

RFP Response Form

Client Management Information System

PROPOSER INFORMATION

Proposer Name: Creative Information Technology, Inc. (CITI)

Authorized Representative Name & Title: Mihir Kurane, Account Manager-State & Local Business Unit

Address: 7799 Leesburg Pike, Suite 500 N., Falls Church VA 22043

Telephone: 571 426 2042

Email: mkurane@citi-us.com

Website: www.citi-us.com

Legal Status: For-Profit Corp. Nonprofit Corp. Sole Proprietor Partnership

Date Incorporated: August 15, 1996

How did you hear about this RFP? CITI retrieved this RFP from the Allegheny County Department of Human Services (DHS) solicitations portal at www.alleghenycounty.us/human-services/resources/doing-business/solicitations

REQUIRED CONTACTS

	Name	Phone	Email
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]

* [MPER](#) is DHS's provider and contract management system. Please list an administrative contract to update and manage this system for your agency.

[REDACTED]

[REDACTED]

[REDACTED]

RFP Response Form

Client Management Information System

[Redacted]

[Redacted]

skolhekar@citi-us.com

REFERENCES

Provide the name, affiliation and contact information [include email address and telephone number] for three references who are able to address relevant experience with your organization.

Please do not use employees of the Allegheny County Department of Human Services as references.

[Redacted]

[Redacted]	[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	[Redacted]	[Redacted]

PROPOSAL INFORMATION

Date Submitted 4/17/2019

Amount Requested: CITI is proposing two(2) options for costing as detailed in the attached document. The costing and 5 year cost of ownership is for 1. On Premise, and 2. Software as a Service (SaaS).

Proposal Abstract:

Please provide a brief summary of your proposal that is at most 750 characters.

CITI proposes our Eligibility Benefit Management System (EBMS) Platform to implement the **CMIS System** that will meet all requirements and use cases of Allegheny County DHS. EBMS will empower DHS with a comprehensive, modular solution and establish an agile, scalable and modernized framework which will rapidly address evolving business needs. Built on the core principles of data integrity, modularity, interoperability and mobility, EBMS provides a configurable framework with robust integration capabilities that can support DHS' client management programs for years to come. CITI's domain expertise and demonstrated success providing social services solutions combined with the futureproof technology and capabilities of EBMS will provide DHS with the solution that will drive operational efficiencies, better decisions making and improved client centric outcomes.

CERTIFICATION

RFP Response Form

Client Management Information System

Please check the following before submitting your Proposal, as applicable:

I have read the standard County terms and conditions for County contracts and the requirements for DHS Cyber Security, EEOC/Non-Discrimination and HIPAA.

By submitting this proposal, I certify and represent to the County that all submitted materials are true and accurate, and that I have not offered, conferred or agreed to confer any pecuniary benefit or other thing of value for the receipt of special treatment, advantaged information, recipient's decision, opinion, recommendation, vote or any other exercise of discretion concerning this RFP.

ATTACHMENTS

Please submit the following attachments with your Response Form. These can be found at <http://www.alleghenycounty.us/dhs/solicitations>.

- MWDBE documents
- Allegheny County Vendor Creation Form
- 3 years of audited financial reports
- W-9
- Screen shots or other visual aids as needed

RFP Response Form

Client Management Information System

REQUIREMENTS

Please respond to the following. The maximum score a Proposal can receive is 140 points. Your response to this section should not exceed 35 pages. You may attach screen shots or other visual aids as needed. These will not count toward the page limit.

Qualifications and Experience (20 points)

1. Describe how you have assisted other clients with assessing the best way to implement, measure, manage changes to, and achieve business objectives via the proposed Solution, especially human services agencies and/or other public sector clients.

[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]

RFP Response Form

Client Management Information System

[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]

RFP Response Form

Client Management Information System

[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]

RFP Response Form

Client Management Information System

[Redacted]

[Redacted]

[Redacted]

[Redacted]

Functional Requirements (40 points)

2. Describe your capacity and capability to provide a Solution that flexibly supports the Core Features (Referral, Intake, etc.)

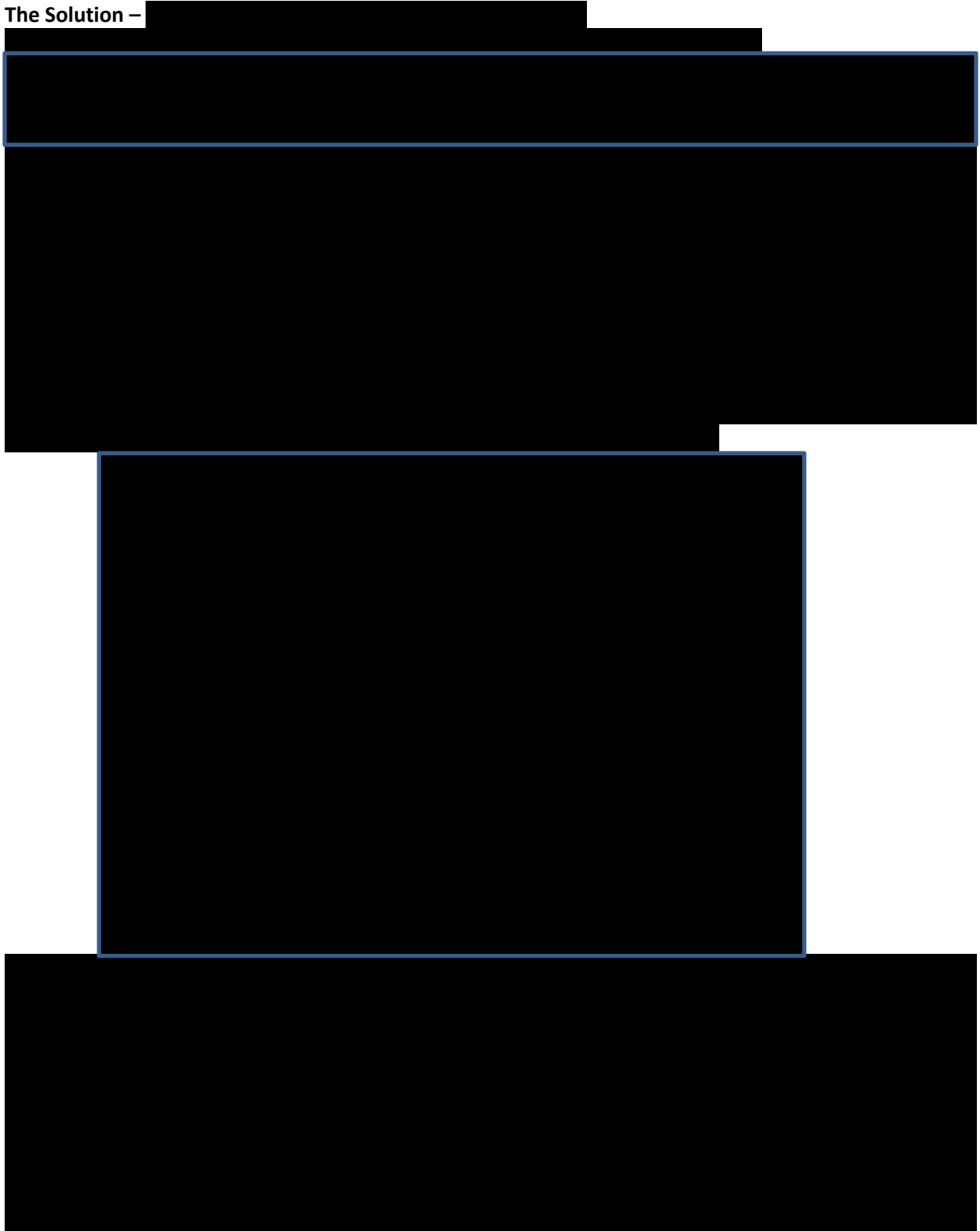
CITI Response Contents

- | | | |
|---|--|---|
| ✓ Solution Supports All Core Features, Requirements, Use Cases and Core Flows | ✓ Direct Alignment to DHS Requirements | ✓ Core Features Overview |
| ✓ Capacity and Capability | ✓ Usability/Functionality | ✓ Integration and Configuration |
| ✓ Data Quality and Reporting | ✓ Documentation and Support | ✓ Functional Requirements and Core Work Flows |

RFP Response Form

Client Management Information System

The Solution –



RFP Response Form

Client Management Information System

[Redacted text block]

[Redacted text block]

[Redacted text block]

RFP Response Form

Client Management Information System



RFP Response Form

Client Management Information System

[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]

RFP Response Form

Client Management Information System

Capacity and Capability

DHS has outlined a collaborative mission to develop and implement a new Client Management Information System (CMIS) to integrate its core and ancillary business functions to improve and streamline services to citizens. CITI has the full capacity and capability to rapidly and cost-effectively facilitate the achievement of DHS's goals. CITI possesses the corporate capacity and capability to deliver on-time, on-budget and on-scope solutions supported by clearly defined service level agreements and a proven track records of successful projects with high customer satisfaction rates. CITI's EBMS delivers business-changing technology and functional capabilities with enterprise-level capacity in terms of technology performance, high internal and external user counts and a 99.9999% uptime track record.

CITI has a 22-year history of providing effective, capable, function rich business solutions to various State and Federal Government agencies across multiple platforms. We understand the unique challenges of government systems, and from this in-depth understanding we have developed the EBMS Platform to address the various needs of a government managed, citizen-centric business process. Additionally, the CITI State and Local team domain experts reach a combined 100 plus years' experience in nationwide case and client management systems technology, including Benefits management (Child Care Subsidy, Department of Transportation, TANF, SNAP) and Welfare (Child Welfare, Juvenile Services and Adult Welfare) expertise. EBMS is built on the central belief that user engagement and focus must be central

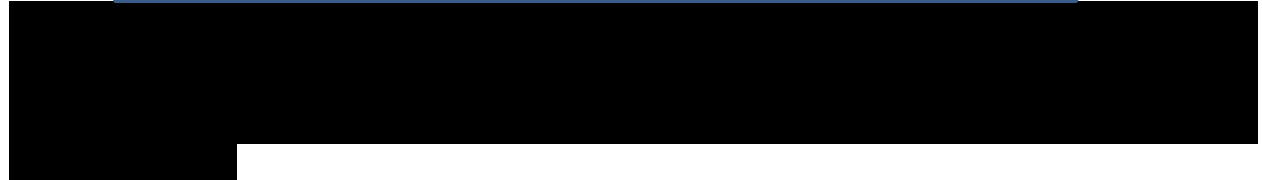
RFP Response Form

Client Management Information System

to product development to adequately solve practice issues and pain points associated with obsolete, duplicate processes and antiquated or disparate legacy systems.

We recognize that every government agency has unique business rules and challenges and as such, one approach does not suit all. To address these needs, EBMS was created as an entirely modular platform to afford agencies with a highly configurable, rapidly-deployable platform which provides unprecedented flexibility. Further, we recognize that although we strive to create the best solutions from our domain expertise, SME engagement and human centered design, there are emerging and best of breed solutions that might better address certain business needs, and systems must easily integrate and inter-operate to keep pace with the speed of business and IT process changes. EBMS was created with this in mind to provide for rapid changes, expandability and “plug and play” capabilities with third-party modules.

Usability/Functionality



RFP Response Form

Client Management Information System

[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]

RFP Response Form

Client Management Information System

[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]

RFP Response Form

Client Management Information System

The form content is almost entirely obscured by black redaction boxes. A blue-bordered rectangle highlights a central section. Below this, a table-like structure is visible with several rows of redacted text, indicated by horizontal white bars of varying lengths.

RFP Response Form

Client Management Information System

[Redacted text block]

[Redacted text block]

[Redacted text block]

[Redacted text block]

[Redacted text block]

RFP Response Form

Client Management Information System

[Redacted]	[Redacted]
[Redacted]	[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	[Redacted]

3. Describe your capacity and capability to provide a Solution that flexibly supports the Supporting Features (Provider/Facility Management, Forms & Reporting, etc.).

[Redacted]

[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	[Redacted]

[Redacted]

RFP Response Form

Client Management Information System



Non-Functional & Technical Considerations (35 points)

4. Describe your approach to the access to and integrity of data entered in to the proposed Solution (e.g., access to data, protecting data, documentation).



RFP Response Form

Client Management Information System

[Redacted content]

6. Describe your experience in user interface design, user experience design, usability and information architecture and provide examples.

[Redacted content]

RFP Response Form

Client Management Information System

[Redacted]

[Redacted]

[Redacted]

RFP Response Form

Client Management Information System

[Redacted content]

RFP Response Form

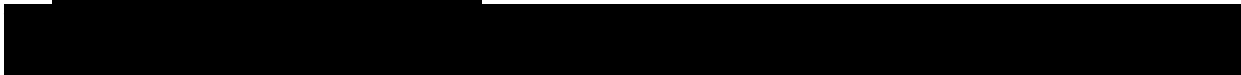
Client Management Information System

[Redacted]

[Redacted]

RFP Response Form

Client Management Information System



RFP Response Form

Client Management Information System

[Redacted]

[Redacted]

[Redacted]	[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	[Redacted]	[Redacted]

[Redacted]

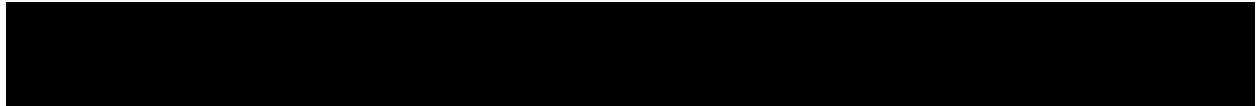
RFP Response Form

Client Management Information System



IT Governance & Delivery Methodology (20 points)

9. Describe how you would assist DHS in governing how the proposed Solution will be managed across various different use cases and stakeholders in a way that retains the Solution's value.



RFP Response Form

Client Management Information System

[REDACTED]. CITI understands the key to a successful project is effective governance and communication, and we will therefore assist the Department in managing the solution across the several use cases. CITI's management team will work with the Department to develop a joint IT governance committee that outlines the channels to be used in addressing various stakeholders. The project will be organized to facilitate effective and efficient communications at all levels and ensure information flow both horizontally and vertically. We will structure these lines of communication to achieve high levels of program performance and collaboration among all stakeholders, which can scale up and scale down, as the Department requires. Our governance model is based on cooperation and open communication with customers which includes periodic reviews with management, active and frequent oversight from corporate leadership, continuous communications within CITI and customer project teams. Continued commitment to the governance and risk management process improves the quality and timeliness of delivery. We identify risks as early as possible, document them in a risk register, and communicate them in status reports and meetings to minimize potential impact. We will develop a comprehensive Quality Control Plan (QCP) and audit process to manage our governance of performance measures preferred by the County. The Technical Manager provides status reports to include updates to the risk register, team performance metrics, updates to the schedule, service desk ticket metrics and other project status. A significant issue may be at a program or project level and may impede progress, quality or compliance with the protocol, regulations, or impact contractually agreed upon timelines, resources or budget. It is expected that most issues will be handled at the primary contact level. If the issue cannot be resolved at the primary contact point, the issue will be communicated and immediately escalated to the next management level at both CITI and the Department using contact information provided in the Communication Plan. Our Account Manager will be available at any time to help expedite and resolve escalated issues. Depicted in the below Figure 9-1 is our typical governance and escalation structure. We will work with the County to accommodate the relevant stakeholders required in the governance structure.

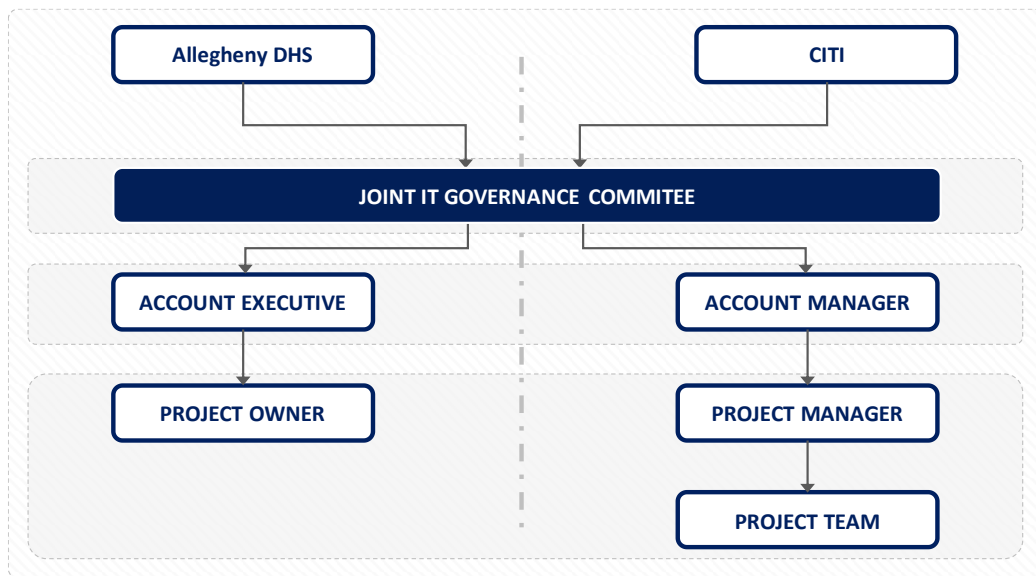


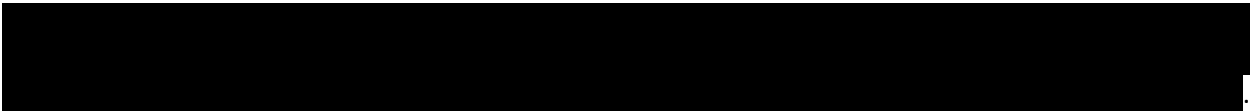
Figure 9-1. CITI's IT Governance and Escalation Structure

RFP Response Form

Client Management Information System

10. Describe how you have used governance and delivery methodology to empower other clients to achieve transparency and flexibility in changes to the proposed Solution.

CITI Response: CITI has governed and successfully delivered several projects with the services similar to that in scope of this RFP. Our governance and delivery structure, described in Question 9, is based on Agile principles and ensures team meetings once in every two weeks, thereby providing transparency to all the stakeholders. Apart from these fortnightly team meetings, we also hold monthly meetings with the senior management and a half yearly review meeting. This helps to monitor the health of the project as well as extends the project's transparency to the senior management. The scrum meetings and fortnightly meetings also render the team the flexibility by allowing review of the project direction and requirements, and to make amendments to the processes as required. CITI also has a change management process that caters to system changes. We implement a Change Control Board (CCB) to ensure that all the change requests are aligned with customer's business objectives and constraints. When a change is required, our team provides all relevant information and context from the service request ticket. We coordinate with the customer's CCB on the proposed regulatory changes and assist with its scheduling, tracking, testing and deployment, using tools such as MS SharePoint and JIRA. CITI provides near real time situational awareness of requests to the customers. At the end of each phase, CITI walks the Steering Committee through all the deliverables. The value of the Steering Committee is enhanced by the diversity of the stakeholder members.



11. Describe your capability in supporting tight feedback loops between proposed Solution changes and positive impacts to end users.

CITI Response: CITI uses industry best practices such as the Agile principles to deliver solution changes and customizations in iterative and incremental chunks. This promotes adaptive planning, evolutionary development and delivery, a time-boxed iterative approach, and will encourage rapid and flexible response to change. We will utilize SAFe principles of inspect and adapt, where the current state of the solution is evaluated by the team to identify improvement backlog items by conducting workshops involving the end users. The metrics collected as part of our auditing process will be used as feedback on which the team works on to tune and adjust the solution accordingly.

Our Agile approach includes customer stakeholders at the center of the process. Feedback from the customer stakeholders are solicited and changes are prioritized and executed based on the requirements. Changes are delivered by our Agile Team in iterative sprints with daily Scrum meetings to monitor progress and identify issues or blockers and resolve them quickly per the timeline. Our Agile methodology is realized through four enabling practices: Continuous Exploration; Continuous Integration; Testing; Continuous Deployment; and Continuous Monitoring.

RFP Response Form

Client Management Information System

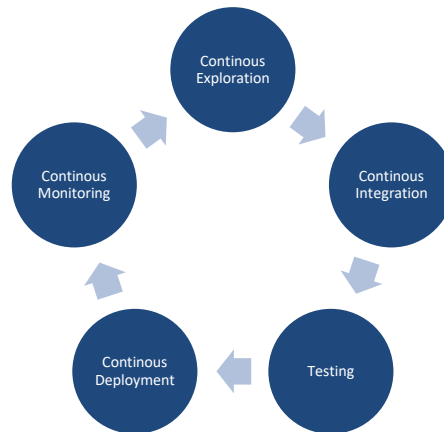


Figure 11-1. Agile Product Cycle Feedback Loop

- **Continuous Exploration** will ensure exploration of features that need to be addressed and defining a roadmap.
- **Continuous Integration** will ensure that each committed change fits with all previously committed changes. Tools such as Git and Jenkins provide real-time source code management and build management.
- **Testing** that will ensure that each build of the software meets all functional expectations. Tools such as junit, SeleniumHQ, and TestNG, provide extensible functional and data-driven testing of each software build.
- **Continuous Deployment** ensures each successful build is automatically and deployed in quarterly releases. Tools such as Chef and NuGet may be used to automate the deployment of the build.
- **Continuous Monitoring (CM)** ensures that operational expectations are met by both the software and environment. CITI Team leverages service level agreements (SLA's) to identify non-compliant operation of the system and alert the operations team to correct the problem(s) encountered. Feedback from the customer stakeholders are taken, prioritized and are fed to the first stage of the cycle which explores the features that can satisfy customer needs.

RFP Response Form

Client Management Information System

Financial Management and Budget (25 points)

12. Attach a detailed start-up budget and annualized budget that clearly outlines the costs associated with implementing and maintaining the Client Management Solution.

In addition to the cost of implementing the initial baseline solution, please refer to the information in Appendices C-N regarding the Re-Entry program and provide a detailed cost estimate for implementing a configured Instance of the Solution for the Re-Entry program, as well a cost estimate to maintain and enhance this Re-Entry Program on an annual basis (a "Total Cost of Ownership" estimate). We are hoping to use this estimate to understand the true implementation costs of spinning up business/program needs, as well as ongoing costs of ownership of these instance spin ups. If the cost of a Solution Instance configured specifically for the Re-Entry program would differ significantly from your typical per-Instance cost, please explain.

CITI Response:

CITI is providing a detailed start-up budget and annualized budget for the implementation of the EBMS platform for a Client Management Information System.

The attached document (**CITI-Allegheny County CMIS-Financial Management and Budget.PDF**) also details the cost of implementing the re-entry program.

12 Financial Management and Budget (25 points)

Creative Information Technology, Inc. (CITI) presents the following information in response to Question 12 of the Client Management Information System RFP Response Form.

- ✓ Attach a detailed start-up budget and annualized budget that clearly outlines the costs associated with implementing and maintaining the Client Management Solution.
- ✓ Detailed startup budget should include all costs of planning stage through the initial implementation of the CMIS solution. The annualized budget should reflect complete ongoing annual costs.
- ✓ The Successful Proposer presents a budget that reflects a realistic estimate of the costs associated with implementing and maintaining the proposed Solution and offers good value to the County.

1 Detailed Start-up and Annualized Budget Overview

CITI is presenting a budget for start-up costs, as well as annualized costs, for the establishing, implementation, expansion and maintenance of CITI's Eligibility Benefit Management System (EBMS) which effectively addresses all requirements of the RFP at a reasonable cost within one year which will bring good and ongoing value to the County. This budget is based on the information in the RFP, and dependent upon more specific discovery of requirements upon project initiation. In order to fully describe the budget and the value that CITI's proposal will provide, we have included the following information.

1. Scope Statement – Defines what is included in the start-up budget and annualized budget.
2. Implementation Timeline – Defines the timeline for the project to assist in the further evaluation of value for cost.
3. Implementation and Annualized Budget
 - a. Start-Up Budget – Defines all costs of planning stage through initial implementation of the platform and functionality for Year 1 of the initiative. These costs do not include costs for internal Allegheny County personnel.
 - b. Annualized Budget – Defines annual costs for Year 2 through 5, with defined assumptions.
4. Specific Program Functional Example – Provides timeline and projected costs for Re-Entry Program

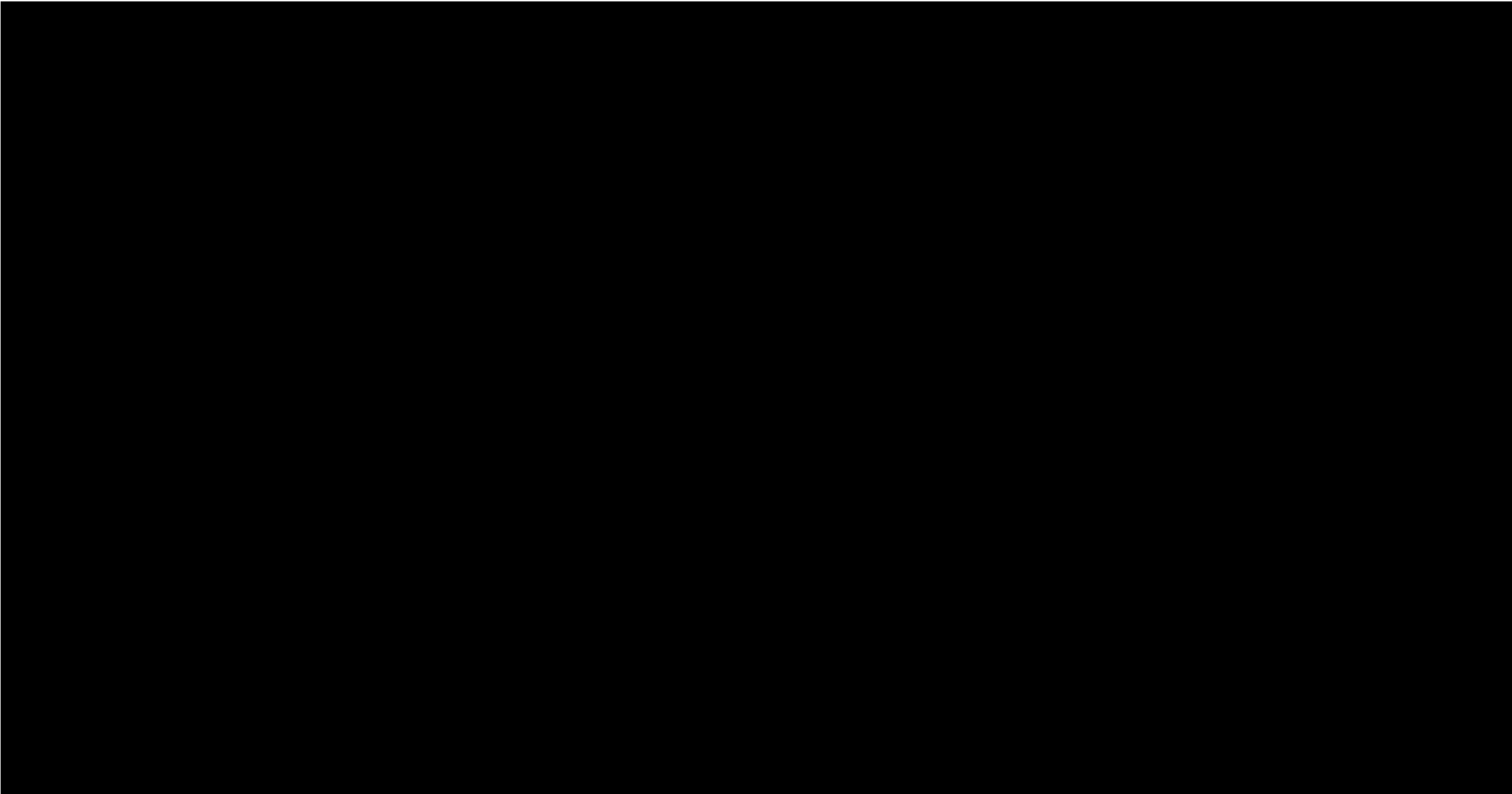
1.1 Scope Statement

The presented detailed start-up budget includes all costs for the following included scope. Details regarding these phases, deliverables and expectations to be met are fully defined in the overall RFP response.

1. Project Initiation – Project planning, outcome definition and measurement, establishment of project governance, establishment of project management office, project plan(s), and baseline product (EBMS) installation into development, testing and training environments provided by CITI (cloud-based)
2. Discovery – Initial requirements gathering and elaboration of all requirements, user stories, and core flows as defined in the Client Management Information System RFP posted March 6, 2019, with clarifications via questions answered as of April 14, 2019.

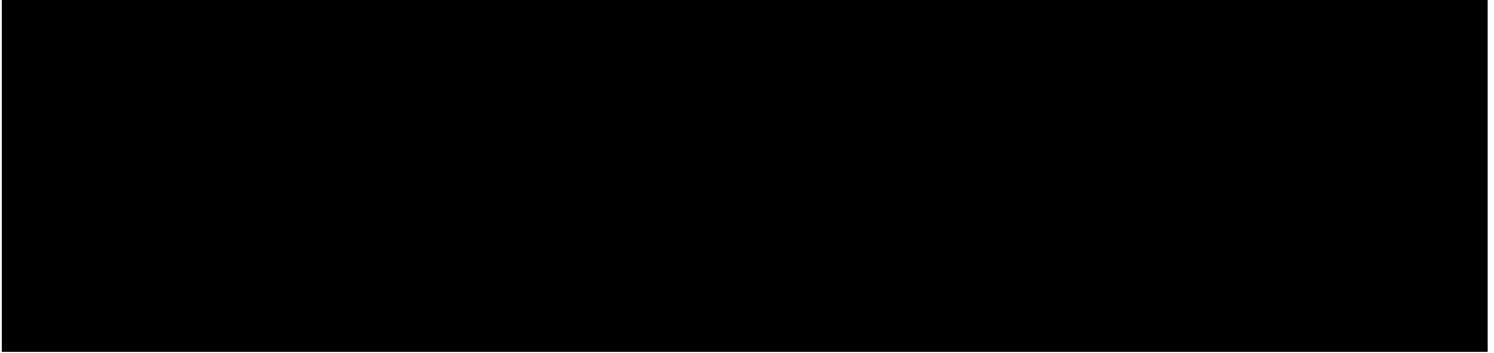
3. Design – Initial design of the solution to encompass all requirements, user stories, and core flows as defined in the Client Management Information System RFP posted March 6, 2019, with clarifications via questions answered as of April 14, 2019. It should be noted that discovery and design is an ongoing process, implemented through an Agile approach with continuous feedback loops.
4. Configuration - Agile iterations of functional product built on EBMS and delivered as functional software in sprints. Delivery of functional value will include the core business functionality (flows) described in the RFP. The order of delivery is subject to approval by Allegheny County. A proposed delivery order and estimated timeline is included below.
5. Integration and Data Migration – The integration of up to 3 systems and the migration of data from 3 systems to facilitate the delivery of the core business functionality (flows) described in the RFP.
6. Documentation – Documentation is an ongoing, iterative process, and will include project, outcome and metric, governance, discovery, design, configuration, integration and migration, training and transition to support documentation. All documents will be delivered in .pdf, Word, Excel and/or other commonly used formats based on the standards of Allegheny County.
7. Training – Training will be provided to Allegheny County and external personnel base on an agreed-upon training plan. At minimum, training will include Allegheny County personnel identified to assist in business implementation (i.e., train-the-trainer), administrators, and information technology staff who will be responsible for ongoing maintenance of the solution.
8. Deployment – Deployment of the production-ready solutions into the identified production environment. This production environment may be on premise or in the cloud based on final decisions by Allegheny County. Allegheny County IT staff will be closely involved with the deployment process to further assist with training and hand-off to operations and maintenance.
9. Transition to Support – CITI will ensure a full transition of support to Allegheny County based on the maintenance and support model to be defined in the completed contract.
10. Project Close Out – CITI will participate in any and all reasonable project close-out activities, such as final presentations, lessons learned sessions, etc.

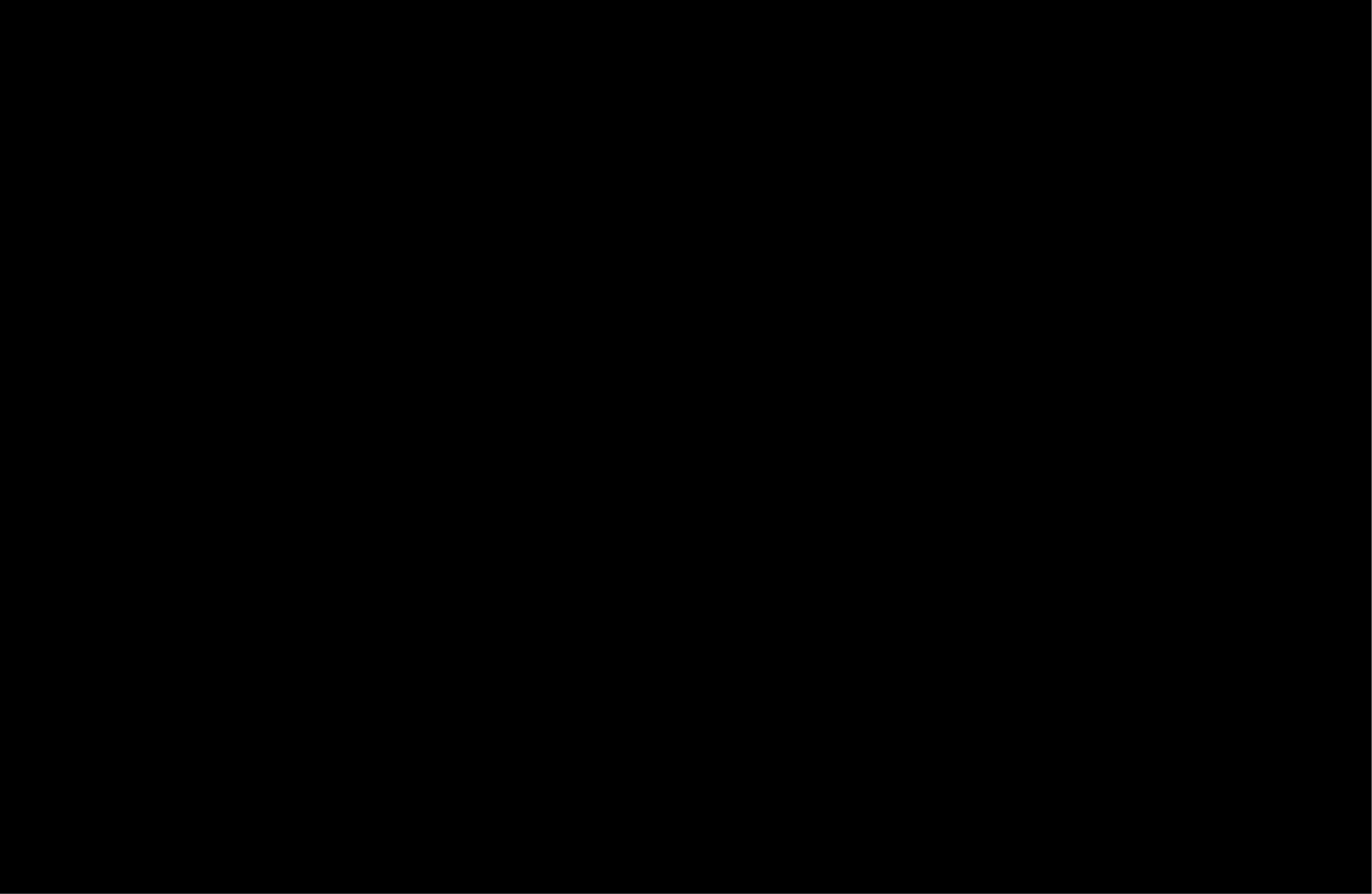
1.2 Implementation Timeline



1.3 Implementation and Annualized Budget

The budget/costs information has been provided for the initial implementation of the solution and two options for ongoing operations. Option 1– On Premises and Option 2, Software as a Service (SaaS).





1.4 Specific Program Functional Example

Allegheny County Re-Entry Program

CITI has conducted a high-level analysis of the information provided in the RFP regarding the Allegheny County Re-Entry Program. The below timeline and budget is provided to demonstrate how Allegheny County can leverage the EBMS platform to rapidly deploy additional solutions that integrate with the modules and data established as part of the completion of the proposed solution as described in the CITI RFP response and Scope Statement above. This timeline and cost estimate assumes that:

- The implementation project has been completed
- Costs are based on CITI completing the work

Costs could be reduced through a collaborative effort. The power of the configurability of the EBMS platform will empower Allegheny County personnel to configure solutions without external services if desired.

