

## ATTACHMENT I – PROJECT TOPIC

# Models for a Data Concierge Service for a National Secure Data Service

### Key Objective

The objective of this project is to explore models for a data concierge service for a potential, future National Secure Data Service (NSDS). In the [Year 2](#) report prepared by the Advisory Committee on Data for Evidence-Building (ACDEB), the need for a data concierge service was identified. A data concierge service would offer technical assistance to individuals seeking access to federal data. This concierge service would serve as a coordinator between data providers and data users, providing assistance to data users in answering general questions; identifying confidential data assets that meet their evidence-building needs; directing them to subject matter experts and more focused guidance when needed; and support in developing evidence-building proposals to apply for access to confidential data. This project will explore the needs of data users who are investigating access to confidential data; the tools that would facilitate a data concierge service in assisting users; and the development of potential models for a data concierge service.

### Background

The year 2 report of the Advisory Committee on Data for Evidence-Building (ACDEB) provided several recommendations that focus on a data concierge service. This service would assist data users in finding confidential data to meet their evidence-building needs; developing a proposal to request access to confidential data; and directing them to any specialized resources or services needed to successfully navigate a data request. Recommendations 3.2, 3.3, and 3.4 discuss the potential services that could provide initial intake, the types of questions that would likely be directed to a concierge service, as well as more in-depth data concierge assistance that could be provided.

Recommendation 3.2 focuses on three general personas for individuals seeking data concierge services: 1) 'I have a question'; 2) 'I'd like to access an existing federal dataset'; and 3) 'I need to create a new data asset by linking multiple datasets.' These three general categories provide insight into the range of assistance that would need to be provided to data users when accessing the concierge service.

Recommendation 3.3 discusses the potential use of chatbots and other similar technologies to provide initial intake and answer simple questions. Recommendation 3.4 discusses using data concierges in the form of subject matter experts that can provide more in-depth assistance to identify confidential data needed for specific evidence-building needs, referrals to additional subject matter experts, proposal development, and providing overall technical expertise.

These three recommendations provide a high-level framework for the types of inquiries likely to be encountered in a data concierge service and a potential tiered approach to providing support. Given the breadth of data within the federal statistical system, it is unlikely that data concierges will be able to

provide subject matter expertise in all data or research areas. To ensure that data concierges can provide a high-level of evidence-building support, tools will be needed to assist data concierges with dataset availability, agency contacts, data linkage capabilities, modes of data access, and the range of options available to data users for their specific needs. A data user, for example, may access the data concierge service with a specific research question but little additional information. A data concierge may need to determine if confidential data access is required and if so, what data sources are needed. In addition, the concierge may need to determine the types of analysis required and how best to meet that need. If multiple data sources are needed, a concierge may need to determine if those sources can be linked and if and how the linkage could be achieved. The concierge could also be called upon to assist with resource constraints, assisting the user in finding potential sources of funding or partnering. Finally, assistance in preparing a proposal may be needed.

This wide range of potential services requires a data concierge service model that takes into account the range of services needed, the types of service providers, such as human vs. chatbots, and the tools required by concierge providers to implement a comprehensive data concierge service. Also, given the wide range of assistance, the limitations of a centralized data concierge service should be taken into account with a view towards what assistance can be provided by a concierge and what will need to be forwarded to agency contacts or other subject matter experts.

As such, this project will involve:

1. An environmental scan to determine how federal statistical agencies are currently providing customer service to researchers and data users and what types of support needs they encounter. This scan should include the identified challenges in providing support to users, not just traditional data users, such as within academic communities, but also non-traditional users such as those from non-profit organizations, state and local governments, and economic development organizations. This task will include outreach to agency contacts to gather in-depth information. This scan will also include any existing data concierge services to inform potential models. This can include services outside of government.
2. Outreach to organizations of state data user networks, minority serving institutions, non-profit think tanks and research entities, and professional associations to identify the types of services and support needed by these users.
3. Development of two or more models for a data concierge service, taking into account services available currently, data user needs, and the requirements for a shared services model, including anticipated cost and personnel to manage the service. These models should include implementation guidelines for each including a user feedback mechanism to adjust services as user needs are further identified or change.
4. Recommendations for tools for a data concierge service. These tools could include decision-trees, contact lists, technical documentation on data and data linkage, and other supporting documentation or online tools to assist both users and data concierges in serving the data user community.

## Information Gaps

This project will identify:

- What are potential models for a data concierge service that would support a National Secure Data Service.
- What types of service requests do federal agencies encounter and how can a concierge service best meet those needs.
- What tools are needed to support a data concierge service.

## Key Evidence Building Considerations

- Key focus questions (address one or more) to assess innovation in the following areas - user engagement and customer service:
  - What support do data users need to conduct evidence-building research?
  - How can a data concierge service be structured to meet the needs of evidence-building communities?

## Deliverables

At a minimum, offerors will provide the following if selected for an award. Additional deliverables may be required.

- Monthly status reports on progress towards project objectives.
- Report detailing environmental scan and user outreach efforts and outcomes.
- Two or more models for a data concierge service, with implementation plans for each.
- Recommendations for tools that can be developed and utilized for a data concierge service.