Community Information Exchange (CIE)
Advisory Board Meeting

January 19, 2021
## CIE Advisory Board Meeting
### AGENDA
January 19, 2021 • 8:30 AM – 9:30 AM

<table>
<thead>
<tr>
<th>Time</th>
<th>Agenda Item</th>
<th>Presenter</th>
</tr>
</thead>
<tbody>
<tr>
<td>8:30 – 8:35am</td>
<td>Welcome and Introductions &amp; Agenda Overview</td>
<td>Mathew Packard Chair 2-1-1 Advisory Board</td>
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<tr>
<td>8:35 – 8:50am</td>
<td>CIE Utilization Update &amp; Initiatives</td>
<td>Karis Grounds VP of Health and Community Impact</td>
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<tr>
<td></td>
<td>• Trends</td>
<td>Alana Kalinowski Director of Partner Integration</td>
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<tr>
<td></td>
<td>• Consents (Joint and Standard)</td>
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<td></td>
<td>• Affinity Groups Update</td>
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<tr>
<td>8:50 – 9:10 am</td>
<td>CIE Dashboard Updates</td>
<td>Karis Grounds VP of Health and Community Impact</td>
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<td></td>
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<td>Nicole Blumenfeld Director of Informatics</td>
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<tr>
<td>9:10-9:25 am</td>
<td>Workgroups Update</td>
<td>Mathew Packard Chair 2-1-1 Advisory Board</td>
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<td></td>
<td>• Membership</td>
<td>Karis Grounds VP of Health and Community Impact</td>
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<td></td>
<td>• Outcomes</td>
<td>Camey Christenson Chief Business Development Officer</td>
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<td></td>
<td>• Sustainability</td>
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<td>9:25-9:30 am</td>
<td>Other Updates &amp; Meeting Adjournment</td>
<td>Mathew Packard Chair 2-1-1 Advisory Board</td>
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WELCOME & INTRODUCTIONS
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.

<table>
<thead>
<tr>
<th>Goal</th>
<th>Current Numbers</th>
<th>% to Goal</th>
<th>Monthly Trends</th>
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<tbody>
<tr>
<td><strong>105 Partners</strong></td>
<td>100 Partners</td>
<td>95% of Goal</td>
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<tr>
<td><strong>Adoption Metrics</strong></td>
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<tr>
<td>30,000 Logins</td>
<td>11,924 Logins</td>
<td>40% of Goal</td>
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<tr>
<td>205,000 Consents</td>
<td>177,299 Consents</td>
<td>86% of Goal</td>
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<tr>
<td>40,000 Searches</td>
<td>11,354 Searches</td>
<td>28% of Goal</td>
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<tr>
<td><strong>Engagement Metrics</strong></td>
<td></td>
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<tr>
<td>100,000 Records</td>
<td>87,990 Records</td>
<td>88% to Goal</td>
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<tr>
<td>30,000 Profile Views</td>
<td>10,218 Profile Views</td>
<td>34% of Goal</td>
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<tr>
<td><strong>Intervention Metrics</strong></td>
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<td></td>
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<tr>
<td>25,000 Direct Referrals</td>
<td>9,763 Direct Referrals</td>
<td>39% of Goal</td>
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Trends:
- Highest login (2,700+)
- Shared records increase to almost 7,000
- Direct referral exceeded 2,000
<table>
<thead>
<tr>
<th>Joint</th>
<th>Standardized</th>
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<tbody>
<tr>
<td>San Ysidro Health</td>
<td>Interfaith</td>
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<tr>
<td>San Diego Food Bank</td>
<td>La Maestra</td>
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<tr>
<td>HMIS</td>
<td>South Bay Community Services</td>
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<tr>
<td>ConnectWell (County HHSA)</td>
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<tr>
<td>San Diego Workforce Partnership</td>
<td></td>
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<tr>
<td>Family Health Center (exploring)</td>
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<tr>
<td>Be There San Diego-Neighborhood Networks, ie. NCL, SAY, CVC (exploring)</td>
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Affinity Groups

Affinity Group

Initiative

- Project with timelines and concrete goals and outcomes

Collaborative

- Opportunities for organizations with overlapping interests to learn from one another and explore shared approaches

CIE Catalyst Cohort

- Kick-start opportunity to ignite CIE within their own organization through shared peer learning
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?  
   Eg. 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?  
   Eg. 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
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

[@Karis Grounds] yeah- I think this is good for Cross-Sector/ Informed Care
Roxanne Suarez, 1/7/2021
CIE Dashboard Updates
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](image)
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

2-1-1 San Diego - Tier 3 Care Coordinator / Referral Manager

Partner Community

Assigned Clients (Care Team)

Patricia McKenna
Ceasar Lara
Irma Sanchez
Thomas Hughes

Referrals

24 Items - Sorted by Agency - Filtered by Domain - Updated after every second ago

Referral # Domain Created Date Referral Domain Referral Method Agency Service Name Assigned To Referral Status Outcome

14 Referral-00626716 Housing 7/11/2019 2:22 PM 2-1-1 San Diego Online Application San Diego Housing ... Homeless Prevention... Pending

17 Referral-00624782 Housing 7/11/2019 4:06 PM 2-1-1 San Diego Online Application San Diego Housing ... Homeless Prevention... Pending

8 Referral-00624816 Housing 7/16/2019 11:22 AM 2-1-1 San Diego Online Application San Diego Housing ... Homeless Prevention... Pending

13 Referral-00628200 Housing 7/16/2019 11:41 AM 2-1-1 San Diego Online Application San Diego Housing ... Homeless Prevention... Pending

20 Referral-00609993 Housing 4/9/2020 1:28 PM 2-1-1 San Diego Text San Diego Housing ... Affordable Housing... Pending

21 Referral-00626621 Housing 9/11/2019 10:16 AM 2-1-1 San Diego Provide Program ... Single Room Domic... Single Room Domic... Pending

22 Referral-00612761 Housing 3/11/2020 12:06 PM 2-1-1 San Diego Text Tenants Legal Center Harbor Law Line Pending

23 Referral-00602055 Housing 9/10/2019 12:15 PM 2-1-1 San Diego Provide Program ... The Meeting Place ... The Meeting Place ... Pending

24 Referral-00774585 Housing 10/13/2020 5:35 PM 2-1-1 San Diego Text United States D... Housing and Urban... Pending

Quick Filters

Referral # Domain Created Date Start End

Referral By Agency

Clear All Filters

2-1-1 San Diego/Imperial
Aggregate Dashboard

Aggregate dashboard is an 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

Comparisons

Selections
- Population
- Comparison
- Time
- Demographics
- Health/Clinical
- SDoH
- Geography

Summary Stats
- #
- #
- %

Comparison Metric 1

Comparison Metric 2

Comparison Metric 3
Draft Dashboard Mock-Up Options

CIE Community Dashboard

Distributions

Comparisons

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

- 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 zip code
- Likely to start with just county comparisons
Working Groups
• 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
Membership Workgroup
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

• Rescheduling
  • Monday January 29

- Education
- Healthcare
- Criminal Justice
- Social Services
- Faith-based
- Chamber-Business
- Law Enforcement
- Community Member
- Government
- Youth/Children
- Veterans
- Seniors
Outcomes Workgroup
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 person's needs or preferences, client goals/self-determination?
  - Prioritization of resources
  - Informed care?
  - Was I able to ensure meeting my patient's 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

<table>
<thead>
<tr>
<th>2021 Outcomes Group</th>
<th>Clinical Markers</th>
<th>Equity Measures</th>
<th>Target Area</th>
<th>Matrix Review Group</th>
<th>Scheduled Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Housing</td>
<td>Health conditions: Behavioral health ED transport</td>
<td>Zip code Race</td>
<td>homeless &amp; homeless prevention</td>
<td>Kris, Mathew, Alana, Hanan</td>
<td>January 20th at 10:00 AM</td>
</tr>
<tr>
<td>Food Insecurity</td>
<td>Health conditions: Diabetes, Heart Disease, Stroke ED transport</td>
<td>Zip code Race</td>
<td>CACHI, CalFresh/Food Bank</td>
<td>Shelly, Rox, Jillian, Christy</td>
<td>January 27th at 1:00 PM</td>
</tr>
<tr>
<td>Family Health and Wellness</td>
<td>Zip code Race</td>
<td>Partners in Prevention/ ACEs AWARE</td>
<td>Aimee, Steve, Alana</td>
<td>January 25th at 8:30 AM</td>
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</tbody>
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### Setting up for next year:
- Health (older adults, homeless, drug use, behavioral health)
  - Health Homes
  - CalAim
- Navigation Model
  - CWS Navigators
  - Neighborhood Navigators
Sustainability Workgroup
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
OTHER UPDATES & NEXT MEETING

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