ARPC for the benefit of their communities."

Peer learning

All interviewees agreed that the in-person meeting (peer learning) was a positive experience and stated that they wish it had taken place earlier in the project. Some interviewees also stated that the collaboration among the organizations had been fruitful and that they were looking forward to continuing and strengthening ties.

One interviewee spoke excitedly about ARPC and Shimberg working to get someone from Shimberg onto ARPC's board as an *ex officio* member, which they suggested would never have happened without grant.

CHALLENGES

Distance

The *Democratizing Data* project is a collaboration between entities in three different cities. In addition to the regular difficulties of building new relationships and establishing consistent patterns of interaction in the early days of a project, the pandemic further disrupted normal work patterns, and exacerbated pre-existing capacity constraints. Virtual collaboration proved insufficient. "[I] wish we'd had the in-person at the beginning and then again at the middle," said one interviewee.

Unclear expectations

Shimberg and ARPC staff stated that expectations were sometimes unclear, especially early on. Interviewees expressed a lack of clarity regarding project goals, but more commonly on the concrete steps that would be taken to accomplish the project's goals and the responsible party or parties for major activities. One important area of misalignment was the local data intermediary piece of the project: interviewees' comments revealed that participants did not have a common understanding of what was to be planned or created, when, and by whom.

Unmet expectations

At the same time, Data Center staff remarked in interviews that expectations that had been communicated and agreed to went unmet. They pointed specifically to

the "homework assignments" between the trainings, which were designed to lead the other partners to "self-assemble"—to organize and take ownership of and agency over the concrete tasks needed to move from receiving information to reinforcing it and applying what they learned. These exercises included, in part, ARPC and Shimberg making decisions together, based on learnings from the trainings, about what was to be planned or created, when, and by whom.

Communications

All interviewees mentioned inconsistent communication as a limiting factor, and interview comments in both rounds revealed that participants did not have the same expectations concerning who would be coordinating the group's activities or who would take the lead on keeping the project moving. "No one wanted to drive the narrative," said one interviewee. Another interviewee stated that the group could have done better at "keeping communication going" and "relationship building."

Capacity

Staff from all three organizations stated that the attempt to accomplish both the data supplement for the LTRPs and start a data intermediary was too heavy a lift.

Participants from all three organizations spoke of the difficulty of making progress without staff dedicated specifically to the grant and with stakeholders already "wearing so many hats," as one put it. "[C]apacity constraints really got in the way of being able to leverage the skill and intentions that people have for the benefit of the project," said another participant.

Three areas of learning loomed largest in participant remarks: the difficulty of navigating the connection between the training presentations and the creation of the data product and intermediary, the lack of adequate capacity, and the attempt to alter or affect pre-existing LTRPs.

Hands-on learning

Participants from all three organizations noted that building products together late in the project revealed the value of hands-on learning over theory alone. One participant stated that following training presentations with building exercises would have been a "really cool way to get to the tactile side of the learning." And both ARPC and Shimberg staff expressed a desire for more "active mentoring" and hands-on application of training lessons (technical assistance). All of this aligns with Data Center staff remarks concerning how they would restructure the process in the future.

Given the chance to do it again, Data Center staff would focus first on the training presentations, as they did this time, but rather than expecting participants to go off and process on their own by jumping into collaborative planning for the data intermediary, they would focus instead on a guided sample project that promoted collaboration and applying what they're learning in real time, but with more active guidance and without having to focus immediately on community needs and a public-facing project. Then, part two of the process would shift focus from engaging with each other to a community engagement and equity lens. This approach would

allow for some learning and application that would also shape the approaches taken to community engagement in the second step.

Future partnerships would benefit from dedicated staff and sustained, multi-year funding

Data Center staff noted lack of sustained funding for the future made ARPC and Shimberg hesitant to consider more "permanent" partnership by formally organizing and hiring dedicated staff. "Even though there [were] resources that came along with this project, there weren't...enough resources for people to do hiring, to bring in new capacity, to bring in new people, to take on this rather large and ongoing responsibility of not only converting community engagement to good data work, but doing that in a way that it formed a lasting entity that could continue to provide value and sort of shepherd equity concepts into conversations and into action in this region."

"Retrofitting equity"

"The other thing that I think is worth saying is that it may not be a great idea to try to take an existing policy that's already been built through public engagement and try to overlay or graph equity onto that existing policy. That may be an approach that is too arduous and won't be able to yield enough fruit to be effective." Rather than attempting to "retrofit" an existing plan, it may be more effective to focus on helping partners become fluent in the type of community engagement and focus on community needs the training is intended to teach, then have them look at existing policies and plans and put what they find there into conversation with the principles

of equity and engagement they've learned to come up with new potential policies or plans and data for decision-making.

Looking Forward

In the next section, we offer a few recommendations designed to support process improvement.

RECOMMENDATIONS FOR PROCESS IMPROVEMENT

In this final section of the report, Clarity identifies potential areas of process improvement. These recommendations are based on Clarity's analysis and synthesis of the data detailed in the preceding sections (frameworks for effective innovation, collective impact, data collaborations, and local data intermediary formation), review of materials provided by The Data Center, and findings from the survey and interviews, including recommendations and requests from interviewees. These recommendations outline **what** Clarity suggests for ongoing improvements. While we do sometimes make suggestions regarding **how** an improvement might be made, we leave that, in large part, intentionally open-ended here, as it should be decided according to the wants, needs, and preferences of The Data Center and future partners in data intermediary creation.

MAKE SURE EVERYONE IS ON THE SAME PAGE

The frameworks for collective impact, data partnerships, and building data intermediaries agree: whether working with only one other organization or collaborating with multiple partners, **alignment is key**. It is critical to ensure that participants have a shared understanding of goals, structures, and expectations at the overall strategic level and at the level of concrete activities. **Clarity recommends building effective practices to ensure that participants have a common agenda, especially clearly defined goals and structure that are clearly, explicitly formulated, stated, and agreed to by all relevant parties.**

PROVIDE PARTICIPANTS WITH CLEAR, CONCISE, AND CONSISTENT FRAMING AND ORIENTATION MATERIALS

A usable innovation (or shared outcome goal) is clearly defined and can be readily described by and disseminated among all partners. One way to ensure that participants actually have the same understanding of shared goals and expectations would be to put together a two-to-five-page packet that provides an overview of the most important information for participants. Examples of possible content include:

- a brief description of the project and a statement of the underlying principles (e.g., Why a local data intermediary? What is a local data intermediary? What is equity in the context of a data intermediary?)
- information on what is expected of participants
- explicit guidance on identifying or forming a planning team (NNIP) or an implementation team
- **an annotated list of planned trainings and assignments for later reference**

PROVIDE SUFFICIENT, CONSISTENT GUIDANCE AND SCAFFOLDING

From the interviews and survey, two of the areas in which ARPC and Shimberg most wanted increased support from The Data Center were essentially more consistent communication, more clear communication, and more active coordination. **Clarity recommends that The Data Center team offer more active guidance** in getting partners off the ground, better equipping them to develop sustainable plans and monitor their progress. **Clarity also recommends the creation of identified,**

dedicated teams to provide ongoing backbone support—planning, coordinating, and facilitating the work of the group.

In line with best practices for innovation and implementation, **Clarity recommends the creation of implementation teams, which may or may not align with NNIP's planning teams.** Given findings from the interviews and survey, **Clarity recommends building stronger strategic support into the process model** in the form of more **technical assistance** (individualized coaching and hands-on reinforcement of the trainings) and fostering more opportunities for **peer learning** of the sort that took place at the in-person meeting.

Clarity believes that if The Data Center and its collaborators implement these recommendations, future iterations of the attempt to replicate The Data Center's model will see greater success.

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