Community Information Exchange (CIE) Advisory Board Meeting

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

<table>
<thead>
<tr>
<th>Time</th>
<th>Agenda Item</th>
<th>Presenter</th>
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</thead>
</table>
| 8:30 – 8:40 AM  | Welcome & Agenda Overview                        | Mathew Packard
                  |                                                                 | Chair 2-1-1 Advisory Board                                             |
| 8:40–9:00 am    | CIE Trends & Utilization Updates                 | Karis Grounds
                  | • Feedback Strategic Goals 2021/2022                                      | VP of Health and Community Impact                                     |
                  | • CIE Updates                                     | Nicole Blumenfeld                                                          |
                  |                                                 | Director of Informatics                                                    |
| 9:00-9:25 am    | Workgroup Updates                                | Mathew Packard
                  | • Outcomes Meeting                                                           | Chair 2-1-1 Advisory Board                                           |
                  | • Membership Meeting                             | Karis Grounds
                  |                                                 | VP of Health and Community Impact                                       |
| 9:25-9:30 am    | Action Items & Meeting Adjournment               | Mathew Packard
                  |                                                 | Chair 2-1-1 Advisory Board                                             |
CIE Trends and Utilization
### Draft CIE Dashboard

#### Coming soon...
- **Active Users**
  - Low
  - Medium
  - High
- **CIE Participant Interaction Groups**
  - Low
  - Medium
  - High
- **Dashboard Views**
  - Individual
  - Case Management
  - Aggregate
- **Shared Screening**

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#### CIE Trends and Metrics Dashboard

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>FY Goal</th>
<th>Current</th>
<th>% of Goal</th>
<th>Monthly Trends</th>
<th>All-Time Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Partners</td>
<td>20</td>
<td>2</td>
<td>10%</td>
<td>1</td>
</tr>
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</table>

#### Adoption Metrics

<table>
<thead>
<tr>
<th>Metric</th>
<th>FY Goal</th>
<th>Current</th>
<th>% of Goal</th>
<th>Monthly Trends</th>
<th>All-Time Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Logins</td>
<td>45,000</td>
<td>8,485</td>
<td>19%</td>
<td>2,672 Jul &lt;br&gt; 2,234 Aug &lt;br&gt; 2,079 Sep</td>
<td>82,069</td>
</tr>
<tr>
<td>Consents</td>
<td>90,000</td>
<td>25,166</td>
<td>28%</td>
<td>7,321 Jul &lt;br&gt; 9,443 Aug &lt;br&gt; 6,492 Sep</td>
<td>239,402</td>
</tr>
<tr>
<td>Searches</td>
<td>35,000</td>
<td>4,811</td>
<td>14%</td>
<td>2,140 Jul &lt;br&gt; 1,996 Aug &lt;br&gt; 1,575 Sep</td>
<td>59,520</td>
</tr>
</tbody>
</table>

#### Engagement Metrics

<table>
<thead>
<tr>
<th>Metric</th>
<th>FY Goal</th>
<th>Current</th>
<th>% of Goal</th>
<th>Monthly Trends</th>
<th>All-Time Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Records with Shared Data</td>
<td>80,000</td>
<td>40,972</td>
<td>51%</td>
<td>18,964 Jul &lt;br&gt; 21,328 Aug &lt;br&gt; 21,282 Sep</td>
<td>153,494</td>
</tr>
<tr>
<td>Profile Views</td>
<td>35,000</td>
<td>8,086</td>
<td>23%</td>
<td>2,577 Jul &lt;br&gt; 3,074 Aug &lt;br&gt; 2,435 Sep</td>
<td>60,067</td>
</tr>
</tbody>
</table>

#### Intervention Metrics

<table>
<thead>
<tr>
<th>Metric</th>
<th>FY Goal</th>
<th>Current</th>
<th>% of Goal</th>
<th>Monthly Trends</th>
<th>All-Time Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Direct Referrals</td>
<td>50,000</td>
<td>7,110</td>
<td>14%</td>
<td>2,489 Jul &lt;br&gt; 2,440 Aug &lt;br&gt; 2,381 Sep</td>
<td>74,561</td>
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Data Source: 211/CIE Information Systems | Reporting Period: 7/1/2021 - 9/30/2021
# CIE High Level Goals

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<tbody>
<tr>
<td><strong>Building Infrastructure</strong></td>
<td><strong>Process Improvement &amp; Involvement</strong></td>
<td><strong>Growth through Utilization &amp; Initiatives</strong></td>
<td><strong>Moving Outputs to Outcomes</strong></td>
</tr>
<tr>
<td>Strategic Planning and Development</td>
<td>System/Functionality Improvements</td>
<td>Continued utilization increases</td>
<td></td>
</tr>
<tr>
<td>Policy and Procedures</td>
<td>Community Involvement-Patient Portal</td>
<td>Priorities: referrals and authorizations</td>
<td></td>
</tr>
<tr>
<td>Tools and Resources</td>
<td>Communication, Support and Reporting to Partners &amp; Stewardship</td>
<td>Alignment with collective projects</td>
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### Identifying and Creating Value
- Supporting Use Cases
- Measuring/Collecting Success

### Increasing the # and Levels of Outputs
- Focus on Integration and Utilization
- Lessons Learned

### Improved System of Care
- Outcomes that matter
- Improved and expanded data integration
- Leveraging the CIE to shape care (i.e. prioritization of services and case management services)

### Community Voice & Involvement
- Community Voice Opportunities (Community Advisory Board)
- Micro, Mezzo, Marco Impact (qualitative and quantitative)
- Policies and Influence that lead with community and equity

### Shared Ownership Across the Network
- Embedding infrastructure into other organizations
- Ambassadors and chairs incorporated into engagement
- CIE Champions within org to push person-centered model

### Bolster Strategic Partnerships
- Expand affinity groups, peer learning and use cases
- Authentic relationships with community-organizing stakeholders and SME in focused areas

### Steward Community Ownership
- Bring in voice of impacted community to CIE and data narrative
- Identify what success means to community members

### Accessibility of Information
- Expand modes and avenues to communicate, support use and enhance CIE
- Client access to information
2021/2022 Overarching High Level Operational Goals

**Bolster Strategic Partnerships**
- Expand affinity groups, peer learning and use cases
- Authentic relationships with community-organizing stakeholders and subject matter experts in focused areas

**Steward Community Ownership**
- Bring in voice of impacted community to CIE and data narrative
- Identify what success means to community members

**Accessibility of Information**
- Expand modes and avenues to communicate, support use and enhance CIE
- Client access to information

**CIE Local Stewardship Suggested Highlights:**
- Formalize a community-centered CIE Advisory Board Membership
- Increase transparency and communication around value and sustainability of CIE
  - Revamping funding structure not only for “new members”-collective impact
  - State of CIE. Story of CIE San Diego, creating avenues, communicate in better way
- Share and highlight leveraging of CIE infrastructure—collective impact, “support local”
CIE Updates

CIE CalAIM Meeting: Scheduled Friday October 29, 2021 from 10:15-11:15 AM

Publications: Available on our website!
- The CIE Data Equity Framework - CIE San Diego

External Publications:
- What is the Outlook for Addressing Social Determinants of Health?: JAMA Health Forum – Health Policy, Health Care Reform, Health Affairs | JAMA Health Forum | JAMA Network
- Social Determinants of Health Data Sharing at the Community Level (hhs.gov)

- Manatt Health Strategies-Consultant for CalAIM: In developing guidance, we have identified San Diego CIE’s publicly-available toolkit, authorization forms, and notice of privacy practices as useful examples of data sharing approaches. Along with guidance on data sharing, DHCS is planning to make available a repository of data sharing policies and forms that may facilitate data exchange and benefit ECM/ILOS stakeholders.
CIE Outcomes Workgroup
How do we better measure impact

- What is the Outlook for Addressing Social Determinants of Health?
  - JAMA Health Forum – Health Policy, Health Care Reform, Health Affairs | JAMA Health Forum | JAMA Network
  - Social Determinants of Health Data Sharing at the Community Level (hhs.gov)

**Discussion Topics:**
- Avenues to re-publish and cite the work for more applied use case
- Uses and parameters for analyzing and publishing CIE data
- The role of the CIE Outcomes workgroup in research and evaluation projects
- Other avenues for collaboration with our data sets, including research
Draft Plans for Shared Best Practices/Research

1. The role of this group in decision-making, review of projects
2. Who are the audiences for external-facing publications?
3. How do we/where do we use data and research to inform?
   • Policy
   • Practice and action

- Awareness of existing asks or projects
- Ensuring data partners are informed
- Guiding principles
- Differentiating by outlet (research vs quality improvement)
- Shared CIE research agenda
  • Meaningfulness, impact
  • IRB considerations, informed consent
OTHER UPDATES & NEXT MEETING

November 16, 2021 8:30-9:30 AM