Grant Award 1 CPIMP211302-01-00

Quarterly Progress Report

TRANSMITTAL MEMO

Award: 1 CPIMP211302-01-00

Date: 10/28/2022

To: Michelle Browne, Project Officer
DHHS OASH OMH

From: Laura McKieran, Executive Director
Community Information Now

Re: Quarterly Progress Report: Year 01 Quarter 04

Note: As required by the Notice of Award, please find following Community Information Now's Quarterly Progress Report for the fourth quarter of Year 1. Please do not hesitate to contact me if you have questions or concerns, and thank you as always for your time and assistance as we pursue project and OMH objectives.

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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 Q4 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 4 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.**

<table>
<tr><th>Key Objective as Stated in Application #</th><th>Objective per Quarter 4 Progress Report[1]</th><th>Justification for the Modification</th><th>Does the modification(s) affect the logic model or evaluation plan?[2]</th></tr>
<tr><td colspan="4">ACCOMPLISHMENTS:
Please see narrative below this table for greater detail.
• Researched and tested multiple methods of super-neighborhood development; renamed to Statistical Small Areas (SSAs) based on community feedback; finalized boundaries; began aggregating data to those areas
• Developed UCD process, developed and piloted questions, and recruited participants for UCD sessions in Q1; held successful sessions in Q2
• Finalized initial set of data to load in Q3, and acquired, processed, and loaded that data in Q4
• Chose the name “Bexar Data Dive” for the platform in Q4 and selected a logo developed by a professional graphic designer
• Beta site developed and tested by staff and community volunteers in Q4, and fixes and improvements were made
• Bexar Data Dive ^{BETA} launched at the end of Q4
• Posted a new Research Coordinator position to assist with data acquisition, processing, loading, and metadata development (e.g., indicator explanation, year, source, link to source, caveats)</td></tr>
<tr><td>Objective 2: increase community stakeholder skill and capacity to use and apply that data to address health disparities among racial and ethnic minority populations</td><td>No change</td><td>-</td><td>-</td></tr>
<tr><td>Sub-obj. 2.1: Outreach to potential data users</td><td>No change</td><td>-</td><td>-</td></tr>
<tr><td>Sub-obj. 2.2: Training and other supports</td><td>No change</td><td>-</td><td>-</td></tr>
<tr><td colspan="4">ACCOMPLISHMENTS:
Please see narrative below this table for greater detail.
• Established several new nonprofit and grassroots contacts via UCD participant recruitment; many of the UDC participants came back to help with site beta testing in Q4
• Developed an initial set of training offerings and formats (see Appendix 1) in Q4
• Developed an initial set of outreach strategies and targets/audiences in Q4
• Developed a job description for and posted a full-time Training Specialist position to focus on outreach and training</td></tr>
</table>

- ***Sub-objective 1.1: Develop and test super-neighborhoods (Statistical Small Areas or SSAs).*** In Q2 CI:Now had grouped into 75 super-neighborhood areas statistically clustered on combination of *poverty*, *housing*, and *transportation*. In Q3 that set of boundaries was put forward for public input, with feedback solicited through CI:Now's website, newsletter, and via Facebook, and several key changes were made in response to the input received. In Q4 CI:Now aggregated census tract-level data into SSAs as part of the larger work of acquiring, processing, and integrating data (Sub-obj. 1.3). No further work on this sub-objective is expected to be needed during the grant project period.

- ***Sub-objective 1.2. User-Centered Design (UCD) of platform, outreach, & training.*** Little work was called for on this activity in Q3, as the information gathered through the UCD process in Q1 and Q2 was employed in Q3 to design and build the platform. In Q4 many of the UCD participants from Q1 and Q2 returned to assist with beta testing of the draft Bexar Data Dive platform. These sessions were held virtually and yielded important information that was used to make several changes to the site prior to launch.

- ***Sub-objective 1.3. Dataset acquisition, processing, and integration.*** In Q3 CI:Now finalized a list of about 100 indicators to load into the platform. The indicators cover health behaviors, health outcomes, and the following categories of social determinants of health: demographics, civic and social issues, criminal justice, educational, environment, financial well-being, housing, and transportation. Q4 focused on collection, processing, and formatting of the data, as well as loading it to the platform, which CI:Now can now do in-house without the web developer's assistance. The Year 1 goal was to load half the planned data to the platform, and CI:Now slightly exceeded that goal by loading 56 of 104, or 54%. Processing and loading of additional indicators from the Q3 list, noted in Bexar Data Dive as "coming soon", will occur in the first half of Year 2, and approved carryover funds will be used to select and load data for additional indicators not included in that original Q3 list.

- ***Sub-objective 1.4. Platform development and testing***. In Q2 CI:Now contracted the Dorothy A. Johnson Center for Philanthropy at Grand Valley State University (GVSU) in Grand Rapids, Michigan, a sister organization in the National Neighborhood Indicators Partnership (NNIP) to develop the platform. As noted in Sub-objective 1.2 above, beta testing by both staff and community volunteers in August and September resulted in a number of changes being made to Bexar Data Dive prior to launch. "Soft launch" – publishing of the site without major announcements about it – occurred at the very end of Year 1 and "hard launch" occurred in mid-October (Year 2 Q1). Staff continue to identify minor fixes needed, and the site has a "report a bug" feature for users to report any issues they encounter. CI:Now also has a running list of additional functionality users want, and approved carryover funds from Year 1 will be used to add that functionality to the platform in Year 2. GVSU has agreed to do that web development work and a contract is being drafted now.

- ***Sub-objective 2.1. Outreach to potential data users.*** Outreach in this sub-objective is really intended to mean outreach to help people access and use data to decrease health disparities, and that work could not begin in earnest until the platform was close to being launched. CI:Now has developed a draft plan of outreach strategies – much of it one-on-one – and targets/audiences, which will be finalized and deployed once (1) CI:Now board and partners have provided any input they have, and (2) the Training Specialist is hired early in Year 2. During Q4 CI:Now continued to publish content about the platform via website, newsletter, and social media. Since late Q2 CI:Now has been publishing data "mini-stories" (e.g., a map of educational attainment by SSA, or a chart by race/ethnicity, with explanatory text) to Facebook, LinkedIn, Twitter, and Instagram, and now that the platform has launched, those stories will be drawn from Bexar Data Dive as a way of publicizing what content and functionality the platform offers.

- ***Sub-objective 2.2. Training and other supports.*** In Q4 CI:Now developed an initial menu of training offerings and formats and developed an orientation video based on staff experience demonstrating Bexar Data Dive to various audiences. That video will be the basis for any in-person or virtual introduction trainings the Training Specialist will conduct once hired. Voice narration will be also added and the video uploaded to CI:Now's YouTube channel. CI:Now staff have also researched both U.S.-based and international data literacy and other non-tool-specific trainings and materials, particularly those from other local data intermediaries in the National Neighborhood Indicators Partnership (NNIP). Once the new Training Specialist is on board, CI:Now will adapt these resources and fill gaps as needed to support data use in reducing health disparities, not just use of the Bexar Data Dive platform.

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. Bexar Data Dive has built-in code to enable analysis of users and visits via Google Analytics, and that data is being generated as expected.

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	Info gathered in Q1-Q2 was used in Q3 to develop the platform, and beta testing with community users was conducted in Q4
2. Create simpler site "front door" that is mobile-friendly	Bexar Data Dive was launched by the end of Year 1. The "My Community" feature is the simple "front door" that generates a report of all the data contained in the platform for the geography the user chooses (county, ZIP code, SSA, or census tract).
3. Work with community partners on outreach to maximize awareness of the tool, supported by an outreach database	Not yet due to start, but CI:Now has prepared for this work by developing a draft plan of outreach strategies and targets/audiences, along with the database developed earlier in Year 1. As of Year 2 Q1 that plan is being circulated to board and partners for feedback.
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]	This task was pushed to Year 2 Q1, as the English-language text has continued to be in flux during beta testing and launch, and CI:Now wanted to avoid having to translate site text multiple times.
6. Providing training and supports for using the data platform	Not yet due to start, but CI:Now has developed an initial inventory of training offerings and other supports, and posted the new Training Specialist position to focus on outreach and training. CI:Now staff have also researched both U.S.-based and international data literacy and other non-tool-specific trainings and materials. (Interestingly, not one U.S.-based Spanish-language data literacy resource was

Domain and strategy	Status
	identified. Once developed, CI:Now's may be the first.)
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 Q4 and remains in place with no changes to either pattern or individual personnel. In Q4 CI:Now developed and posted two new position descriptions to work on the project: (1) a new Research Coordinator II to focus on new/additional data acquisition, processing, and loading; and (2) a new Training Specialist II to focus on outreach and training. Those new staff should be on board by the end of November.

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 table on the following page summarizes each core partner's role in the project. In Q4 CI:Now circulated notes on draft outreach strategies and targets/audiences to project partners for their input.

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. However, the indicator list for initial platform launch has been developed and no PHI/PII is expected to be involved.

F. Evaluation Plan

Describe the following:

1. Instrumentation, selected and used

The sole measure due to be measured by the end of Year 1 was to load 50% of planned indicators in the platform. At 54%, CI:Now slightly exceeded that target, using the inventory of planned indicators and actual site content to determine the percentage loaded. None of the other approved process or outcome measures in CI:Now's approved evaluation plan were to "kick in" until the platform was launched, but the ability to measure platform visits and users needed to be developed by the time of platform launch. The Bexar Data Dive web developer has incorporated code to enable analysis of users and visits via Google Analytics. That data is being generated as expected and will be analyzed and reported as per the evaluation plan beginning with Year 2 Q1.

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.** No process or outcome measures in the approved evaluation plan were due to be measured until platform launch, which occurred at the very end of Year 1. The evaluation work in Q4 focused on ensuring that CI:Now is ready for evaluation to begin at the start of Year 2, including setting up Google Analytics to measure site traffic. As of this time all planned data collection methods remain as described in the project narrative evaluation plan table (pp. 43-44).
- **Promising practices.** CI:Now is compiling lessons learned over time and maintaining that information in one place to facilitate inclusion of key lessons into the dissemination toolkit. To date that includes relevant text from quarterly reports and the NCCA, along with summaries of notes from project retrospectives. (Only one retrospective was actually held in Year 1, but the October 2022 retrospective focused on Year 1 work, including development of the Statistical Small Areas, user-centered design, technical development of the platform, and grant and project administration.) CI:Now's Project Manager will also work separately with the contracted web developer at GVSU to identify any additional lessons learned specific to platform development and joint project management that were not surfaced in the project retrospective.

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 on the project as a whole were made in Q4, but at the request of the National Neighborhood Indicators Partnership (NNIP), CI:Now staff member Cristina Martinez presented on a technical aspect of data acquisition and processing.

Citation	Level	Status	Delivered	Attendees
Martinez, C.E. (2022, July 9). *Using R TidyCensus to pull Census ACS and PUMS data* [Showcase presentation]. National Neighborhood Indicators Partnership Technology and Data Management Event, Virtual, United States. https://youtu.be/5lsABZzochE?t=1871	Nat'l	Delivered	7/19/22	~25, with 26 subsequent views to date

<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 Q4.

<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 Q4, prior to platform launch, but web content was updated and new newsletter content published. The table below summarizes that content. In Q4 CI:Now also began (1) preparing for a presentation on Bexar Data Dive at the Spark! convening of the Alamo Regional Data Alliance on October 7; (2) working with UTHealth communications staff to publicize Bexar Data Dive launch in

October 2022; and (3) preparing data "mini-stories" drawn from Bexar Data Dive to be pushed out on social media (LinkedIn, Facebook, Twitter, and Instagram) beginning in October 2022.

Type	Title	Target Audience	Purpose
Web content	OMH Grant Progress Dashboard	Partners & general	Transparently communicate project progress and status
Web content	OMH Awards Additional Funds	General, data users	Announce project continuation and Year 2 focus
Web content	Bexar Data Dive FAQ	General, Bexar Data Dive users	Help people understand key aspects of Data Dive content and methods
Newsletter (special)	Big news! OMH awards additional funds	General, community residents	Announce project continuation and Year 2 focus
LinkedIn, Facebook, Twitter, & Instagram	Big news! OMH awards additional funds	General, community residents	Announce project continuation and Year 2 focus
Newsletter (special)	CI:Now is hiring!	General, community residents	Recruit for new project positions
LinkedIn, Facebook, Twitter, & Instagram	Position postings	General, community residents	Recruit for new project positions
Newsletter (July)	Call for Spanish translation services	General, data users	Support open competition for Spanish translation contract
LinkedIn, Facebook, Twitter, & Instagram	Call for Spanish translation services	General, data users	Support open competition for Spanish translation contract
Newsletter (July)	Beta testers needed	General, community residents	Recruit community residents to help test the beta version of Bexar Data Dive
Newsletter (September)	Bexar Data Dive is coming soon!	General, data users, residents	Raise awareness of upcoming platform launch

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.

Successes

- Bexar Data Dive, the new data platform, soft-launched on time at the end of Year 1. (The hard launch with publicity occurred in mid-October.) Considering its size and robust content and features, it is a great success that Bexar Data Dive was developed within tight timeline and budget constraints.
- CI:Now has worked very closely and successfully with the contracted web developer at Grand Valley State University. That web developer has executed all deliverables well and on time and has been easy to work with.
- The beta testing virtual sessions went well, even though CI:Now's prior experience with beta testing was an in-person format. Data Driven Detroit, contracted by CI:Now in Year 2 to provide technical consultation on user-centered design, was very helpful in ensuring that CI:Now got the information needed from these sessions to improve the beta version of the platform prior to launch.
- With technical assistance, CI:Now submitted the NCCA and a carryover request at the end of Q3, and in Q4 received notice of award approving both.
- CI:Now worked with the web developer to incorporate code to ensure that Google Analytics would capture site traffic data from the day that Bexar Data Dive launched.
- CI:Now slightly exceeded its target to load 50% of indicators by the end of Year 1.
- CI:Now already has a working list of additional features and indicators that users would like added to Bexar Data Dive. The approved carryover funds from Year 1 will support the addition of those features and indicators (assuming data is available).
- In preparation for Year 2 outreach, CI:Now spent significant time and effort throughout Q4 building its social media presence and newsletter audience, investing in the Hootsuite application that allows CI:Now to schedule and post content across multiple social media platforms at once. Some platforms have to date been much more successful than others, but the following table summarizes audience net growth during Q4.

As-of date	Facebook	Instagram	LinkedIn	Twitter	Mailchimp
7/1/2022	0	0	0	258	222
9/30/2022	34	8	140	269	225

- CI:Now staff collaboratively developed job descriptions for the new Research Coordinator II and Training Specialist II, and worked with UTHealth to post those positions quickly after the Year 2 Notice of Grant Award was received, confirming availability of funds to support the positions.

Lessons learned

- This lesson is not specific to Q4 work but was strongly confirmed through Q4 beta testing: the user-centered design process is absolutely critical to ensuring that the tool meets community needs and preferences. Despite staff's deep knowledge and years of experience in democratizing data, current and prospective data users are able to articulate site features and improvements that CI:Now staff alone would not have caught. Although usability testing on draft products has been conducted in the past, this project is the first time that CI:Now has had the resources to conduct a comprehensive and formalized user-centered process. Data Drive Detroit's technical consultation in Year 1 was tremendously helpful and has greatly increased CI:Now's internal capacity for user-centered design.
- In the three months from July to September 2022, CI:Now has learned a tremendous amount about the NCCA process, the carryover request process, and grant administration in general. Those learnings will make CI:Now a more effective grantee through the rest of this project period and for any future awards.

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.).

CI:Now staff participated in a joint grantee meeting in July 2022, focused on project updates, and in September 2022, focused on community engagement. Staff met with Dr. Browne in August for the bimonthly one-on-one call. CI:Now has shifted to using the PPR module in GrantSolutions with no issues.

As of this writing in October 2022, CI:Now's only technical assistance (TA) need is to better understand the reason for two Federal Financial Reports (FFRs) to be submitted for Q4, one being for three months and the other for one day (September 30), and will contact our designated PMS accountant with that question. Feedback on any aspect of the project is always welcome.

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.

One of CI:Now's "Critical Activity Milestones" was to develop an initial version of a Sustainability Plan by the end of Year 1. That goal was met, though it was challenging to do so given that it was not fully clear what would need to be sustained, and what resources would be available during Year 2, until the Year 2 Notice of Grant Award was received in mid-September. The sustainability plan as currently drafted is attached to this report as Appendix 2, but the format and even content will almost certainly change given that the plan needs to be a living document, evolved over time, to be useful. The draft sustainability plan has been distributed to CI:Now's board of directors for their review and input.

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.

PROCESS MEASURES		
Process Measure	**Accomplishments**	**Challenges encountered**
1. Percent of target datasets loaded to platform Target: 50% by end of yr. 1; 100% by end of yr. 2	Indicators (and thus datasets) were selected in Y1 Q3, and 54% (56 of 104) were loaded to platform in Y1 Q4.	None
	How will these challenges be resolved? Please provide a brief explanation in narrative form.	
	N/A	
Process Measure	**Accomplishments**	**Challenges encountered**
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**	-	-
	How will these challenges be resolved? Please provide a brief explanation in narrative form.	
	-	
Process Measure	**Accomplishments**	**Challenges encountered**
3. Number of training video views and document downloads Target: 50 by end of year 2; 75 by project end **NOT YET DUE**	-	-
	How will these challenges be resolved? Please provide a brief explanation in narrative form.	
	-	

Process Measure	Accomplishments	Challenges encountered
4. Number of people trained (virtually or in-person) Target: 50 by end of year 2; 75 by project end **NOT YET DUE**	-	-
	How will these challenges be resolved? Please provide a brief explanation in narrative form.	
	-	
Process Measure	**Accomplishments**	**Challenges encountered**
5. Lessons learned have been documented Target: in every project retrospective	Lessons learned are documented in every OMH progress report and every retrospective (one in Q2; none required in Q3 or Q4; next is Y2 Q1).	None
	How will these challenges be resolved? Please provide a brief explanation in narrative form.	
	N/A	
Process Measure	**Accomplishments**	**Challenges encountered**
6. Project findings have been disseminated Target: End of each year	OMH Progress webpage includes all Year 1 monthly and quarterly reports approved to date; Y1 Q4 will be uploaded once approved by OMH.	None
	How will these challenges be resolved? Please provide a brief explanation in narrative form.	
	N/A	

<table>
<tr><th colspan="4">PROGRAM OUTCOMES</th></tr>
<tr><td>Grantee Program Outcome</td><td>Status</td><td>Has data been collected?</td><td>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.</td></tr>
<tr><td rowspan="3">1. Number of data platform users
Target: 750 in 1st year after launch; then 1,000/yr.
NOT YET DUE</td><td>In progress</td><td>Yes</td><td>Data is generated via Google Analytics starting 9/30/22, the start of Y2.</td></tr>
<tr><td colspan="3">Please provide a brief narrative that demonstrates the status of the project as it relates to this program outcome.</td></tr>
<tr><td colspan="3">The platform soft-launched 9/29/22 and is getting steady traffic. On track to meet or exceed goal.</td></tr>
<tr><td>Grantee Program Outcome</td><td>Status</td><td>Has data been collected?</td><td>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.</td></tr>
<tr><td rowspan="3">2. Percent of sessions that are for Spanish-language portion of platform
Target: 20%
NOT YET DUE</td><td>Anticipated</td><td>No</td><td>-</td></tr>
<tr><td colspan="3">Please provide a brief narrative that demonstrates the status of the project as it relates to this program outcome.</td></tr>
<tr><td colspan="3">-</td></tr>
<tr><td>Grantee Program Outcome</td><td>Status</td><td>Has data been collected?</td><td>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.</td></tr>
<tr><td>3. Percent of platform visitors reporting the information found</td><td>Anticipated</td><td>No</td><td>-</td></tr>
</table>

<table>
<tr><td rowspan="2">was “somewhat useful” or “very useful”

Target: 50% by 1 year after launch; 75% by 2 yrs.

NOT YET DUE</td><td colspan="3">Please provide a brief narrative that demonstrates the status of the project as it relates to this program outcome.</td></tr>
<tr><td colspan="3">-</td></tr>
<tr><th>Grantee Program Outcome</th><th>Status</th><th>Has data been collected?</th><th>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.</th></tr>
<tr><td rowspan="3">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</td><td>Anticipated</td><td>No</td><td>-</td></tr>
<tr><td colspan="3">Please provide a brief narrative that demonstrates the status of the project as it relates to this program outcome.</td></tr>
<tr><td colspan="3">-</td></tr>
<tr><th>Grantee Program Outcome</th><th>Status</th><th>Has data been collected?</th><th>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.</th></tr>
<tr><td rowspan="3">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</td><td>Anticipated</td><td>No</td><td>CI:Now has begun collecting data use stories for other tools and projects to build experience and expertise in that work.</td></tr>
<tr><td colspan="3">Please provide a brief narrative that demonstrates the status of the project as it relates to this program outcome.</td></tr>
<tr><td colspan="3"></td></tr>
</table>

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.

CI:Now has identified no current or anticipated problems. Happily, the Year 2 NCCA resulted in approval of level funding for Year 2 as well as carryover of unspent Year 1 funds, which will support adding significant functionality to the data platform and expand the health and social determinant data available through the platform beyond what was possible under the original incorrect Year 1 budget.

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, 2022 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. In Q4 staff worked in the office two days of the week (of their choosing), with the rest of work being remote as it had been since March 2020. COVID-19 had no impact on staffing levels, though it remains to be seen whether it will affect recruitment in Year 2 Q1. The Q4 beta testing sessions, held in-person in the past, were successfully conducted virtually.

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 platform did not launch until the very end of Year 1, as of the end of Q4 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.

OMH menu of training offerings and formats

By end of 2022

- Site demo – virtual or in person depending on opportunity (English)
- Video tutorials – overview, My Community, Explore, Download (English)
- Written user guide (English)
- Help Desk services (bilingual)
- Links to any very useful external resources (e.g., Pittsburgh Excel)

First half of 2023

Add:

- Site demo – virtual or in person depending on opportunity (Spanish)
- Video tutorials – overview, My Community, Explore, Download? (Spanish)
- Written user guide (Spanish)
- data literacy training (English)

Second half of 2023

Add:

- data literacy training (Spanish)
- use case-specific training (e.g., grantwriting, strategic planning) (English)

Last updated 9/30/22

Sustainability Plan

Bexar Data Dive: Data Access, Training, & TA

Last updated 9/29/2022

This Sustainability Plan, to be updated over time, summarizes CI:Now's plan as of September 2022 to sustain work that supports this project's goal and objectives. The goal and both objectives remain unchanged after the end of the project period in September 2024, but some sub-objectives will be complete by the end of the project period and thus do not need work sustained. Table 1 below shows the status of each sub-objective after the end of the project period.

Table 1. Status of Project Sub-Objectives After Project Period End

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	**Status After Project Period**
Objective 1: facilitate community stakeholder access to and utilization of integrated community-level SDOH and health data	
Sub-obj. 1.1: Development and testing of super-neighborhoods	Complete within project period
Sub-obj. 1.2: User-centered design (UCD) of the platform	Complete within project period
Sub-obj. 1.3: SDOH/health dataset acquisition, processing, and integration	Most work complete within project period, with annual data updates and additions ongoing
Sub-obj. 1.4: platform development and testing	Most work complete within project period, with maintenance and new features (if any) ongoing
Objective 2: increase community stakeholder skill and capacity to use and apply that data to address health disparities among racial and ethnic minority populations	
Sub-obj. 2.1: Outreach to potential data users	Ongoing after project period
Sub-obj. 2.2: Training and other supports	Ongoing after project period

Much of the work in the grant period, particularly Years 1 and 2, is one-time startup work such as planning and developing the platform (now called Bexar Data Dive), including branding; developing the Statistical Small Area (SSA) boundaries; collecting, processing, and loading the initial five years of trended data; creating trainings and video tutorials; and setting up project management and evaluation infrastructure. Table 2 on the following page outlines provides additional detail about what start-up/one-time project-related activities will be complete by the end of the project period and what activities will be ongoing to support project objectives.

Table 3 summarizes the primary sustainability strategies for the needs identified in Table 2. A narrative following Table 3 describes each sustainability strategy.

Table 2. Start-Up vs. ongoing expenses after Grant Year 3

	TASKS/NEEDS/EXPENSES	
Area	**Start-up (Years 1-3)**	**To sustain after project period end**
SSAs (Sub-obj. 1.1)	• Develop and test SSAs • Write code to aggregate tract-level data to SSA level	• None anticipated
Platform design, development, testing (Sub-obj. 1.2 and 1.4)	• Initial UCD • Design (features, layout, etc.) • Development (incl. setting up test environment) • Testing beta version • Translate site to Spanish • Hosting	• Ongoing dev site testing and monitoring • Identify and fix bugs • Develop and test new features • Translate any changes to Spanish • Hosting
Data content (Sub-obj. 1.3)	• Write code to extract and process public data • Ad-hoc requests and data processing for non-public data • Compile five years of data • Format and load all data	• Revise code if data formats etc. change • Write code for any new public data • Ad-hoc requests and data processing for non-public data • Backend database updates to incorporate new indicators • Format and load new data
Outreach & communication (Sub-obj. 2.1)	• Develop outreach plan/strategies, including initial partnerships • Develop outreach materials • Conduct ongoing outreach • Integrate into CI:Now's digital Communication Plan (including social media)	• Establish new outreach partnerships • Revise/refresh outreach materials if needed • Conduct ongoing outreach • Communicate widely about new data and features as per Communication Plan
Training and other supports (Sub-obj. 2.2)	• Determine training offerings • Develop video tutorials for tool features • Develop training (in-person and virtual) on the tool • Develop basic data literacy training • Translate core offerings to Spanish • Conduct trainings	• Update video tutorials if features or navigation change • Review training content after tool releases and annually and revise if changes are needed (with Spanish translation if needed) • Conduct trainings
Evaluation (no specific sub-obj.)	• Build evaluation tasks into project management system • Measure process and outcome indicators, including outcome (data use) case studies in written and/or video format	• Measure process and outcome objectives, including outcome (data use) case studies in written and/or video format • Revisit evaluation plan annually to ensure process and outcome indicators are appropriate

Table 3. Primary Sustainability Strategies for Activities to Sustain

Area	Activities to sustain	Primary sustainability strategies
1. Platform design, development, testing (Sub-obj. 1.2, 1.4)	• Hosting • Ongoing dev site testing and monitoring • Identify and fix bugs • Translate any changes to Spanish	a. Integrate into CI:Now's existing site hosting and monitoring processes b. Secure revenue to support web development (site fixes) and Spanish translation
2. Data content (Sub-obj. 1.3)	• Revise code if data formats etc. change • Write code for any new public data • Ad-hoc requests and data processing for non-public data • Backend database updates to incorporate new indicators • Format and load new data	a. Free up existing staff resources (data processing, project management) by retiring the Viz-a-lyzer, an older data tool that is less powerful than Bexar Data Dive and is currently updated annually b. Write code during project period that automates data processing and load as much as possible, minimizing time required for data updates c. Integrate management of data updates into CI:Now's existing project management processes
3. Outreach & communication (Sub-obj. 2.1)	• Establish new outreach partnerships • Revise/refresh outreach materials if needed • Conduct ongoing outreach • Communicate widely about new data and features as per Communication Plan	a. Integrate into CI:Now's existing Communication Plan and communication activities b. Partner with others to integrate communication/outreach into existing local capacity-building initiatives to minimize expenses related to venue space, scheduling, and other logistics c. Secure revenue to support outreach activities and materials
4. Training and other supports (Sub-obj. 2.2)	• Update video tutorials if features or navigation change • Review training content after tool releases and annually and revise as needed (Spanish translation as needed) • Conduct trainings	a. Partner with others to integrate trainings into existing local capacity-building initiatives to minimize expenses related to venue space, scheduling, and other logistics b. Secure revenue to support training activities and materials
5. Evaluation (no specific sub-obj.)	• Measure process and outcome objectives, including written and/or video outcome (data use) case studies • Revisit evaluation plan annually to ensure process and outcome indicators are appropriate	a. Integrate into CI:Now's existing performance management and evaluation activities

1. Platform design, development, testing (Sub-obj. 1.2, 1.4)

a. **Integrate into CI:Now's existing site hosting and monitoring processes.** Over the past year CI:Now has worked to consolidate all its online tools and content in an Amazon Web Services (AWS) environment, which has reduced both hosting costs and staffing costs. CI:Now secures AWS nonprofit credits through the TechSoup program, meaning that current hosting costs are about $100 per year rather than about $1,000. Hosting costs will increase again as Bexar Data Dive traffic increases, but still likely not to the prior level. Management of multiple sites is also streamlined by having all sites hosted in one place, and much of that work can be done by staff rather a tech contractor.

b. **Secure revenue to support web development (site fixes) and Spanish translation.** The cost of this item depends tremendously on whether CI:Now adds new features to the site or just keeps it updated. The OMH-approved award of Year 1 carryover funds will allow several additional "wish list" features to be added, and no valuable functionality has been identified that cannot be added through this carryover budget. Should new features be identified after the project period, however, funders are typically much more eager to fund new functionality than ongoing maintenance. Maintenance is thus harder to fund through grants, but because the cost is low, CI:Now expects to be able to cover that cost through earned income, i.e., excess revenue earned through mission-related contract work, which has no restrictions on how it is used. (The percentage varies by year, but typically about half of CI:Now's total annual revenue is earned income.) CI:Now is also prioritizing Spanish fluency in hiring new staff so that translation of relatively smaller site changes can be handled in-house if needed.

2. Data content (Sub-obj. 1.3)

a. **Free up existing staff resources (data processing, project management) by retiring the Viz-a-lyzer, an older data tool that is less powerful than Bexar Data Dive and is currently updated annually.** Updating the Viz-a-lyzer, launched in 2017 and arguably CI:Now's best-known local data tool, requires a significant investment of staff time each year, as the off-the-shelf technology is "clunky" and data must be formatted and quality-checked manually. In contrast, Bexar Data Dive has been built for easy data loading after largely-automated data processing. Virtually all Viz-a-lyzer content has been loaded Bexar Data Dive, and the last two indicators are expected to be loaded by the end of 2022. Retiring the Viz-a-lyzer rather than updating both tools allows those already-funded staff efforts to be shifted to Bexar Data Dive updates and maintenance.

b. **Write code during project period that automates data processing and load as much as possible, minimizing time required for data updates.** Over the past three or so years CI:Now has greatly developed internal capacity to use statistical program code (e.g., R, SAS) to automate functions like data extraction (e.g., from Census or the City of San Antonio's open data portal) and data processing and analysis. CI:Now will continue to build this internal capacity both by hiring for those skills and by training existing staff, and during grant Years 2 and 3 will develop code to automate as much of the data extraction and processing as possible. The data loading utility is being built specifically to accommodate loading by CI:Now staff, meaning that an expensive web developer will not need to be involved in updating the data annually (or in adding new indicators).

c. **Integrate management of data updates into CI:Now's existing project management processes.** A considerable part of the "lift" in data tool maintenance and updates is keeping track of what needs to be updated, where it comes from, when new data is released, which staff person is responsible for the update, and whether the update has been done. CI:Now will use its existing ClickUp project management platform to set recurring tasks for data updates with due dates tied to new data release dates, with information about data source and acquisition (e.g., the specific contact for the data request, or the internal server location of R code to extract the data) contained in the task description itself. This method also minimizes the impact of any staff turnover that may occur over time.

3. Outreach & communication (Sub-obj. 2.1)

a. **Integrate into CI:Now's existing Communication Plan and communication activities.** CI:Now communicates with the local community and national peers via its website, a monthly newsletter, and four social media platforms. Content includes data mini-stories (e.g., an interesting chart with text description), new products released, data tool updates, and ad-hoc announcements (e.g., position postings, community surveys, new grants awarded). Efforts are streamlined by reusing the same content across multiple communication mechanisms and by using a platform (Hootsuite) that allows staff to schedule posts to Facebook, LinkedIn, Twitter, and Instagram at the same time. In September 2022 CI:Now's Board of Directors approved a formal Communication Plan that will be updated every two or years going forward. Communications and outreach needed to sustain project activities will be incorporate into this existing infrastructure and processes.

b. **Partner with others to integrate comm/outreach into existing local capacity-building initiatives to leverage existing (external) networks and outreach infrastructure.** Several local capacity-building initiatives already exist, together serving nonprofits, community development corporations, grassroots organizations, and small businesses. As described in more detail in 4.a. below, partnering with these initiatives to leverage their existing networks and outreach activities.

c. **Secure revenue to support outreach activities and materials**. Outreach that is specifically focused on increasing data access and use – as opposed to general organizational communications – is easier to fund through grants, as it is typically understood as a program or direct service. CI:Now has begun to build outreach and communications into every grant budget and will continue to do so. Flexible mission-related earned income (see 1.b. above) can also help fill any gaps left by grant funding.

4. Training and other supports (Sub-obj. 2.2)

a. **Partner with others to integrate trainings into existing local capacity-building initiatives to minimize expenses related to venue space, scheduling, and other logistics.** As noted earlier in this plan, training costs decrease once training materials and supports have been developed. One substantial portion of the ongoing cost is actually setting up the trainings, including logistics (scheduling, venue setup) and communication to recruit participants. CI:Now will work to integrate training on data access and use into existing community capacity-building initiatives (see 3.b. above) that (1) already have resources to handle logistics and communication, and (2) whose own mission would be furthered by offering training on data access and use.

b. **Secure revenue to support training activities and materials.** Training is an activity for which CI:Now has successfully been grant-funded in the past, and future grant funding (specifically from the local United Way and a local family foundation that have long funded CI:Now) is a reasonable expectation.

5. Evaluation (no specific sub-obj.)

a. **Integrate into CI:Now's existing performance management and evaluation activities.** CI:Now already invests a significant amount of effort in using data to improve performance. In fact, the Executive Director's performance evaluation is entirely comprised of 14 metrics related to operational strength and stability, financial strength and stability, and community engagement. Engagement (e.g., training participation) and outcome (e.g. data use stories) measures that are initially assessed specifically for this grant will be folded into that larger effort, with the information gathered used for both communications and performance improvement.