The Service Insights Initiative:

A Network Framework for Implementing a Service Insights Program

Design Phase

June 2018

Version 2.0

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Key Terms and Definitions

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Instructions and User Guide

The Network Framework reflects learnings from members participating in the pilot phase and the Member Advisory Group. While the suggestions in the framework are **recommendations, not requirements**, they are based on the real experiences of member food banks implementing this type of initiative. You are encouraged to **use as much of the framework as you find useful** and pertinent to your food bank.

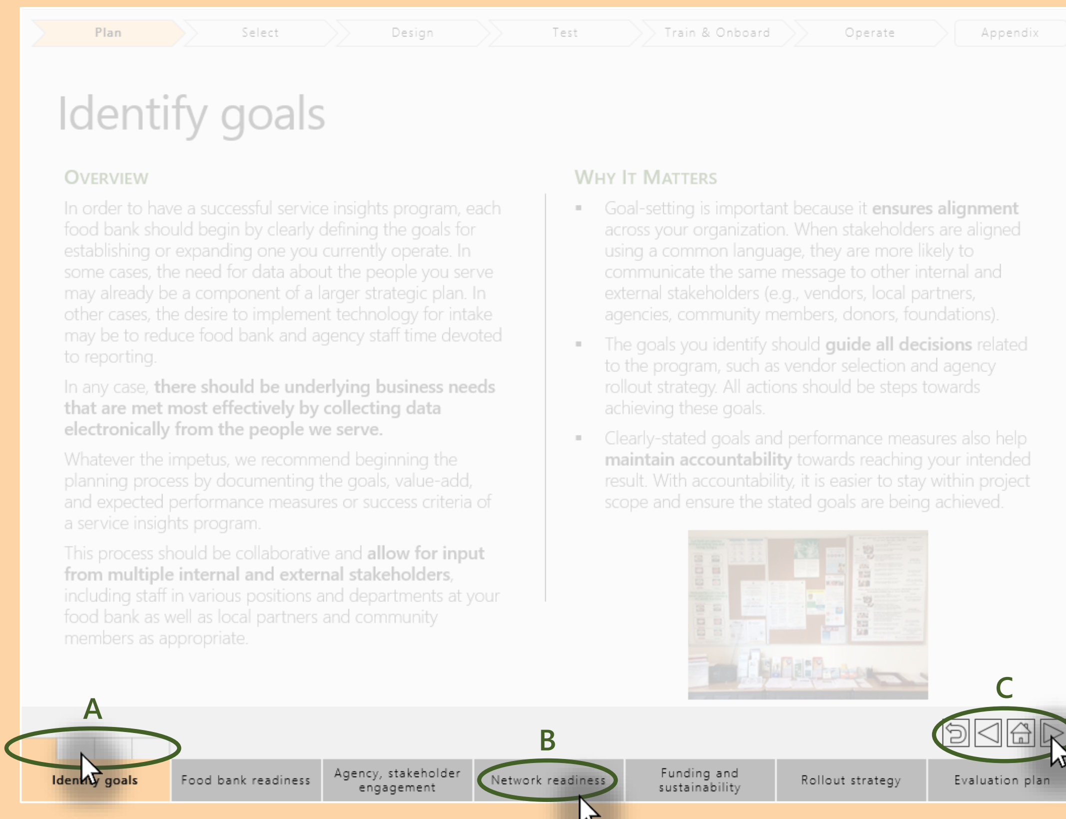
At the top of each page, you will see a row of chevron arrows that correspond to each phase. **Clicking on these or any other chevron arrows will open that phase document**.

Within the phase, you will notice a list of objectives at the bottom. These objectives are seen as **fundamental to any implementation**, although the manner in which they are executed will vary.

Although objectives are presented in a specific order, **there will be overlap between objectives when they are carried out. Consequently, we recommend fully reading all of the content for a given phase before taking action.**

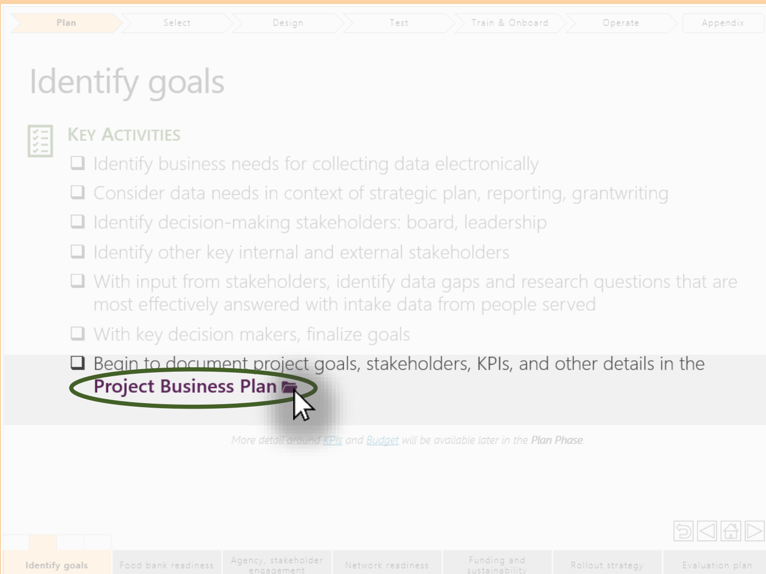
To learn more about each objective and to navigate within a phase, you can:

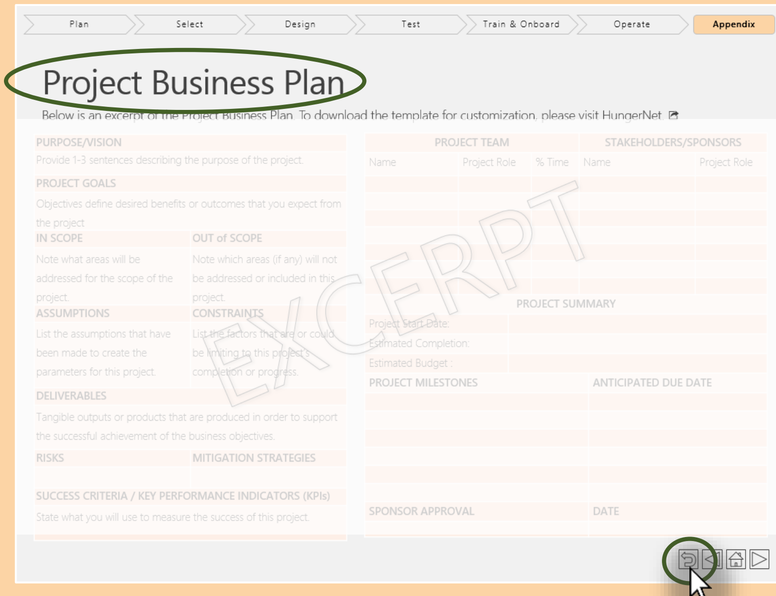
- **(A)** click the tabs above each objective,
- **(B)** click an objective name to jump to that specific objective, and
- **(C)** use the bottom right corner navigation to advance forward or backward.



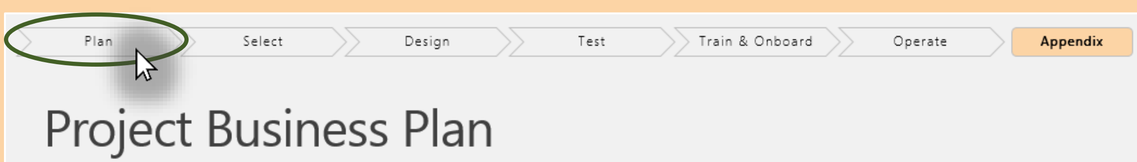
Instructions and User Guide

Some objectives reference a companion tool, such as a **Project Business Plan**. When the tool name appears in the framework, you can click it to access an excerpt in the appendix. We provide excerpts in the appendix to familiarize yourself with the tool; however, full versions are available for download and customization [on HungerNet](#).





To return to the page you were previously viewing from the appendix, you can either click the button in the bottom corner navigation, or click the corresponding phase at the top of the page to return to the phase's homepage.



Service Insights Network Framework: Overview

The Network Framework, which has been **adapted for food bank use from a software deployment framework**, is a sequenced implementation guide comprised of six phases: Plan, Select, Design, Test, Train & Onboard, and Operate.

By dividing the work into phases, members can manage the implementation and ongoing maintenance of a service insights program in an organized and intentional way.

Plan: Members should begin by identifying goals, assessing internal and network readiness, and beginning to define the project and program scope.

Select: Priorities from the planning phase are used to help inform the selection of a software vendor and hardware.

Design: **The software and hardware are configured, including data elements. Process documentation, including identifying user types and permissions, begins to outline the future operational state.**

Test: The software and hardware configurations are tested and refined in order to confirm functionality and prepare for training agencies.

Train & Onboard: Food bank and agency staff and volunteers are taught how to use the software, how to adapt to new processes, all while respecting cultural competency.

Operate: Agencies regularly collect data using the software. The data is used and shared in accordance with goals set at the outset of the project. Ongoing training and system updates occur.

Service Insights Network Framework: Objectives

Implementation (Plan, Select, Design, Test, Train & Onboard) — **Maintenance** (Operate)

	Plan	Select	Design	Test	Train & Onboard	Operate
Objectives	Identify goals Food bank readiness Agency and stakeholder engagement Network readiness Funding and sustainability Rollout strategy Evaluation plan	Identify requirements Compare vendors Select vendor Contract negotiation Consider hardware needs	Agency configuration needs Configure software Configure data Configure users Privacy and security Operating plan and processes	Identify and train testers Test hardware, software, and processes Modifications Food bank and agency acceptance	Select agencies Change management Develop training materials Train food bank users Configure agency and processes Train agency users Refine rollout strategy	Clean data Monitor agencies and follow up Use and share data System modifications System maintenance System enhancements Evaluate program and implementation
Outcome	Project Business Plan	Vendor Contract Signed	Processes and Software Ready for Testing	Accept Software and Process	Agencies Trained and Onboarding	Solution Used Effectively

Service Insights Network Framework: Tools

Each phase of the framework is accompanied by a suite of tools prepared specifically for this initiative. Below is a list of the tools and templates by phase. In the appendix of each phase, you can view excerpts of the tools. To access original copies, as well as examples of food bank tools, [visit HungerNet.](#)

Tools and Templates

- Project Business Plan
- Food Bank Readiness Factors
- Agency Readiness Assessment
- Change Management Plan
- Risk Management Plan
- Agency Rollout Strategies
- Budget Template
- Example KPIs

- Requirements Development Guide
- Technology Buyer's Guide
- Vendor Considerations
- Technology Business Case
- Network Data Glossary

- Data Sharing Agreement
- User Confidentiality Agreement
- Client Privacy Agreement
- User Account Groups
- Operating Plan

- Requirements Testing Toolkit
  - *Use Cases*
  - *Test Log*
  - *Defect Resolution Plan*

- Agency Setup Form
- Role Play Videos

- Data Communications Guide
- Data Cleaning Guide
- Guide to Monitoring and Assessment Evaluation

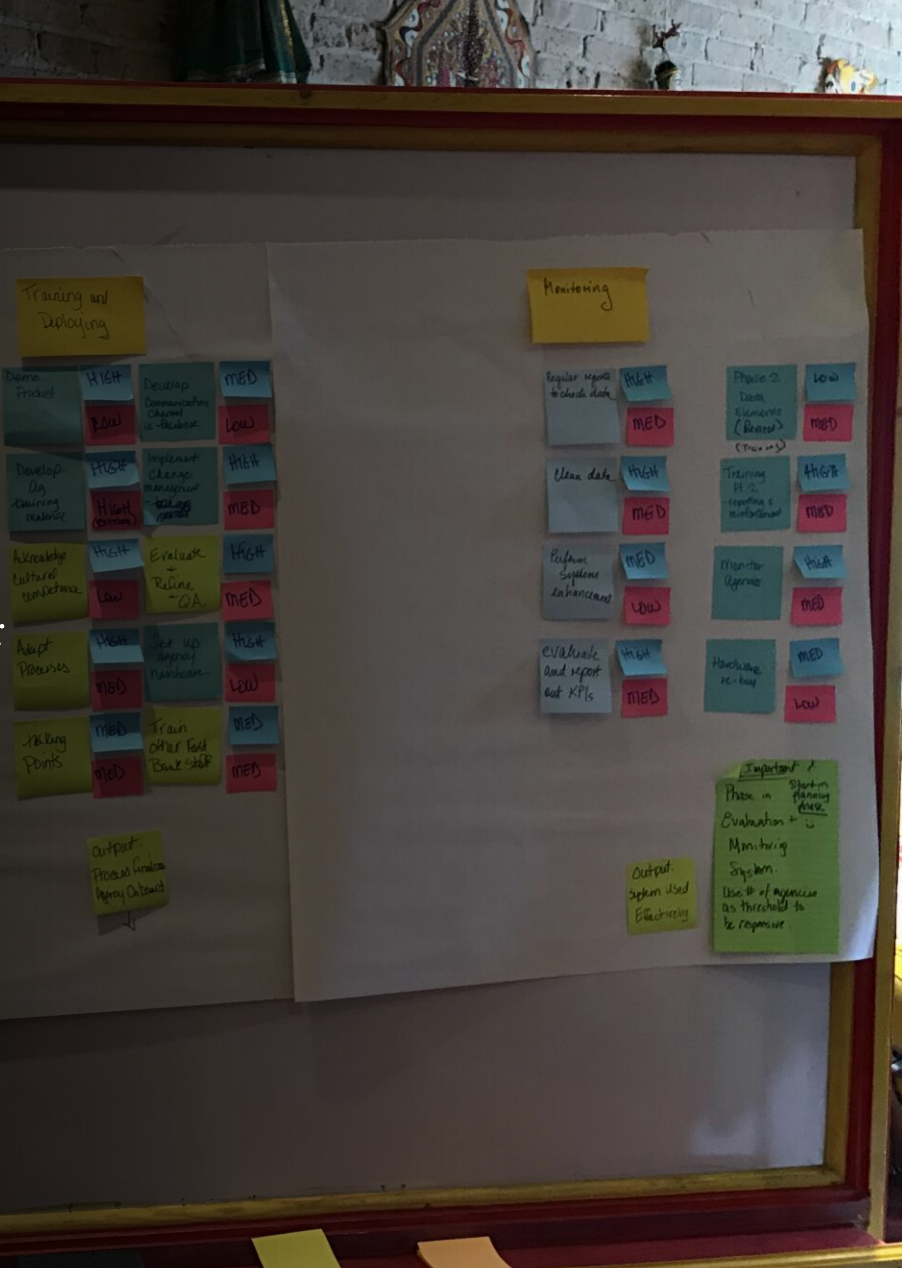
Design

"Onboarding and configuring is such a daunting task that it is difficult to see beyond that when you are first getting started.

But you need to remember why you are implementing Service Insights at your Food Bank: Is it just a tracking system for your programs in processing clients or is it the long-term benefit of analyzing the data and knowing who your food bank serves?

Keeping the long-term goals in mind can help prioritize which configuration options to make."

– Winston-Salem, NC



Design

Objectives and Outcome

- Agency configuration needs
- Configure software
- Configure data
- Configure users
- Privacy and security
- Operating plan and processes

Processes and Software Ready for Testing

Agency configuration needs

Overview

Before beginning configuration, **reacquaint yourself with the needs of your partner agency network** in order to design the software to meet the program goals and rollout strategy you are envisioning.

These needs include both tangible items, like the hardware devices to be tested in the following **Test Phase**, and non-tangible items, such as current data elements, readiness levels, and current intake and reporting processes that will need adjustment to accommodate the implementation.

Agency-level processes, such as conducting intake and remitting data to your organization, **will change as a result of introducing a new software system**, so it's critical to identify them in advance in order to work with agencies to align any processes to the implementation.

In the **Test Phase**, an initial batch of hardware and agency processes will be tested alongside the initial software configuration to be further refined for go-live.

In the **Train and Onboard Phase**, any additional configuration needs unique to an individual agency will be documented and further customized.

Why It Matters

- Revisiting your partner agencies' needs is critical because it allows you **to configure the software system to match their capabilities.** For example, if you learn through readiness results that your desired rollout group does not have network or connectivity devices, you can plan to buy, configure, and test a small number of devices prior to beginning training.
- Documenting agency processes is another important part of configuration because it **reduces ambiguity about how activities will occur with the implementation of new technology**. For instance, if agencies will now send TEFAP reports and client signatures through a different mechanism, it is helpful to document and discuss this in advance to confirm it will work.
- It is also important to address configuration needs and process change ahead of time so that you can **share with partner agencies and food bank staff how you plan to address potential changes in process** during the course of training and change management.

Agency configuration needs

Key Activities

- ❑ Revisit agency readiness results and rollout strategy from the **Plan Phase**
- ❑ Identify common processes across agencies to inform configuration (e.g., intake, data needs, reporting)
- ❑ Identify agency hardware needs to procure an initial batch for configuration and testing in the **Test Phase**
- ❑ Revisit configuration needs of individual agencies to be trained during the **Train & Onboard Phase**

"When rolling out a software process, ideally the software is tailored to fit what you're using it for. But sometimes, you have to adapt your process to fit the software. It's important to identify an opportunity to create greater efficiencies while maintaining the dignity of the people you serve."
– Chief Operating Officer and President of Data Blueprint

What are "processes"?

Processes refer to the activities and tasks that regularly occur in order to achieve a goal or end result. As a result of implementing any new technology, the ways that people are accustomed to working will shift.

Rather than waiting until agencies are being trained and onboarded to address process change, we encourage you to think about process alignment ahead of time. This way, you can share with partner agencies and food bank staff how you plan to address potential process changes as a part of training and change management.

Below we describe examples of agency processes and how they might be aligned to the new software. For more information on process alignment, see the objective in this phase: Operating plan and processes.

Example Agency Processes

Conducting intake for a new or repeat client

- *Before*: Clients may have privately completed a paper form in a public waiting room.
- *After*: Clients may be asked to sit at a computer station in a semi-private area.

De-duplication at the intake level when the record shows a possible match in the system

- *Before*: Agency staff and volunteers may have not needed to be aware of duplicate records.
- *After*: Agency staff and volunteers should verify the individual does not already have a record in the system to prevent creating duplicate data.

Submitting monthly reports to the food bank

- *Before*: Agencies may have shared their monthly reports via voicemail, Google sheets, or Primarius.
- *After*: Agencies' monthly reports may be pulled automatically by food bank staff; however, you will need to agree on the date this will occur.

Submitting TEFAP signature sheets

- *Before*: Agencies may have faxed copies of paper signature sheets to the food bank.
- *After*: Food bank staff may be able to view electronically stored signatures and share these directly with TEFAP state administrators.

Agency configuration needs

Stakeholders to Engage

- Key internal departments, including Agency Relations, Programs, Operations, and Technology
- Software vendor
- Partner agencies or agency working group

Peer Advice

- To address differences in intake process when entering new clients to the database, some agencies created **separate queues for new registrants and returning households** and clearly explained the rationale for separate lines.
  - *More information on structuring the first initial intake process is in the* **Train & Onboard Phase**.
- Work with the agency working group or representatives of diverse partner agencies to validate and discuss the readiness results.

"Another need for the food bank is to have documented processes for the agencies. We have a staff person who works with the agencies and knows which agencies are always on time and those who are always late submitting reports and all other deadline requirements. It's important for every food bank to have what's required and late consequences documented." – Winston-Salem, NC

Configure software

Overview

In the **Select Phase**, your organization selected a final vendor based on the functions and attributes (i.e., requirements) that were desired of the software system.

Now is the time to discuss these requirements with the selected vendor in greater detail in an effort to **understand available features and configure the software in order to meet the needs of your organization and partner agency network**.

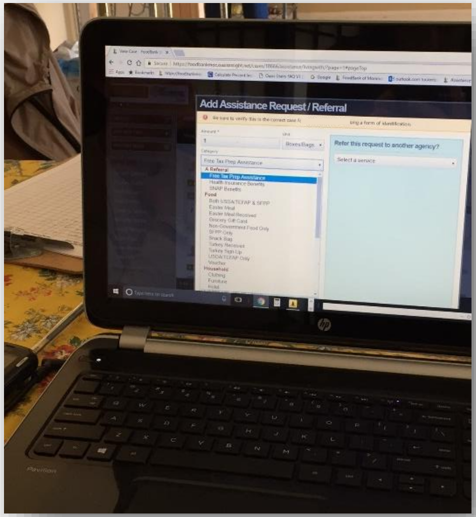
To make the best configuration decisions, refer to information you have compiled in prior phases, including partner agencies' needs, the goals of your service insights program, and more. One key configuration decision will be whether any records are visible to other partner agencies (discussed later in this objective).

During this process, it is **critical to prioritize core functionalities and deprioritize features** that would be "nice to have," but could be foregone over others to better meet your organization's needs.

With this information, the vendor and food bank staff may begin to configure the software system. In the upcoming **Test Phase**, the initial configuration will be validated and verified against your requirements to ensure the software performs as desired and agreed upon in your contract.

Why It Matters

- By configuring prioritized functionalities over features that would be "nice to have," you can **save both time and expenditures** in the long-term.
- The configuration will also become a tool to understand whether your requirements are being met. By devoting time to testing the initial configuration prior to going live, you can **avoid potential issues down the line**, such as training agency volunteers with the incorrect interface or not being able to produce needed reports.



Configure software

Key Activities

- ❑ Identify features available to be configured based on requirements identified in **Select Phase**
- ❑ Work with vendor to configure software to meet food bank and agency requirements

Stakeholders to Engage

- Key internal departments, including Agency Relations, Programs, Operations, and Technology
- Partner agencies and agency working group
- Software vendor
- State TEFAP or other program administrators

Food Bank Case Example

Situation

An early adopter food bank was onboarding the software system identified and approved by the state TEFAP program administrator. Unfortunately, the food bank was not involved in the vendor selection process.

During the configuring process, the food bank learned that **each onboarded agency would require its own individual configuration**. As a result, the food bank team was responsible for configuring each agency, including the agency's user accounts, as well as the data elements and answer options for each agency.

Because the agencies being onboarded have different regulations and intake processes, the configuration needed to be altered significantly for each partner agency. **The team has found the process to be time-intensive** for food bank staff who are also focused on recruiting and training new partner agencies. In addition, the team must also de-duplicate data across all agencies on the back end in order to produce aggregate, food bank-level data.

Result

The situation has conveyed to both the food bank and the Feeding America team the **value of defining roles and responsibilities** for configuring the software systems well in advance.

For example, when selecting a vendor, **it is important to know which configurations and data customizations are included by default and which will result in additional costs**. Before selecting a final vendor, review the contract to understand, and negotiate, which customizations the vendor will execute and any implications for the project timeline.

To document agencies' various intake methods, **use multiple ways to document agency processes on the ground**. This includes agency readiness results, additional surveying with a subset of agencies, focus groups, site visits, and assigning staff to the project that have a deep understand of how agencies work, including relationships with agency representatives.

Options for Configuring a Common Software

There will be options for how data can be viewed by peer agencies in your network. Some vendors describe these options as "walls up" or "walls down." We describe these options as "fully-closed" and "semi-open" for illustration, but vendors may use different terms. **Consider the benefits and drawbacks of each approach before configuring your software system.** To produce unduplicated data at the food bank level, while keeping details of individuals' visit history secure, **we recommend a semi-open approach**.

Semi-Open Database ("Walls Down")

Agencies can access high-level records (e.g., name, DOB), but not individuals' history visiting other agencies.

Pros

- Prevents creation of duplicate records in database
- Unduplicated data about people across the service area
- May facilitate referrals between agencies

Cons

- Requires additional training and safeguards on how to best use the system to ensure data privacy and security

Fully-Closed Database ("Walls Up")

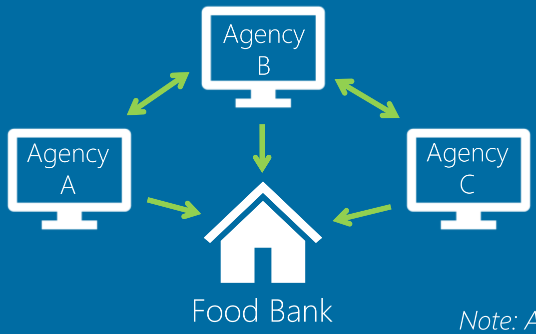
Agencies cannot access any records or information about people served at other agencies.

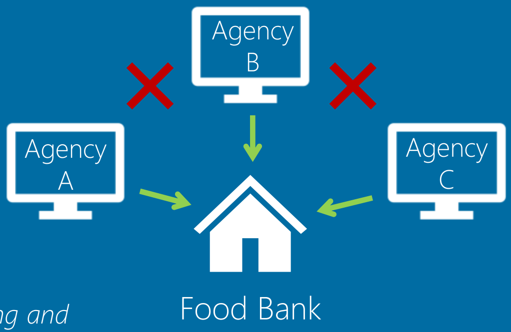
Pros

- Heightened data security (an option for agencies that serve domestic violence survivors or undocumented individuals)

Cons

- Clients must complete full intake at every agency they visit
- No unduplicated data about people across the service area





Note: Additional guidance around data cleaning and de-duplication is provided in the **Operate Phase**.

Configure software

Overcoming Common Challenges

One common configuration challenge is **balancing the various needs of all your partner agencies**, as different partners will request different features.

In addition, there may be a challenge in turning down features that are "nice to have," but not critical to meeting the needs of your organization or the majority of partner agencies.

- In order to overcome this challenge, your organization will need to understand which needs are common to a **critical mass** of agencies and prioritize those.
- The features you select should also match the organizational goals and the rollout strategy that is informing your service insights program. For more information on types of agency rollouts, including the recommended agency rollout strategy, review the **Agency Rollout Strategies** document.
- For example, if TEFAP agencies are the priority rollout group, then software system features that streamline and support TEFAP monitoring processes will be crucial to incorporate, such as electronic signature and monthly reports.

Peer Advice

- Consider whether **additional languages beyond English** can be configured or supported in the software. Review the pilots' tips for bridging language barriers on HungerNet.
- Also be sure to **involve multiple staff from various different groups** during this phase. Per the pilot food banks, *"it was very important to have eyes from various areas look over"* the configuration options being considered.

> *"We at the food bank can adjust the height of data walls among the agencies, what they can see in other agencies."* – Washington, DC

Configure data

Overview

During initial stakeholder engagement in the **Plan Phase** , your organization identified preliminary data points of interest across multiple teams. You may have also discussed compatibility and data customization with vendors during the **Select Phase** .

Now is the time to **revisit those conversations in order to solidify the data elements and answer options** that will be programmed in the software system. The **Network Data Glossary (NDG)** outlines "Core" data elements recommended for all implementations to encourage consistency across your partner agencies, peer food banks, and states.

In addition to Core data elements from the NDG, you may also wish to **select additional data elements that contribute to your broader goals** or strategies for pursuing service insights. This process should be collaborative, with input from multiple stakeholders, and should only result in data elements that are actionable.

Confirm with the vendor which party will be responsible for carrying out the data configuration. For example, items that can only be completed by the vendor may incur additional fees; however, food bank-led configuration requires allocating additional time and internal resources to carry out this task.

Why It Matters

- It's important to begin configuring data elements and answer options early so that the test environment for food bank and agency testers during the **Test Phase** is as close as possible to the final version. You will want to ensure you are also receiving feedback on the intake questions as they are available in the software.
- It's also important to configure data, as vendors will have their own set of data elements and answer options preconfigured into the system. Your organization will want to ensure the final data elements are customized to meet your specific needs and align with recommendations outlined in the **Network Data Glossary**.
- Beyond adopting the Core data elements to share common definitions with peers, it is also critical for your organization to incorporate supplementary data elements. **These data elements will answer the key research questions** and business needs that prompted your organization to begin a service insights program.

Configure data

Key Activities

- ❑ Review the **Network Data Glossary**
- ❑ Engage stakeholders (e.g., agencies, TEFAP administrator) to confirm adoption of Core data elements and answer options and if needed, perform data mapping
- ❑ Engage stakeholders (e.g., food bank departments) to align on additional data elements and answer options
- ❑ Identify which party (vendor or food bank) will configure each data element
- ❑ Customize answer options for all data elements
- ❑ During the **Test Phase**, confirm that desired reports can be produced and meet organizational needs given data configuration

"I wish more time could have been spent discussing the research questions and the answer selections. I think that would have helped me develop this area better. I am now backing up to revisit those questions and specifically the answer selections." – Winston-Salem, NC

What Types of Data to Configure

The **Network Data Glossary** (NDG) is an official Service Insights tool **designed to facilitate consistency** across your partner agencies and among peers. It has been produced with input from dozens of food banks and external experts. Recommendations about data elements and answer options beyond those outlined in the NDG have not yet been identified, but should be configured **based on your organization and network's needs**.

Core Data Elements in the Network Data Glossary

- **Examples: Gender, date of birth, race/ethnicity, and more**
- Foundational to any implementation and essential to producing accurate, unduplicated data about people we serve
- Validated recommendations for both question phrasing and answer options
- Data mapping guidance to further customize answer options to meet local requirements or cultural norms

Non-Core Data Elements

- **Examples: Income, health and employment status, dietary preferences, receipt of SNAP**
- Members are free and encouraged to collect other items beyond Core data elements as it meets their program goals and outcomes
- Feeding America is developing a long-term strategy to identify other standardized measures that meet the network's research interests
- Recommendations for these items will be prioritized and incorporated based on network consensus as well as pretested or piloted results

How to Prioritize Which Data to Collect

In order to decide which data are most critical to configure in the software system, **consider the questions below alongside key stakeholders** within your food bank, partner network, and community.

What baseline data should we be collecting?

Some data elements are foundational to any food bank data collection effort. These help produce unduplicated insights about the people you serve.

- Review the Service Insights **Network Data Glossary**
- As applicable, also confirm TEFAP or other program reporting guidelines.

What other data elements should we collect?

- Items should be incorporated as they **support specific program goals** and outcomes or grant reporting requirements.
- Because data are collected at the point of service, consider how adding items may **impact intake efficiencies, wait times, and clients' experience.**
- As possible, refer to validated surveys for question phrasing (i.e., *Hunger in America*, U.S. Census Bureau, American Community Survey, CDC, and other surveys).
- It is **not** recommended to collect data on **clients' immigration status**.

How should we plan for future data to collect?

- As you begin to receive and analyze data about the people you serve, **you may wish to ask additional questions or adjust current data elements** in order to better answer your research questions or goals.
- Guidance for regularly reviewing, cleaning, and learning from the data in order to adjust or incorporate new data items will be discussed in the **Operate Phase**.

Core Data in the Network Data Glossary

Here we present **an excerpt** of the core data elements and answer options from the **Network Data Glossary**.

The full context of recommendations, including **data mapping advice for implementing and reports with alternative answer options**, is available in the full document.

What is your first and last name?

First | Last

How do you describe your gender identity?

- Female
- Male
- Transgender
- Do not identify as female, male, or transgender

***Source**: Williams Institute, the Center for American Progress, and the Federal Interagency Working Group on Improving SOGI (Sexual Orientation & Gender Identity) Measurement*

***Source**: U.S. Census Bureau (2015 National Content Test: Race and Ethnicity Analysis Report). Anticipated categories in the 2020 Decennial Census, in alphabetical order.*

What is your date of birth?

MM/DD/YYYY

What is your race or ethnicity? Select all that apply, you may report more than one group.

- American Indian or Alaska Native
- Asian
- Black or African American
- Hispanic, Latino, or Spanish
- Middle Eastern or North African
- Native Hawaiian or Other Pacific Islander
- Prefer not to answer
- Some other race or ethnicity
- White

What is the zip code where you are currently living?

5 digits (xxxxx)

How many people, including yourself, are currently living in your household and sharing expenses?

Two digits, 1-20

What are the names of all household members who are currently living in your household?

First | Last

What are the birthdates of all household members who are currently living in your household?

MM/DD/YYYY

- Don't know

What is the race or ethnicity of all household members who are currently living in your household?

Configure data

Overcoming Common Challenges

One very common challenge is **attempting to collect too many data elements**. Because service insights data are designed to be collected during the intake process and firsthand by a program volunteer, there are some constraints compared to traditional methods of surveying.

- To overcome this challenge, it will first be important for your food bank to **define the desired intake duration and thus number of data elements**, based on agency input and the current intake and distribution process of the partner agency, including wait times.
- Another potential method for avoiding this issue is to regularly **refer back to the organization's original strategic goals**, business needs, and purpose for collecting data. Carefully assess whether the proposed data element(s) help fulfill those goals.
- By clearly understanding how the data will be put to use, you can determine **whether the data element is actionable or simply interesting**.
- Another possible strategy for overcoming this issue is to **limit the items for the initial intake** to a select number. Then, additional questions can be phased in over time during subsequent visits and intake processes.

Another common challenge is **aligning on common data elements**, given differences across partner agencies and whether they are already using a software system.

Some agencies may request additional data elements and answer options, especially if they are needed to fulfill existing grant reports.

- One possible way to remedy this issue is to **develop a clear and uniform policy for honoring data requests** from partner agencies. For example, offer a submission process for requesting data elements so that you can monitor the volume of requests for a particular item.
- You can also address this issue by **developing additional answer options** that might accommodate an individual agency's needs, but that still map to the food bank's primary answer options. For example, if an agency wishes to collect the nationalities of Asian household members, these values can still map to the "Asian" answer option used at other partner agencies.
- For additional guidance on understanding agencies' data collection priorities and whether or not to allow imports of historical data, review the **Plan Phase**.

Configure data

Stakeholders to Engage

- Key internal departments who will use the data, such as Agency Relations, Fundraising, Marketing and Communications, Programs, Operations, and Technology
- Partner agencies and agency working group
- Software vendor
- State TEFAP or other program administrators
- State association or peer food banks
- Community or client advisory board, if one exists
- Current and prospective funders
- Local or county government, healthcare, nonprofit partners (e.g., organizations such as YMCA, Salvation Army, and other community partners)

"Don't be short sighted and look only at onboarding programs, must look long term and what you expect to get from the data"– Winston-Salem, NC

Benchmarks/KPIs

- Pilot food banks collected **an average of 17 data elements**, including required and supplemental items
- The number of data elements collected by each pilot **ranged from 8 to 29**

"We had to submit all of our questions to Illinois Department of Human Services [DHS, the TEFAP Administrator] to get them approved. They asked us what we were doing with these answers, so we had to have a reason for asking each one, a plan for the data." – Geneva, IL

Configure data

Peer Advice

- Avoid placing additional burden on people by asking **questions that are interesting, but cannot be used to make any actionable changes** or improvements.
- If there are data elements your food bank is collecting in order to inform future services that aren't yet available, train volunteers to share that while they cannot help with an individual's expressed needs now, **by capturing this information, you may be able to do so in the future**. More information about volunteer training is available in the **Train & Onboard Phase** .
- Consider in advance to what degree, if any, you will **allow partner agencies to further customize data** elements and/or answer options.
  - *For example, some agencies may be reluctant to include "Transgender" as an answer option.*
- **Align on a policy for additional data customization** prior to beginning training and onboarding. As needed, refer to the **Network Data Glossary** for suggestions on mapping non-standard answer options.
- Confer with the state or county program administrators to **understand the laws or policies around what can legally be collected**. If state administrators require approval before customizing or collecting data, allow ample time for seeking approval.
- Consider whether you will **translate question phrasing and answer options** to accommodate languages spoken in the service area, such as Spanish or Arabic. This may require additional time and expenditures that should be denoted in the **Project Business Plan** . Access additional suggestions from the pilots for accommodating language barriers here.
- There are options for **introducing data elements over time**. For example, some food banks begin with basic demographics (i.e., NDG Core data elements) to expedite the initial intake and then introduce additional data elements as people return to the agency.

"We need to balance getting the data we need and providing the best client experience that we can." – Washington, DC

Configure users

Overview

As part of software configuration, you will also have the ability to create groups of system users and assign them specific permission levels. To ensure that users only have access to the degree of information they need to fulfill their function, review the guide to **User Account Groups**.

For example, **lead staff at the food bank may be appointed as "super users."** Super users have a deep understanding of the software, including how data is entered, stored, and reported, as well as how permission levels are assigned to other users (e.g., other food bank staff, agency intake workers, etc.).

Super users may become the first line of contact for agency support and will be instrumental in conducting the test phase, so it's critical that they are identified early on.

In addition to super users, other staff and volunteers using the system will use the system and require different access levels. **Consider whether people only need to use reporting or intake functions** and who has permission to view other users' activity (i.e., through audit trails).

In the **Train & Onboard Phase**, individual staff and volunteers will get user accounts created based on their specific user account group.

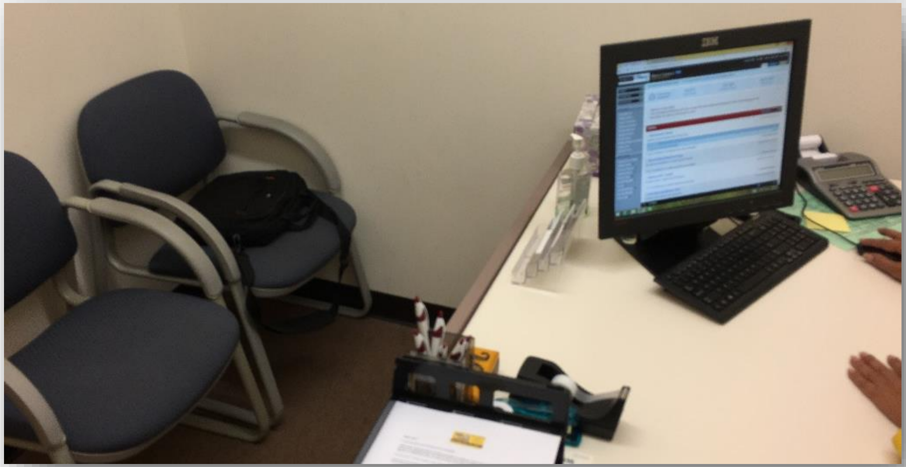
Why It Matters

- Determining user account groups is an important aspect of configuration; specifically, it allows you to **identify the specific privileges and levels of access to data** that certain people may have over others. Without clearly delineating these permissions levels, it could compromise the privacy and security of the data being collected.
- It is also important to identify super users ahead of testing since super users will be **familiar with the software and able to identify any needed changes** to processes, data fields, and training protocols. It is critical to **identify this staff person in advance**, rather than after the data is beginning to be collected, so they are acquainted with the system.

Configure users

Key Activities

- ❑ Review the **User Account Groups** guide
- ❑ Create user account groups in the software
- ❑ Assign permission levels to user account groups
- ❑ During the **Train & Onboard Phase**, individual staff and volunteers' user accounts will be created



Configure users

Peer Advice

- Consider the **different permission levels available to different types of system users** and establish them on a "need-to-know" basis. Food bank staff from different departments will require different access levels to aggregate service area-level data.
    - *For example, agency relations managers may require broader access than a grant writer or development staff person.*
- Similarly, agency managers and frontline volunteers will also require **different access levels to their agency's information**. This may include allowing agency managers broader access to produce queries and reports about their agency's data in order to fulfill grant reports and other requests.
- **Err on the side of limiting more permissions** than enabling them, as permissions can always be added over time; however, they can be difficult to remove from users who already have them.

Overcoming Common Challenges

One common challenge with configuring user accounts and permissions levels is when **volunteers at the partner agency share login information**, rather than each volunteer using individual credentials.

- It is important for all users to have individual accounts so that there is an audit trail of who was accessing the software system. If data quality issues point to a training issue, staff can follow up with the volunteer individually.
- To address this challenge, it is important to ask partner agencies for individual staff names and email addresses when assigning user accounts.
- Consider visiting agencies during the distribution to observe the intake process and discuss protocols with the agency lead.

> *"It's a best practice for all users to have their own user account. Also, ensure you understand the system's audit trail. Know what you can track about user actions in the system in case there is a breach."* – Washington, DC

Privacy and security

Overview

While designing your service insights program and configuring the software system, you will also have the opportunity to consider the privacy and security aspects of the implementation.

There are a variety of ways to protect personally identifiable information (PII), including **instituting physical safeguards, executing administrative policies, as well as configuring technical features of the software itself**.

Discuss the potential risks and mitigation strategies for each privacy and security consideration with internal food bank staff, as well as externally with partner agencies and the software vendor.

Your end goal should be to make as many reasonable efforts as possible to protect individuals' personal information and to train others on how to maintain this information as private.

With tools from the framework and advice from peers, you can strive to maintain the security of the data and the privacy of the individuals from whom it is being collected.

Why It Matters

- It is important to make formal efforts to safeguard the data because it contains **personal information about the people you serve.**
- The types of data you collect may influence your privacy and security strategies, so it is important to **understand what data will be in the system** in order to prepare a tailored risk mitigation approach. For example, given the level of risk it poses, it is **not recommended to collect immigration data from clients.**
- Some individuals, as well as agency staff, may have questions about data collection procedures and security protocols. With efforts in place to protect this data, **you can help give assurance** that you are committed to keeping their information private and secure.
- It is also important to keep the data secure in order to **mitigate any potential risks** to the partner agency and/or your food bank if there is a data breach or hack. By preparing a **Risk Management Plan** to address potential risks, you will be able to execute premeditated protocols and initiate action planning as soon as the risk occurs.

Three Types of Security Safeguards

There are a variety of ways to protect electronic personal information. Although the software vendor will offer a number of safeguards, **food banks and agencies should also institute additional protections**. Below we share three dimensions of security safeguards as well as example mitigation strategies.

Administrative Safeguards & Policies

- reasonable and appropriate policies and procedures to help manage the conduct of staff and volunteers in relation to protecting information

- Trainings
- Written policies
- Regularly review agreements
- Regularly review user activities
- Risk analysis and management

Physical Safeguards

- designed to protect electronic personal information as well as buildings and equipment
- should address natural and environmental hazards and unauthorized intrusion

- Device locks
- Device location tracking
- Office or cabinet locks
- Screen shields
- Building alarms
- If traveling, do not leave in car

Technical Safeguards

- designed to address technology and related policies and procedures
- protect electronic personal information and control access to it

- Secure WiFi networks
- Data encryption
- Secure user IDs and passwords
- Role-based permission levels
- Hardware & software protection (e.g., anti-malware)
- Routine audits

Adapted from the U.S. Department of Health and Human Services' Office of the National Coordinator for Health Information Technology

What's the difference between security, privacy, and confidentiality?

Although these are similar terms, privacy, confidentiality, and security items refer to distinct concepts. Understanding the difference between the three, and executing written agreements with stakeholders to support them, your organization can **help develop safeguards to protect the data you are collecting.**

Security

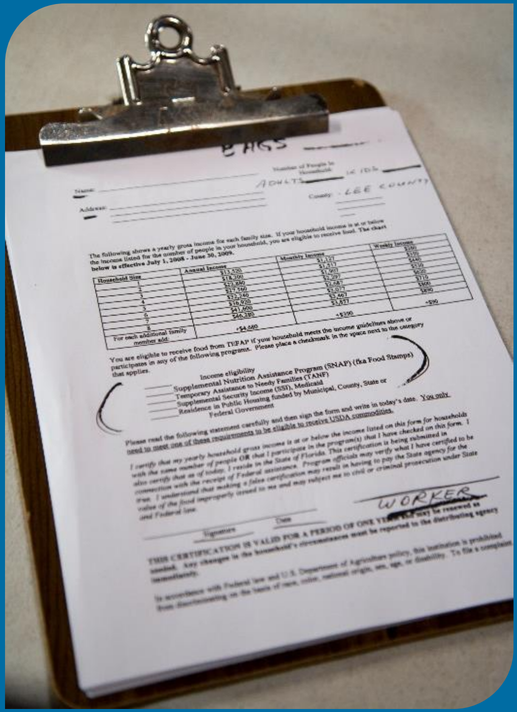
- **Security** refers to controls that are exercised in order to protect confidential information from unauthorized access
- *Mitigated by safeguard measures (prior page)*

Privacy

- **Privacy** refers to peoples' ability to control access to information about them.
- People exercise their right to disclose information in exchange for privacy.
- *Mitigated by a* **Client Privacy Agreement**

Confidentiality

- **Confidentiality** refers to keeping information shared with another person private
- It is a condition and a mutual responsibility
- *Mitigated by* **User Confidentiality Agreement** *and* **Data Sharing Agreement**



Three Template Tools for Security and Privacy

To strive to protect the people and the personal data you are collecting, we have prepared a number of example agreements that you can customize to further protect your organization and community. **Before executing any documents, members should confer with local legal counsel** (fee, pro bono, or board contact) and any local and state privacy laws. **Contact us** if you have difficulty acquiring legal counsel.

Data Sharing Agreement

- *Executed between*: Food Bank and Partner Agency
- *Purpose:* To commit to provide and share data, but not with unauthorized third parties
- *When?* Signed prior to configuring an agency or creating user accounts

User Confidentiality Agreement

- *Executed with:* Any Software User (Food Bank and Agency)
- *Purpose:* To commit with an individual user to keep private information confidential
- *When?* Before user account is created and user is enabled access to data

Client Privacy Agreement

- *Executed with:* People Served at Partner Agency or Program
- *Purpose:* To notify individuals of their rights and your efforts to keep their data secure
- *When?* Provided at point of service, by public notice, electronic consent or written copy

Privacy and security

Key Activities

- ❑ Review template agreements and customize for use:
  - **Data Sharing Agreement**
  - **User Confidentiality Agreement**
  - **Client Privacy Agreement**
- ❑ Revisit **Vendor Considerations** and contract to inform updates to the **Risk Management Plan**
- ❑ Based on configured data elements, develop necessary data security policies, roles, and responsibilities in order to adhere to potential TEFAP, HIPAA, etc. regulations

*For example, if your food bank plans to transmit data electronically to other partners, such as a healthcare provider, execute the advanced **Client Privacy Agreement** and review Feeding America and Harvard Law School's guide to HIPAA and food bank partnership.*

Privacy and security

Peer Advice

- Work with the vendor to include **security safeguards** in the software system.
  - *For example, are there limitations on the types of data exports that agency staff and volunteers can perform?*
  - *Will personal data, such as names and birthdates, be masked upon export (e.g., XX/XX/XXXX)?*
- Ask whether the vendor can include a **warning in the system any time sensitive data is exported** so that users understand the ramifications of removing data from the secured site.
- Establish **clear policies and expectations** for any software users, especially volunteers. This can be achieved through the **User Confidentiality Agreement** and training practices that are discussed in the **Train & Onboard Phase**.
- While understanding that proper training and policies are the first line of defense, invest in **cyberinsurance** to cover events such as privacy breaches or cyber extortion threats. Confer with the vendor as well as internal counsel or a pro bono lawyer on what liability protections are available to your organization.
- Promote the use of **physical safeguards** for hardware, such as device locks and password-protected user accounts.
  - If personal data are printed, such as on copies of ID cards, ensure they are kept in locked cabinets.
  - Work with partner agencies to regularly audit devices to ensure no information is stored locally.
  - Configure the web browsers to regularly clear the cache (i.e., browser history). If possible, consider encrypting the device's hard drive.
  - If traveling, do not leave devices in any vehicle. If you must, ensure devices are locked in the trunk.

Stakeholders to Engage

- Key internal departments, including Finance/Legal, Operations, and Technology
- Software vendor
- Partner agencies and agency working group
- Community or client advisory board, if one exists
- Food bank and/or agency volunteers

Cyberinsurance: What is it and should I have it?

Cyberinsurance refers to *"an insurance product used to protect businesses and individual users from Internet-based risks, and more generally from risks relating to information technology infrastructure and activities."*

Members should contact their insurance broker to determine what they cover. Components include both cash and services, so understand what is included before you buy. **Below we highlight examples of the types of cyberinsurance coverage and what your food bank can do in the case of a cyber event.**

Types of Coverage

- **Errors or Omissions** (e.g., Costs associated with errors in the performance of technology services)
- **Media Activities** (e.g., Costs associated with deploying media or communications professionals to address the breach)
- **Network Security & Privacy** (e.g., Costs associated with the failure of network devices or protocols)
- **Privacy Breach (**e.g., Costs associated with the disclosure of private information)
- **Cyber Extortion Threat** (e.g., Costs associated with the investigation of threats to commit cyber attacks against the policyholder's systems)

For example, in the event of a data loss or breach, what would be your plan of action?

1. Contact your insurance broker to walk through next steps and leverage their resources for support to help remedy
2. Review the **Risk Management Plan** you prepared and signed vendor contract
3. Review the **Vendor Considerations** to initiate dialogue with the software vendor and understand their coverage
4. Pay the cyberinsurance deductible in exchange for coverage and support

Adapted from McGuireWoods Consulting: A Buyer's Guide to Cyber Insurance

Privacy and security

Overcoming Common Challenges

One common privacy challenge is **determining when and how to obtain consent** from people to request their personal information.

- If the partner agency receives TEFAP, then people are already accustomed to providing some personal information and signature.
- However, some state agencies may prohibit agencies from asking additional questions. **Engage your state administrator early** to not only approve e-signature and electronic data collection, but also to confirm how consent should be obtained in order to ask additional questions.
- For example, an individual may provide e-signature and initial information for TEFAP and then be asked to consent to answer additional questions. The specific **order of questions and consent check boxes/e-signature will need to be determined early and configured into the system during this phase**.
  - *For example, one pilot food bank prepared a document for agency staff and volunteers that explains which data were required for TEFAP.*
- If the partner agency does not receive TEFAP, you should still alert people of their privacy rights and provide brief information on how their data will be kept secure.
- This information can be adopted from the **Client Privacy Agreement** and **made publicly available in the agency, such as on a laminated poster or at the check-in location**. Depending on the software system, consent can then be logged electronically.

Operating plan and processes

Overview

Prior to training agencies, your food bank should think ahead to the operational phase of the program and draft a plan to guide ongoing activities.

An **Operating Plan** provides clarity on **food bank roles and responsibilities for program activities and processes that will occur during training and after implementation** (e.g., trainings, software updates, vendor management, cleaning data, and producing reports).

Since new and existing food bank processes will shift as a result of implementation, it is important to identify and document these changes in advance. Processes that will be implemented once the system is live (e.g., submitting TEFAP reports) should also be tested during the **Test Phase**, before agencies are trained.

Although an operating plan will not be fully executed until the **Operate Phase**, because some processes cannot be tested until after implementation (e.g., software updates), it is important to develop an early draft and begin documenting the future operational state of the program.

Implementing new processes and program activities will be a great resource investment. **By identifying these in advance, you can ensure you're staffed appropriately to support the initiative on an ongoing basis**.

Why It Matters

- A key input to a successful long-term software implementation is **a long-term strategy** that aligns with business goals. In addition to planning for future software or hardware upgrades, a long-term strategy should **include a plan of how to measure and put the data to use**, and identification of data stewards to control data quality moving forward. The **Operating Plan** is a vehicle for documenting these steps.
- Developing an operating plan is important because **support for the system tends to be an afterthought**. By planning for supporting activities earlier in the process, you can initiate conversations across food bank teams to make sure you're staffed appropriately to support the initiative on an ongoing basis.
- An operating plan is also important to sustaining the program, **given high staff turnover rates across the network**.
    - *For example, during the 1-year pilot, across 5 pilot food banks, 7 of the total 19 staff members (37%) working on the projects left the organization while 3 of the 5 food bank CEOs (60%) departed during the pilot.*

Operating plan and processes

Key Activities

- ❑ Revisit goals, business needs, initial rollout strategy, and change management plan
- ❑ Review and complete the **Operating Plan** to document short- and long-term processes and program roles
- ❑ From the **Operating Plan**, identify which food bank processes can be tested during the **Test Phase** (e.g., data entry, de-duplication, reporting, etc.)
- ❑ Identify ongoing costs and revisit **Project Business Plan** and budget

"Staff capacity is a challenge, not just reviewing the data being collected by the agencies, but also executing the evaluation plan." – In-person pilot meeting

Roles and responsibilities for successful program operation

Prior to training and onboarding agencies, begin to think about how the program will operate in the long-term. To ensure the program's success and sustainability, assign clear roles and responsibilities for program staff.

Below we share example program roles described in the Operating Plan. **Program roles can be fulfilled by one or more individual(s). By providing clarity about a person's contributions to the project, the program will operate much more smoothly**.

Program Governance

- Controlling software configuration, processes, and policies
- E.g., Allowing customizations or changes to be executed

Vendor Management

- Maintaining the relationship with the software vendor
- E.g., Reviewing contract and invoices, disaster plan, and other **Vendor Considerations**

Release Management

- Identifying defects or bugs and communicating software updates
- E.g., Notifying agencies about system maintenance or upgrades

Technical Support

- Supporting users on a day-to-day basis and elevating issues to vendor
- E.g., Serving as point of contact for agencies with questions

Security and Access

- Maintaining the security of the software and data
- E.g., Reviewing **User Account Groups** and permissions, removing departing users

Training and Knowledge Transfer

- Supporting software users to ensure consistency of use
- E.g., Training new staff and volunteers, creating reference materials

Data Management

- Managing the database to ensure its quality and integrity
- E.g., Reviewing and merging duplicate records, identifying anomalies

Reporting

- Using and sharing the data with stakeholders
- E.g., Generating regular reports, running custom analyses as needed

Operating plan and processes

Stakeholders to Engage

- Executive Leadership
- Key internal departments, including Agency Relations, Finance, Fundraising, Programs, Operations, and Technology
- Partner agencies and agency working group
- Software vendor

Overcoming Common Challenges

One common challenge is **not having the time during implementation to plan for the sustainability** and long-term operation of the program. Pilot staff reported being so occupied with recruiting, training, and onboarding agencies that they weren't as able to plan for long-term activities.

- To address this challenge, we highly recommend beginning to **build your maintenance plan early** on in the process, prior to beginning to train agencies, in order to ensure time to gain alignment and clarity on the roles for maintaining the program long-term.
- Because the maintenance plan will be executed over a long-time period, it can **serve as a working document** that is updated over time. Include the update history with the working document to ensure version control.

"Trying to write the maintenance plan at the beginning when you're a "deer in headlights" is difficult. A basic outline would be helpful – just know that it will definitely need to be updated over time. I look at things so differently now then I did at the planning of the pilot." – Winston-Salem, NC

Key Takeaways

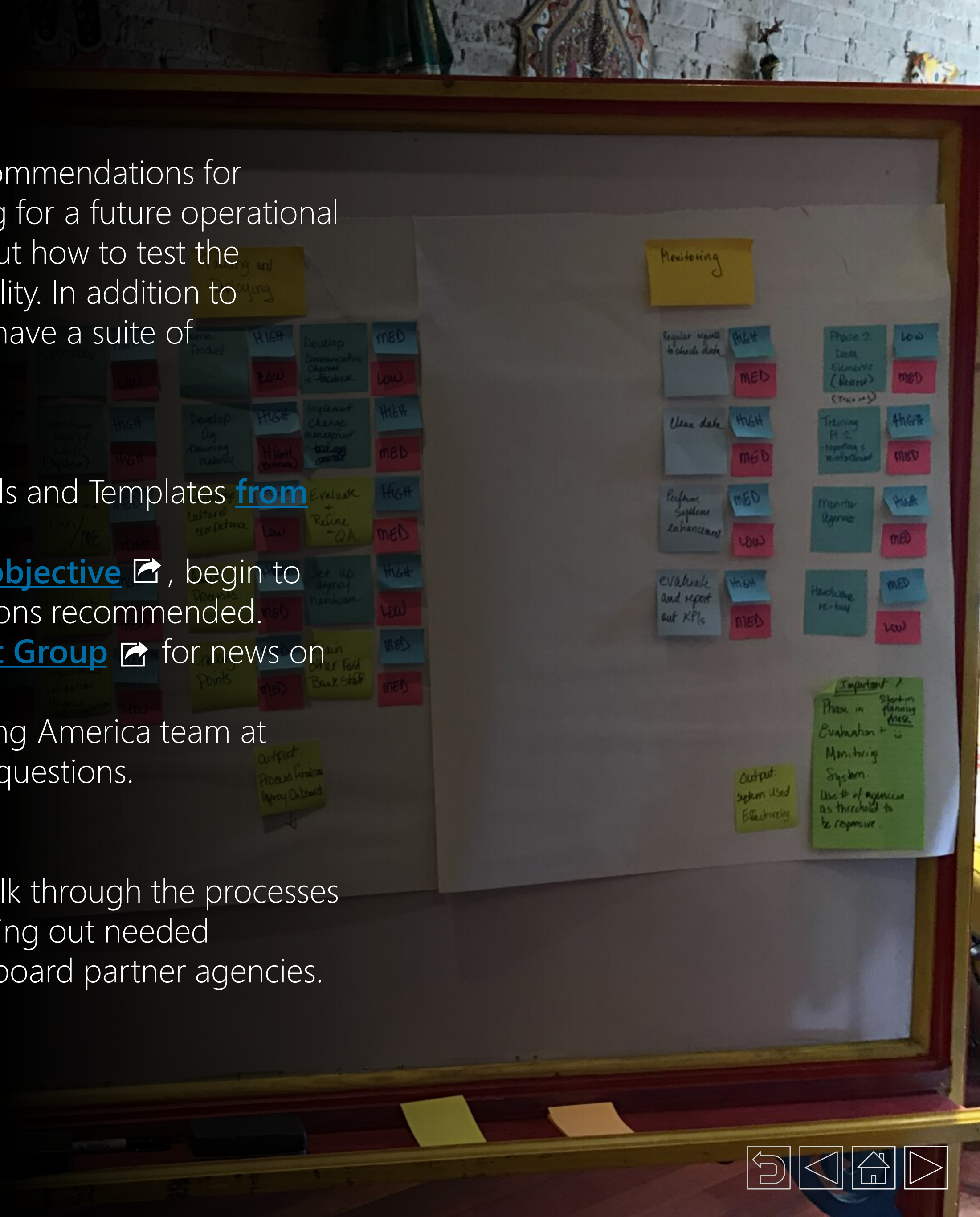
Now that you have read the full breadth of recommendations for configuring your software system and preparing for a future operational state, you will have a better understanding about how to test the configuration and plan for long-term sustainability. In addition to suggestions for system configuration, you also have a suite of customizable tools to aid in the process.

Where to Start

1. Download a copy of the Design Phase Tools and Templates from HungerNet.
2. Using the list of Key Activities for each objective, begin to complete documents and execute the actions recommended.
3. Subscribe to the Service Insights Interest Group for news on upcoming webinars and phase releases.
4. In the meantime, please contact the Feeding America team at research@feedingamerica.org with any questions.

What to Expect Next

In the next phase, the **Test Phase**, we will walk through the processes for testing the software configuration and carrying out needed modifications before beginning to train and onboard partner agencies.



Appendix

#5 H2 train agencies more efficiently?
Different experience levels
VARIABLE TECH SKILLS
Varied timing of onboarding so time bet. training + go-live varies
Digital Divide
Post-it
CAUSES
SOLUTIONS
Extensive material to learn
Major internal process shifts "Get stuck in the weeds"
Resistance to Change
Varying lvl's of interest
Increase frequency of training
Offer variable training schedules to meet diff. agencies' schedules
Simplify training to only the basics
Offer advanced training course for necessary staff.
Interns to teach at sites tech skills
Add evening and/or weekend training
Create exercises for the agcy's to take home + practice in sandbox environment
Peer-to-Peer discussions
Support of Agency Mgmt

Table of Contents

Below is a listing of all items in the Table of Contents. Click on any of the text items to jump to that section.

Design Phase Tools and Templates

- User Account Groups
- Data Sharing Agreement
- User Confidentiality Agreement
- Client Privacy Agreement
- Operating Plan

Links to Other Resources

Links to Food Bank Examples

Design Phase Tools and Templates

Below is a list of the tools and templates that were introduced in the Design Phase. The type of tool is indicated in the columns:

- A **guide** is a static tool you can review to become familiar with the information.
- A **blank template** is an editable version that you can download and customize.
- A **completed example** is a blank template with sample text filled in to provide additional context.

The content that follows in this appendix are only excerpts. **We encourage you to visit the HungerNet library to browse the complete versions of these tools.**

Tool or Template Name	Guide	Blank Template	Completed Example
User Account Groups	✓		
Data Sharing Agreement	✓	✓	✓
User Confidentiality Agreement	✓	✓	✓
Client Privacy Agreement	✓	✓	✓
Operating Plan	✓	✓	

User Account Groups

Below is an excerpt of the User Account Groups Guide. To download the full document, please visit HungerNet.

FOOD BANK USER ACCOUNT GROUPS			
Permission Levels by Theme	**Administrator**	**Super User**	**Viewer**
Administrative			
Configure software (e.g., answer options)			
Full access into all accounts on software	X		
Audit the software (supervise users)	X		
Create user accounts and assign roles	X	X	
Remove user from the system	X	X	
Update agency information	X	X	
Database Management			
Merge potential duplicate records	X	X	
Edit individual records	X	X	
Collect data during intake	X	X	
Reporting & Analysis			
Run reports – detailed, individual-level data	X	X	
Run reports –aggregate, summary data	X	X	X

USER ROLES		
	Agency Super User	**Agency Intake User**
oles	X	
Remove *agency* users from the system	X	
Update *agency* information	X	
Database Management		
Merge potential duplicate records	X	
Edit individual records	X	X
Collect data during intake	X	X
Reporting & Analysis		
Run reports	X	

Data Sharing Agreement

Below is an excerpt of the Data Sharing Agreement. To download the full document, please visit HungerNet.

SAMPLE DATA SHARING AGREEMENT	
This agreement establishes the terms and conditions under which ______________ [agency] and ______________ [food bank] can acquire and use data from the other party. Either party may be a provider of data to the other, or a recipient of data from the other.	
I. PURPOSE AND DESCRIPTION OF DATA	**IV. SECURITY AND CONFIDENTIALITY**
II. PERIOD OF AGREEMENT	**V. METHOD OF DATA ACCESS OR TRANSFER**
III. INTENDED USE AND CONSTRAINTS ON USE OF DATA	**VI. DATA SHARING FINANCIAL COSTS**

User Confidentiality Agreement

Below is an excerpt of the User Confidentiality Agreement. To download the full document, please visit HungerNet.

SAMPLE USER CONFIDENTIALITY AGREEMENT	
This agreement establishes the terms and conditions between ____________________ [name] and ____________________ [organization] to preserve and protect confidential client, employee and business information. This agreement applies to any organization staff and volunteers who use the software and collect data about clients, including paid employees, temporary, contract or seasonal staff, volunteers, students and/or interns.	
I. PURPOSE	The purpose of this User Confidentiality Agreement is to protect the identity and privacy of individuals providing personal information and data. Staff and volunteers at the organization will encounter personal and sensitive information about individuals served in the course of using the software and asking for personal information. Therefore, it is important to refrain from disclosing any information to unauthorized third parties about the people we serve to avoid disclosing information they would not wish to be shared.
II. CONFIDENTIAL INFORMATION	Confidential guest information should never be discussed in the presence of unauthorized third parties, except under the Terms outlined below. Any files and/or documents containing confidential information should never be shared or released to third parties, except under the Terms outlined below.
III. TERMS	By signing this Confidentiality Agreement, I understand and acknowledge that: 1. All communications between agency staff, volunteers, and clients are confidential. 2. It is my responsibility to protect the privacy, confidentiality and security of all client records and data included, such as personal, employment, health, and information. 3. As agency staff or volunteer, I shall not disclose confidential information to any third party without express client consent and agency's knowledge and consent to release such data.

Client Privacy Agreement

Below is an excerpt of the Client Privacy Agreement. To download the full document, please visit HungerNet.

SIMPLE CLIENT PRIVACY AGREEMENT

Benefits and Purpose

[Pantry name] and [food bank name] are using an electronic system for registration. All information that was collected on paper before will now be saved electronically. We recognize this is a change for this pantry and for you.

Security of the Information You Provide

We respect your information and want to make sure it remains private. Providing information electronically can be safer than providing information on paper. Only certain staff and volunteers can log in to the system, and each person has been trained and has signed an agreement to keep your information private.

How we Use the Information You Provide

By providing your information, you help us better serve the community. The information you provide will only be used to learn about the community as a whole. Any reports produced with the data will not identify your individual information. The information you provide will not be used to limit your access to services for which you are eligible.

ADVANCED CLIENT PRIVACY AGREEMENT

(if transmitting individual-level data electronically to another organization, e.g., to generate a referral)

Benefits and Purpose

[Agency name] provides [health, mental health, child care, income support] and other social services. To serve you, staff will ask you for personal information. This information may include:

- Information that identifies you, such as your name, address, telephone number, date of birth.
- Information about benefits or programs in which you participate.
- Financial information, such as information about your income or employment status.
- Protected health information, such as information that tells us about your past, present or future health status, diagnosis or treatment.

In addition, in order to connect you with other high quality services of interest to you, we may share your information with trusted partners.

Security of the Information You Provide

We respect your information and want to make sure it remains private. Information in the electronic database can be safer than providing information on paper.

Providing information electronically can be safer than providing information on paper. Only certain staff and volunteers can log in to the system, and each person has been trained and has signed an agreement to keep your information private. Your personal information is also protected by Local, Federal and State laws and we follow all of those laws.

Operating Plan

Below is an excerpt of the Operating Plan. To download the full document, please visit HungerNet.

PROGRAM ROLE	MAKES DECISIONS ABOUT:	EXAMPLE RESPONSIBILITIES:
Program Sponsor	Program perpetuity, budget, resources, review and approve major decisions on scope, schedule, and budget, etc.	Works with Executive Team and Board of Directors to: ▪ Declare the project budget, scope and schedule ▪ Ensure project staff has all resources needed ▪ Decide and communicate project success criteria and determine the frequency that progress and success will be reviewed o Review results regularly (e.g. monthly report on unduplicated client counts) o Review program strategy (e.g. quarterly)
Program Lead	Manage execution of scope, schedule, and budget, etc. within guidelines established by project sponsor.	Reports to Program Sponsor to: ▪ Manage the full project team to executes project goals and milestones ▪ Delegate tasks and resources provided by the project sponsor ▪ Declare which business questions the collected data will answer ▪ Approve system enhancement requests prior to submitting to vendor
Research/Evaluation Support	Data collection, data quality, design and production of reports, etc.	Reports to Program Lead to: ▪ Review collected data to identify and remove duplicate respondents ▪ Generate regularly scheduled data reports ▪ Submit system enhancement requests to vendor and follow up through successful testing and implementation

TYPES OF ACTIVITIES	
Software Governance	**Security and Access**
Vendor Management	**Training and Knowledge Transfer**
Change/Release Management	**Data Management**
Technical Support	**Reporting**

Links to Other Resources

Visit the HungerNet library to download these tools.

Objective	Resource Name	Origin	Description
Privacy and security	**How HIPAA and Concerns about Protecting Patient Information Affect Your Partnership**	FA Community Health & Nutrition Center for Health Law and Policy Innovation (CHLPI) at Harvard Law School	An overview of the HIPAA legislation, how these regulations apply to food banks and partners and how to comply. Sample partnership agreements and client waivers are included.
Configure data	**Collecting and Removing Immigration Data through Service Insights**	Feeding America Research Team's Technical Advisory Group (TAG)	Recommendations to not collect immigration data, and how to remove historical immigration data, through Service Insights.

Links to Food Bank Examples

Visit the HungerNet library to download these tools.

Example Document Name	Food Bank	Description
CAFB Your Data Your Rights	Capital Area Food Bank	Flier/notice used with people served to alert them of their privacy rights, using graphics
CAFB Your Data Your Rights [Spanish]	Capital Area Food Bank	Spanish-language flier/notice used with people served to alert them of their privacy rights, using graphics
Fulfill Agency Confidentiality Agreement	Fulfill (Food Bank of Monmouth and Ocean Counties)	Agreement used with agency staff and volunteers to confirm their agreement to keep information confidential
Fulfill Client Release of Information	Fulfill (Food Bank of Monmouth and Ocean Counties)	Agreement used with people served to provide consent to provide and use information
Fulfill Data License Agreement	Fulfill (Food Bank of Monmouth and Ocean Counties)	Agreement used with partner agencies to enable their use and access to the software system
SHFBNWNC User Confidentiality Agreement	SHFB Northwest North Carolina	Agreement used with agency staff and volunteers to confirm their agreement to keep information confidential
SHFBNWNC TEFAP Disclaimer Notice	SHFB Northwest North Carolina	Document provided to agency staff and volunteers that explains which data are required for TEFAP

Thank you!

Please contact us if you have questions:

Theresa DelVecchio Dys, Director of Research (tdelvecchiodys@feedingamerica.org)

Feeding America Research (research@feedingamerica.org)

You are welcome to share feedback on this toolkit here.