Role of a Knowledge Management Portal in Supporting Program Success

April G. Roeseler, California Department of Health Services
Rebecca Augustyniak, Florida State University
Brian Arsenault, Florida State University
Introduction

- How a knowledge management portal facilitates program success
- Importance of easy access to reliable information and program success
At the conclusion of this presentation you will have a comprehensive understanding of the interrelationship between integrated information management and program success

Presenter expertise
Outline

- Portal Overview
- Knowledge Management Systems
- Business Management Systems
- Information-Communication Systems
- California Online Tobacco Information System (OTIS)
- Harnessing Distributed Knowledge
- California Tobacco Control Collaborative Portal
The Three Little Pigs...
The first little pig built his house out of straw because it was the easiest thing to do.
The second little pig built his house out of sticks. This was a little bit stronger than a straw house.
The third little pig...  

- The third little pig built his house out of bricks
Portal Overview

- What is a portal?
- Advantages
What is a portal?

- A portal is a Web site that provides a uniform interface with the ability to use a secure username/password to access customizable content based on specific end-user interests and needs.

- Examples:
  - MyYahoo!
  - Amazon
  - MyCalifornia
  - Banking
What is a Knowledge Management Portal?

- A knowledge management portal integrates information, collaboration, processes, and expertise.
Major Advantages

- Improves coordination, collaboration, and accountability.
- Improves the ability to analyze program effectiveness.
- Promotes standardized data-collection methodology.
- Facilitates timely feedback and approval.
- Generates useable reports of individual and aggregate data.
- Combines multiple forms into one online system.
- Streamlines and tracks plan/reporting approval process.
- Identifies contractor training needs.
Types of Information Systems

- Knowledge Management System
- Business Management System
- Information-Communication System
Integrated Systems
What is Knowledge Management (KM)?

- The explicit and systematic management of vital knowledge and its associated processes of creating, gathering, organizing, diffusion, use and exploitation in pursuit of organizational objectives.
- The conscious strategy of getting the right knowledge to the right people at the right time and helping people share and put information into action in ways that strive to improve organizational performance.
Why is KM Important?

- The portal is the interface that interacts with the KMS to collect and distribute data based on the specifications of the end-user.
- If a portal is to be successful, it must have as its foundation a comprehensive knowledge management system (KMS).
Business Management Systems

- Incorporates and integrates all the components needed by an organization to complete critical tasks and meet and accomplish its business objectives.
Information-Communication Systems

- Standardizes the collection and tracking of information and provides a communication mechanism for the sharing of information and collaboration in real time.
Information-Communication Systems

- Connects stakeholders with each other and critical information.
- Provides integrated tools to facilitate planning, collaboration, and the systematic communication of information
  - Announcements
  - Directories
  - Calendars
  - Program Assistance
California Online Tobacco Information System (OTIS) Portal

- Description
- History
- Technical Overview
- System Roles
- Information-Communication Systems
- Business Management Systems
- Advantages
- How Distributed Knowledge is Harnessed
California Online Tobacco Information System (OTIS)

- OTIS is a knowledge management portal that integrates its business management systems with information-communication systems to provide real-time user-centered data.
History

- Prior to 2001, hundreds of tobacco control plans and contracts were managed via a paper system.
- Disadvantages
  - No real-time aggregate data to support decision-making and program improvement.
  - Unable to easily identify programmatic gaps.
  - No way to control the quality of data.
  - Inefficiency due to redundancy.
Web-based Online System

- OTIS v1 2001
  - Grants management
- OTIS v2 Portal 2003
  - Business Management, i.e.
    - Grants management
    - Contract management
  - Information-Communication, i.e.
    - Project Directory
    - Evaluator Directory
Why transition to a portal?

- Single point of entry through a common interface with information, resources, and business processes based on the end-user’s needs and specifications
- Delivery of customized data
- Elimination of redundancy in data creation and publishing
Welcome to My OTIS, Grantee Person 2!

Announcements

General

Plan Revision
The Plan Revision component for OTIS is now open. Please contact your OMPC by telephone to discuss the changes prior to submitting the request through OTIS. After you submit the request, TCS must approve the request. Please remember that TCS staff priorities will be completing close-outs and negotiating new contracts beginning July 1, 2005. If you have an urgent need—please negotiate with your PCOM about your approval timeline.

Posted by: April Rosessler 04-12-2005 (01:57 PM)

New OTIS Technical Support Contact
Greetings OTIS Users! If you need any technical assistance with OTIS, please contact me, Augustine Chavez, at achavez@dhs.ca.gov or at (516) 448-5514.

Posted by: Augustine Chavez 03-01-2005 (01:28 PM)

Progress Report Documents Sent to TCS
As in previous years, please continue to submit TWO sets of tracking measures to TCS as part of your Progress Report. Attach the Document Repository Report to each packet of the items sent. One set stays with your permanent contract file. Frequently, pieces of the second set are placed in the TCS resource library.

Posted by: April Rosessler 02-25-2005 (11:07 AM)

Pre-Recorded Trainings On OTIS V2
Pre-recorded trainings on OTIS V2 are available by going to the site below and clicking on "View Public Record/PlayBack Meetings."

Link: http://webmeeting.citox.tsu.edu/

Posted by: Michael Macintosh 03-16-2004 (11:53 AM)

Calendar of Events

April 2005

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<thead>
<tr>
<th>S</th>
<th>M</th>
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</tbody>
</table>

View | Add Event

*Apr 20 - 21, 2005
2005 Project Directors' Meeting
State*

*May 4 - 6, 2005
2005 National Tobacco Control Conference
National*

*May 9, 2005
RFA 05-102 Bidders' Conference
State*

*May 9, 2005
Cojus County Tobacco Education Coalition Meeting
County*

*May 10 - 11, 2005
Diversity and Culture: Understanding and Planning the Young Adult Movement Conference
State*

*May 12, 2005
RFA 05-102 Bidders' Conference
State*

Tasks

Add Task | View All

Personal

TEST 02/25/2004

Agency-wide

TEST 02/25/2004
OTIS Portal Technical Overview

- 21 systems
- 244 database tables
- 200 forms
- 392 end-users
- 12 system roles
- 60 reports
System Roles

- Applicant
- Subcontractor
- Program Consultant (PC)
- Contract Manager (CM)
- TA Consultant (TAC)
- Supervisor
- Tobacco Control Section (TCS)
- System Administrator (SysAdmin)
- Procurement Manager (PM)
- Peer Reviewer (PR)
- Evaluator
- Contract Management Unit (CMU)
OTIS Information-Communication Systems

- Calendar
- Task Management
- Contact Directory
- Project Directory
- Evaluator Registry/Directory
- Program Assistance
- Materials Development and TECC Intake
- Announcements
- Communication
OTIS Business Management Systems

- Plan/Application Submission
- Review and Scoring
- Plan/Application Approval
- Plan Revisions
- Augmentations (renewal)
- Progress Report Submission
- Progress Report Approval
- Cost/Invoice Report Submission
- Cost/Invoice Report Approval
- Procurement Management
- TCS System Administration
- Contract Management
Advantages

- Improves coordination, collaboration, and accountability
- Improves the ability to analyze program effectiveness
- Promotes standardized data-collection methodology
- Facilitates timely feedback and approval
- Identifies contractor training needs
- Provides more efficient contract management
Harnessing Distributed Knowledge

- Systems that support shared knowledge:
  - Program Assistance
  - Calendar
  - Task Management
  - Contact Directory
  - Project Directory
  - Contract Management
  - Evaluator Directory
  - Materials Developed
Program Assistance

- FAQs
- Documentation
- Technical Assistance
- Contacts

- Facilitates access and connection to individuals based on expertise
- Assists TCS in identifying training needs
Help System

Frequently Asked Questions
The following groups of Frequently Asked Questions have been gathered in order to provide a quick help resource addressing commonly occurring issues:

- **BUDGET**
  - Budget FAQ

- **EVALUATION**
  - Evaluation FAQ

- **NAVIGATION**
  - Navigation FAQ

- **PROGRAM**
  - Program FAQ

Help Documentation

- LLA Allocation Table
- OTIS Manual - A. General
- OTIS Manual - D. Evaluator Information
- OTIS Manual - G. Additional Documents
- OTIS Manual - CXPP Planning Objective
- OTIS Manual - Table of Contents
- OTIS Manual - B. Contact Info
- OTIS Manual - E. Scope of Work
- OTIS Manual - H. Plan Submission
- OTIS Manual - I. Project Abstract
- OTIS Manual - Introduction
- OTIS Manual - C. Background Info
- OTIS Manual - F. Budget Information

Request Technical Assistance

If you are unable to locate an answer to your question, please contact one of the following links or the contacts listing below:

**PROCUREMENT SPECIFIC**

- Program Assistance
- Budget-related Assistance
- Reporting Assistance
- Evaluation Assistance
- Other

Contacts

- View Technical Assistance Contact Listing
Calendar

- Supports access to event information
  - national
  - state
  - regional
  - local
  (personal and shared)

- What’s happening when and where around the state
- Identifying events of interest for replication
**Announcements**

**General**

**Plan Revisions**
The Plan Revision component for OTIS is now open. Please contact your CMPC by telephone to discuss the changes prior to submitting the request through OTIS. After you submit the request, TCS must approve the request. Please remember that TCS staff priorities will be completing close-outs and negotiating new contracts beginning July 1, 2005. If you have an urgent need—you need to negotiate with your PCOM about their approval timeline.

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*Posted By* Augustine Chavez 03-01-2005 (04:09 PM)

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**Calendar of Events**

<table>
<thead>
<tr>
<th>April 2005</th>
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<td>24</td>
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</table>

View | Add Event

- **Apr 18, 2005**
  - **2005 I&E Trainings**
    - State

- **Apr 19, 2005**
  - **2005 I&E Visits**
    - State

- **Apr 20 - 21, 2005**
  - **2005 Project Directors' Meeting**
    - State

- **May 4 - 6, 2005**
  - **2005 National Tobacco Control Conference**
    - National

---

**Calendar**

**View Event**

**Return to My OTIS**

**EVENT INFORMATION**

**Event Name:** 2005 Project Directors' Meeting

**Geographic Scope:** State

**TCS Sponsored Event:** Yes

**Start & End Date:** April 20 - 21, 2005

**Audience:** TCS Contractors

**City, State:** Sacramento, California

**CONTACT INFORMATION**

**Project Name:** Tobacco Control Section

**Name:** Kelli Bliss / Nancy Guenther

**Telephone:** 449-5481 / 449-5496
Task Management

- Personal and shared task assignment
- Status indicator
- Agency specific tasks that are personal and shared
Tasks

View Task

Edit Task | Delete Task | Return to Tasks Index
Status: Not Started
Assigned to: Person 2, Grantee
Assigned by: Grantee Person 2
Level: Personal
Task Name: TEST
Due Date: 02/26/2004
Comments: TEST

Tasks Index

Add Task

<table>
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<tr>
<th>TASK</th>
<th>DUE DATE</th>
<th>ASSIGNEE</th>
<th>ASSIGNED BY</th>
<th>LEVEL</th>
<th>STATUS</th>
<th>ACTION(S)</th>
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<td>TEST</td>
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<td>Grantee Person 2</td>
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<td>View</td>
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</table>
Contact Directory

- Master directory of agency contacts integrated with all other systems throughout the portal

- Access to contacts within an agency
  - Project directors
  - Fiscal directors
  - Agency signatory
  - Coalition members
## Contact Directory

### Test Agency Number 1

<table>
<thead>
<tr>
<th>CONTACT</th>
<th>PHONE</th>
<th>EMAIL</th>
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<tr>
<td>Doh, John</td>
<td>999-000-9876</td>
<td><a href="mailto:barsenault@cites.fsu.edu">barsenault@cites.fsu.edu</a></td>
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<td>MacIntosh, Michael</td>
<td>555-1212</td>
<td><a href="mailto:michaelmacintosh@earthlink.net">michaelmacintosh@earthlink.net</a></td>
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<td>Monroe, Blair A</td>
<td>000-000-0000</td>
<td><a href="mailto:bmonroe@cites.fsu.edu">bmonroe@cites.fsu.edu</a></td>
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</tr>
<tr>
<td>Officer, Fiscal</td>
<td>000-0000 x. 0000</td>
<td><a href="mailto:bmenroes@mailer.fsu.edu">bmenroes@mailer.fsu.edu</a></td>
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<td>Inactive</td>
<td></td>
</tr>
</tbody>
</table>

---

### View Contact

**Agency:** Test Agency Number 1

**Agency:** Test Agency Number 1

**Edit Record | Contact Directory**

- **Status:** Active
- **Salutation:**
- **Last Name:** Doh
- **First Name:** John
- **Middle Initial:**
- **Associated User Account:** None

**Mailing Address:** 1234 Elsewhere Rd.
Beyond, CA 12345-6789

- **Phone:** 999-000-9876
- **Cell:**
- **Fax:** 777-999-9999
- **Email:** barsenault@cites.fsu.edu

**Used As:** PROCUREMENT CONTACT TYPE

- TEST LLA 04-07 Health Officer
- Project Director
  - Primary Tobacco Contact
## Plan Index

<table>
<thead>
<tr>
<th>ITEM</th>
<th>STATUS</th>
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<tr>
<td>Contact Information</td>
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<td>Agency &amp; Contract Information</td>
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<td>View</td>
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<tr>
<td>Project Director</td>
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<td>View</td>
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<tr>
<td>Fiscal Contacts</td>
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<td>View</td>
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<td>Background Information</td>
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<td>Indicator Worksheet</td>
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<td>Asset Worksheet</td>
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<td>Evaluator Selection</td>
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<tr>
<td>Scope of Work</td>
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</table>
Project Directory

- Uniform search interface to identify relevant information
- All TCS funded projects

- Access to all facets of funded project information
  - Sample plans
  - Contacts
  - Materials developed
  - Projects
  - Objectives
  - Indicators
  - Intervention categories
  - Priority areas
Project Directory

View Sample Plans

8 results were returned from your query.

The California Department of Health Services, Tobacco Control Section (CDHS/TCS) identified the following project plans to illustrate several examples of a well-prepared Scope of Work. These plans contain well-written objectives and clear intervention and evaluation activities that can be used as samples when you begin the task of developing your project plan.

The Sample Plans also illustrate the level of detail and description needed to sufficiently provide a roadmap for project staff in achieving objectives and learning to assess, through evaluation information, how improvements have aided intervention.

The plans were selected to reflect different size communities and funding levels as well as a variety of local priorities.

<table>
<thead>
<tr>
<th>AGENCY</th>
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<td>Tobacco Reduction of Amador County</td>
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<tr>
<td>Marin County</td>
<td>Marin County Tobacco Education Program</td>
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<td>Monterey County</td>
<td>Tobacco Control Program</td>
<td>View</td>
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<td>Sacramento County</td>
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<td>Santa Cruz County</td>
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<td>Sonoma County</td>
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<td>Tuolumne County</td>
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<tr>
<td>Yolo County</td>
<td>Yolo County Tobacco Education Program</td>
<td>View</td>
</tr>
</tbody>
</table>
### Project Directory

#### Advanced Search

Fields in **RED** are required

1. **Select Category:**
   - Choose One

2. **Select Field Option:**
   - Agency Name
   - Project Name
   - Region
   - Local Health Jurisdiction
   - Project Director
   - Primary Contact
   - Fiscal Contact
   - Project Abstract
   - Objectives

Fields in **RED** are required

1. **Select Category:**
   - Region

2. **Select Field Option:**
   - Choose One

3. **AND Keyword:**
   - Bay Area Region
   - Central Coast Region
   - Central Valley Region
   - Gold Country Region
   - High Country Region
   - Los Angeles Region
   - North Coast Region
   - North Valley Region
   - Southern Coast Region
   - Statewide (All Regions)
Project Directory

View Results

Return to Form

Category: Agency and Contact Information
Field Options: Region - Central Valley Region
Keyword: Not provided
7 results were returned from your query.

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<tr>
<th>AGENCY</th>
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<td>Fresno County</td>
<td>Fresno</td>
<td>Daniel Kim, Jr</td>
<td>Daniel Kim, Jr</td>
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<tr>
<td>Kern County</td>
<td>Kern</td>
<td>Naeeli Nsangani, MPH</td>
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<tr>
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<td>Kings</td>
<td>Zoe Ann Taylor</td>
<td>Oriala Vallejo</td>
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<td>Madera County</td>
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<td>Mariposa County</td>
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<td>Tulare County</td>
<td>Tulare</td>
<td>Kathy Amos</td>
<td>Michelle Jacketta</td>
<td>View</td>
</tr>
</tbody>
</table>

Project Directory

View Agency and Contact Information
Advanced Search: Category: Agency and Contact Information, Field Options: Region - Central Coast Region, Keyword: Not provided

Return to Results

Agency: Monterey County Health Department
Project Name: Tobacco Control Program
Procurement: Local Lead Agency 04-07

CONTACT INFORMATION

Agency
Monterey County Health Department
1270 Natividad Road
Salinas, CA 93906
Phone: (831) 755-4526
Fax: (831) 755-4767
Web: http://www.co.monterey.ca.us/health

Project Director
Ms. Elsa Mendez
1200 Agua Road, Ste. 103
Monterey, California 93940
Email: mendez2@co.monterey.ca.us
Phone: (831) 755-7910
Fax: (831) 755-7942

Primary Tobacco Contact
Ms. Michelle House
1200 Agua Road, Ste. 103
Monterey, California 93940
Email: housesmi@co.monterey.ca.us
Phone: (831) 647-7760
Fax: (831) 647-7042

Day-to-Day Fiscal Contact
Ms. Carol Corpus
1270 Natividad Road
Salinas, California 93906
Email: corpusc@co.monterey.ca.us
Phone: (831) 755-1250
Fax: (831) 755-4865

Director of Health
Mr. Len Foster
1270 Natividad Road
Salinas, California 93906
Email: foster@co.monterey.ca.us
Phone: (831) 755-4525
Fax: (831) 755-4797

My OTIS | My Account | Help | Logout

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Sponsored and Developed by the Tobacco Control Section, California Department of Health Services
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Fields in **RED** are required

1. **Select Category:**  
   - Objectives

2. **Select Field Option:**  
   - Choose One —

3. **AND Keyword:**
   - Choose One —
   - Search All
   - Primary
   - Secondary
   - or Indicator Number

[Search]

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**Project Directory**

**View Results**

- **Return to Form** | **View by Agency**

**Category:** Objectives  
**Field Option:** Objectives - Primary  
**Keyword:** Not provided

183 results were returned from your query.

<table>
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<tr>
<th>PRIORITY AREA</th>
<th>INDIATOR</th>
<th>OBJECTIVE</th>
<th>ACTION(S)</th>
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<tbody>
<tr>
<td>(1) Counter Pro-Tobacco Influences</td>
<td>1.1.1</td>
<td>the mean number of tobacco advertisements inside and outside convenience and liquor stores in the unincorporated areas of Butte County will decrease to 10 per store.</td>
<td>View</td>
</tr>
<tr>
<td>(1) Counter Pro-Tobacco Influences</td>
<td>1.1.1</td>
<td>at least 60% of the 5 retail outlets selling tobacco products in Mariposa County and having tobacco advertisements targeting children will voluntarily remove all in-store advertising that is a) located near candy or b) three and a half feet or below the counter.</td>
<td>View</td>
</tr>
<tr>
<td>(1) Counter Pro-Tobacco Influences</td>
<td>1.1.1</td>
<td>There will be an increase of 25% (from baseline measurements) in the proportion of stores in Kings County who adopt and implement a voluntary policy to eliminate in-store tobacco advertisement.</td>
<td>View</td>
</tr>
<tr>
<td>(1) Counter Pro-Tobacco Influences</td>
<td>1.1.1</td>
<td>80% of all the [46] tobacco retail stores in Calaveras County will sign and implement a voluntary policy to reduce indoor tobacco advertising signage for an overall County reduction of 50% from a baseline measure.</td>
<td>View</td>
</tr>
<tr>
<td>(1) Counter Pro-Tobacco Influences</td>
<td>1.1.1</td>
<td>Point of purchase tobacco advertising will decrease 20% from baseline to be determined via survey in 77 retail outlets in Lake County.</td>
<td>View</td>
</tr>
<tr>
<td>(1) Counter Pro-Tobacco Influences</td>
<td>1.1.1</td>
<td>At least 10% of the identified tobacco retailers in South Placer County will adopt a written voluntary policy to counter pro-tobacco influences by eliminating at least one tobacco marketing strategy in their stores (e.g. tobacco ads below 3ft; tobacco ads on windows and/or doors; candy/look alike tobacco products; tobacco displays and/or promotional items).</td>
<td>View</td>
</tr>
</tbody>
</table>
Contract Management

- Procurement and contract data management and tracking
  - History
  - Intake Results
  - Meeting Notes
  - Documentation Log

- Access by role to pertinent and real-time contract data and status.
Contract Information Index

<table>
<thead>
<tr>
<th>ITEM</th>
<th>ACTION(S)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contract History</td>
<td>View</td>
</tr>
<tr>
<td>Contract Number</td>
<td>View</td>
</tr>
<tr>
<td>$ Meeting Notes</td>
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<td>Documentation Log</td>
<td>View</td>
</tr>
<tr>
<td>Reports</td>
<td>View</td>
</tr>
</tbody>
</table>

View Contract History

Edit History | Return to History Index

Contract Number: 04-3000-01
Start Date: 11/16/2004
End Date: 03/31/2005
Funds Requested: $723,578
Amount Awarded: $4931
Amendment Date: 11/23/2004
Amendment/Disencumbrance Type: Extension/Augmentation
Comments: This is a test comment. This is an edit test.

View Contract Log

Edit Dates and Comments

Negotiation Meeting Date: 11/10/2004
Contract Approved By: 11/29/2004
Prevention Services:

Due Date For Negotiation Materials Return: 11/09/2004
Contract Mailed: 11/22/2004

Actual Date Materials Received: 11/10/2004
Contractor Returns Signed: 12/09/2004
Contract:

Documents Approved By PC: 12/16/2004
Contract To CNM: 12/31/2004

Documents Approved By CNM: 12/16/2004
CM Receives Fully Executed: 11/19/2004
Contract:

LPU Supervisor Approves: 01/01/2004
Date Fully Executed: 01/03/2004


Comments: This is a test for comments in the contract management section of OTIS.
Evaluator Registry/Directory

- Allows individual to register as potential evaluator (upload resume’)
- Allows project applicants to select registered evaluators when developing their Plan

- Provides easy access to evaluators with specific expertise
- Improves the quality of evaluation when the right evaluator is selected
### Evaluator Directory

#### Search Results for Health Jurisdiction: Berkeley

<table>
<thead>
<tr>
<th>Name</th>
<th>Phone</th>
<th>Email</th>
<th>View Profile</th>
</tr>
</thead>
<tbody>
<tr>
<td>Albright, Larry Bye, Victoria</td>
<td>(415) 392-5763</td>
<td><a href="mailto:albright@field.com">albright@field.com</a></td>
<td></td>
</tr>
<tr>
<td>Address: Field Research Corporation 222 Butter Street, 7th floor San Francisco, California 94108</td>
<td></td>
<td></td>
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</table>

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<thead>
<tr>
<th>Name</th>
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<tbody>
<tr>
<td>Aved, Barbara</td>
<td>(816) 428-2847</td>
<td><a href="mailto:barbara@barbaraavedassociates.com">barbara@barbaraavedassociates.com</a></td>
<td></td>
</tr>
<tr>
<td>Address: 23 Chicory Bend Court Sacramento, California 95831</td>
<td></td>
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<tr>
<th>Name</th>
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</thead>
<tbody>
<tr>
<td>Barbic, Sheryl</td>
<td>(707) 776-0774</td>
<td><a href="mailto:s_barbic@yahoo.com">s_barbic@yahoo.com</a></td>
<td></td>
</tr>
<tr>
<td>Address: 943 Pepperwood Lane Petaluma, California 94952</td>
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</table>

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<thead>
<tr>
<th>Name</th>
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<th>Email</th>
<th>View Profile</th>
</tr>
</thead>
<tbody>
<tr>
<td>Berkancvic, Emil</td>
<td>(310) 825-6063</td>
<td><a href="mailto:eberkancvic@mednet.ucla.edu">eberkancvic@mednet.ucla.edu</a></td>
<td></td>
</tr>
<tr>
<td>Address: 650 Charles Young Drive South, 38-073 CHS Los Angeles, California 90085-1772</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Supporting Program Success

- Program Development
- Evaluation
- Program Assistance
- Professional Development
- Marketing and Public Relations
- Research
Next Step

- **OTIS**
  - Currently supports TCS business management processes

- **Partners Virtual Community**
  - Supports the process and activities of a broader community of stakeholders
  - Provide research tools, additional communication and collaboration tools
PARTNERS Virtual Community

Personalized workspace to
- Collaborate
- Communicate
- Conduct research
- Plan activities
Collaborative Tools

- **Research Tools**
  - Identify, organize, and store information

- **Collaboration/Communication Tools**
  - Conduct meetings
  - Share and develop resources
  - Interact with stakeholders in real-time

- **Planning Tools**
  - Conduct personal and organizational planning
  - Task management

- **Admin Tools**
  - Managing users, content, and processes
**Partners Virtual Community**

**Portal Functions and Features**

The Web portal represents a paradigm shift in business operations by changing how we manage people and resources. Technology and software transcend time and place to allow people to collaborate effectively and efficiently. People no longer need to be in the same room at the same time in order to accomplish great things.

**The Partners Virtual Community**

Provides a personalized workspace where individuals can collaborate, communicate, conduct research, and plan activities based on a common interest.

**Profile**
- User Profile
- User Preferences

**Planning Tools**
- Calendar
- Tasks

**Admin Tools**
- Management Tools
- Security
- Workflow Tools
- Content Management Tools

**Research Tools**
- Federated Search Engine
- Expertise
- Links to External Sites
- Publications
- Clipboard
- My Folders (publications, contacts, organizations)
- Portal Search (keyword, advanced)
- Survey Development/Deployment/Results
- Ask an Expert
- Ask a Librarian

**General**
- Help
- System Announcements
- Feedback

**Roles**
- TCS
- Grantees
- Stakeholders

**Collaboration/Communication**
- E-Forums
- Web Meetings
- Blogs
- Chat
- Briefcase

**Research Tools**
Provides comprehensive tools to identify, organize, access, and store information from human and web-based resources.

**Collaboration/Communication Tools**
Using state-of-the-art tools to conduct meetings, share and develop resources, and interact with stakeholders in real-time.

**Planning Tools**
Accessing centralized tools that allow community members to conduct personal and organizational planning and task management.

**Admin Tools**
Tools for managing users, content, and processes customized by user role.
Conclusions

- The OTIS portal delivers the right information to the right person at the right time.
- Provides a one stop shop for information gathering, management, and delivery.
- Real time views of aggregate data provide administrators and practitioners with a picture of trends, problems, and gaps, that help facilitate
  - Decision making
  - Resource allocation
  - Replication of successful practices
  - Program evaluation and improvement