

Evolution of a COEE Outreach Management System

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Background

- Tracking outreach activity is important beyond CCSG requirements, it is also a measure of accountability, helps optimize resources, and can serve as a way to identify and celebrate successes.
- Since 2016, Moffitt outreach tested multiple data systems to capture outreach activity and improve upon existing, fragmented tracking that did not capture the lifecycle of an event and required duplicate data entry.
- We describe the evolution of our outreach management system (OMS), illustrating how each contributed to refining our process, ultimately leading to select REDCap (Research Electronic Data Capture) as the foundation for our new OMS.

Figure 1. Elements of Outreach Management System (OMS)



Lessons Learned

- 1) Creating an OMS requires outreach team input and buy in; it will likely change their process for conducting events.
- 2) Developing a user manual is essential.
- 3) The format for communicating data via dashboards can influence the system selected and the data collection approach.
- 4) It is key to select an OMS that can be adapted or expanded as new use cases and needs emerge.

Infographic Key

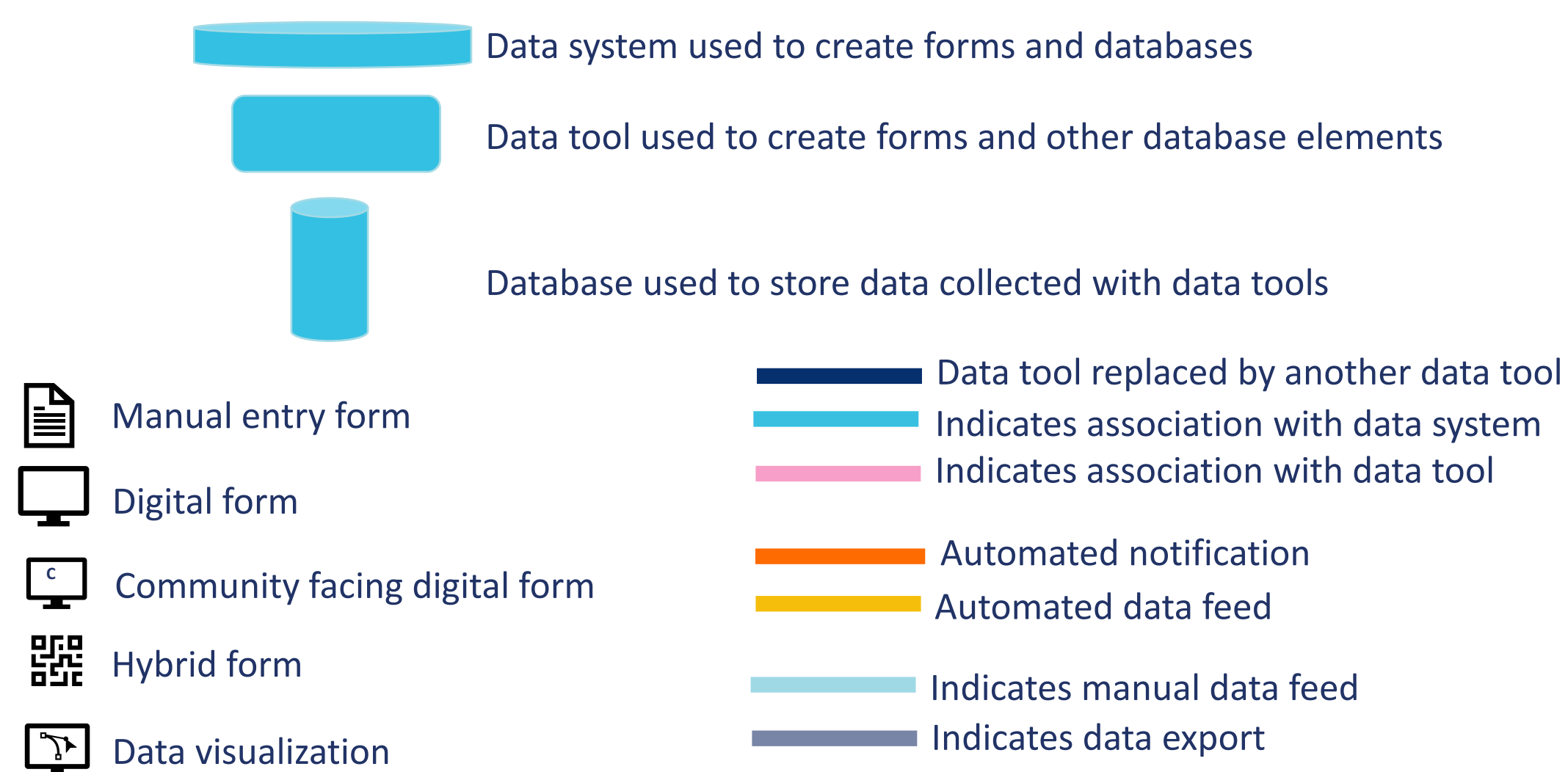
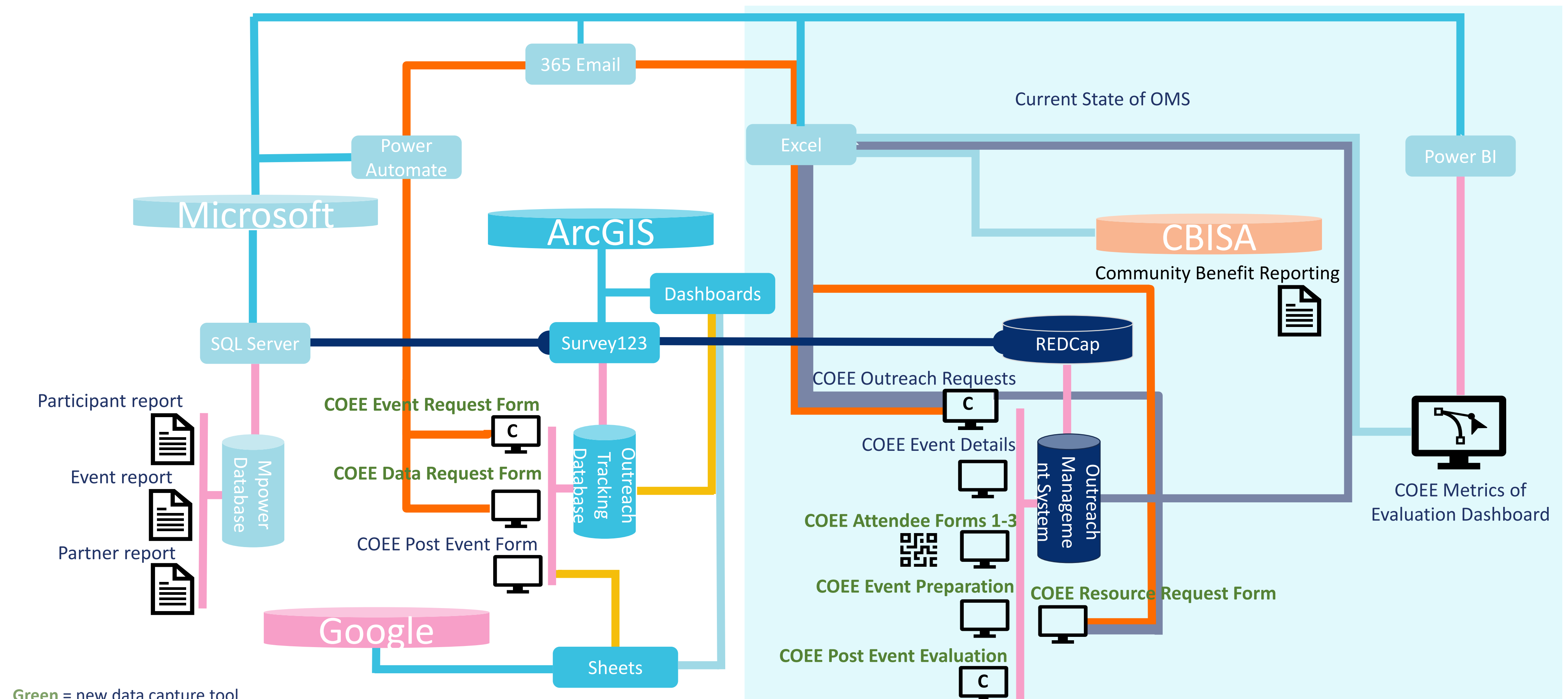


Figure 2. Evolution of Moffitt's COEE Outreach Management System



Green = new data capture tool

- | ...2016 | 2020 | 2022 | 2024... |
|---|--|--|---|
| <ul style="list-style-type: none"> 2016: Moffitt Outreach established (M-POWER) Data management: Built using SQL Server Creators: IT personnel COEE Ownership: No clear ownership by M-POWER Benefits: <ul style="list-style-type: none"> ✓ First outreach initiative for tracking outreach activity at Moffitt Cancer Center Challenges: <ul style="list-style-type: none"> × Not user-friendly for data analysis × Data entry was manual, lengthy, and backlogged (2+ years) × Triplicate data entry, with 3 separate tools capturing the same data | <ul style="list-style-type: none"> 2020: Merged M-POWER Outreach with COEE Data management: Started to test Survey123 for dashboard and data requests; Still used SQL Server for final event and partner info Creators: COEE, completely new system and questions COEE Ownership: Managed by COEE, but Outreach team had limited access to Survey123 (needed extra licenses/training) Benefits: <ul style="list-style-type: none"> ✓ Captured new outreach request and partner metrics ✓ Created a live feed dashboard with Survey123 data in ArcGIS Challenges: <ul style="list-style-type: none"> × SQL Server still used for event and partner info × Outreach lacked access to Survey123 without extra resources × Data captured but not streamlined; manual updates in Google Sheets | <ul style="list-style-type: none"> 2021-2023: Aimed to replace SQL Server and move to a single system Data management: Chose REDCap for OMS to capture lifecycle of event Creators: COEE building off 2020 systems COEE Ownership: Outreach team involved in training, refinement, and SOP development Benefits: <ul style="list-style-type: none"> ✓ Transitioned to a single system (REDCap) for managing outreach requests, events, partner info, and evaluations ✓ Integrated automated email systems for efficiency ✓ Developed SOP for sustainability Challenges: <ul style="list-style-type: none"> × Data visualization and analysis not considered during development × Refinement and training process required significant time and effort | <ul style="list-style-type: none"> 2024-...: Launch of the full OMS system Data management: REDCap, PowerBI Creators: COEE building off 2022 systems COEE Ownership: Outreach team fully trained, established SOP Benefits: <ul style="list-style-type: none"> ✓ High sense of ownership for outreach team ✓ Captures entire lifecycle of outreach event ✓ Adaptable Challenges/Lessons: <ul style="list-style-type: none"> × No live feed from survey to dashboard, requires data cleaning × Complex surveys = complex data cleaning (using RedCap) |