

DRAFT

Objective #1:

Build a data system for storing county-wide longitudinal client data.

Summary:

Within our community there are numerous existing data systems that collect and store client level data for individual organizations. To understand the outcomes of individuals and families and the impact of the array of services they receive, Upstream Investments is looking to build a data system that can pull information from existing systems and allow for user-friendly analysis and reporting.

Requirements:

- The data system and all technical elements used to satisfy any requirement within this RFP must be compatible with our community's established infrastructure, architecture, and security requirements.
- The data system must conform to our community's confidentiality standards or other standards as applicable.
- The data system must meet or exceed industry standards for data security.
- The data system must be easily expandable and modifiable to incorporate future needs.
- The data system must continue to meet acceptable performance levels as additional data is incorporated over the coming years.
- The Vendor must provide a detailed expansion plan that identifies all investments necessary to accommodate the expandability of this data system and maintain acceptable performance levels.

Objective #2:

Structure data in the data system to ensure usability and efficient reporting.

Summary:

Data in the data system will be used to generate canned reports, custom reports, dashboards, charts, graphs, and other data displays. End users may also run queries against the data, perform analyses, or extract data for other purposes. Data must be structured in a manner that is user-friendly and allows for efficient reporting.

Requirements:

- Data structures must provide for efficient linking of data
- Data structures must be expandable and modifiable to allow for additions, changes, deletions, or modifications
- Data structures must allow for different levels of access to data and reporting.
- Data structures must make use of current design patterns and best practices
- Data structures must ensure efficient creation of reports and queries.
- Data structures must allow for user-friendly generation of reports and queries.
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Objective #3:

Develop processes for inputting, extracting, transforming data.

Summary:

Individual organizations will have the option to enter data into the data system or upload data from their existing data system. Additionally, the data system will need to have the ability for data to be exported for use in other formats.

Requirements:

- The data system must have an automated process for importing and loading data from external organizations data systems.
- The data system must have processes for deidentifying individual client data and ensuring that cases are matched accurately.
- The data system input process must reduce dual data entry.
- The data system input, export, and transform processes must be able to accept, process, and send different data formats.

Objective #4:

Develop a web-based portal for accessing data in the data system.

Summary:

Sonoma County is in need of a web-based system that allows organizations, community members, and individuals to access reports and generic data online. The vendor will develop a Web portal to provide secure and non-secure access to data.

Requirements:

- The portal must provide for different levels of access depending on the user's role.
- The portal must provide different levels of functionality based on the user's role.
- The portal must provide for either secure or non-secure access as appropriate.
- The portal must meet usability and handicap accessibility standards.
- The user interface must be easy to understand, have clear and straightforward functionality, and use simple navigational features.
- End users must be able to Search within the portal.
- The user interface must be modifiable so components can be changed, and extensible so new components can be added.

Objective #5:

Provide a reporting tool that allows users to generate and view reports from data in the data system.

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Summary:

The reporting tool must be able to provide different levels of reporting capabilities to different types of users. Users must be able to select from different visual displays (dashboards, charts and graphs, etc.), drill down to different levels of detail, view canned reports, produce their own queries, and extract and export data to different formats.

Requirements:

- The reporting tool must provide different options for graphical representations and displays (e.g. dashboards, charts, graphs, tables, text).
- The reporting tool must allow users to generate pre-defined reports, to perform data queries, and to generate, save and reuse custom, ad hoc reports.
- The reporting tool must allow for reporting at the aggregate level.
- The reporting tool must allow for different levels of security access to individual reports, data elements, and functions.
- The reporting tool must provide the ability to generate data extracts in different formats such as, but not limited to, Excel or PDF.
- Users must be able to generate, view, and save reports.

Objective #6:

Provide documentation for all processes, structures, and tools developed or provided.

Summary:

Once the new data system, processes, structures, and tools have been developed and implemented, community organizations and Upstream Investments staff will be responsible for understanding them over time. The vendor will provide complete and detailed documentation on all processes, structures, and tools developed or provided.

Requirements:

- Provide detailed, comprehensive documentation on all processes, structures, and tools developed and implemented.

Objective #7:

Provide training for all processes, structures, and tools developed or provided.

Summary:

Once the new data system, processes, structures, and tools have been developed and implemented, community organizations and Upstream Investments staff will be responsible for understanding them over time. The vendor will provide complete and detailed training on all processes, structures, and tools developed or provided, and will develop a comprehensive data quality training program for end users.

- Provide online, computer-based instruction to end users on data quality so they can access the training as needed. Training methods may include video, quick notes, training manual, etc.
- Provide in person training options to end users on data quality.
- Provide ongoing technical assistance to end users.