Scaling CBPL Steps for Establishing DSAs with LEAs

The following outlines the general process the RTI Research and Learning (RTI R&L) team will follow for establishing data sharing agreements with research site LEAs.

RTI's Steps for Establish Data Sharing Agreements with LEAs	
1	**Establish Data Flow:** Meeting with RTI R&L to discuss process & confirm Data Flow (can be scheduled as partnership check in with Partner Liaison). Reminder of previously shared documents relevant for this discussion: Research Terms & Flow Schematic presents a schematic of the relationships and timing between "pilot sites" and "research sites." Data Flow Map provides an overview of what data will be collected with who, using what method and instrument, when, and by who as well as the schedule for who will share the data with who and in what format. See Section 2 and Table 2.
2	**Confirmation**: Publisher confirms pilot site interest in participating in research and shares with Partner Liaison, along with whether the LEA requires a research review (that could be expedited) or if the project is exempt, and the partners' contacts in the LEA. Publisher also notes any existing DSAs the publisher and/or PL provider has or expects to develop with the LEA and if those DSA(s) contain terms allowing data sharing with 3rd parties. If they do, the next steps listed below will be adjusted to account for the existing DSA(s).
3	**Research Application/DSA:** RTI Research and Learning Team will begin DSA process and any LEA required research application process (after Partner introduces RTI to LEA point-of-contact). See Tips for the partners and RTI to consider in determining if this process is needed for a specific LEA, and if it is, to request an exemption or expedited review.
4	**Meeting with LEA Point of Contact:** RTI Research and Learning Team will coordinate with partner in setting up a time with LEA point of contact to 1) discuss research study activities 2) discuss data flow 3) confirm point of contact for any LEA required research application 4) confirm point of contact for DSA execution within LEA 5) answer any questions
5	**Submit Research Application/DSA**: RTI Research and Learning Team to submit LEA research application and draft DSA for sharing with LEA
6	**Monitor:** RTI Research and Learning Team will monitor research approval and DSA execution process between RTI legal counsel and LEA point of contact