Grant Award 1 CPIMP211302-01-00

Quarterly Progress Report

TRANSMITTAL MEMO

Award: 1 CPIMP211302-01-00

Date: 4/28/2022

To: Michelle Browne, Project Officer
DHHS OASH OMH

From: Laura McKieran, Executive Director
Community Information Now

Re: Quarterly Progress Report: Year 01 Quarter 02

Note: As required by the Notice of Award, please find following Community Information Now's Quarterly Progress Report for the second quarter of Year 1. Please do not hesitate to contact me if you have questions or concerns.

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PART I. PROJECT NARRATIVE

1. **Progress Narrative**

Program Purpose/Strategies/Interventions: Describe the strategies/interventions provided during this reporting period.

A. Project Objectives

Indicate if there are any changes; refer to *Appendix A*.

There have been no changes to the two major objectives in support of that goal: (1) facilitate community stakeholder access to and utilization of integrated community-level SDOH and health data, and (2) increase community stakeholder skill and capacity to use and apply that data to address health disparities among racial and ethnic minority populations.

As per Appendix A in the reporting guidance, the following table summarizes any changes to and Q1 progress on each objective and sub-objective. Greater detail on the progress per sub-objective is provided below the table.

GOAL: Strengthen local efforts to reduce and eliminate health disparities through the use of timely, relevant, quality local SDOH and health data.

Key Objective as Stated in Application #	**Objective per Quarter 2 Progress Report**[1]	**Justification for the Modification**	**Does the modification(s) affect the logic model or evaluation plan?**[2]
Objective 1: facilitate community stakeholder access to and utilization of integrated community-level SDOH and health data	No change	-	-
Sub-obj. 1.1: Development and testing of super-neighborhoods	No change	-	-
Sub-obj. 1.2: User-centered design (UCD) of the platform	No change	-	-
Sub-obj. 1.3: SDOH/health dataset acquisition, processing, and integration	No change	-	-
Sub-obj. 1.4: platform development and testing	No change	-	-

[1] If there is no change to the original Objective, recommend inserting "no change" per Objective. If there is a change, recommend highlighting the modification.

[2] If there is no change to the logic model or measures, recommend inserting "no change" per Objective. If there is a change, recommend highlighting the modification in the logic model and evaluation plan. **If there has been a change in the logic model, attach revised logic model.**

Key Objective as Stated in Application #	Objective per Quarter 2 Progress Report[1]	Justification for the Modification	Does the modification(s) affect the logic model or evaluation plan?[2]
ACCOMPLISHMENTS: **Please see narrative below this table for greater detail.** • Researched and tested multiple methods of super-neighborhood development • Developed UCD process, developed and piloted questions, and recruited participants for UCD sessions in Q2 • Via UCD pilot interviews, began to gather info on issues/datasets of interest			
Objective 2: increase community stakeholder skill and capacity to use and apply that data to address health disparities among racial and ethnic minority populations	No change	-	-
Sub-obj. 2.1: Outreach to potential data users	No change	-	-
Sub-obj. 2.2: Training and other supports	No change	-	-
ACCOMPLISHMENTS: **Please see narrative below this table for greater detail.** • Established several new nonprofit and grassroots contacts via UCD participant recruitment			

- ***Sub-objective 1.1: Develop and test super-neighborhoods.*** In January and early February CI:Now staff continued researching and testing statistical methods of census tract aggregation, including meeting several times with multiple other investigators who have done similar work in the U.S. A recurring method in the literature on spatially aggregating geographies is using Principal Component Analysis (PCA) as a way to reduce dimensions (number of variables used). Staff ran a PCA with demographic variables such as race, income, and education along with a K Means analysis to group like census tracts together based on the number of principal components that explain at least 90% of the original variance in the predictors.[3]

  By the end of February CI:Now developed four separate models where census tracts are

[3] The Spatial 'K'luster Analysis by Tree Edge Removal (SKATER) algorithm is used to keep the clusters spatially contiguous. CI:Now staff created a function to automatically run the PCA, K-means, and SKATER algorithms for different combinations of minimum census tract groupings and number of regions (clusters) and calculate the coefficient of variation (CV) for the African American population for the newly created regions. The goal is to create new regions where the CV for the African American population is 0.5 or less, because although it is the third-largest race/ethnicity group in the county, at just over 7% of total population the African American population is the one for which super-neighborhoods should make the biggest improvement in margin of error and resulting usefulness of small-area estimates.

grouped into 75 super-neighborhoods statistically clustered on different key criteria: *poverty*, *housing*, *transportation*, and *general*, which incorporates all three of the other key criteria. In March these four models were shared with core project partners to gather their input on which of the four models should be moved forward for public input on the boundaries. The "General" model was selected to be put forward for public input. This process is occurring concomitant with the City of San Antonio's City Council District redistricting process, but that process is still underway and the boundaries are not yet available to overlay on the map. The "General" model can presently be viewed at https://sphsarc.maps.arcgis.com/apps/webappviewer/index.html?id=ae36bd61dd234b4c917261ab98f16e75. Now that the General model is chosen, those boundaries will replace the neighborhood association boundaries currently displayed in the tool CI:Now has created to gather public input on the boundaries: https://sphsarc.maps.arcgis.com/apps/opsdashboard/index.html#/1f6db8a222a5409da696844335807077. A few modifications remain to be made to that public input tool, including adding an introduction and an option to name the area the person is giving input on. The tool will be translated into Spanish and both versions launched to the public by April 30.

- ***Sub-objective 1.2. User-Centered Design (UCD) of platform, outreach, & training.*** Building on Q1 work, UCD session participant recruitment continued through mid-January. Examples of participants include a student college advisor, a nonprofit data manager, community health workers, a health counselor, a community outreach coordinator, a data entry coordinator, the Dean of Advanced Academics at a university prep charter school, and a Director of Constituent Services at the City of San Antonio. So far, the UCD process has involved planning/pilot interviews with four entry-level and intermediate data users, four focus groups involving a total of 15 entry-level and intermediate data users, and two interviews with advanced users. The script or guide used for the entry-level focus groups is attached to this narrative; the similar intermediate script is available on request.

  In March the information gathered through the UCD process was used to generate "user stories" – statements of desired platform functionality phrased as "As a *[user type]* I want *[some feature/function]* so that *[some reason]"* – for the platform developer's use, as well as to inform the list and prioritization of datasets to include in the platform. Once developed, the user stories were then rated and ranked by staff to determine priority given a finite budget. Together with a list of data platform requirements developed by staff, the prioritized user stories will guide the developer in building the platform. Following are some examples of user stories, most related to platform development but a handful related to training. Given budget limitations, not all of these user stories will be passed to the developer for inclusion in the first version of the platform.

  1. **As a** *user* **I want** *a flexible query interface* **so that** *I can get the specific data I need.*
  2. **As a** *grant writer* **I want** *quick and easy access to data and statistics* **so that** *I don't have to spend much time looking for the numbers I need.*

3. **As a** *user* **I want** *the tool to be in Spanish* **so that** *I can access the data in the language I'm most comfortable speaking.*
4. **As an** *entry-level user* **I want** *the data I retrieve turned into maps and charts* **so that** *I don't have to visualize the data myself.*
5. **As an** *advanced user* **I want** *to be able to download the data and metadata* **so that** *I can do my own calculations.*
6. **As an** *instructor who uses data* **I want** *an "explore your neighborhood" feature* **so that** *students can engage with data on a personal level.*
7. **As an** *entry-level user* **I want** *pop up info prompts/instructions on the tool itself* **so that** *I can learn how to use each feature of the tool on the spot and without having to open a separate window or tab.*
8. **As a** *user* **I want** *the tool to be similar to Google Maps* **so that** *I can interact with it and put a little "person" down on the map and instantly pull up data about that area.*
9. **As a** *user* **I want** *examples of how the data has been used* **so that** *I can learn and use the data in similar ways.*
10. **As an** *entry-level user* **I want** *virtual training on data concepts* **so that** *I understand and can communicate about the data I've gotten from the tool.*

In March CI:Now staff pilot tested and formally deployed a community survey that will be held open throughout the project period. The survey will collect further information from Bexar County residents on community data needs and preferences, data user characteristics, and ways data is used. The survey has initially been distributed via CI:Now's newsletter (215 successful deliveries) and through the Bexar Necessities listserv (2,300+ subscribers). As of this writing CI:Now has received about 25 survey responses; the survey will continue to be pushed through all available avenues, including informal partner networks, CI:Now's newsletter, and groups like the Alamo Regional Data Alliance and a local Geographic Information System (GIS) user group.

- ***Sub-objective 1.3. Dataset acquisition, processing, and integration.*** In March CI:Now staff began to compile the list of indicators and datasets to be included in the tool. The initial inventory, which is quite extensive, includes all indicators staff know are available. In April that inventory will be prioritized based on community survey results, feedback from the UCD sessions, and staff knowledge of what data is frequently requested. Once the inventory is prioritized, staff will begin pulling, processing, and integrating those datasets to be loaded into the platform in subsequent months. In March CI:Now also attended a demonstration of a new (and much less extensive) data tool being launched by project partner San Antonio Metropolitan Health District (Metro Health) to learn what data and features Metro is offering and begin to think about how the OMH-funded data platform can build on this resource as it does other assets. Staff sent an initial request to project partner HASA, the area health information exchange, to determine data availability and completeness. Some indicators of interest include inpatient and emergency department utilization for key diagnoses (e.g., asthma, COVID-19), lab values (e.g., to indicate uncontrolled diabetes), and prescriptions (e.g., to indicate antidepressant use). HASA staff are researching the requested items in preparation for an April worksession with CI:Now.

- ***Sub-objective 1.4. Platform development and testing***. In early December CI:Now had published an RFP for web development via its website and newsletter. Staff also pushed it out to organizational contacts and asked board and staff to circulate it within their networks. When only one proposal was received by an initial deadline of January 6, 2022, CI:Now extended the deadline to January 25 and published the RFP link to the NNIP partners google group to identify qualified vendors not located in the San Antonio area.

  The two proposals received were from ITG in San Antonio and the Dorothy A. Johnson Center for Philanthropy (JCP) at Grand Valley State University in Grand Rapids, Michigan. Both proposals exceeded CI:Now's OMH web development budget of $38,640, of which $34,500 was for development and testing in Grant Year 1 and $4,140 for fixes and improvements in Grant Year 2. A formal comparison of those proposals against key criteria was developed to inform the decision. Although CI:Now stated a preference to hire locally, both the objective proposal merits and the demonstrated track record of JCP greatly exceeded those of ITG. JCP appears both able to meet requirements and willing to manage to CI:Now's budget through an Agile software development approach that allows for features and functionality – the user story approach mentioned above – to be continually identified and ranked/prioritized for inclusion in the scope.

  CI:Now's Financial Policies and Procedures on procurement require board review and approval of contracts valued at $25,000 or higher that create a financial obligation for CI:Now. A staff recommendation to contract with JCP was made to, and after discussion unanimously approved by, CI:Now's Board of Directors at its February 25, 2022 meeting. The kickoff meeting was held April 6, 2022, and as of this writing, site wireframes (the mockup) has already been developed and refined. Below is an excerpt from the executed contract summarizing key deliverables and the projected timeline for each.

ACTIVITY	RESPONSIBLE PARTY	DELIVERABLE	TIMELINE
Wireframe creation	Johnson Center	Platform wireframes	April 2022
Platform development	Johnson Center	Platform beta version	May – July 2022
Beta launch and testing	Johnson Center and CI:Now	Platform release version	August – September 2022
Client training	Johnson Center	Platform documentation and training	September 2022
Platform launch	Johnson Center	Platform launched for general public	September 2022
Platform support	Johnson Center	Ongoing platform support	October 2022 – March 2023

- ***Sub-objective 2.1. Outreach to potential data users*****.** In addition to deploying the community survey described above, in March CI:Now selected and began to customize the free version of HubSpot as an outreach management database, populating it with contacts made since the project started. That work will continue through the rest of the project period. Much like any customer relations management solution, CI:Now will use the database to capture contact information and nature of contacts with any individuals with whom CI:Now interacts on this project. For example, the database can be queried to identify UCD participants who volunteered to help with site beta testing later in 2022, or community survey respondents who prefer in-person rather than virtual training and thus should get targeted outreach about upcoming in-person training opportunities. As per the workplan, no other user outreach work is yet due.

- ***Sub-objective 2.2. Training and other supports.*** As per the workplan, no work was done on this activity in Q2.

B. Disparity Impact Statement

- **Population of Focus: Describe progress on numbers served/trained/reached during this reporting period, disaggregated by race/ethnicity and for the disparate population(s) identified in the Disparity Impact Statement. Refer to *Appendix B.***

  The DIS table below will be empty throughout Year 1, as the platform and data trainings do not launch until the end of Year 1.

DIS: Participants by Population Type in Grant Year 1, Bexar County, Texas *

Population Type	**% Locality**	**Q1**	**Q2**	**Q3**	**Q4**	**FY1 Target**
Total numbers to be reached		0	0	0	0	**0**
Race/Ethnicity Group						
Black/African American	7.4%	-	-	-	-	-
American Indian/Alaska Native	0.2%	-	-	-	-	-
Asian	3.2%	-	-	-	-	-
White, Non-Hispanic	26.7%	-	-	-	-	-
Hispanic or Latino	59.3%	-	-	-	-	-
Native Hawaiian/Pacific Islander	0.1%	-	-	-	-	-
Some other race	0.4%	-	-	-	-	-
Two or more races	2.7%	-	-	-	-	-
Sex						
Female	50.6%	-	-	-	-	-
Male	49.4%	-	-	-	-	-
User Type						
General (proxy: HS grad/GED or less)	40.9%	-	-	-	-	-
Advanced (proxy: Some college or higher)	59.1%	-	-	-	-	-
Spanish-Preference (proxy: speak Spanish at home and speak English less than “very well”	11.6%	-	-	-	-	-

** Note: The data platform and trainings do not launch until the very end of FY1, so there will be no users until FY2.*

- **Quality Improvement Plan: Describe progress on quality improvement strategies implemented to address disparities related to access, use, and outcomes. Describe status on adherence to the National Standards for Culturally and Linguistically Appropriate Services (CLAS) in Health and Health Care.**

  The following table summarizes status of adherence to the National CLAS Standards via the strategies set forth in CI:Now's DIS.

Domain and strategy	Status
A. Access to the data	
1. Members of the General User Disparate Population guide platform design, including features and navigation	Q2 included UCD sessions in Jan.-Feb. and community survey launch in March
2. Create simpler site "front door" that is mobile-friendly	Contract executed in March; kickoff meeting held April 6, 2022
3. Work with community partners on outreach to maximize awareness of the tool, supported by an outreach database	Not yet due to start
4. Demystify the platform and data in general by gathering and promoting stories of data use by non-technical people in community and grassroots settings	Not yet due to start
5. Develop Spanish-language version of the site [specific to Spanish-Preference User Disparate Population]	Not yet due to start
6. Providing training and supports for using the data platform	Not yet due to start
B. Use of the data to decrease health disparities	
1. Develop and deploy data literacy training grounded in common real-world scenarios to help people understand data	Not yet due to start
2. Provide "just in time" training/consultation to either an organization or a collaborative seeking to use data to inform decisions	Not yet due to start

C. Personnel Matters

Summarize the status of the project's staffing situation, including key staff vacancies, efforts to fill these vacancies, and changes in key personnel during the reporting period. If there have been staffing changes, provide the current project organizational chart with titles and names of incumbents, including evaluation specialist(s). Provide resumes for any new key staff (if not previously provided).

The core staffing via UTHealth that was described in the grant application has been stable throughout Q2 and remains in place with no changes to either pattern or individual personnel.

D. Partners

Recipients should collaborate with other partners to implement the interventions, including institutions of higher education, local school districts, faith-based groups, community-based organizations, public health entities, and community health centers. Describe the role of each partner for this reporting period. Discuss the activities relative to the project carried out during the reporting period by each partner. Discuss changes, if any, (e.g. change of membership in the partnership, change in roles) that occurred during the reporting period.

No changes were made to the partnership this quarter. Drawn from the grant application project narrative, the following table summarizes each core partner's role in the project. The bold font indicates one of the primary ways in which partners were involved this quarter, connecting CI:Now with people to participate in the user-centered design process and being interviewed themselves as advanced users. All core partners also actively participated in the March 11 project retrospective described in Sections F and H below.

Role	CI:Now	THC	HASA	COSA Health	COSA ITSD
Administer and responsibly steward federal grant funds	•				
Has ultimate responsibility to ensure goals and objectives are achieved	•				
Support a collaborative evaluation process that quantifies progress	•				
Coordinate communication among all core collaborating entities and other community participants	•				
Implement user-centered design process to determine platform requirements and core design elements	•				
Develop, test, deploy, host, and manage data platform	•				
Coordinate and provide training and TA that support the community in using both the platform and the data provided through the platform	•				
Participate in the user-centered design process to maximize the degree to which the needs of both internal and external users are captured in the platform requirements and design	•	•		•	•
Participate in establishing and maintaining data governance policies and procedures to ensure data privacy, integrity, and responsible use	•	•	•	•	•
Provide highly-disaggregated datasets for platform	•	•	•	•	•
Connect CI:Now with existing and potential data users who would benefit from support in using both the platform and the data accessed	•	•	•	•	•

E. Institutional Review Board (IRB)
Describe status.

As is protocol at UTHealth, CI:Now core staff's home institution, the Executive Director/Principal Investigator met by phone with personnel in the Office of Human Research Protections to describe the project and determine what aspects of the overall project require IRB review and approval. With regard to the user-centered design work early in the project, CI:Now was advised that regardless of how the data is collected – focus group, interview, survey, etc. – if the sole purpose and use of the data is to inform the design of the data platform, its content, related trainings, or other product/service, IRB review and approval is not required. Should the data be used instead for research, that would require IRB and approval.

The next project activity that might require IRB review and approval is the handling of any Protected Health Information (PHI) or other personally-identifiable information (PII) as part of the work of processing the datasets to be made available through the platform. Once those datasets are identified, CI:Now will request IRB review and approval for work with any dataset involving PHI/PII.

F. Evaluation Plan
Describe the following:

1. Instrumentation, selected and used

None of the approved process or outcome measures in CI:Now's approved evaluation plan "kick in" until the platform is launched. As CI:Now is still in the platform design phase as per the workplan in the grant application project narrative, no instrumentation has yet been used.

2. Other (specify): (a) Status of evaluation activities; (b) Discuss any current or anticipated problems with evaluation activities; (c) Discuss any changes in your evaluation plan; (d) Promising practices identified.

- **Status, problems, and changes.** As noted above, no process or outcome measures in the approved evaluation plan are yet due to be measured. No problems have been encountered, nor are any problems anticipated at this time. All planned data collection methods remain as described in the project narrative evaluation plan table (pp. 43-44).
- **Promising practices.** To facilitate transparency and communication with project partners and the general public, CI:Now developed a public-facing webpage (https://cinow.info/omh-progress/) to share progress on the project. Once quantitative process and outcome metrics have been measured, those will be communicated through a dashboard on that page. In the meantime, CI:Now has published to that page the monthly progress reports submitted to OMH.

  Finally, as described in the grant application, CI:Now is holding a series of project retrospectives through the course of the project to help CI:Now staff and project partners identify needed mid-course corrections and lessons learned. A tool borrowed from the Agile software development approach, retrospective participants will review the tasks completed in the phase and talk about:

- What tasks went well?
- What tasks did not go well?
- What adjustments should we make for the upcoming phases?

The first retrospective session was held Friday, March 11. At least one representative from all core project partners participated, along with all four CI:Now team members. The notes from the retrospective are attached to this report, and the more substantive learnings are in the *Successes and Lessons Learned* section below.

G. Dissemination

(Related Products, including Presentations, Publications and Materials): Describe and provide copies and/or links of products* developed, modified, or otherwise used in the planning, administration, and management of the grant during the reporting period. Also, describe any upcoming trainings, abstracts, major activities, etc. * Note: As products are developed upload them to GrantSolutions as a Grants Note.

<u>1) Presentations</u>: Please list all professional presentations about the funded project made during the current quarter, including: (a) Presentation citation, Conference/meeting level (international, national, state, regional, or community/local); (b) Status (submitted, accepted/rejected, or delivered) - If Delivered: Date presented; (c) Total number of attendees. *Note - Please do not count partner meetings or trainings.

No professional presentations were made in Q2.

<u>2) Publications</u>: Please list all peer-reviewed publications that were submitted, in revision, accepted/published, or rejected, including: (a) Publication citation; (b) Date published or to be published; (c) Status for reporting period (submitted, accepted/rejected, published).

No peer-reviewed publications were submitted, in revision, accepted/published, or rejected in Q2.

<u>3) Products*</u>: Please list all new, targeted educational materials and campaigns including: (a) Webinars; (b) Newsletters; (c) Media campaigns; (d) Print materials, including posters/billboards; (e) Web materials. * For each new, targeted educational material or campaign, please describe: (a) Title; (b) Target audience; (c) Purpose.

No targeted educational materials or campaigns were deployed in Q2, but web content was updated and new newsletter content published. The table below summarizes that content.

Type	Title	Target Audience	Purpose
Web content	OMH Grant Progress Dashboard	Partners & general	Transparently communicate project progress and status over time
Newsletter	Ever wished someone had asked you what YOU want in a data tool? Now's your chance!	General, data users	Recruit UCD participants
Newsletter	Contract opportunities open	General, diverse vendors	Recruit needed contracted services (web developers and graphic designers)
Newsletter	Tell Us About It	General, data users	Announce and solicit responses to community survey

H. Successes and Lessons Learned

Please provide information about any additional notable achievements (successes) you have made in the past quarter, if it is not already mentioned previously. Please provide information about any challenges you encountered and/or lessons learned in the past quarter, if it is not already mentioned previously.

Below are the more substantive learnings that emerged during the March 11 project retrospective.

Successes

- CI:Now's project management tools and processes (e.g., weekly team meetings with periodic worksessions, ClickUp project management software, Toggl timekeeping software, QuickBooks Online) and are working very well to manage the project and track and report progress and expenditures.
- Core project partners report being satisfied with the amount and frequency of communication with them. Because everyone's schedule is heavy, they prefer to be looped in with targeted updates and specific asks and offers rather than general project updates not specific to them. All partners know that the newsletter will include project updates on a regular basis, and project progress will continue to be posted to https://cinow.info/omh-progress/.
- The retrospective itself was a success. CI:Now used a virtual whiteboard tool called Miro for the first time, which worked well. It also worked well to populate the board with thoughts ahead of time, which allowed for more thought to go into the content, and for the team and partners to use the time for discussion, questions, and problem-solving rather than brainstorming.

Lessons Learned

- Difficulty recruiting for the UCD sessions indicated that CI:Now has substantial work to do to build its connections with entry-level data users and people who do not currently use data at all but would likely benefit from it. That work has begun but will need to be built systematically over time, particularly as the outreach and training phase approaches.
- CI:Now needs to strengthen its ability to make sure that qualified web development and similar technical vendors know about and find it feasible to respond to Requests for Proposals. The National Neighborhood Indicators Partnership was a lifesaver in identifying a qualified vendor, and given the technical and niche nature of this kind of work, it may be that the San Antonio area cannot currently offer an adequate pool of qualified vendors.
- Increasing the budget would likely make those vendors who do learn about the opportunity more likely to respond to the RFP. That was not feasible within this already generous grant, so the best strategy is probably to work to cobble together multiple sources of funding within and across years to support the work at the budget level that would be attractive to vendors.

I. Technical Assistance

Please report each key challenge and/or technical assistance need facing your project. Please describe any action taken to resolve this challenge (e.g., outreach to your FPO, attempted collaboration with partners, etc.).

As of this writing in April 2022 CI:Now has no substantive technical assistance (TA) needs. Feedback on any aspect of the project is welcome.

CI:Now staff participated in joint grantee meetings in January and March 2022. Staff met with Dr. Browne in January for TA on the quarterly report template, and communicated with Dr. Browne by email in several other instances. CI:Now is grateful for project officer and other OMH staff work to have the new grantee monthly report condition in the original notice of award re-evaluated and subsequently removed.

J. Sustainability Activities

Describe the approach or plan for sustaining the project after the period of Federal funding ends. Identify factors that will lead to the project's sustainability. Factors may include: (a) Creating an Action Plan; (b) Securing Community Support; (c) Integrating Programs Into Existing Programs and Services; (d) Creating Strategic Partnerships; (e) Securing Diverse Financial Opportunities; (f) Developing or Revising Policy.

CI:Now's approach to project sustainability is described in Section 6 (Sustainability) of the grant application project narrative. The workplan included in that project narrative calls for the Sustainability Plan to be developed between March and September 2022, prior to the end of Year 1 of the grant, and starting in earnest in April. Other than beginning informally in March to identify which likely sources of FY23 funding can be used to further this work, no sustainability activities were undertaken in Q2.

PART II: PROJECT PROGRESS

PROGRAM MEASURES - Include measures for each quarter that display the progress of your program. We suggest you use the tables in Appendix C to report your program-specific data collected that supports program outcomes for this quarter and future quarters. Your table should also include baseline and target data. The table can be in Excel or Word format.

The process and outcome measure tables as suggested in Appendix C appear on the following pages.

<table>
<tr><th colspan="3">PROCESS MEASURES</th></tr>
<tr><th>Process Measure</th><th>Accomplishments</th><th>Challenges encountered</th></tr>
<tr><td rowspan="3">1. Percent of target datasets loaded to platform
Target: 50% by end of yr. 1; 100% by end of yr. 2
NOT YET DUE</td><td>Community survey launched in Q2 included several questions intended to inform platform content and design</td><td>None</td></tr>
<tr><td colspan="2">How will these challenges be resolved? Please provide a brief explanation in narrative form.</td></tr>
<tr><td colspan="2">N/A</td></tr>
<tr><th>Process Measure</th><th>Accomplishments</th><th>Challenges encountered</th></tr>
<tr><td rowspan="3">2. Number of community organizations/entities to which outreach is done
Target: 50 by end of year 2; 75 by project end
NOT YET DUE</td><td>-</td><td>-</td></tr>
<tr><td colspan="2">How will these challenges be resolved? Please provide a brief explanation in narrative form.</td></tr>
<tr><td colspan="2">-</td></tr>
<tr><th>Process Measure</th><th>Accomplishments</th><th>Challenges encountered</th></tr>
<tr><td rowspan="3">3. Number of training video views and document downloads
Target: 50 by end of year 2; 75 by project end
NOT YET DUE</td><td>-</td><td>-</td></tr>
<tr><td colspan="2">How will these challenges be resolved? Please provide a brief explanation in narrative form.</td></tr>
<tr><td colspan="2">-</td></tr>
</table>

<table>
<tr><th>Process Measure</th><th>Accomplishments</th><th>Challenges encountered</th></tr>
<tr><td rowspan="3">4. Number of people trained (virtually or in-person)

Target: 50 by end of year 2; 75 by project end

NOT YET DUE</td><td>-</td><td>-</td></tr>
<tr><td colspan="2">How will these challenges be resolved? Please provide a brief explanation in narrative form.</td></tr>
<tr><td colspan="2">-</td></tr>
<tr><th>Process Measure</th><th>Accomplishments</th><th>Challenges encountered</th></tr>
<tr><td rowspan="3">5. Lessons learned have been documented

Target: in every project retrospective

NOT YET DUE</td><td>-</td><td>-</td></tr>
<tr><td colspan="2">How will these challenges be resolved? Please provide a brief explanation in narrative form.</td></tr>
<tr><td colspan="2">-</td></tr>
<tr><th>Process Measure</th><th>Accomplishments</th><th>Challenges encountered</th></tr>
<tr><td rowspan="3">6. Project findings have been disseminated

Target: End of each year

NOT YET DUE</td><td>-</td><td>-</td></tr>
<tr><td colspan="2">How will these challenges be resolved? Please provide a brief explanation in narrative form.</td></tr>
<tr><td colspan="2">-</td></tr>
</table>

PROGRAM OUTCOMES			
Grantee Program Outcome	**Status**	**Has data been collected?**	**If yes, please provide information about the data collected during this quarter.** Please include information as to how this will be measured and the baseline data that has been collected.
1. Number of data platform users Target: 750 in 1st year after launch; then 1,000/yr. **NOT YET DUE**	Anticipated	No	-
	Please provide a brief narrative that demonstrates the status of the project as it relates to this program outcome.		
	-		
Grantee Program Outcome	**Status**	**Has data been collected?**	**If yes, please provide information about the data collected during this quarter.** Please include information as to how this will be measured and the baseline data that has been collected.
2. Percent of sessions that are for Spanish-language portion of platform Target: 20% **NOT YET DUE**	Anticipated	No	
	Please provide a brief narrative that demonstrates the status of the project as it relates to this program outcome.		
	-		
Grantee Program Outcome	**Status**	**Has data been collected?**	**If yes, please provide information about the data collected during this quarter.** Please include information as to how this will be measured and the baseline data that has been collected.
3. Percent of platform visitors reporting the information found was "somewhat useful" or "very useful"	Anticipated	No	-
	Please provide a brief narrative that demonstrates the status of the project as it relates to this program outcome.		

Target: 50% by 1 year after launch; 75% by 2 yrs. **NOT YET DUE**	-		
Grantee Program Outcome	**Status**	**Has data been collected?**	**If yes, please provide information about the data collected during this quarter.** Please include information as to how this will be measured and the baseline data that has been collected.
4. Percent of contacts reporting use of platform data to… (see Outcome 2 language) Target: 50% by 1 year after launch; 75% by 2 yrs. **NOT YET DUE**	Anticipated	No	-
	Please provide a brief narrative that demonstrates the status of the project as it relates to this program outcome.		
	-		
Grantee Program Outcome	**Status**	**Has data been collected?**	**If yes, please provide information about the data collected during this quarter.** Please include information as to how this will be measured and the baseline data that has been collected.
5. Number and content of data use stories gathered (intent is to learn more about how data is used and by whom Target: 10 by 1 year after launch; 30 by project end **NOT YET DUE**	Anticipated	No	CI:Now has begun collecting data use stories for other tools and projects to build experience and expertise in that work.
	Please provide a brief narrative that demonstrates the status of the project as it relates to this program outcome.		

PART III: PROJECT MANAGEMENT

Part III of the Quarterly Progress Report also emphasizes managerial and other aspects of the project not specifically related to the implementation of grantee evaluation plans or subsequent data analysis, reporting, and dissemination.
This includes, but is not limited to, project management changes and challenges, personnel issues, modifications to previously approved project plans or other supplementary information, such as a modified logic model, as appropriate.

A. Other Management Issues

Discuss any current or anticipated problems and include strategies for resolution.

The project has gone smoothly so far. CI:Now did not experience any management changes or challenges, personnel issues, or modifications to previously approved plans or other information in Q2, and none are anticipated at this time.

B. Other Matters

Provide any other programmatic information, materials, questions, or recommendations developed under the grant during the reporting period.

CI:Now continues to manage the project in its ClickUp platform and log time spent on project activities in the Toggl timekeeping application. Month- and year-to-date project expenditures are tracked and reported to the Board of Directors monthly in the Supplemental Statement of Functional Expenses, part of the routine monthly financial reporting package. Since January 1 CI:Now has made both reimbursement and advance payment requests through PMS without issue.

1. If applicable, a short description of COVID-19 related impacts to your project.

CI:Now has been fortunate that COVID-19 has caused minimal to no impacts to the project. Staff continued working primarily remotely throughout Q2, as they have been since March 2020, and COVID-19 had no impact on staffing levels. UCD session participant recruitment was handled via email and phone, with the January and February 2022 UCD sessions using a virtual format. (That format was actually unexpectedly helpful in that Zoom auto-transcribes the audio; it must then be proofed and corrected, but that goes much faster than does manual transcription.)

C. Logic Model

If modified, please attach updated logic model and highlight the changes and strike the deletions. Please refer to Appendix A and the footnote.

No changes have been made to the logic model.

D. Systems Level Outcomes

In what ways are you expanding access for racial and ethnic minorities or socio-economically disadvantaged individuals? Please include a description of any culturally or linguistically appropriate services that you are implementing.

Because the project is in such an early stage in Q2, access has not yet been expanded, nor have any services been implemented. CI:Now's approach and plans are described in the DIS and in Sections 1 (Problem Statement) and 2 (Project Plan) of the grant application project narrative.

CI:Now Data Use Interview

Beginners

Location: ______________________________
Date: _________________________
Facilitator: __________________________________
Note taker(s)/Recorder(s): ____
Participant: ____

[Make other facilitator a co-host]
[To get the transcribed closed captions: 1) Make sure on Zoom.us>settings>meeting that the options “closed captions” and “save captions” are enabled. 2) During the meeting, enable “live transcription” and disable “live captions” so that you don’t see the subtitles at the bottom of the screen. 3) Make sure you record to cloud. Once the meeting is over, the transcribed captions will be sent to the Zoom cloud.]

Introduction:
Hello, and thank you for speaking with us today. I am __________________________. I will be facilitating today’s interview. This is ________________________ (*facilitator introduces themselves).* They will be taking notes.

Before we begin, if we have any connection issues, we can reconnect through email. (*provide email information if they don’t already have it*). Also, if you would like turn on or off subtitle settings, you can do so at the bottom of the screen by clicking Live Transcript.

To start I would like to tell you about CI:Now and the Office of Minority Health project. CiNow is a Nonprofit organization housed at UT Health Science Center Houston School of Public Health in San Antonio. We help the community by opening up access to information that helps assess community conditions, we help people better understand data and how to use it, and help to define results of that information.

The OMH project is to create an accessible online tool that will strengthen local efforts to reduce health disparities through use of local data. This will allow the San Antonio community to have greater capacity to use information to make changes in our community to address health disparities among racial and ethnic minority populations.

The purpose of this interview is to examine if and how you use data. We specifically would like to know how data can help you in your work and what we can do to make data more accessible to you. Findings from this interview will help build a tool that people, like you, can use to find data, and if you would like to track our progress with making this tool, you can view our monthly updates on cinow.info or email us.

Today’s interview will last about thirty minutes to an hour. During the conversation, we want to get your reaction to some questions about your experience with data. We’re here to listen and learn.

Do you have any questions about the information shared so far?

If it's okay with you, we will start recording the session so that we have the audio transcript. This will only be used internally.
[Start recording session, make sure to click "Record to Cloud" to get the transcription]

Note: Add question to Zoom in the chat as they're being asked.

Okay, let's begin.

1. What community or organization do you represent?

2. What is your role in the community or in your organization?

3. What problem(s)/issue(s) are you, your community, or your organization trying to solve?
    a. What kind of questions do you try to answer?
    b. How do you usually find information?
    c. Do you have a preferred way of finding this information?
    d. What information would be useful to help work towards solutions and goals?

4. If there was one website you could visit to get the information (data) you need, what would that website look like for you and what information (data) would it have?

Transition: Thank you for your responses to those questions. We're going to shift now and talk a little bit about data

5. What is data to you? (*Explore familiarity with data, more of a conversation*)
    a. Are there questions about your work that you think data can help answer?
    b. What kinds of data sources are you aware of?

Can use questions at end to probe more if appropriate for the interviewee

6. Do you use data in your work? If so, how? *Depending on their response, you can probe to see what kind of software or tools they use*
    a. What data sources do you use? (Example: Census, etc).

7. In what ways would you like to become more familiar with data and how to use it to help you, your community, or your organization move towards finding solutions to the problems you're trying to solve?

8. What format works best for you to learn a new tool?
   a. Videos, in-person trainings, manuals?

9. Lastly, would you be available for questions or user testing in January, February, April, or July of next year?
   a. How much advance notice would you like before a session?

That was the last question. Thank you very much for your input today. Are there any last comments that anyone would like to make?

[Stop recording. The audio transcript should get sent to your Zoom Cloud Recordings online]

Extra Probing Questions if needed.

What technology are you most familiar with?
How do you use data in your daily work?
What datasets do you commonly use?
What information do you want from the data?
What difficulties do you encounter when using data?
What data do you hope to have for current or future work, like your dream dataset?

OMH SDOH Retrospective #1 Meeting Results (3/11/22)

Project Goals and Outcomes:

- Address the stark racial/ethnic health disparities in San Antonio and Bexar County
- Strengthen local efforts to reduce/eliminate health disparities through the use of timely, relevant, quality local SDOH and health data.
- Outcome 1: Community stakeholders have greater capacity to use data to make data-informed decisions to improve the health of racial and ethnic minority and disadvantaged populations.
- Outcome 2: Community stakeholders utilize integrated community-level SDOH/social need/social disparities among racial and ethnic minority populations.

Project Expectations:

- Develop super-neighborhood boundaries
- User-centered platform design
- Dataset acquisition and processing
- Platform development utilizing open-source tools
- Outreach and communications
- Spanish translation of all content
- User training and technical assistance available to everyone in Bexar County

OMH SDOH Retrospective #1 Meeting Results (3/11/22)

Lessons Learned:

	Continue – Helped us move forward	**Invent – How could we do things differently**	**Stop – Held us back**
Admin and Setup	• Clickup Project Management o Team tags o Track progress and history • Staff Project Workloads • Contract Executions • Grant Application and Staff Review • Meetings w/ OMH • Progress Reports • Financial Tracking o Toggl & Quickbooks made it easy to track grant expenditures • Retrospective Scheduling and Planning o Pre-meeting board setup with longer timeline	• RFP Outreach o Useful to post on CI:Now site as a reference but need better outreach to direct proposals o Need a place to access local developers o Recruit through other local sites designers • RFP Dev Process o Graphic Design RFP was too big for the budget • Partner Communication o Guidance from partners on how often to communicate o Directed targeted tasks for partners o Targeted short meetings with walk throughs and overviews o How they can inform the metrics and measurements of the project	• Original format monthly dashboard
User Centered Design	• Mine NNIP Network o Helped with UCD process and web dev • Dev of UCD Process Timeline • Dev of UCD Questions o D3 and team feedback helped w/ good questions • UCD Participant Scheduling • Focus Groups o Very interactive session. • UCD Feedback Synthesis and User Stories • Advanced Interviews • Community Survey Dev and Testing	• UCD Participant Search o Better method for getting diverse users by age o Need a bigger pool of candidates • One on One Interviews o Replace with one test focus group • Define Initial Indicators o Open ended. A lot of indicator suggestions are not available o A lot to track but might be hard to avoid • Focus groups o Make the project expectations clearer. Not a tool for their orgs data.	

Super Neighborhoods	• Census Tract Cluster Analysis • Super Neighborhoods Options Tool • Get help from subject matter experts		

Act – What should we do in the next project phase:

- Platform Development
- Dataset Processing and Database Setup
- Set Super-Neighborhood Boundaries
- Spanish Translation of Site and Community Survey
- Data Platform Launch
- Outreach and Communication Plan Set
- Sustainability Plan Development
- Training Materials
- Super Neighborhood Options Tool Responses
- Your Neighborhood Survey Tool Setup and Review
- Community Survey Response Tracking
  - Check UWSA Bexar Necessities List (Take short training)
- Graphic Design Contractor and Spanish Translation Contractor
- Find what we can aggregate from address or point level data
  - Go through City open data portal
  - Ask core partners