



Community Information Exchange (CIE) Advisory Board Meeting

January 19, 2021

CIE Advisory Board Meeting
AGENDA

January 19, 2021 • 8:30 AM – 9:30 AM



Time	Agenda Item	Presenter
8:30 – 8:35am	Welcome and Introductions & Agenda Overview	Mathew Packard Chair 2-1-1 Advisory Board
8:35 – 8:50am	CIE Utilization Update & Initiatives <ul style="list-style-type: none"> • Trends • Consents (Joint and Standard) • Affinity Groups Update 	Karis Grounds VP of Health and Community Impact Alana Kalinowski Director of Partner Integration
8:50 – 9:10 am	CIE Dashboard Updates	Karis Grounds VP of Health and Community Impact Nicole Blumenfeld Director of Informatics
9:10-9:25 am	Workgroups Update <ul style="list-style-type: none"> • Membership • Outcomes • Sustainability 	Mathew Packard Chair 2-1-1 Advisory Board Karis Grounds VP of Health and Community Impact Camey Christenson Chief Business Development Officer
9:25-9:30 am	Other Updates & Meeting Adjournment	Mathew Packard Chair 2-1-1 Advisory Board

WELCOME & INTRODUCTIONS



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CIE UTILIZATION UPDATE



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CIE TRENDS AND METRICS DASHBOARD - Fiscal Year: July 1, 2020 - June 30, 2021

The trends dashboard highlights the established fiscal year metric goals for the CIE. These goals are specific to utilization, including how many partners and clients are in the network and how partners use the network to view clients, refer them to appropriate resources and share data to enhance records. This utilization allows us to better assess and understand the overall impact the CIE has on client outcomes.

Goal	Current Numbers	% to Goal	Monthly Trends												
105 Partners	100 Partners	95% of Goal													
Adoption Metrics															
30,000 Logins	11,924 Logins	40% of Goal	<table border="1"> <tr> <td>2,122</td> <td>1,806</td> <td>1,829</td> <td>1,940</td> <td>1,523</td> <td>2,704</td> </tr> <tr> <td>Jul</td> <td>Aug</td> <td>Sep</td> <td>Oct</td> <td>Nov</td> <td>Dec</td> </tr> </table>	2,122	1,806	1,829	1,940	1,523	2,704	Jul	Aug	Sep	Oct	Nov	Dec
2,122	1,806	1,829	1,940	1,523	2,704										
Jul	Aug	Sep	Oct	Nov	Dec										
205,000 Consents	177,299 Consents	86% of Goal	<table border="1"> <tr> <td>5,425</td> <td>6,805</td> <td>5,184</td> <td>5,144</td> <td>4,201</td> <td>4,125</td> </tr> <tr> <td>Jul</td> <td>Aug</td> <td>Sep</td> <td>Oct</td> <td>Nov</td> <td>Dec</td> </tr> </table>	5,425	6,805	5,184	5,144	4,201	4,125	Jul	Aug	Sep	Oct	Nov	Dec
5,425	6,805	5,184	5,144	4,201	4,125										
Jul	Aug	Sep	Oct	Nov	Dec										
40,000 Searches	11,354 Searches	28% of Goal	<table border="1"> <tr> <td>2,205</td> <td>1,556</td> <td>1,727</td> <td>2,321</td> <td>1,617</td> <td>1,928</td> </tr> <tr> <td>Jul</td> <td>Aug</td> <td>Sep</td> <td>Oct</td> <td>Nov</td> <td>Dec</td> </tr> </table>	2,205	1,556	1,727	2,321	1,617	1,928	Jul	Aug	Sep	Oct	Nov	Dec
2,205	1,556	1,727	2,321	1,617	1,928										
Jul	Aug	Sep	Oct	Nov	Dec										
Engagement Metrics															
100,000 Records with Shared Data	87,990 Records with Shared Data	88% to Goal	<table border="1"> <tr> <td>5,102</td> <td>5,375</td> <td>4,517</td> <td>4,149</td> <td>3,277</td> <td>6,739</td> </tr> <tr> <td>Jul</td> <td>Aug</td> <td>Sep</td> <td>Oct</td> <td>Nov</td> <td>Dec</td> </tr> </table>	5,102	5,375	4,517	4,149	3,277	6,739	Jul	Aug	Sep	Oct	Nov	Dec
5,102	5,375	4,517	4,149	3,277	6,739										
Jul	Aug	Sep	Oct	Nov	Dec										
30,000 Profile Views	10,218 Profile Views	34% of Goal	<table border="1"> <tr> <td>1,768</td> <td>1,615</td> <td>2,495</td> <td>1,884</td> <td>1,230</td> <td>1,226</td> </tr> <tr> <td>Jul</td> <td>Aug</td> <td>Sep</td> <td>Oct</td> <td>Nov</td> <td>Dec</td> </tr> </table>	1,768	1,615	2,495	1,884	1,230	1,226	Jul	Aug	Sep	Oct	Nov	Dec
1,768	1,615	2,495	1,884	1,230	1,226										
Jul	Aug	Sep	Oct	Nov	Dec										
Intervention Metrics															
25,000 Direct Referrals	9,763 Direct Referrals	39% of Goal	<table border="1"> <tr> <td>1,627</td> <td>1,544</td> <td>1,436</td> <td>1,503</td> <td>1,650</td> <td>2,003</td> </tr> <tr> <td>Jul</td> <td>Aug</td> <td>Sep</td> <td>Oct</td> <td>Nov</td> <td>Dec</td> </tr> </table>	1,627	1,544	1,436	1,503	1,650	2,003	Jul	Aug	Sep	Oct	Nov	Dec
1,627	1,544	1,436	1,503	1,650	2,003										
Jul	Aug	Sep	Oct	Nov	Dec										

Data Source: 211/CIE Information Systems | Reporting Period: 7/1/2020 - 12/31/2020

Trends:

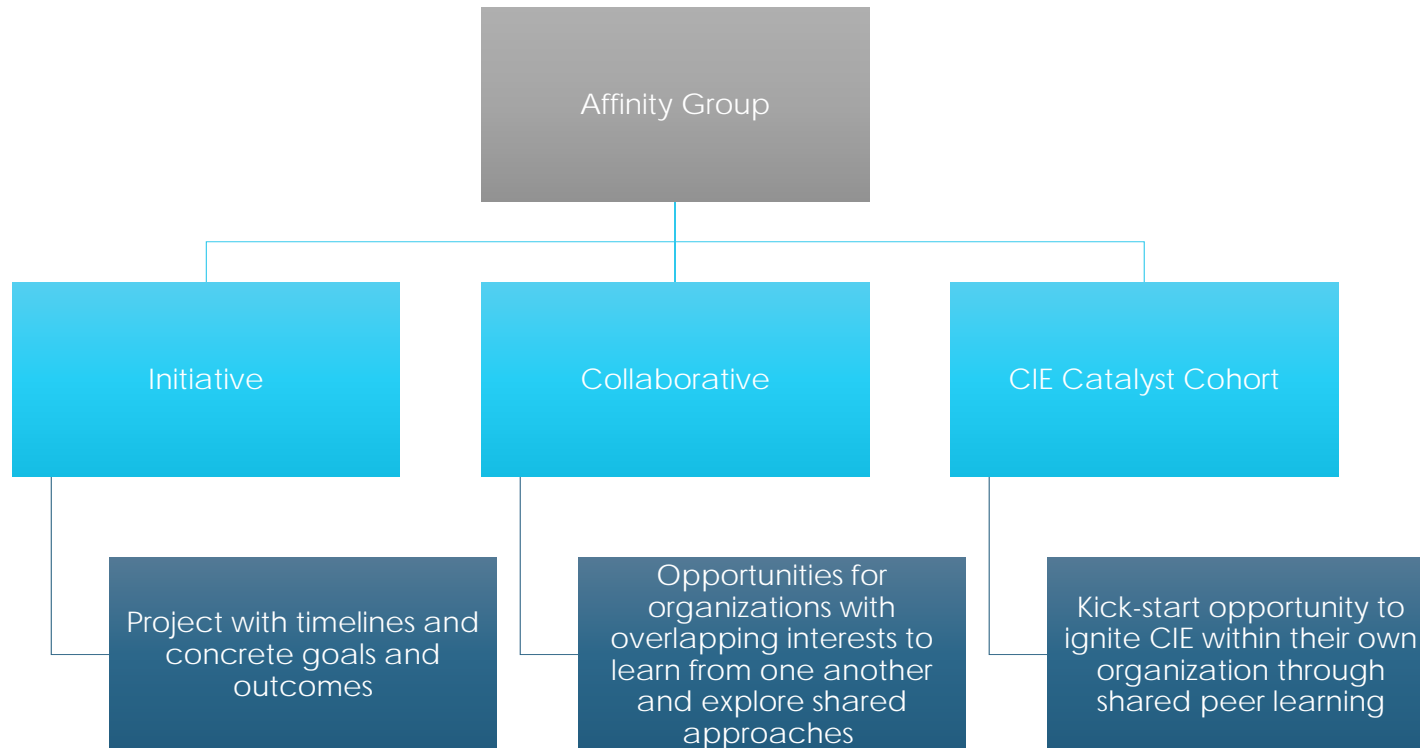
- Highest login (2,700+)
- Shared records increase to almost 7,000
- Direct referral exceeded 2,000



Joint or Standardized Consents

Joint	Standardized
San Ysidro Health	Interfaith
San Diego Food Bank	La Maestra
HMIS	South Bay Community Services
ConnectWell (County HHSA)	
San Diego Workforce Partnership	
Family Health Center (exploring)	
Be There San Diego-Neighborhood Networks, ie. NCL, SAY, CVC (exploring)	

Affinity Groups



Affinity Group #1: Initiative

Goal: Identify and explore opportunities for cross sector collaboration through the use of the CIE through a project with existing goals and outcomes

Format: Structured and often based on timelines of the project or project

Frequency/Instances: Ongoing, at least monthly

Meeting 1: Where are we trying to goal: Initiative vision and goals

Meeting 2: Exploration of CIE System and Internal Capacity Assessment

Meeting 3: Cross Pollination: Design and Implementation

Meeting 4: Action Plan Rollout

Meeting 5 and On: Action Plan Tune-Up: Peer Learning, Lessons Learned, Best Practices

Affinity Group #2: Collaborative

Goal: Find opportunities for organizations with overlapping interests to learn from one another and explore shared approaches.

Format: Initial Set-up and Continue Peer Learning

Frequency/Instances: 3 meetings, after the third meeting, if interested in continuing a member of the Network can facilitate with support from CIE Network team.

Meeting 1: Kick-Off (Introductions/ who's at the table)

Meeting 2: Explore Opportunities with CIE

Meeting 3: Implementation

Meeting 4: Continued Learning, Peer-Learning, Shared Best Practices, Check-Ins

Example: City Collaborative

Areas of Exploration:

1. What departments does your city have?
Eg. EMS, Police Department & Housing
2. What relationships with community providers would you want to leverage or establish?
E.g. Chula Vista Police Department works with McAlister and La Mesa works with PATH for justice involved individuals.
3. How would you want to leverage CIE?
E.g. Alerts, Direct Referrals, Eligibilities?

Action:
What other collaborative efforts might be interesting or important?

Affinity Group #3: CIE Catalyst Cohort

Goal: Use CIE to meet organizational objectives and design an implementation plan in a peer-learning environment.

Format: Structured Curriculum, Cross-Sector Learning

Frequency/Instances: Bi-weekly/ 5 sessions (1 to 2 hours each) for 3 months, with 2 quarterly check-ins

Content:

Participants will join 5 structured sessions that include presentations, discussion and outside assignments. At the end of the 5th session, each participant will have designed and implemented a pilot specific to their own organization.

When: Bi-Weekly meetings

Slide 10

KG3 Like this, what about the Community Catalyst name or something cool, Cross-Sector Learning is more of the format, right?

Karis Grounds, 1/4/2021

RS3 [@Karis Grounds] yeah- I think this is good for Cross-Sector/ Informed Care

Roxanne Suarez, 1/7/2021

CIE Dashboard Updates



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Individual Dashboard

1. Adding clinical information within the CIE
2. Expanding alert functionality to include additional
 - Homeless + Chronic Condition
 - Missed Appointments
 - Food Insecurity + Diabetes, Pre-diabetes, hypertension
 - Housing Insecure + Medications
 - New eligibility
3. Enhancing search for referrals
 - Accounting for demographic, eligibility and health condition to sort referrals

Example of clinical data in CIE

Clinical Measures Detail			
Edit Delete Clone Sharing			
▼ General Information			
Account	Reynaldo Cintron	Created By	San Ysidro Integration, 8/10/2020 9:51 AM
Clinical Measures Name	a3e2C000000Wptb	Updated by Agency	San Ysidro Health
Date Taken	5/7/2020 12:00 AM	Last Modified By	San Ysidro Integration, 8/10/2020 9:51 AM
Total # Records	1		
▼ Clinical Measures			
A1C	55.00	HDL	99
Systolic Blood Pressure	119	LDL	144
Diastolic Blood Pressure	77	Triglycerides	6.40
Body Mass Index	21.0	Total Cholesterol	158
Smoking Status	Test Smoking Status 2	Fasting Plasma Glucose	126
Medication List	albuterol 90 mcg/inh inhalation aerosol, beclomethasone 80 mcg/inh inhalation aerosol		
▼ Additional Clinical Information			
PCP/Medical Home	Yes	Health Coverage Payer	Test Health Insurance 2
Health Condition	Test Health Condition 2	Health Plan	Test Health Plan 2

Panel Management Dashboard

Panel management is the concept of seeing a group of individuals in a list or table view that allows the user to make decisions or take actions based on the information in this view.

Key Functions

1. Determining eligibility
2. Prioritization
3. Stratification
4. Outreach
5. Targeted Interventions


Examples of Actions

- Sorting
- Filtering
- Export list
- Bulk update referral outcomes

Common Types of Information & Combinations of Information

- Health condition
- Health insurance
- Employment status
- Housing status
- SDoH risk
- Age
- Behavioral health concerns
- Transportation

Mockup of Panel Dashboard Redesign



DASHBOARD AGENCY PROFILE REQUEST LOG SERVICE DIRECTORY SUPPORT

SEARCH CLIENT
KNOWLEDGE

Partner Community
2-1-1 San Diego - Tier 3 Care Coordinator | Referral Manager
Tier 3 Referral Manager | Sign Out

Assigned Clients (Care Team)

New

- Patricia Mckenna**
- Cesar Lara**
- Ima Sanchez**
- Thomas Hughes**

Referrals

24 Items - Sorted by Agency - Filtered by Domain - Updated a few seconds ago

Referral #	Domain	Created Date	Referred ...	Referral Method	Agency ↑	Service Name	Assigned To	Referral Status	Outcome
16	Referral-00634716	Housing	7/11/2019 3:22 PM	2-1-1 San Diego	Online Application	San Diego Housing ...	Homeless Preventio...	Pending	
17	Referral-00634792	Housing	7/11/2019 4:06 PM	2-1-1 San Diego	Online Application	San Diego Housing ...	Homeless Preventio...	Pending	
18	Referral-00638185	Housing	7/16/2019 11:32 AM	2-1-1 San Diego	Online Application	San Diego Housing ...	Homeless Preventio...	Pending	
19	Referral-00638209	Housing	7/16/2019 11:41 AM	2-1-1 San Diego	Online Application	San Diego Housing ...	Homeless Preventio...	Pending	
20	Referral-00909593	Housing	4/3/2020 1:28 PM	2-1-1 San Diego	Text	San Diego Housing ...	Affordable Housing ...	Pending	
21	Referral-00686621	Housing	9/11/2019 10:14 AM	2-1-1 San Diego	Provide Program D...	Single Room Occup...	Single Room Occup...	Pending	
22	Referral-00818761	Housing	2/11/2020 12:48 PM	2-1-1 San Diego	Text	Tenants Legal Center	Renters Law Line	Pending	
23	Referral-00692053	Housing	9/18/2019 12:13 PM	2-1-1 San Diego	Provide Program D...	The Meeting Place ...	The Meeting Place ...	Pending	
24	Referral-01179343	Housing	10/13/2020 5:35 PM	2-1-1 San Diego	Text	United States Depa...	Housing and Urban ...	Pending	

Accounts

Recently Viewed

17 Items - Updated 27 minutes ago

⊕
⊞
↶
↷
⌵

Account Name	Mid...	Birth...	Last...	Phone	Acc...	Acc...	Created Date
1	Sadie Blue	01/1950	6789	(858) 300-1211	Client		7/31/2017 11:32 AM
2	2-1-1 San Diego			(858) 300-1300	Agency		5/31/2017 1:03 PM
3	Sadie Blue2	04/1952	1212	(858) 300-5491	Client		1/6/2020 2:27 PM
4	Sadie Blue3	11/2000	1212		trufe	Client	11/9/2020 7:56 AM
5	Chico Smoke	10/2020	1234	(619) 357-0806	trufe	Client	10/21/2020 10:03 AM
6	ZeroShundred			(858) 309-4415	Agency		11/1/2019 9:58 AM

Quick Filters

Referral #

Domain Clear

Created Date
Start End

Referred By Agency

Clear All Filters
Apply

Aggregate Dashboard

Aggregate dashboard is opportunity to view and analyze larger datasets within the CIE to search by demographic, geographic and other distinguishing features.

February: Look out for invites to design sessions.

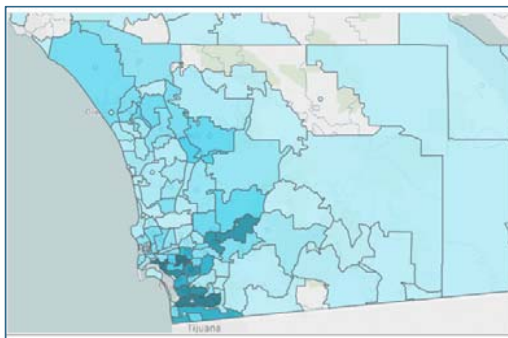
Those interested, please let me know you are interested.

Coming Spring 2021

Draft Dashboard Mock-Up Options

CIE Community Dashboard

Distributions



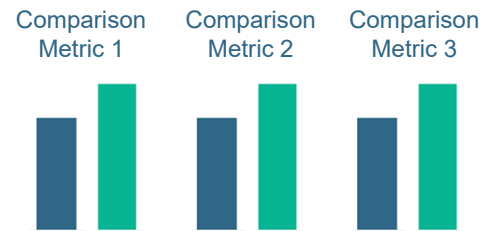
Summary
Stats

#

#

%

Comparisons



Summary
Stats

#

#

Selections

Population

Comparison

Time



Demographics

Health/Clinical

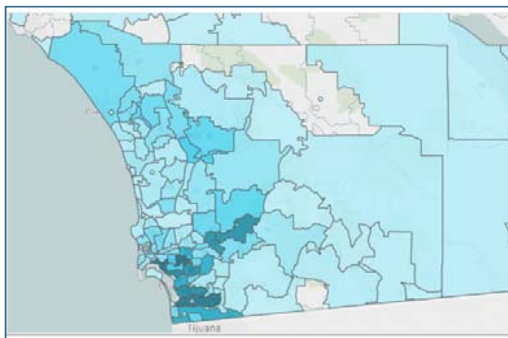
SDoH

Geography

Draft Dashboard Mock-Up Options

CIE Community Dashboard

Distributions



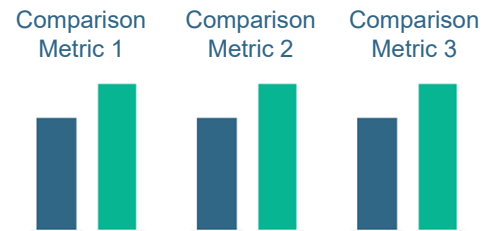
Summary
Stats

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#

%

Comparisons



Summary
Stats

#

#

Selections

Population

Comparison

Time



Mapping Metric 1

Comparisons
Metric 2

Comparisons
Metric 3

CIE Data Menu

Filters

Demographics

- Age
- Race
- Gender
- Military status
- Children in HH
- Geography

Health – Clinical

- A1C
- Systolic blood pressure
- Diastolic blood pressure
- BMI
- HDL
- LDL
- Triglycerides
- Total Cholesterol
- Fasting Plasma Glucose
- Smoking status

Metrics and/or Filters

Health – Conditions

- Diabetes/Pre-diabetes
- Cardiovascular disease
- Hypertension
- Cancer
- Other conditions?

Health – Utilization

- EMS transports
- PCP
- Missed Appointments
- Managing Care
- Barriers
- Other Health Acuity measures?

SDoH

- Homeless
- Housing insecure
- Food insecure
- Utility insecure
- Transportation barriers
- Unemployment
- Education (by level)
- Income/FPL
- Health insured
- Criminal justice involvement
- Arrested

Comparison Data Sources

- Census, ACS
- San Diego County HHS
- SANDAG
- San Diego County Sheriff's Department
- CDC

Population Options

Population

- All CIE clients
- Clients my organization consented
- Clients direct referred to my organization
- Clients enrolled in a program at my organization
- Clients on my care team

Comparison

- All CIE clients
- CIE clients in San Diego County, city or zip code
- External datasets by San Diego County, city, and or zip code
 - *Likely to start with just county comparisons*

Working Groups



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Workgroups

- Membership Workgroup Meeting
 - Second Monday of the Month
- Sustainability Workgroup Meeting
 - Second Tuesday of the Month
- Outcomes Workgroup Meeting
 - 1st Tuesday of the Month



Workgroup Updates



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Membership Workgroup



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Membership

MEMBERSHIP WORK GROUP

AGENDA

Monday December 14, 2020

- I. Review of Work Group tasks and timeline
- II. Report on stakeholder outreach conversations
 - Nancy Maldonado – Chicano Federation
 - Arnulfo Manriquez – Arnulfo Manriquez
- III. Suggestion to add additional member to work group
- IV. Further discussion to finalize sector seats
- V. Additional Business/Discussion

- Education
 - Healthcare
 - Criminal Justice
 - Social Services
 - Faith-based
 - Chamber-Business
 - Law Enforcement
 - Community Member
 - Government
 - Youth/Children
 - Veterans
 - Seniors
-
- **Rescheduling**
 - **Monday January 29**

Outcomes Workgroup



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How to measure: Changing Interventions

- **Example Intervention Questions:**
 - Do you help a person differently because of information in CIE?
 - The information in CIE changes the way you help a patient
 - Did you prescribe or provide a different recommendation based on information in CIE?
 - Did I ask the patient different questions or take a different approach to care?
 - Do you understand a persons needs or preferences, client goals/self-determination?
 - Prioritization of resources
 - Informed care?
 - Was I able to ensure meeting my patients care plan or client goals by using the CIE.
- Marco-has anything changed because of the use of CIE, within your own organization?
Training or orientation?

Outcomes Plan

2021 Outcomes Group	Clinical Markers	Equity Measures	Target Area	Matrix Review Group	Scheduled Time
Housing	Health conditions: Behavioral health ED transport	Zip code Race	homeless & homeless prevention	Kris, Mathew, Alana, Hanan	January 20 th at 10:00 AM
Food Insecurity	Health conditions: Diabetes, Heart Disease, Stroke ED transport	Zip code Race	CACHI, CalFresh/Food Bank	Shelly, Rox, Jillian, Christy	January 27 th at 1:00 PM
Family Health and Wellness		Zip code Race	Partners in Prevention/ ACEs AWARE	Aimee, Steve, Alana	January 25 th at 8:30 AM

Setting up for next year:

- Health (older adults, homeless, drug use, behavioral health)
 - Health Homes
 - CalAim
- Navigation Model
 - CWS Navigators
 - Neighborhood Navigators

Sustainability Workgroup



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CIE Sustainability Workgroup Planning Meetings

Workgroup Session 1: Intro & Level Set

- Review and approve Work Group Goals / Objectives / Agenda
- Brief CIE History
- FY21 Goals Overview

Workgroup Session 2: Best Practices

- CIE's Shared Governance Model
- Overview of Historical Documents / Past Strategies
- Deep Dive into FY21 Strategies, Membership Model, & Revenue Expectations
- Identify Other Financial Models for backbone/technology/network sustainability

Workgroup Session 3: Brainstorming Strategies

- Review existing metrics, ROI, and value propositions
- Compare value propositions to current audience and marketplace
- Identify Opportunities to Diversify Funding Streams / Monetize

Workgroup Session 4: Compare Updates from Outcomes Committee with Sustainability Plans

- Review work of Outcomes Workgroup and any potential changes to metrics, ROI, and value propositions

Workgroup Session 5: Recommendations

- Establish Recommendations for Future Sustainability Models
- Identify Roles and Responsibilities



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OTHER UPDATES & NEXT MEETING

February 16th, 2021 8:30-9:30 AM



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