

Eckerd Connects Data Warehouse RFP Responses to Vendor Submitted Questions

Below are the responses to submitted questions concerning the request for proposals. Answers provided by the Eckerd Connects project team are provided below the original respective questions in blue.

1. Section 7C - We won't know the exact team members until we get closer to the start date. We can send same resumes of potential staff. Is that acceptable?
 - Yes, that would be acceptable.
 2. Would you be receptive to segregating the RFP into 2 phases: (1) Discovery/Visioning (to include Planning & Design) and (2) Implementation/deployment
 - We would like both elements as a response to the entire RFP. It can be segmented however the respondent chooses but needs to be comprehensive in nature.
 3. Does the organization have a preferred engagement model, (1) Fixed-price vs. (2) Time and materials?
 - Fixed price is preferred. Eckerd would not be charged for any unused portions of the fixed price services and in the event the project was completed more efficiently than originally priced.
 4. How much weight are you placing on prior work for NFP organizations? We have some success stories, but the bulk of our work has been for for-profit companies.
 - Though prior work with non-profit organizations is preferred, we are not placing a lot of weight on that experience.
 5. How many vendors did you send the RFP out to?
 - The RFP was posted publicly on our website. We also sent the RFP to four vendors that expressed interest.
-
1. Is Eckerd Connects' expectation to have the vendor estimate the cost in phases i.e. developing the requirements, developing the data warehouse, training and documentation independently.
 - Ideally, we would like to see the phases of the solution priced individually and as applicable to the respondents reply.
 2. Has it been decided if the interfaces between the existing data management sources and the data warehouse will be real time or batch? If batch, what frequency is anticipated?
 - It is dependent on the source; real-time is preferred where possible and cost effective, batch is also acceptable and ideally twice/daily for most systems.
 3. How many environments does Eckerd expect to have for this project i.e. development, QA, test, and production?
 - We anticipate minimally a DEV, TEST and PROD environment solution.
 4. Does Eckerd Connect expect any reports, extracts, or dashboards to be delivered as part of the Business Intelligence application, if so roughly how many of each?
 - Yes, we expect reports, extracts, and dashboards to be delivered as part of the application. Across current data systems, we operate with approximately 130 dashboards, and 500 reports. Though we do not expect the data warehouse solution to recreate all the existing dashboards and reports, these estimates can be used for purposes of relative scope.
 5. Does Eckerd Connect have any specific version requirements for SQL Server?
 - Current versions; we currently utilize an O365 MS Azure and MSSQL solution and would like to incorporate the proposed data warehouse in to the at environment.
 6. Does Eckerd Connect have an existing Azure cloud architecture in which the company's Active Directory domains and users are available or does it require a separate off domain cloud environment for the data warehouse?
 - Yes, we have both an Azure AD enabled environment in conjunction with out MS O365 environment/solution.

7. Does Eckerd Connect have the infrastructure and the staffing to setup and manage the Azure cloud environment or will the setup, provisioning, and ongoing management of the cloud architecture be part of the deliverables and / or ongoing maintenance of the project?
 - Eckerd Connects will provide the setup and provisioning. Please provide the cost for ongoing maintenance and support of the proposed solution in your response.
8. Will all the end users of the system be Eckerd employees with Active Directory Domain accounts or will access need to be granted to external users as well?
 - Primarily end users will be Eckerd employees, but we also infrequently need to provide access to external entities, such as community partners, auditors, etc.
9. Do any of the data sources for the warehouse lack documented methods for data extraction, if so which ones.
 - Yes, JJIS, NC Allies.
10. Are there any data sources for the warehouse to which Eckerd Connect does not have direct administrative access to the underlying databases, if so which ones?
 - FSFN, JJIS, Mindshare, CoBRIS/CareMatch, Emyra, Valant, ETO, NC Allies.
11. Roughly how much data will be managed by the warehouse: about how many rows of data will be contained in the largest primary data structure and about how many rows will be contained in the largest child or dependent data structure?
 - Unknown at this time. Many of the existing data systems that will be required as part of this solution contain years, minimally, 7, of data pertaining to tens of thousands of clients.

1. In reviewing the Request for Proposal, we noted several areas where additional communication would be beneficial. Is Eckerd Connects open to an adjustment to the proposal process that might allow for an in-person or conference call meeting prior to the deadline for proposals?

- Our experience is that this can provide all parties with a richer understanding of the needs and goals for a project. Eckerd is unable to accommodate this request.

2. To help us better understand your business needs, would Eckerd Connects be willing to share more information about how the organization came to the decision to build a data warehouse?

- Eckerd is interested in pursuing a data warehouse for a variety of reasons including but not limited to the following:
 1. Ability to track outcomes of clients across multiple systems
 2. To maintain a secure, agile data repository independent of funder-based systems that may not be under Eckerd control
 3. Ability to extract/transform/load the business data, form across the Enterprise, into conformed business process data marts, subject areas, or data cubes, and a data warehouse based on Eckerd Connects business and operational rules
 4. Ability to map the operational business data from the logical business data models, across the Enterprise, into physical business data models.
 - Both items noted in #3 and 4 above will allow Eckerd Connects to utilize standard BI applications to compare and process different data sets via ad-hoc queries, reports, dashboards etc. and in support of #1 above

3. Are there any identified business needs with specific targets or deadlines that should be considered in the timeframe for this project?

- The total implementation period for creating the data warehouse is anticipated to be completed within 18-24 months per our funder.
- a. If there is some flexibility in the schedule, would it be possible to extend the time between the response to questions and the deadline for the final proposal so that final proposals could fully address any new information provided in the question responses?
 - Yes, we are extending the due date of proposals from the original date of 11/5/2018 and to a

11/12/2018 deadline.

4. Would Eckerd Connects be willing to share a budget range allotted for this project?
 - Our budget is approximately \$250,000.
5. In our experience, dynamic organizations, such as Eckerd Connects, benefit from data warehouse solution that includes consistent, ongoing support and development. Is ongoing support and development part of Eckerd Connects' vision for this proposal and project?
 - Yes, we understand ongoing maintenance & support, post project completion will be at a cost additional to the services provided in the RFP.
6. Is there any additional information that Eckerd Connects would be willing to share regarding the team who will be reviewing the proposal, such as the mix of technical staff vs. clinical, administrative, or management staff?
 - We will have seven project team members reviewing proposals, composed of four technical staff and three management staff.
7. Could we please clarify the correct mailing address for the physical copies of the proposal?
 - Eckerd Connects
Attn to: Gina Mercuri
100 N. Starcrest Drive
Clearwater, FL 33765
- a. Is it possible for that address to accept signature-required Fedex packages?
 - Yes.

1. Could we please clarify if the 1,800 end users supported by Eckerd Connects (indicated on Page 1 of the Request for Proposal) would be the number of end users who might be accessing aggregate and/or detailed data reports or the business intelligence solution, or if that is the number of end users for all the various data entry systems?
 - 1,800 reflects all staff supported by Eckerd across the Enterprise. As stated in the RFP, the initial number of staff/users who will be contributing to/using the solution and reporting is approximately 1,000. This quantity may grow to 2,000 over the next 24-36 months.
2. We would like to request some additional clarification of the use of Azure in this statement "Microsoft SQL server DBMS and Azure are absolute technology standards for any proposed Eckerd Connects data warehousing solution." (Page 1, Section 3; also mentioned on Page 8, Letter d)
 - a. Does this mean that the proposal needs to address connecting to data systems that are hosted in Azure? Yes, see below Or, does this mean that the proposed data warehouse needs to be hosted in Azure or in an equivalent cloud environment?
 - We have an existing Azure environment and want this solution to reside in and leverage existing data solutions contained within our Azure environment.
3. We would like to request some additional information about the current technology environment at Eckerd Connects.
 - a. What are the technology environments that need to be considered for end users of the Business Intelligence system?
 - We are a MS Windows based organization utilizing Windows 10, O365. We have fewer than (5) executives who work from Macs. Most staff utilize either IE or Chrome as their Browser, we also support Firefox as well.
 - i. Does this need to account for both Windows and Macintosh environments?

- Yes, as applicable based on the above reply.
 - ii. Do end users need access to the Business Intelligence system on mobile devices?
 - Yes, both iOS and Android based platforms.
 - iii. Will end users need access in both on-line and off-line situations?
 - Ideally, yes, if possible.
 - b. Does Eckerd Connects have an existing secure e-mail or other communication system through which Protected Health Information can be shared?
 - Yes, O365.
 - c. Does Eckerd presently have updated licensing for Microsoft Excel (at least 2013) on the user machines of potential end users of the Data Warehouse solution?
 - Yes.
 - d. What are the “Eckerd Connects existing managed data systems” mentioned in the Service Initiation section? (Page 7, Letter b, 3rd Primary bullet) Does Eckerd Connects have an existing data management system that needs to be considered in this project or is this referring to the data systems that will be integrated in the proposed solution? If there is an existing data management system, additional information about that platform would be helpful.
 - This is referring to the data systems that will be integrated into the proposed solution as referenced to in the items detailed in Sect.4.1 on page 2 of RFP.
4. We would like to clarify the data systems that should be considered as in scope for the project. The Request for Proposal mentions that “approximately 15 data systems” need to be accounted for, and it appears that more than 15 systems are specifically mentioned in other pages of the document.
- We anticipate that, given Eckerd Connects’ growth and change over the years, the set of systems may continue to grow with time.
 - a. Would it meet the needs of Eckerd Connects if we include a baseline set of systems in our proposal, along with the details of how additional systems would be incorporated as the project evolves and continues over time?
 - Yes, as long as all applicable data systems are accounted for in the scope of the reply.
 - b. Of these 15+ data systems, has Eckerd Connects identified the system or systems that would be highest priority for your immediate business needs?
 - Yes, please refer to page 2, Sect 4.1, items a-i of RFP.

We recognize that exploring the complexity of systems used by Eckerd Connects will be one of the initial steps for the Data Warehouse Design process, and we look forward to working closely with Eckerd Connects’ data partners to identify efficient and effective solutions. If there is any additional information that can be provided on the various platforms, that would be helpful in aligning our project timeline and plan with Eckerd Connects’ business needs. For each platform, could Eckerd Connects provide any estimates (even rough estimates) of the following:

1. The number or proportion of users entering data into the system?
2. The number or proportion of the client or provider population housed in that system?
3. The number or proportion of existing data reports or dashboards currently using data out of that system?
 - Responses by system are provided at the end of this document

Florida Safe Families Network

1. We would like to be sure that we understand this statement: “Staff have to use ancillary systems and multiple spreadsheets to juggle the parts of these activities that are and are not supported by an information system.” (Page 2, second paragraph under letter 4.1.a.) Is this meant to imply that the data warehouse platform will need to support a data entry system for some additional data components not currently being captured?

- The scope of this project is that of a data warehouse for reporting purposes, where daily snapshots of each contributing system are taken and then served together in a business intelligence interface. The proposal is not to build new interfaces for data entry, but to ensure that these ancillary data systems content can be uploaded in to the Warehouse

Comprehensive Assessment System

1. We would like to be sure that we understand this statement: “There is also a need for a data warehouse for querying abilities to retrieve data from other Eckerd Connects data systems ... and export defined data elements from the other systems to interface with another separate database that houses the project specific data.” (Page 3, Second paragraph) Does the phrase “another separate database that houses project specific data” refer to the Comprehensive Assessment database, or is it referring to an additional database that is not listed?

- The phrase in question is referring to the Comprehensive Assessment database, not an additional, separate one.

Empyra

1. Is there any additional detail available about the data extraction options that exist for this system?

- The Empyra data system is purchased and managed by Eckerd Connects, which provides us unrestricted access to the data; Empyra has the ability to connect with other systems via API (according to developers, not currently used by Eckerd Connects) and possibly web-services.

Microsoft Dynamics CRM

1. What proportion of Eckerd’s programs are currently using CCP?

- Approximately 30%, 27 programs currently.

2. In our experience, many CCP users are leveraging the Pro-Filer billing engine as part of their implementation.

a. Is Pro-Filer used by Eckerd as the back-end billing engine for CCP?

- We are not currently using Pro-Filer.

b. If not, is there a different billing engine being used with CCP that would be incorporated into the data warehouse project?

- Possibly Unit 4 – see page 1, section 4.1 of RFP

c. Would the project need to include pulling historical billing information from Pro-Filer or another billing system?

- Possibly Unit 4 – see page 1, section 4.1 of RFP

Mindshare

1. Our understanding of the Mindshare system is that it provides a predictive model of risk, along with alerts and dashboards, based on multiple sources of data regarding children and families. Does Eckerd Connects plan to continue using the Mindshare platform, with the proposed Data Warehouse serving as a bridge, integrating information from Mindshare and other Eckerd Connects data systems, or is the proposed Data Warehouse is intended to replace Mindshare?

- It is not our intent to replace CoBRIS or Mindshare. We want to be able to report against the data from both systems within a single environment/data warehouse

Five Points CoBRIS and CareMatch

1. Is there any additional information available about the data extraction system from CoBRIS or CareMatch?
 - The data extracts are in CSV file format, approximately 30-40 of them, downloaded via SFTP to us nightly. Each file is a “full” copy daily, not differential, and obviously are quite large given the amount of client information in each extract.

Juvenile Justice Information System

1. Is there any additional detail available about the method for running the reports from JJIS that would be part of desired the automated report process?
 - It would be beneficial to have referral and wait list from JJIS (and NC Allies) transmitted to CCP.
2. We would like to clarify this statement in Appendix A about this interface: “It would be beneficial to have this data uploaded to CCP vs. manual entry.” Is this referring to a system where certain data would be extracted from JJIS and then configured so that it can be uploaded to CCP directly?
 - Yes, that is correct, our staff currently maintains census data in CCP and JJIS/NC Allies. It would save time and eliminate data entry error if that information could push (from either source) so staff only needed to enter it one time, however at this time, the State of Florida does not support that functionality within JJIS.

Finance System Unit 4

1. We would like to clarify this statement: “Data elements collected from this system will be client billing information queried for reporting needs of the organization.” (Page 5, Letter i) Is Finance System Unit 4 the native location of that client billing information or is there a different system that houses that information?
 - Client billing information is contained in Unit 4, however it is originally created in CCP and FSFN
2. Is the row for “Finance” on Page 11 referring to this system or a different system?
 - Yes, it is in reference to Unit 4
 - a. If so, we would like to clarify the statement under “Data Needed from Data Warehouse” on Page 11 which states, “No data needed; can feed data into system as applicable via web-services or IDE.” Could we please clarify if data from this system would need to be integrated into the data warehouse (perhaps through the feed described) or if it is not being considered at this time?
 - Our recommendation would be to consider including this data, as many providers find a connection to financial data to be useful. Yes, we want to include appropriate data form Unit 4 in to the proposed solution

Valant, Exponent HR, eNotes, Salesforce, FFT Database, Protective Factors, NC Allies (NC DJJ)

1. For these data systems (which are mentioned briefly on page 5 at the end of section 4.1, and on Page 11 in Exhibit A), is there any additional information that can be provided about the type and amount of data these systems contain and how the data from these systems might need to be incorporated into the solution?
 - Valant: Yes, we would want this data fed in to the warehouse on a regular basis to support “real time” reporting. Minimally, we would want the date fed over daily. The amount of data is nominal compared to other data systems and pertains to approximately 1,100 active clients at any time.

- eNotes: Not currently in-use, however if we move to that system then we will see about 1,100 active clients at any given time.
- Exponent HR: Approximately 1,800 active users use this system
- Salesforce: This program is only used for one of our program's referrals. Estimated end-users using this system is approximately 3-5 staff.
- FFT Database: This database is used by one our programs for data collection; approximately 8-10 end-users support this system.
- Protective Factors: This system has approximately 8-10 end users.
- NC Allies: NC Allies is similar to the needs of the JJIS system outlined above, with approximately 10-12 users.

Confidential and Proprietary property of Eckerd Connects

Platform-Specific Information:**Florida Safe Families Network**

1. The number or proportion of users entering data into the system?
 - Approximately 500 users, across Hillsborough, Pasco and Pinellas counties
2. The number or proportion of the client or provider population housed in that system?
 - In the last fiscal year, Eckerd served over 12,600 children and young adults formerly in foster care
3. The number or proportion of existing data reports or dashboards currently using data out of that system?
 - Out of FSFN, Eckerd tracks 240 different measures. There are about 50 different reports that we use, out of the FSFN business objects environment. We contract with a third party, Mindshare Technologies, who provides a reporting product called tracking and analytics for children and families (TACF). The TACF hosts approximately 100 different reports that are based on data from FSFN. Some of the TACF reports are unique. Many of them are duplicates of reports that are available in the FSFN business objects environment.

Empyra

1. The number or proportion of users entering data into the system?
 - The system currently has 255 users, with the ability to support 400 users with our current licensing agreement.
2. The number or proportion of the client or provider population housed in that system?
 - This is a constantly growing number if looking just a number of client files housed in the system. The current breakdown of client files are:
 - Active participants (receiving services): 9500
 - Clients who have completed services (historical performance): 2500
 - Pre-enrollment/non-enrolled clients: 600
3. The number or proportion of existing data reports or dashboards currently using data out of that system?
 - Active reports available for use: 44 additional reporting up to 50 various reports will be available as development continues; Scorecards/Dashboards: 61

ETO

1. The number or proportion of users entering data into the system?
 - Eckerd no longer uses ETO for data entry it is a closed-out system; data is in backup format that is currently not available to users.
2. The number or proportion of the client or provider population housed in that system?
 - This is 10+ years of data from various projects. We do not know the extent of these numbers at this time (it was never requested as part of our closeout of the system). An educated guess on this would be around 20K in participant files, another 5,000 entities (employers, service and training providers) and a large quantity of file attachments and documents.
3. The number or proportion of existing data reports or dashboards currently using data out of that system?
 - None at this time, this system was closed out and the data provided to us in backup format that would need restored to a SQL format before any reporting or data extraction could be used. This should be part of what the chosen vendor does for the ETO related data.

Comprehensive Assessment System

1. The number or proportion of users entering data into the system?
 - There are currently approximately 50 users for the current 10 sites using the system, rapid growth in the number of users is expected as more Eckerd Connects program phase into deploying the assessment. By the end of 2019, an additional 100 users will likely be entering data into the system. End goal of users entering data into the system will likely be around 400.
2. The number or proportion of the client or provider population housed in that system?
 - Currently (operating at 10 program sites), there are approximately 430 clients currently housed in the system, though in the future the end goal is all Eckerd Connects clients (34,000 annually).
3. The number or proportion of existing data reports or dashboards currently using data out of that system?
 - There is one existing dashboard, with 16 current existing data reports, and likely 25 reports in total once report builds are completed near the end of the calendar year.

Microsoft Dynamics CRM

1. The number or proportion of users entering data into the system?
 - We currently have just over 300 users, and anticipate up to 600 users
2. The number or proportion of the client or provider population housed in that system?
 - Census of active clients in CCP runs just under 3,000.
3. The number or proportion of existing data reports or dashboards currently using data out of that system?
 - We currently have 243 reports and 62 dashboards.

Mindshare

1. The number or proportion of users entering data into the system?
 - Approximately 800 users.
2. The number or proportion of the client or provider population housed in that system?
 - Mindshare contains data on approximately 40% of our clients served.
3. The number or proportion of existing data reports or dashboards currently using data out of that system?
 - Approximately 100 data reports are currently housed in Mindshare.

Five Points CoBRIS and CareMatch

1. The number or proportion of users entering data into the system?
 - Approximately 900 users.
2. The number or proportion of the client or provider population housed in that system?
 - This system contains data on approximately 40% of our clients served.
3. The number or proportion of existing data reports or dashboards currently using data out of that system?
 - Currently Eckerd teams are using approximately ten reports, but would like the ability to do build more in the future.

JJIS

1. The number or proportion of users entering data into the system?
 - Approximately 100 users.
2. The number or proportion of the client or provider population housed in that system?
 - Approximately 10% of our clients served have data populated in the JJIS system.
3. The number or proportion of existing data reports or dashboards currently using data out of that system?
 - Eckerd does not use reports or dashboards from this system, it is mainly used for data entry, the most reporting that can be pulled from the system is a roster and waitlist.

Finance Unit 4

1. The number or proportion of users entering data into the system?
 - Less than 50 users.
2. The number or proportion of the client or provider population housed in that system?
 - Client population data is not housed in the system, however the accounting software supports all Eckerd clients (approximately 35,000 clients annually).
3. The number or proportion of existing data reports or dashboards currently using data out of that system?
 - The financial data are typically reported across programs through one monthly report.

Confidential and Proprietary property of Eckerd Connects