Implementation Planning Checklist

Preparation Phase

Determine if the HIE-centric CODI model can be implemented in a community.

1. **Identify Implementation Partners**

   ☐ Identify one HIE and at least one CBO partner interested in connecting social service data with clinical data.

   ☐ Validate that a CODI implementation would support organizational goals.

   ☐ Identify executive-level and program-level champions at each partner organization.

   ☐ Identify the CODI implementation roles that will be filled by each partner organization and ensure all required roles will be filled.

2. **Decide to Implement CODI with Selected Partners**

   ☐ Validate that partner organizations meet minimum requirements to successfully implement CODI.

   ☐ Identify a primary point of contact at each partner organization and confirm that person has bandwidth to support Discovery Phase activities.

3. **Estimate Resources Needed to Support Implementation**

   ☐ Estimate duration of the CODI implementation.

   ☐ Determine if funding is needed to support implementation.

   ☐ Identify and pursue funding opportunities (if applicable).

4. **Commit to Data Sharing**

   ☐ Make initial governance decisions that commit partner organizations to data sharing.

Discovery Phase

Determine scope, select use cases, and plan governance.

1. **Gather Foundational Knowledge to Inform Implementation Scope**

   ☐ Define implementation goals and preliminary scope.

   ☐ Conduct a needs assessment to document workflows and characterize data availability and quality.

2. **Determine Scope of Implementation**

   ☐ Draft preliminary use cases.

   ☐ Establish prioritization criteria.

   ☐ Prioritize use cases.

   ☐ Select use cases.

3. **Create a Plan to Implement Governance for Data Sharing**

   ☐ Conduct governance discovery.

   ☐ Define a governance approach for formalizing data sharing and use.

Implementation Planning Checklist

Planning Phase

Develop implementation workplan, execute contracts, and convene workgroup.

1. **Design Technical and Operational Approach to Share, Connect, and Use Data**

   ☐ Draft approach for connecting community and clinical data with input from CBOs.

2. **Determine Implementation Approach for Measuring Outcomes**

   ☐ Identify relevant outcome measure categories and prioritize based on value and feasibility.

   ☐ Identify candidate outcome measures of interest.

   ☐ Rank candidate outcome measures for implementation.

   ☐ Categorize ranked outcome measures for implementation.

3. **Create a CODI Implementation Workplan**

   ☐ Define and plan each workstream.

   ☐ Obtain buy-in from implementing partners.

4. **Execute Contracts and Agreements to Support Implementation and Facilitate Data Sharing**

   ☐ Secure approvals.

   ☐ Execute contracts (as needed).

   ☐ Execute data sharing agreements (as needed).

5. **Convene Working Group**

   ☐ Identify individual(s) responsible for work group.

   ☐ Determine workgroup member list that includes at least one representative from each partner organization.

   ☐ Establish meeting cadence.

   ☐ Establish norms.

6. **Kickoff Implementation**

   ☐ Prepare kickoff materials.

   ☐ Hold kickoff meeting.

For more detail, see Connecting Data to Improve Health: CODI Implementation Playbook for Communities with an HIE. This and other CODI resources are available at https://mitre.github.io/codi/.