

# Memorandum of Understanding

## Six-Month Service-First Data & Compliance Pilot

Between: Whittier First Day (WFD) and Recovery Compass (RC), a 501(c)(3) organized January 29, 2025.

Effective Date: \_\_\_\_\_

Term: Six (6) months, with either party free to conclude the pilot at any time upon written notice.

### 1) Shared Purpose

WFD and RC will collaborate on a time-bound, no-cost pilot to:

- Improve the quality, completeness, and usefulness of WFD's program data (intake ~ services during care ~ exit outcomes).
- Establish a simple, staff-centered workflow that reduces burden and supports learning.
- Produce a de-identified case study WFD may use with funders and stakeholders, and that RC may use (with WFD approval) to advance the field.
- Lay groundwork for evidence-based practice (EBP) validation while not conducting human subjects research during this pilot.

### 2) Scope & Deliverables (forward-looking only)

- A lightweight dashboard that surfaces the measures WFD leaders prioritized (intake completion, services delivered, exit outcomes; volunteer & access-to-care call tracking if available).
- Data quality support (spot checks, simple prompts, brief job aids).
- Monthly learning briefs (what's working, what to adjust).
- A de-identified case study describing process and descriptive trends only (no claims about past success rates).
- An EBP pathway memo mapping what would be required after the pilot if WFD wishes to pursue publications/validation.

### 3) Roles & Responsibilities

WFD will name a point person; provide access to the data sources WFD chooses to include (HMIS exports or spreadsheets, phone logs, etc.); review/approve any staff prompts or job aids before use; and approve any external language or visuals before they are shared outside WFD.

RC will design and operate the pilot dashboard and supporting scripts/tools (no-cost to WFD); provide brief, low-burden staff supports (one-page guides, short videos); maintain secure handling and de-identification for all pilot artifacts; and prepare the case study draft and EBP pathway memo for WFD review.

### 4) Data Governance & Privacy

- Ownership: All WFD source data remains the property of WFD.
- Processor role: RC acts only as a service provider/data processor for the pilot.

- Minimum necessary: Only data elements required for the agreed measures are used.
- De-identification: All pilot outputs and the case study will be de-identified.
- Security: RC stores pilot data in secure, access-controlled environments; no public posting of any WFD data.
- Deletion: Upon pilot conclusion (or at WFD's request), RC will delete WFD data from RC systems within 15 business days and confirm deletion in writing.
- HMIS control: WFD maintains control over HMIS and client records; RC does not access HMIS directly.

## **5) Communications & Case Study**

Any public-facing description of the pilot (including RC website text, presentations, or funder attachments) requires WFD's prior written approval. The case study will emphasize process, learning, and descriptive trends; it will not report historical success rates or make causal claims. If WFD approves publication or sharing, both parties will be appropriately acknowledged; WFD may opt out of logo use.

## **6) Cost & Support**

RC provides this pilot at no cost to WFD. RC will document any optional, future support models (if WFD desires continuity after the pilot).

## **7) Evidence Pathway (after the pilot, if WFD chooses)**

The pilot will not constitute research. If WFD later wishes to pursue EBP validation, the parties may plan a follow-on phase with multi-site implementation, standardized protocol documentation, IRB readiness if necessary, and a 12 month data plan with defined outcome measures and cost analyses—sequenced to respect WFD's capacity and culture.

## **8) Intellectual Property**

Pre-existing IP remains with the originating party. WFD receives a royalty-free, perpetual internal license to use pilot artifacts (templates, prompts, job aids). RC may generalize learnings into non-identifiable tools, without WFD data.

## **9) Non-Exclusivity & Good-Faith Collaboration**

The pilot is non-exclusive; WFD remains free to use other tools and partners. Both parties commit to good-faith, low-burden collaboration centered on WFD's mission and clients.

## **10) Termination**

Either party may conclude the pilot at any time via written notice; Sections 4 and 8 survive termination.

## Authorized Signatures

Whittier First Day

Name/Title: \_\_\_\_\_

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

Recovery Compass

Name/Title: \_\_\_\_\_

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

## **Annex A – Pilot Measures (illustrative; finalized at kickoff)**

- Intake quality: % intakes with required fields complete; time-to-completion.
- Services during care: visit counts by type; volunteer hours captured; access to care call logs captured (aggregated).
- Exit outcomes: % exits with documented housing/benefit status; follow up scheduled (counts/ratios).
- Burden & satisfaction: 2–3 item pulse check for staff (optional).

## **Annex B – Guardrails**

- No publication or public sharing without WFD approval.
- No historical success rate claims; forward looking only, focused on data quality and learning.
- Plain language artifacts; staff time protected.