SAPC FY 2026-27 Value-Based Incentives
Data Aggregation – Building Performance and Risk Metrics (1-C)
Cohort 3 (New / First Year Participants)
Submission 2: Data Aggregation Readiness Assessment

Purpose: Provider Agencies will complete the Data Aggregation Readiness Assessment to evaluate readiness for change, including goals, barriers, and constraints. This readiness assessment will inform planning and decision-making for the purchase and implementation of a data aggregation platform. The submission is due **December 15, 2026**.

Instructions: Fill in the tables below with the requested information. There is no one-size-fits-all approach towards data aggregation, but this template serves as a strong starting point. If the tables below do not fully address your provider agency's needs, there is a blank page at the end of the document for any additional information.

Provider Agency Information	
Provider Agency:	
CIBHS Coach Name (if applicable)	

SECTION 1: PROJECT OVERVIEW (PROJECT CHARTER)

This section summarizes the basic components of a project charter: the who, what, when, where, and why of data aggregation readiness. By completing this section, provider agencies will have a general roadmap to guide project planning decisions and timeline. Be intentional about your responses to ensure that the project aligns with organizational values and goals.

Data Aggregation Project Team

Instructions: Complete the table below by listing your agency's data aggregation project team and related responsibilities.
Please Note: This information will be used for attendance tracking and submission-related correspondence.

Project Team Role	Name(s)	Email(s)	Responsibilities
Executive Sponsor *(list one person only)*			
Project Lead *(list one person only)*			
Submission Coordinator(s) *(one or more)*			
Team Member(s) *(one or more)*			

Additional Data Aggregation Project Team Members

Instructions: Please list any additional internal or external stakeholders involved in the data aggregation platform purchase and/or implementation process. A sample project team is provided below. You may edit the project team role names. Actual roles and quantities may vary.

Project Team Role	Name	Email	Job Title	Responsibilities
Developer				
Partner/Vendor				
End User				
Data Contributor				
Other Team Member				
Other Team Member				

Role Definitions

- **Executive Sponsor:** Provides overall direction, resources, and support for the project. Ensures alignment with organizational priorities and approves major decisions, scope changes, and final deliverables.
- **Project Lead:** Oversees day-to-day project planning and execution. Manages timelines, deliverables, and communication among stakeholders to ensure the project stays on schedule and within scope.
- **Submission Coordinator(s):** Coordinates development, completion, and submission of project deliverables, working in close collaboration with the project lead and team members.
- **Developer:** Designs and builds the technical components of the project, working in close collaboration with the project lead and team members.
- **Project Team Member:** Contributes subject-matter expertise and completes assigned tasks or deliverables. Collaborates with other team members as needed to support project completion.
- **Partner / Vendor:** Provides outside products, services, or expertise that support project completion. Includes, but is not limited to, software vendors, external developers, or external advisors.
- **End User:** Uses the completed data system, reports, or dashboards as part of their regular work and provides input on usability, accessibility, and usefulness.
- **Data Contributor:** Enters, uploads, maintains, or submits data that feeds into the data aggregation process and helps ensure source data are complete and accurate.

Project Communications: Any reporting, meetings, or other communication methods in place to support timely and accurate project completion. Sample communication methods are provided in the table – you may edit these names.

Communication Method	Description	Frequency	Audience
Status Report			
Internal Meeting			
External Meeting			

Sample Communications Methods:

- **Status Report:** Recurring written update summarizing accomplishments, upcoming tasks, barriers, and risks.
- **Internal Meeting:** Can vary from high-level stakeholder briefs to weekly operational check-ins.
- **External Meeting:** Applicable if contracting with external vendors.
- **Project Management Platform:** Live task tracking via spreadsheets, whiteboards, or any other platforms.

Reflection Questions

1. What are your agency's goals for data aggregation platform implementation?

2. Describe your agency leadership's (e.g., executive team, Board, etc.) commitment to purchasing, developing, and implementing a data aggregation platform.

3. Purchase and initial implementation criteria require at least seven of the ten metrics to be included in the final dashboard/report submission. What other data elements or metrics do you plan on including? Please describe the purpose or rationale for incorporating these elements into your data aggregation platform.

4. What unique factors about your agency would you like to incorporate? Please describe the purpose or rationale for including these factors into your data aggregation platform.

SECTION 2: FEASIBILITY (GAP ANALYSIS)

This section summarizes the technical and logistical aspects of your agency's readiness for implementing a data aggregation platform. It should identify gaps in knowledge, skills, abilities, and resources that need to be addressed through coordination, training, or external support. Be realistic about your agency's current capacity and outline how you plan to address any identified gaps.

Data Source Access: Please refer to your *Submission 1: Data Source Inventory & Baseline Metrics Tool*. List all data sources needed to report on the ten metrics and fill in the rest of the table. Prioritize automated methods (API, database) over manual (file upload, manual entry) whenever possible.

Data Source Name	**Data Category** *(financial, workforce, clinical, organizational)*	**Data Source Type** *(API, database, file upload, manual entry)*	**External Point of Contact(s)**	**Notes**

Knowledge, Skills, & Abilities Matrix: For each team member listed in the personnel summary (page 2), please add the team member role to the first row. Assign an involvement level for each project area using the following acronyms: DM, O/D, A/C, C, O/A. See descriptions below. For example, Executive Sponsor would be added as "Team Member #1" and then Decision Maker (DM) would be selected for high-level project decisions.										
	Team Member #1	Team Member #2	Team Member #3	Team Member #	Team Member #5	Team Member #6	Team Member #7	Team Member #8	Team Member #9	Team Member #10
Project Area										
General										
High-Level Project Decisions										
Budget Management										
Project / Timeline Management										
Task Completion										
Communications										
Internal Communication & Updates										
External Communication & Updates										
Implementation										
Technical Development										
Quality Assurance / Risk Mitigation										
Testing & Validation										
Training / Change Management										
Administrative										
Contracting										
Documentation / P&P										
Compliance										

Levels of Involvement:

- **Decision Maker (DM):** Holds authority to approve major decisions regarding project direction, resources, and final deliverables. Ensures alignment with organizational priorities and is accountable for overall outcomes.
- **Owner / Developer (O/D):** Leads the design, implementation, or production of project components. Responsible for day-to-day progress, deliverable quality, and translating decisions into action.
- **Advisor / Collaborator (A/C):** Provides subject-matter expertise, feedback, and guidance to shape project decisions or deliverables. Works closely with the owner/developer to ensure accuracy, feasibility, and alignment with broader goals.
- **Contributor (C):** Supports specific tasks or activities within the project scope. Provides input, data, or resources as requested, under the direction of the project lead or owner.
- **Observer / Awareness (O/A):** Maintains general awareness of project progress and outcomes. Receives updates and communications but is not directly involved in decision-making or task execution.

Project Needs: Describe any products, services, or internal changes needed to successfully implement a data aggregation platform.		
Item	**Needed? (Y/N)**	**Description/Justification (required for all items)**
Initial Development & Implementation		
New software purchase		
External development services		
Other external services *(example: advisory, project management)*		
Process changes *(example: workflows, documentation, IT infrastructure)*		
Training / skill development		
Ongoing Maintenance		
Software licensing & fees		
External development services		
Other external services *(example: advisory, project management)*		
Process changes *(example: workflows, documentation, IT infrastructure)*		
Training / skill development		

Reflection Questions:

1. Are there any significant barriers to accessing or reporting current data? If so, please describe how these barriers affect your agency's ability to use or report data.

2. Do you anticipate any challenges integrating existing data sources into a data aggregation platform? If so, please identify which data sources and explain the challenges or barriers.

3. Identify any gaps in technical knowledge, skills, or abilities within your project team that will need to be addressed internally (e.g., skill development) or externally (e.g., consultants / personnel). What are your plans to address those gaps?

4. What is your agency's estimated budget for the initial implementation of a data aggregation software platform? Please provide a high-level summary of foreseen needs and associated costs.

5. What is your agency's estimated budget for ongoing support (e.g., licensing fees, external services, additional staffing)? Please provide a high-level summary of foreseen needs and associated costs.

6. How do you envision your selected data aggregation platform scaling over time? (In this context, "scaling" refers to how the platform can grow or adapt over time. For example, its ability to handle larger data volumes, support additional users or programs, integrate with new systems, or expand functionality as needs evolve.)

SECTION 3: READINESS ASSESSMENT

This section evaluates your agency's overall readiness based on the responses to the previous sections. Please rate your confidence level using a scale of **1 = Not at all confident** to **5 = Very confident,** then provide a brief explanation. SAPC will not use these scores to assess submission completion. Be open about your team's areas of strength as well as areas where additional support may be needed.

Question	**Confidence Level (1-5)**	**Briefly explain why you selected this confidence level (*required*).**
Project Overview		
Roles and responsibilities are clearly defined.		
Communications expectations are clearly defined.		
Goals are clearly defined, realistic, and achievable.		
The project aligns with the agency's unique needs.		
The project aligns with organizational priorities.		
Feasibility		
We have a clear understanding of how information can be pulled from each data source and a point of contact to assist with access-related inquiries.		
We have a clear understanding of current data access barriers and planned solutions.		
Gaps in knowledge, skills, and/or abilities have been clearly identified and accounted for.		
We have a clear understanding of the staff time and resources needed to support project completion.		
We have a clear budget range, accounting for upfront and ongoing implementation costs.		

Reflection Questions

1. How confident is your agency in its ability to purchase and initially implement a data aggregation platform by March 2027? Please explain your response.

2. What are the top three barriers your agency faces in purchasing and implementing a data aggregation platform? Please describe potential strategies for addressing these barriers.

3. What steps can your agency take now to prepare for the purchase and initial implementation of a data aggregation platform by March 31, 2027?

SECTION 4: DATA AGGREGATION PLATFORM OPTIONS

This section includes questions to help your agency reflect on potential platform or vendor options. If your agency has already purchased / implemented a data aggregation platform, there are additional questions below to help assess current progress and plan for future needs.

If your agency does not have a data aggregation platform in place:

1. Based on the information gathered, what potential software products could meet your agency's needs for a data aggregation platform?

2. What are the key barriers to project completion, and how will your agency address those barriers?

If your agency already has a data aggregation platform in place:

1. Please provide the following documentation when completing the VBI Electronic Submission Form.
    a. **Description of Software Program(s):** A brief overview of the software program(s) used. Acceptable documentation may include a one-page product summary, a description from the vendor's website, or other materials that clearly describe the platform's key features and functions.
    b. **Supporting project documentation:** Submit materials that demonstrate your agency's structured and intentional approach to selecting and implementing the data aggregation platform. Documentation should reflect the planning, decision-making, and implementation processes. Examples of acceptable materials include:
        i. **Project planning document(s):** Work plans, timelines, or implementation checklists outlining key milestones and responsible staff.
        ii. **Procedural or policy documents:** Internal procedures, protocols, or user guides developed to support consistent use and data management practices.

2. Does the current platform meet the submission criteria required for successful completion of Submission 3? If not, please describe which criteria it does not meet and strategies to address.

3. What are the key barriers to project completion, and how will your agency address those barriers?

4. What are the estimated resources (e.g., budget, time, personnel) needed to support ongoing implementation?

5. How is the data aggregation platform supporting agency goals, needs, and priorities?

SECTION 5: ADDITIONAL INFORMATION (OPTIONAL)

Certain tables or questions in the Data Aggregation Readiness Assessment may not have sufficient space to capture your response. In the text box below, please provide any additional information that can supplement your responses to the questions above. Please reference the respective section number and table name / question number in your responses.