CIE Toolkit In Depth

Webinar 2: Identify the CIE Vision and Governance
January 17, 2019
10:00 am – 11:30 am (Pacific)
Introductions

Beth Johnson, MPH
Director Strategic Initiatives

Karis Grounds, MPH
Vice President Of Health and Community Impact

Camey Christenson, MSW
Senior Vice President
Why a Toolkit?

• Share San Diego’s long history developing, growing, and maintaining its CIE

• Support the nationwide movement around capture and use of social determinants of health data to promote individual well-being as a foundation for more holistic approach to community health

• Provide communities across the country with insights and strategies on how to approach development of a local CIE

This toolkit was made possible through a generous grant from the Schultz Family Foundation
Toolkit Sections

Section 1: What is a Community Information Exchange
Learn about the features and benefits of developing a CIE, including how the CIE creates community impact.

Section 2: State of the Field
Discover the influences that shaped the conceptualization and evolution of the CIE.

Section 3: Insights and Strategies
Explore the six strategies essential to developing an effective and sustainable CIE.
Toolkit Features

- Purpose
- Action Checklist
- Practical Application
- Glossary
- Resources/Templates
Section 3: Insights and Strategies

www.ciesandiego.org/toolkit

Identify the CIE Vision and Governance
Mobilize the Community Network
Prepare a Legally Compliant Framework
Adopt Interoperable and Scalable Technology
Cultivate Sustainability
Transform the Movement
Importance of Establishing CIE Vision and Governance
Collective Impact Model

The Five Conditions of Collective Success

- Common Agenda
- Shared Measurement Systems
- Mutually Reinforcing Activities
- Continuous Communication
- Backbone Organization

Backbone Organization

- Guiding the development of a shared vision and strategy
- Maintaining a shared identity
- Expanding the network of partners and funders
- Aligning partners and their activities
- Engaging target populations
- Establishing shared outcomes and measurement practices to facilitate ongoing learning and process
Action Checklist

1. Establish the Need for the CIE
2. Clarify the Vision
3. Create a Governance Structure
4. Plan for CIE Oversight
1. Establish the Need for the CIE

- Conduct an Environmental Scan
- Convene Potential Partners and Participants
- Gain Buy-in
Conduct an Environmental Scan
Convene Potential Partners and Participants

- Share the findings of the environmental scan
- Leverage the structures and collaborations of established coalitions
- Hold educational workshops on the scan’s findings
- Involve or meet individually with elected officials, government, philanthropic, and nonprofit agency leaders
Gain Buy-In

- Gauge the interest
- Actively recruit potential partners
- Convene workshops or meetings
- Determine whether local organizations and/or coalitions are interested in CIE
Convening Examples
2. Clarify the Vision

- Develop use cases
- Articulate the vision
Develop Use Cases

Client

2-1-1 Agent

CIE Partner

CIE Partner

Client Record

- Risk Scoring
- Notifications
- Program Enrollment
- Care Teams
Articulate the Vision

What are the needs of prospective and committed partners?
Why does the community need a CIE?
What will success look like?
CIE Mission, Vision & Values

**Mission**: Empower communities to engage with people through a human-centered and data-driven perspective

**Vision**: Enabling communities to change systems to improve equity and health

**Values**:
- Movement: Driven by innovation and evolution
- Meaningful: Create understanding through an informed and experiential lens
- Efficacy: Enhance the power of the individual and the community
- Engagement: Establish integrated, tailored and inclusive input and information
- Interdependence: Build a Network of trusted, supportive partners
3. Create a Governance Structure

- Engage Stakeholder Partners
- Establish the Vision, Roles, and Responsibilities of an Advisory Group or Governance Structure to Guide the CIE’s Development
- Convene and Champion the Cause
Engage Stakeholder Partners

- Confirmed and prospective CIE partner organizations
- Subject matter experts
- Public stakeholders, elected officials, funders, and other “influencers”
Governance Structure

- Backbone Agency Board of Directors
- CIE Partner Network
- CIE Advisory Board
- Workgroups
  - Policy
  - Sector Specific (Housing, Healthcare)
Individuals from 2-1-1 San Diego, network partner organizations, and the advisory board also serve on workgroups that support various aspects of the CIE’s development and management:

- Policy Workgroup
- Shared Language Review Workgroup
- Healthcare and Housing Workgroups
Convene and Champion the Cause

- Establish regular advisory group meetings
- Establish regular meetings with the CIE partner network
- Keep council apprised of successes and challenges
- Develop a communications plan
Community Information Exchange (CIE) Partner Meeting

1. Welcome & Introductions
2. Utilization Updates
3. CIE Toolkit
4. CIE Summit 2019
5. 2nd Quarter Updates
   - Workgroup Meetings
   - Newsletters
   - Agency Integration and Utilizations meeting
6. Care Coordination Series Launch
7. Partner Feedback
8. CIE Partner Update
9. Announcements
4. Plan for CIE Oversight

- Establish Core Activities
- Leverage Existing Resources
- Identify Lead(s) or a Backbone Organization
Establish Core Activities

- Engage and support an advisory group and active partner network
- Develop and maintain a legally compliant framework
- Manage the system infrastructure and technology platform
- Secure resources to ensure the sustainability of the CIE
Leverage Existing Resources

Fill critical gaps in expertise by leveraging the knowledge and relationships of local **subject matter experts**, such as:

- Referral organizations with resource directories, such as 2-1-1
- Government agencies, foundations, and non-profits
- Organizations with health care and social services expertise
2-1-1 San Diego as Backbone Organization:

### Qualifications
- Committed to addressing health and social problems through technology
- Community reputation
- Involvement in the CIE since inception

### Assets
- Staff capacity and expertise
- Direct provider services
- High volume of callers
- Existing technology resources
- Existing relationships with social and health service providers
- Experience serving in same role for SD United

### Roles and Responsibilities
- Manage brainstorming for initial and ongoing use cases for technology
- Develop and manages technology platform
- Ensure compliance with appropriate legal protocols
- Engage new and current partners
- Ensure CIE’s financial stability and sustainability
Stewards of the CIE
Next Time

CIE Toolkit In Depth: Mobilize the Community Network
February 21, 2019
10:00 am – 11:30 am (Pacific)

Register today at www.ciesandiego.org
Q&A

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Register today at www.ciesandiego.org
The 2nd Annual Community Information Exchange Summit
Driving Cross-Sector Collaboration and Data Sharing to Create Healthier Communities

April 24 – 26, 2019
Marriott Marquis San Diego Marina
www.ciesandiego.org/ciesummit2019

Call for Abstracts
Deadline Extended: February 4, 2019
Thank You!

Please provide your feedback!

Visit: https://www.surveymonkey.com/r/CIEweb2