TRANSMITTAL MEMO

Award: 5 CPIMP211302-02-00

Date: 4/27/2023

To: Michelle Browne, Project Officer
DHHS OASH OMH

From: Laura McKieran, Executive Director
Community Information Now

Re: Quarterly Progress Report: Year 02 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 2. 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.

Quarterly Progress Report

Grant #:   5 CPIMP211302-02-00

Name of Grant Program: Assessing Social Determinants of Health Data Through Local Data Intermediaries Project

Grantee Project Name: Increasing Community Access to and Use of Social Determinants of Health Data through Local Data Intermediary in Bexar County, Texas

Grantee Project Director Name: Laura McKieran

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Grantee Organization Name: Community Information Now

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Year of Grant Cycle: 02

Reporting Quarter: 02

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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 Y2 Q2 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 Y2 Quarter 1 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 (complete)	-	-
Sub-obj. 1.2: User-centered design (UCD) of the platform	No change (complete)	-	-
Sub-obj. 1.3: SDOH/health dataset acquisition, processing, and integration	No change (ongoing)	-	-
Sub-obj. 1.4: platform development and testing	No change (ongoing)	-	-

[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 Y2 Quarter 1 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.** • Bexar Data Dive [BETA] Spanish-language version launched 1/25/23. • Planned and began developing additional site features • Continued processing and loading data from initial target indicator list			
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 (ongoing)	-	-
Sub-obj. 2.2: Training and other supports	No change (ongoing)	-	-
ACCOMPLISHMENTS: **Please see narrative below this table for greater detail.** • Delivered many brief presentations and more in-depth trainings on Bexar Data Dive • Began developing Data 101 training to support people in understanding and using data • Continued adding to HubSpot contact management database to support outreach efforts and recruitment for training and any further user-centered design or testing needed			

- *Sub-objective 1.1: Develop and test super-neighborhoods (Statistical Small Areas or SSAs).* This objective was completed in Y1Q4 and no further work on this sub-objective is expected to be needed during the grant project period. CI:Now's work related to this objective is now focused solely on disaggregating data by SSA and disseminating to the field information on the methods used to develop the SSAs.

- *Sub-objective 1.2. User-Centered Design (UCD) of platform, outreach, & training*. This objective was completed in Y1Q3. Depending on new features built into Bexar Data Dive in Y2 using Y1 carryover funds, additional limited UCD may be conducted.

- *Sub-objective 1.3. Dataset acquisition, processing, and integration*. As of the end of Y2Q2 CI:Now had processed and loaded 67% of a list of 104 initial target indicators, with several more ready to load in April. Staff have been maintaining a list of additional indicators requested by Data Dive users, and additional indicators beyond the initial target list will be selected and added later in Y2 using approved Y1 carryover funds. CI:Now's data loading work has been slowed because the data already loaded prior to Y2Q2 has had to be re-processed and re-loaded to support a new Data Dive feature, which will enable the user to run data for a custom geographic area by choosing a group of census tracts, SSAs, or ZIP codes. For Data Dive to be able to generate data for that custom area as a whole, the dataset underlying the platform must include not just a percentages or rate (e.g., 25%) but also every numerator and denominator (e.g., 300 and 1,200) used to calculate the percentage or rate. This issue will be discussed again in the **Successes and Lessons Learned** section below.

- *Sub-objective 1.4. Platform development and testing*. In Y2Q1 CI:Now re-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 continue development of the platform using approved Y1 carryover funds. Minor fixes to both the platform and the data have been identified and corrected over time, and several additions and improvements to design and functionality have been added so far in Y2 or are currently in progress:

    1. Admin login for CI:Now to edit content (Text (eng. sp.), indicator mgmt, source mgmt., filters, recent updates) [complete]
    2. Feedback link to survey user about platform usefulness [complete]
    3. Indicator definition popup so that the user does not have to go to the About the Data page [complete]
    4. Ability to create, save, and re-use custom/aggregate geographies [in progress]

    Beyond those listed above, the number of new features that can be added will depend on budget and how extensive the work required is, but the following are under consideration. (New indicators for addition have not been determined and are not included here.)

    1. Graphic Design overview
    2. Add Place (City of San Antonio) geography
    3. Add School District geography

4. Chart MOE lines (bar and trend)
5. Add compare to trend chart (multiple trend lines)
6. Dashboard Toggle to view all map, trend, compare at same time
7. Linking between tools (ex. Tables and downloads links to map, trend)
8. Improve responsiveness on smaller screens

- *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. The Training Specialist continues to maintain and use the HubSpot outreach database, and new contacts are often made through demos and trainings. During Y2Q2 CI:Now also continued to publish content about the platform via website, newsletter, and social media.

- *Sub-objective 2.2. Training and other supports.* Bexar Data Dive demos and trainings began in earnest in Y2Q2, with five demos/trainings, some in-person and some hybrid, attended by a total of 125 people, already exceeding target. Data Dive trainings continue to be scheduled, but a new kind of training is also in development now. The name may be changed, but what is currently being called "Data 101" is intended to teach basic data concepts that will equip people to better understand and use the data from Data Dive. The content would be delivered in multiple formats like trainings, webpages, videos, and tip sheets and would include:

  - Where does data come from and why does that matter? (for example, administrative data like school attendance records vs. surveys like American Community Survey)
  - What's a rate and why use one instead of counts?
  - Why do we get "bounce"/volatility in rates?
  - What's a margin of error and why care about it?
  - What's disaggregation and why care about it?
  - What are the tradeoffs with disaggregation?
  - What kinds of bias are often baked into data, and how can you tell what that means for the data?
  - What difference does it make how data is summarized, e.g., household income average vs. median vs. distribution?
  - What difference does it make how data is shown, even the effects of things like y-axis range?

  CI:Now has experience teaching these concepts in an informal "just in time" way to clients and partners for whom a report or dashboard has been developed. For example, we might explain that small numbers cause "bounce" or volatility in rate trend lines in this way: "Okay, there are two of you at the table and both of you are female, so 100% of people at the table are female. Say one of you gets up and leaves, and a male comes in and sits down. Now only 50% of people at the table are female. And that's a huge change in percent,

which would show up as a really dramatic downward drop in a trend line. But it's only one person's worth of difference we're talking about."

Spanish-language video tutorials had initially been targeted for development by this point in Y2, but that work has been pushed back. As substantial new features are still being added to Data Dive, and the site is about to undergo improvements in graphic design, any video tutorial developed now would be almost immediately inaccurate. Those tutorials are now expected by the end of Y2 or early Y3.

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*.**

DIS: Participants by Population Type in Grant Year 2, Bexar County, Texas

Population Type	% Locality	Q1	Q2	Q3	Q4	FY2 Target
Total numbers to be reached		305	354	0	0	750
Race/Ethnicity Group*						
Black/African American	7.4%	23	26	-	-	56
American Indian/Alaska Native	0.2%	1	1	-	-	2
Asian	3.2%	10	11	-	-	24
White, Non-Hispanic	26.7%	81	95	-	-	200
Hispanic or Latino	59.3%	181	210	-	-	445
Native Hawaiian/Pacific Islander	0.1%	0	0	-	-	1
Some other race	0.4%	1	1	-	-	3
Two or more races	2.7%	8	10	-	-	20
Sex*						
Female	50.6%	154	179	-	-	380
Male	49.4%	151	175	-	-	371
User Type						
General (proxy: HS grad/GED or less)	40.9%	85	135	-	-	307
Advanced (proxy: Some college or higher)	59.1%	107	219	-	-	443
Spanish-Preference (proxy: speak Spanish at home and speak English less than "very well")	11.6%	**	40	-	-	87

In Y2Q1 and Q2 Google Analytics was the only data source available, and Google Analytics does not capture race/ethnicity or sex. Demographics will be collected via other sources later in Y2, but the Q1 numbers shown are estimates based on the Locality percentages applied to the actual total number of users. User Type is based on actual proportion of users for the My Community tool (General) vs. the Explore and Tables tools (Advanced).

** The Spanish-language data platform launched late January 2023, so this measure begins Y2Q2.*

- **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 Y1 was used to develop and test the beta version of the platform, and user preferences are being included in decisions about what functionality to add in Y2.
2. Create simpler site "front door" that is mobile-friendly	Bexar Data Dive was launched by the end of Y1 with the "My Community" feature, a 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	CI:Now developed plan of outreach strategies and targets/audiences and built out the HubSpot dataset. Outreach began late in Y2Q1 and is ongoing.
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	CI:Now has been gathering data use stories and has started to research local videographers who could create short testimonial videos.
5. Develop Spanish-language version of the site [specific to Spanish-Preference User Disparate Population]	The Spanish-language version of the platform, which exactly mirrors the English-language version in features and data content, launched January 25.
6. Providing training and supports for using the data platform	Since platform launch at the very end of Y1 CI:Now has conducted five demos/trainings attended by 125 people. (This total does not include dissemination activities like conference presentations.)
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	The "Data 101" training is being developed now.

Domain and strategy	Status
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 were all retained in Y2Q1. As budgeted for Y2, in Y2Q1 CI:Now hired two new project staff: (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. These two new staff are still on the team.

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 Y2Q2 partners helped publicize the launch of the Spanish-language version of Bexar Data Dive. Y2Q3 will see more intensive outreach through partners and potentially new datasets to include in Bexar Data Dive.

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

CI:Now is using its ClickUp project management platform to monitor progress on percent of targeted indicators loaded and is using Google Analytics to measure Data Dive users and visits for both the English- and Spanish-language versions. HubSpot (contact management database) fields and analytics have been set up to support quantification of outreach and training. The user satisfaction mini-survey mentioned in the Y2Q1 report has been added to Data Dive; it appears on the right side of the screen once the user has been on the site for 60 seconds. A post-training survey was developed and deployed starting in Y2Q2.

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 Y1. The evaluation work in Y2Q2 focused on (1) measuring Data Dive users and visits; (2) setting up the user one-question usefulness survey pop-up on Data Dive; and (3) setting up processes and templates to track training activity. 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 held in March 2022, October 2022, and March 2023. CI:Now's Project Manager has been working 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; that information will eventually be included in the end-of-project Dissemination Toolkit. CI:Now also updated the online OMH Grant Progress Dashboard to include all evaluation metrics due to be measured as of Y2Q2.

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.**

1) Presentations: 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.

Citation	Level	Status	Delivered	Attendees
Parra, Jeanette Z. (2023, February 23). *Bexar Data Dive Platform*. National Neighborhood Indicators Partnership, February Idea Showcase.	National	Delivered	2/23/23	+19 subsequent video views

Bexar Data Dive trainings and demos to local users will be discussed elsewhere in this report and not included here.

2) Publications: 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 Y2Q2.

3) Products*: 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.

Type	Title	Target Audience	Purpose
Press Release	New bilingual data portal sheds light on health and social inequities across Bexar County / Nuevo portal de datos bilingüe ilumina las desigualdades sociales y de salud en todo el condado de Bexar (web version here)	Local media (~40 contacts)	Outreach, dissemination
Newsletter (January)	Coming Soon: Data Dive en Español	General, community residents	Outreach
Newsletter (special, January)	Just Launched! Bexar Data Dive en Español	General, community residents	Outreach
Newsletter (February)	Want a Bexar Data Dive Training?	General, community residents	Outreach, recruit trainees
Newsletter (February)	ICYMI: Bexar Data Dive en Español	General, community residents	Outreach
Newsletter (March)	Want a Bexar Data Dive Training?	General, community residents	Outreach, recruit trainees
Web content	Just Launched! Bexar Data Dive en Español	General, community residents	Outreach
Web content	OMH Grant Progress Dashboard (performance metrics updated)	Partners & general	Transparently communicate project progress and status
Web content	Working with race and ethnicity data in Bexar County, Texas	General, community residents	Raise awareness of and solicit input on local changes in race/ethnicity that affect Data Dive
LinkedIn, Facebook,	Our work to develop Statistical Small Areas (SSAs) was accepted as	General, community residents	Dissemination

Type	Title	Target Audience	Purpose
Twitter, & Instagram	an oral presentation to the @PopAssocAmerica conference in April		
LinkedIn, Facebook, Twitter, & Instagram	Did you know data is available by COSA Council District?	General, community residents	Outreach
LinkedIn, Facebook, Twitter, & Instagram	Bexar Data Dive is live in Spanish	General, community residents	Outreach
LinkedIn, Facebook, Twitter, & Instagram	Is Data Dive useful?	General, community residents	Push site mini-survey for evaluation
LinkedIn, Facebook, Twitter, & Instagram	Bexar Data Dive training available in English or Spanish	General, community residents	Outreach, recruit trainees
Training materials	Bexar Data Dive training worksheets (example attached as appendix to this report)	Bexar Data Dive trainees	Support trainees' learning how to find specific information in Bexar Data Dive

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

- The Spanish-language version of Bexar Data Dive launched early in Y2Q2. The response has been positive, and by the end of Y2Q2 the Spanish-language site had had 40 users (Y2 target: 87) over 118 visits.

- In Y2Q2 the English-language version of Data Dive had 314 users (Y2 target: 750) over 3,381 visits.

- Although not a formal measure in the evaluation plan, responses post-surveys administered at the end of Bexar Data Dive trainings are promising. The table on the following page summarizes feedback received via post-training survey from 11 training participants. (The survey was not deployed until March 2023.) Eighty-two percent of

respondents said Data Dive was very easy (82%) or somewhat easy (18%) to use. Although two respondents didn't answer the question, 100% of those who did said they'd definitely or probably use Data Dive.

	Data skill self-rating				
	Very Good	Good	Fair	Poor	Total
Number of training participants	1	6	3	1	11
How likely are you to use Bexar Data Dive?					
Definitely would	100%	67%	67%	-	64%
Probably would	-	17%	-	100%	18%
Probably wouldn't	-	-	-	-	-
Definitely wouldn't	-	-	-	-	-
No response	-	17%	33%	-	18%
Please rate how easy it was to navigate Bexar Data Dive.					
Very easy	100%	83%	100%	-	82%
Somewhat easy	-	17%	-	100%	18%
Somewhat difficult	-	-	-	-	-
Very difficult	-	-	-	-	-
No response	-	-	-	-	-

- By the end of Y2Q2 CI:Now had loaded 67% of its initial list of indicators (Y2 target: 100%).

- A one-question survey to assess platform usefulness was added to Data Dive in mid-March 2023. Although only nine responses have been received so far, all in English, six of those (67%) rated the tool as "very useful" and three of those (33%) as "somewhat useful". The evaluation measure is rating as "very useful or somewhat useful", with a target of 50% by the end of Y2, so CI:Now is far exceeding that target. CI:Now has expanded its OMH Grant Progress Dashboard to include that evaluation metric.

- A Houston-based food security researcher at UTHealth Houston School of Public Health has received a contract to analyze food security data for Bexar County and to create a dashboard to visualize that data. Instead of re-creating a dashboard, his budget will support the cost of adding the data he compiles to Bexar Data Dive, either late in Y2 or early in Y3.

Lessons learned

- CI:Now's data loading work has been slowed because the data already loaded prior to Y2Q2 has had to be re-processed and re-loaded to support a new Data Dive feature, which will enable the user to run data for a custom geographic area by choosing a group of census tracts, SSAs, or ZIP codes. For Data Dive to be able to generate data for that custom area as a whole, the dataset underlying the platform must include not just a

percentages or rate (e.g., 25%) but also every numerator and denominator (e.g., 300 and 1,200) used to calculate the percentage or rate.

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 January 2023 and a one-on-one with project officer Dr. Browne in February, as well as a NORC webinar on sustainability. Staff also attended the UCLA CHPR launch of the new NHPI Data Policy Lab dashboard in March. CI:Now received the NORC assessment via Dr. Browne in March, and although no concerns were noted by NORC, staff are discussing what TA might be most valuable. As of this writing in April 2023, CI:Now has no technical assistance (TA) needs, but will request TA if needed as work begins on the NCCA due in July. 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.

    CI:Now developed a Sustainability Plan by the end of Year 1. One change was made in Y2Q2 to add strategy 2.d., to ensure that any appropriate data collected through another project – and thus covered by another revenue source – is flagged for inclusion in Data Dive. The table below summarizes the current status of each strategy. If not described in that Current Status column, activity related to that strategy is detailed elsewhere in this report. In addition, in January CI:Now executed a five-year (2023-2027) contract with UTHealth Houston for continuity of core staffing at the School of Public Health in San Antonio.

Primary Sustainability Strategies for Activities to Sustain (Table 3 in Sustainability Plan)

Activities to sustain	Primary sustainability strategies	Current status (Y2Q2)
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	In progress Pending
2. Data content (Sub-obj. 1.3) • Revise code if data formats etc. change	a. Free up existing staff resources (data processing, project management) by retiring the	No further updates scheduled; working to add to Data Dive any Viz-a-lyzer functionality

Activities to sustain	Primary sustainability strategies	Current status (Y2Q2)
• 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	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 d. Add to Bexar Data Dive any appropriate data collected through another project (e.g., community health assessment)	(e.g. linked chart and map) not already in Data Dive In progress In progress
3. Outreach & commun-ication (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	In progress In progress Pending
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	In progress Pending
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	Complete for measures that apply so far

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 Y1Q3, and 67% (70 of 104) were loaded to platform by the end of Y2Q2.	In Y2Q2, CI:Now began developing a new Data Dive feature to allow the user to create and query data for custom geographies. That new functionality requires that numerators and denominators be loaded for every indicator, which wasn't necessary before. Those additions have slowed the loading of new indicators.

How will these challenges be resolved? Please provide a brief explanation in narrative form.

CI:Now has revised both the Data Dive database structure and the statistical code used to process data to include all fields needed to aggregate to the custom geography. CI:Now is on track to meet the target.

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	CI:Now built out and populated the HubSpot contact management database, which now contains 152 organizations and 105 individual contacts. CI:Now is on track to meet this target.	None

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	CI:Now's three video tutorials have a combined total of 61 views to date, already exceeding target.	None
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	- CI:Now has so far conducted five demos/trainings to a combined total of 125 people.	
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, the third of which was held March 15, 2023.	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 monthly and quarterly reports approved to date, as well as progress on evaluation metrics due to be measured. CI:Now and its web developer have documented the open source tools used in development of the platform, but that	None

information is not yet public. A GitHub repository has been created; this repository is where platform code will be available to any community for download/use. One Data Dive presentation has been made to the National Neighborhood Indicators Partnership, which included people from across the U.S.
How will these challenges be resolved? Please provide a brief explanation in narrative form.
N/A

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.	In progress	Yes	Per Google Analytics, 659 users as of the end of Y2Q2. This number does not match those in the DIS table because it unduplicates people who used Data Dive in both Q1 and Q2.
Please provide a brief narrative that demonstrates the status of the project as it relates to this program outcome.			
The English-language platform soft-launched 9/29/22 and the Spanish-language version launched 1/25/23. The current total is 88% of Y2 target.			
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%	In progress	Yes	Per website analytics, the Spanish-language site totaled 118 views in Y2Q2, which is 3.4% of 3,499 total (combined English- and Spanish-language) Y2Q2 views.
Please provide a brief narrative that demonstrates the status of the project as it relates to this program outcome.			
The Spanish-language platform only launched on 1/25, so it has not yet attracted the degree of traffic that the English-language site has. Spanish-language outreach efforts are expected to increase the percentage of total views that are of the Spanish-language version.			

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" Target: 50% by 1 year after launch; 75% by 2 yrs.	In progress	Yes	A four-item Likert scale survey that pops up on Data Dive after 60 seconds was deployed in Y2Q2. So far 100% of respondents rate it "somewhat useful" or "very useful"
Please provide a brief narrative that demonstrates the status of the project as it relates to this program outcome.			
Current performance exceeds target. The survey will continue to appear on the site.			
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.	Anticipated	No	-
Please provide a brief narrative that demonstrates the status of the project as it relates to this program outcome.			
Work on this measure begins in Y2Q3.			
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	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.			
Work on this measure begins in Y2Q3.			

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.

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. CI:Now is making reimbursement 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 Y2Q2 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 or recruitment activity in Y2Q2.

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.

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. As of Y2 Q2, the major ways CI:Now has expanded access for racial and ethnic minorities or socio-economically disadvantaged individuals are:

- Launch of the English-language beta version of Bexar Data Dive, which as of the end of Y2Q2 included multiple years of data for 68 indicators disaggregated (as allowed by source data) by race/ethnicity, sex, age group, and geography. Supported geographies include county, San Antonio City Council District, ZIP Code Tabulation Area (ZCTA), Statistical Small Area (SSA), and Census Tract. The data is visualized through a map, comparison bar chart, and trend line chart.

- Launch of the Spanish-language beta version of Bexar Data Dive in Y2Q2, including all the same data and functionality as the English-language version.

- It was intended that the platform be very easy to use to ensure that data could be accessed by people with lower technical skill or data literacy level. Training and other supports are also needed and are in development, but all the data in Bexar Data Dive can be accessed for any geography (e.g., Bexar County, City Council District 2) with *just two clicks*: one on "My Community" and one on the geography of interest.

- In Y2Q2, subsequent to the launch of the Spanish-language version of the site, a press release in English and Spanish was sent to local English- and Spanish-language print, tv, and online media.

TRAINING/ENGAGEMENT RECORD [EXAMPLE]

Save as: (a) date of event (YYYY-MM-DD), (b) name of the event, and (c) quick description of the training. For example: "*2023-01-27 HCAB Meeting BDD Demo*"

Date:	01-27-2023
Presenter:	Jeanette Parra (Training Specialist II)
Subject:	Bexar Data Dive Demo
Event name:	UTHSCSA IIMS Community Health Advisory Board (CHAB) Quarterly Meeting
Host:	UTHSCSA IIMS (Institute for Integration of Medicine and Science)
Location (with address):	Family Service Neighborhood Place 3014 Rivas Street San Antonio, Texas 78228
# Attendees:	Total 44 (including 19 in-person and 25 virtual)
Conference/meeting level:	Community/Local *Options = International, National, State, Regional or Community/Local*
Purpose/objective:	This group is the Community Health Advisory Board (CHAB) of the UT Health (UTHSCSA) Institute for the Integration of Medicine and Science, which is in turn part of their Clinical and Translational Science Award. We were invited to present the Bexar Data Dive platform to all attendees (which included members from many organizations in San Antonio, community leaders and students). Objective was to introduce everyone to the platform and to encourage them to use it/share it.
Notes:	• Audience included range of data backgrounds • Presenter and CI:Now were invited for two different training opportunities (with Methodist Health Ministries and to kick-off a high-school, summer Public Health Camp at The Neighborhood Place) • Suggestion from audience: Adding school districts as a community type • Some attendees let presenter know that they followed us on social media right away!

TRAINING WORKSHEET EXAMPLE

ZIPCODE: **78211**

DEMOGRAPHIC

Age group (overall only)		Under 5	5-17	18-34	35-64	65+
	BEXAR	7%	18.5%	26.3%	36.1%	12.1%
	78211	%	%	%	%	%

		All	American Indian or AK Native	Asian	Black or African American	Hispanic or Latino	NHPI	Other Race	Two or More Races	White (Not Hispanic or Latino)
Limited English proficiency	BEXAR	11.5%	15%	30.2%	1.7%	16.6%	3.4%	19.8%	12.7%	1.8%
	78211	%	%	%	%	%	%	%	%	%
Race/ethnicity	BEXAR	NA	0.1%	2.9%	7%	60.5%	0.1%	0.2%	2%	27.1%
	78211	NA	%	%	%	%	%	%	%	%

Sex		Male	Female
	BEXAR	50.6%	49.4%
	78211	%	%

Speak Spanish at home		All
	BEXAR	34.8%
	78211	%

ECONOMIC

		All	Black or African American	Hispanic or Latino	White (Not Hispanic/Latino)
ALICE and below poverty households	BEXAR	57.8%	59.5%	59.3%	39.6%
	78211	%	%	%	%

Metric	Geography	All	American Indian or AK Native	Asian	Black or African American	Hispanic or Latino	NHPI	Other Race	Two or More Races	White (Not Hispanic or Latino)
Computer and broadband subscription	BEXAR	87.1%	83.1%	91.6%	85.7%	84.6%	94.6%	79.6%	90.5%	92.1%
	78211	%	%	%	%	%	%	%	%	%
Employed	BEXAR	94.3%	90.0%	95.7%	93.4%	94.0%	95.6%	95.0%	92.3%	94.9%
	78211	%	%	%	%	%	%	%	%	%
Unemployed	BEXAR	5.7%	10.0%	4.3%	6.6%	6.0%	4.4%	5.0%	7.7%	5.1%
	78211	%	%	%	%	%	%	%	%	%
Not in labor force	BEXAR	34.9%	39.8%	32.9%	34.0%	34.1%	23.9%	36.0%	34.3%	36.7%
	78211	%	%	%	%	%	%	%	%	%
Home ownership	BEXAR	58.5%	54.5%	52.5%	40.0%	57.4%	36.5%	54.9%	57.1%	65.6%
	78211	%	%	%	%	%	%	%	%	%
Family income (median)	BEXAR	$70,280	$49,863	$86,124	$62,481	$58,399	$73,750	$53,274	$67,361	$95,903
	78211	$	$	$	$	$	$	$	$	$
Household income (median)	BEXAR	$58,288	$48,697	$75,371	$47,415	$50,930	$53,971	$47,818	$56,074	$74,005
	78211	$	$	$	$	$	$	$	$	$

		All	American Indian or AK Native	Asian	Black or African American	Hispanic or Latino	NHPI	Other Race	Two or More Races	White (Not Hispanic or Latino)
Income below poverty	BEXAR	15.6%	24.1%	17.0%	19.1%	18.2%	16.7%	17.8%	14.0%	9.0%
	78211	%	%	%	%	%	%	%	%	%
Uninsured	BEXAR	15.9%	22.9%	13.6%	13.3%	19.2%	16.5%	23.3%	17.5%	9.6%
	78211	%	%	%	%	%	%	%	%	%

		All
Youth not in school or working	BEXAR	8.4%
	78211	%
Housing cost burden	BEXAR	32.2%
	78211	%

EDUCATION		All	American Indian or AK Native	Asian	Black or African American	Hispanic or Latino	NHPI	Other Race	Two or More Races	White (Not Hispanic or Latino)
Less than HS diploma/GED	BEXAR	15.6%	22.8%	13.3%	8.1%	23.0%	3.3%	29.1%	17.6%	4.5%
	78211	%	%	%	%	%	%	%	%	%
Bachelor's degree or higher	BEXAR	28.5%	20.0%	52.6%	27.7%	18.3%	34.8%	14.2%	25.2%	43.9%
	78211	%	%	%	%	%	%	%	%	%

HEALTH

Death rate (per 100K)		All	Black or African American	Hispanic or Latino	White (Not Hispanic/Latino)
	BEXAR	953.2	1,028.8	810.4	1,370.4
	78211				

Disability status		All	American Indian or AK Native	Asian	Black or African American	Hispanic or Latino	NHPI	Other Race	Two or More Races	White (Not Hispanic or Latino)
	BEXAR	14.5%	23.9%	6.5%	14.7%	14.1%	7.8%	16.8%	13.5%	16.0%
	78211	%	%	%	%	%	%	%	%	%

		All
Sleeping less than 7 hrs among adults	BEXAR	36.4%
	78211	%
Obesity among adults	BEXAR	43.4%
	78211	%
Current smoking among adults	BEXAR	11.4%
	78211	%
Diabetes among adults	BEXAR	10.8%
	78211	%

		All
Visits to doctor for routine check-up within the past year among adults	BEXAR	66.9%
	78211	%
Diabetes hospitalization rate (3yr avg, per 10K)	BEXAR	26.2
	78211	
Older adults 65+ who are up to data on a core set of clinical preventive services	BEXAR	NA
	78211	%
Life expectancy	BEXAR	79.1 years
	78211	years

HOUSING		All	
Multifamily housing units	BEXAR	30.0%	
	78211		%
Renter housing stability (moved in the past year)	BEXAR	27.8%	
	78211		%

Other available indicators/still relevant:

- **DEMOGRAPHIC**: Veteran Population
- **EDUCATION**: Enrolled in preschool
- **HEALTH**: Asthma hospitalization rate, Coronary heart disease among adults, Mental health hospitalization rate, Mental health not food for >=14 days among adults, Stroke among adults
- **CRIMINAL JUSTICE**: Child abuse prevalence, Family violence
- **HOUSING**: Renter occupied housing cost burden, Owner occupied housing cost burden

Questions to think about as you analyze the data:

- What was most surprising to you?
- Was there anything that wasn't surprising or that you already expected?
- How does the zip code data compare to the county (Bexar) data? Are there any significant differences?

NOTES

Hey there! The CI: Now team would appreciate your feedback on today's training. **All questions are optional**.

First and Last Name:	Occupation/title:
Email:	Organization:

1. How would you describe your data skill level?
   ☐ Very good   ☐ Good   ☐ Fair   ☐ Poor

2. How likely are you to use Bexar Data Dive?
   ☐ Definitely would   ☐ Probably would   ☐ Probably wouldn't   ☐ Definitely wouldn't

3. What would you use Bexar Data Dive for?
   ☐ Grant writing   ☐ Advocacy
   ☐ Reports   ☐ Browsing
   ☐ Evaluation   ☐ Research
   ☐ Other _____
   _____

4. Please rate how easy it was to navigate Bexar Data Dive:
   ☐ Very easy   ☐ Somewhat easy   ☐ Somewhat difficult   ☐ Very difficult

5. Please rank how helpful the training was in helping you learn more about Bexar Data Dive and community data
   ☐ Extremely helpful   ☐ Very helpful   ☐ Somewhat helpful   ☐ Not helpful

6. Are you interested in future trainings?
   If so, what topics are you interested in?
   ☐ Yes   ☐ No

   ☐ Data literacy   ☐ Story telling with data
   ☐ Data visualization   ☐ Grant writing
   ☐ Other _____
   _____