

RFP Response Form

Client Management Information System

PROPOSER INFORMATION

Proposer Name: Eagle Creek Software Services, Inc.
Authorized Representative Name & Title: Kevin Burkhart, Executive Vice President
Address: 10050 Crosstown Circle, Suite 650, Eden Prairie, MN 55344
Telephone: 704-577-7188
Email: kburkhart@eaglecrk.com
Website: www.eaglecrk.com

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

Date Incorporated: 5/21/1999

How did you hear about this RFP? Email from Ian Maverro of Allegheny County

REQUIRED CONTACTS

	Name	Phone	Email
Chief Executive Officer	Ken Behrendt	(952) 230-2070	kbehrendt@eaglecrk.com
Contract Processing Contact	Laura Behrendt	(952) 258-0133	lbehrendt@eaglecrk.com
VP of Technology	Jeff Brusseau	(605) 945-4725	jbrusseau@eaglecrk.com
Accounting Manager	Stephanie Johnson	(952) 230-2058	sludewig@eaglecrk.com
MPER Contact*	Laura Behrendt	(952) 258-0133	lbehrendt@eaglecrk.com

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

BOARD INFORMATION

Provide a list of your board members as an attachment or in the space below.

Ken Behrendt
Kevin Burkhart
Robert Dillon

Board Chairperson Name & Title: Ken Behrendt
Board Chairperson Address: 10050 Crosstown Circle, Suite 650, Eden Prairie MN 55344
Board Chairperson Telephone: (952) 230-2070
Board Chairperson Email: kbehrendt@eaglecrk.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.

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Salesforce Reference

LA Care – (See Overview in Qualifications and Experience Section Below)

Brijesh (Brij) Mathur – I.T. Solution Delivery - [REDACTED]

Vlocity References

The State of Indiana Department of Children Services (DCS) – (See Overview in Qualifications and Experience Section Below)

Kevin Jones – CIO - [REDACTED]

Boulder County Housing and Human Services (BCDHHS) – (See Overview in Qualifications and Experience Section Below)

John Green – Sr. Business Analyst - [REDACTED]

Eagle Creek Reference

Hospital Corporation of America (HCA) – (See Overview in Qualifications and Experience Section Below)

Hunter Groves – Product Analyst - [REDACTED]

PROPOSAL INFORMATION

Date Submitted 4/18/2019

Amount Requested: See Financial Management & Budget Section

Proposal Abstract:

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

Allegheny desires a new CMIS application FRAMEWORK to meet its needs of today and beyond. Our proposal leverages Salesforce – utilized in over 1,000 government agencies – and their top ISV partner, Vlocity. Together, these platforms represent the lowest risk and fastest way to securely build, connect, optimize, and deploy applications tailored for your current and future use cases.

Feature-rich – Combo of Salesforce and Vlocity provides world-class functionality

Reliable – Bullet-proof and fully supported

Agile – Process changes at the speed of business

Modular – Aids pragmatic growth and expansion

Enabling – Easy configuration and usability

Workhorse – Scale to any size of internal/external users

Optimized – Reduce IT spend and increase output

Relevant – Works today and tomorrow as needs evolve

Knowledgeable – Implemented and supported by industry-leading experts

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CERTIFICATION

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

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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. **Per QA, we do not exceed 35-page limit when excluding screen shots.**

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.

Our proposed CMIS framework is based on two complementary software solutions – Salesforce and Vlocity – and system integration services from Eagle Creek (and optionally, Public Consulting Group) to achieve your business objectives. Below are examples of how each element have helped their respective clients achieve their desired results.

Salesforce

With the world’s leading cloud platform, Salesforce is freeing government data from legacy systems and unleashing staff, partners, and citizens to administer government in powerful new ways. In the public sector, Salesforce’s trusted cloud platform and applications help government employees and agencies collaborate easily and connect with citizens and partners like never before. Organizations around the globe are leveraging Salesforce’s leading cloud solutions and experiencing incredible results ranging from more connected customer service, to streamlined operations, better performance, and overall cost savings. A few representative customer use cases are provided below:

New York City Department of Health and Mental Hygiene, Office of Emergency Preparedness and Response needed a better way to manage and award grants to help citywide public health preparedness. More than 6 years of information was stored in email, Excel spreadsheets, Word documents, and paper-based systems, making it difficult to access, analyze, and share data. They needed to coordinate with internal and external partners; track consulting agreements, equipment, personnel, supplies, and travel; and ensure grant requirements were met. Grant staff also needed an easy way to manage approval processes and communications about approval status. OEP selected the Salesforce cloud platform for the ability to automate and streamline business processes. With help from a Salesforce system integration partner, OEP developed a Public Health Emergency Preparedness and Response Performance Management System in three months and deployed to 55 staff in program, project and fiscal management functions. Programs can electronically submit requests for funding. Automated workflows keep funding requests moving through review, approval, and notifications processes. Automated notifications keep programs up to date on grant funding status and approvals. Custom reports track project deliverables and spending of funds, showing real-time performance of funded activities and keeping leadership updated on key metrics. Systems administrators can easily modify fields and forms as grant requirements and business processes change. OEP has reduced time spent on administrative tracking by having all data in one system, enabling program administrators to ensure successful completion of preparedness and response activities. Activities can be linked with

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federal preparedness requirements, ensuring compliance and facilitating reporting to the funding entity. Reports can be generated quickly and easily on spend-down and performance in specific preparedness and response areas. OEP has experienced improved customer service and increased transparency to programs through information sharing.

San Francisco Family Service Agency replaced an entirely manual system with an enterprise-wide, HIPAA-compliant, electronic client record solution that helps program managers and clinicians manage social service data on 12,000 clients across 24 major programs, each with different data collection and reporting needs. Working with an implementation partner, FSA customized Salesforce Sales Cloud Enterprise Edition to create San Francisco's first automated client and case management system. Using the Salesforce Platform, FSA built a custom human services case management application called CIRCE. Initial deployments addressed client progress notes and documentation; subsequent phases included development of tools for client diagnosis and assessment, and for care planning. The solution was deployed to 215 users across all organizational functions, including 120 case workers spread among four major service sites. All documentation is stored within Salesforce, eliminating the need for paper forms and files and making it easy to share information. The solution is also used to track contacts and episodes. Clinicians and support personnel can easily share diagnoses, objectives, progress notes, and plans of care. View Customer Story: <http://www.salesforcefoundation.org/stories/family-service-agency/>

L.A. Care provides access to quality health care for Los Angeles County's vulnerable and low-income communities and residents and supports the safety net required to achieve that purpose. As the nation's largest publicly operated health plan, L.A. Care serves more than two million members in six health plans. L.A. Care Business Partners expressed to its IT department the need for applications that allow quick consolidation of customer data and streamlining day-to-day tasks. And for IT, they needed a tool that would allow various project teams to fill requests quickly as well as handle frequent changes in requirements and timelines. Initiated as a joint effort with L.A. Care Member Services, Salesforce at L.A. Care represents the realization of two important IT organizational goals: (1) Identify tools and methods to provide right application solutions the first time to our Business Partners and (2) Implement development processes that increase collaboration and more accurate communication between Business and IT. Salesforce is doing this in several different ways. An initial project was done for the Member Outreach and Retention (MORE) team at L.A. Care. For this initial project, Member Outreach and Retention needed a tool to manage member campaigns efficiently and track internal activities around member interactions. The Salesforce team used the out-of-the-box Campaign Management module to fill the request and scheduled integration with the TriZetto QNXT system to get member data seamlessly for the customer. MORE was very happy with the result and has since completed their Phase 2 project to enhance the original functions. Currently, MORE is working with the Salesforce on Phase 3 of their development roadmap to direct integration with MHC to use MediCal member data in member outreach campaigns. In another project, the L.A. Care Provider Network Operations (PNO) Team reached out to IT for help defining one tool that will deliver an integrated Provider Workforce solution customized for L.A. Care. The L.A. Care Salesforce Team led various rapid application design sessions to understand PNO's needs as well as the complex data relationships in play for PCPs, PPGs, and Hospitals. As a result, this multi-phase project will encompass: - Development of a custom CRM solution - System integration with existing Provider systems. This will include clean-up of standalone spreadsheets and

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one-off databases. - Automation of departmental workflows, including real-time collaboration with Salesforce Chatter.

Vlocity

Vlocity is a proven application, in use by more than 150 large customers around the world. Leading blue-chip companies like Verizon, T-Mobile, New York Life, Farmers, and Anthem have selected Vlocity to help them provide modern, digital customer interactions. US Government agencies including the State of Indiana, New York City, Washington, DC, and Boulder County, Colorado, use Vlocity to enhance client interactions and improve outcomes. Vlocity has helped these organizations rapidly deploy HHS solutions with minimal or no coding.

Boulder County Housing and Human Services (BCDHHS) offers local residents affordable housing, child and family support, health care, food and financial assistance, and long-term care, plus other services. BCDHHS goal is to assist their customers with the services they need to become self-sufficient as well as collaborating with a network of providers with the same goal. They needed better digital tools to meet these goals. BCDHHS case managers were having difficulty accurately tracking all activity as well as providing communications to their community partners. With the implementation of a new provider portal, BCHHS now can give their community partners real-time access to a customer's information. They can provide better data delivery, services and community support more efficiently. In addition, BCHHS has implemented technology tools for communication and data sharing for customers and partners. Staff as well as providers can now leverage mobile and cloud apps to provide and share a full customer view of information, plus referrals, from various locations. They can provide their caseworks with a service provider directory that meets their needs and generates referrals plus allowing the ability to assign tasks to providers and collaborate with partners. To ensure customer progress, everything is visible via the portal. Refer to the press release for detailed information:

<https://vlocity.com/community/boulder-county-selects-vlocity>

The State of Indiana Department of Children Services (DCS) conducted extensive due diligence on Salesforce and Vlocity that culminated with agency decision to standardize their IT systems on the Vlocity and Salesforce platform. State of Indiana implemented several pilot projects such as Foster Care solution built on Vlocity with several other possible use cases under way. The Vlocity and Salesforce application is being considered for statewide deployment of Indiana Child Welfare CCWIS system as well as Child Support Enforcement System.

New York City Employees Retirement System (NYCERS) selected Salesforce and Vlocity in 2018 to modernize client interactions in its member contact center and self-service portal. NYCERS contact center agents will benefit from a complete 360-degree view of all member interactions. On the self-service portal, Vlocity's guided processes will take members step-by-step through the tasks they need to perform, increasing task completion rates and raising the number of member actions that can be performed through the less expensive self-service channel.

Washington, DC Department of Health selected Vlocity to provide a new case management system for the Healthy Start program, which helps pregnant mothers and their newborns get the healthcare and other assistance they need to ensure the best possible outcomes for the babies. The Department of Health needed to replace an outdated system that was inflexible and cost the department considerable money every time they needed to make a small change to their system. Vlocity worked with an

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implementation partner and the Department of Health project team to implement the first phase of the Vlocity Public Sector solution in just over six weeks. The initial phase focused on the extensive intake process that the Healthy Start caseworkers needed to capture for each new client. Subsequently, Vlocity has collaborated with the team to provide the Healthy Start caseworkers a modern tool for tracking all interactions with the pregnant mothers and infants served by the program. The Department of Health is benefiting from a flexible system that can be adapted to meet their needs, and powerful reporting tools that allow the system users to generate the reporting they need with ease.

Eagle Creek

In 1999, Eagle Creek was founded as a specialty CRM system integrator. Since that time, we have successfully participated in many of the largest and most complex customer/constituent-facing implementations in North America and beyond. Our credentials include:

- Hundreds of US-based (onshore) consultants dedicated to customer-facing technologies
- 5+ million hours of related implementation and development experience
- 20 years of contact center/case management/CRM implementations and managed services
- 12+ years of SaaS-based implementation services
- 8 years of Salesforce implementations, spanning hundreds of clients and virtually every major Salesforce product offering
- Third largest number of *Vlocity-certified* consultants to date with experience in major implementations, including Anthem, WellCare, MetLife, Telecom Argentina, Verizon, TXU, as well as contributing to multiple Vlocity Process Libraries (VPL's)
- Dedicated practice areas that include:
 - **CRM** – 70+ dedicated Salesforce multi-certified consultants
 - **App Dev** – UI/UX, Apex, Java, .Net, Drupal
 - **Data Management** – ETL, Data Integration, MDM, BI
 - **QA** – Dedicated QA teams for both Functional and Data QA

Our value proposition is simple – deliver the highest quality services at the lowest possible cost, while mitigating project risks. We do this by leveraging our unique delivery model that combines senior “onsite” consultants with “offsite” consultants located in our three US-based technology centers.

These technology centers were created out of a public/private partnership between Eagle Creek, the States of North and South Dakota, and the respective city locations. We are proud of the number of STEM jobs we have created in places where they previously did not exist. And we are delivering remarkably high quality on some of the most sophisticated customer-facing programs in the industry from these non-urban locations – while simultaneously revitalizing our communities.

Our US-based, “Onshore” Delivery Model fits best if you require the following:

- **High Collaboration** – Close collaboration between you and your system integrator. And close collaboration between IT and the Users (no work performed offshore)
- **Affordable** – If your needs require something more than “one-and-done” that you can afford over multiple phases of implementations

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- **Consistency** – We average less than 7% annual employee turnover
- **Complexity** – The more complex your needs the better suited we are. This includes:
 - “Enterprise” level implementation approach (e.g. fully integrated CMIS)
 - Large and complex data migration and data integration
 - Sophisticated QA needs – both functional and data-level QA

Our *public sector experience* includes, but is not limited to, the states of Arizona, California, North Dakota, Oregon, Vermont, Iowa, Tennessee and Utah. At a federal level, we have worked with the Department of Homeland Security (Eagle Creek has a current *Facility Clearance* through the DSS division of DoD) and the U.S. Army. Our experience ranges from case management, to health information exchanges, to web site and content management systems, to business intelligence.

Anthem is a \$62 billion company. It is the largest managed health care organization in the Blue Cross and Blue Shield Association. Anthem is working to transform health care with trusted and caring solutions. Anthem delivers quality products and services that give their members access to the care they need. With more than 73 million people served by its affiliated companies including nearly 40 million enrolled in its family of health plans, Anthem is one of the nation's leading health benefits companies. One in nine Americans receives coverage for their medical care through Anthem's affiliated plans. Anthem needed an “onshore” organization capable of scaling resources based on the needs of projects. One experienced in supporting and integrating into offshore teams, with a lower cost model when compared to U.S. based onsite companies. An organization with depth and breadth in data related technologies, and expertise in Salesforce, Vlocity, and customized application development. An organization that consistently produces quality deliverables.

Eagle Creek provided multiple onshore teams to Anthem, including:

- Salesforce and Vlocity implementation services to their national accounts, small group, client strategy, and underwriting divisions. Team sizes have ranged from six to twelve consultants.
- 24x7 Informatica Tier 3 support team.
- Data warehousing team supporting Anthem’s enterprise wide, Teradata warehouse.
- Business Intelligence teams building mandatory state healthcare reports.
- Application development teams building new web applications to support the changing requirements of the business.
- Metadata management and support team.

With these onshore teams, Eagle Creek eliminated numerous high-cost onsite resources while replacing offshore teams that could not meet the quality demands of the Anthem organization.

Hospital Corporation of America (HCA) is a leading provider of healthcare services. It is a company comprised of locally managed facilities that include over 180 hospitals and 115 freestanding surgery centers in the U.S and the U.K. HCA employs approximately 250,000 people and is dedicated to providing healthcare services that meet each community's local healthcare needs. HCA had cycled

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through various Salesforce partners – both big and small – prior to engaging with Eagle Creek. They were not satisfied with the consistency of results or the responsiveness of their previous partners. Given their significant plans for deploying the Salesforce platform across their organization, they needed a trusted partner to assist them in their efforts.

Eagle Creek was selected for its technological expertise, ease of engagement and versatility. Eagle Creek’s “Adaptive Agile” methodology enabled high levels of communication and speed to market. Since engaging in 2014, Eagle Creek has deployed various Salesforce solutions across 14 different divisions and has become the go-to partner for all new Salesforce initiatives. Projects have ranged from contact center case management, innovation tracking and prioritizing, opening of urgent care centers and laboratory management – all based on the Salesforce platform.

OPTIONAL – Public Consulting Group (PCG) – See Finance Section

Public Consulting Group, Inc. (PCG) is a government management consulting company headquartered at 148 State Street, in Boston MA. Established in 1986, PCG has been serving primarily public-sector clients nationally and globally for over 32 years. The firm has experience in all 50 states, clients in six Canadian provinces, and a growing practice in the European Union. Currently, PCG has domestic contracts across five practice areas in all 50 states. Today, with more than 2,200 professionals in over 50 offices around the U.S., Canada, England, and Poland, PCG is committed to providing proven solutions and outstanding customer service to its clients.

PCG has dedicated itself almost exclusively to the public sector for over 30 years. They have developed a deep understanding of the legal and regulatory requirements and fiscal constraints that often dictate a public agency’s ability to meet the needs of the populations it serves. They have helped numerous public sector organizations to maximize resources, make better management decisions using performance measurement techniques, improve business processes, improve federal and state compliance, and improve client outcomes.

Many of PCG’s employees have extensive experience and subject matter knowledge in a range of government-related topics, from disability services, vocational rehabilitation, child welfare, Temporary Assistance for Needy Families (TANF), Welfare to Work, and Medicaid and Medicare policy to special education, literacy and learning, and school-based health finance. They stay abreast of innovations in practice in technology as they strive to help our clients best meet the needs of the clients they serve.

PCG also helps state, county, and municipal human services agencies achieve their performance goals and better serve populations in need. The organization is a proven national leader in consulting services for state health and human services program including Temporary Assistance for Needy Families (TANF) programs, state child welfare and juvenile justice programs, workforce investment boards, early childhood programs, and state Supplemental Nutrition Assistance Programs (SNAP). PCG provides state-of-the-art consulting, project management, technology installations, and operations management to improve service outcomes and associated business functions while reducing or containing costs.

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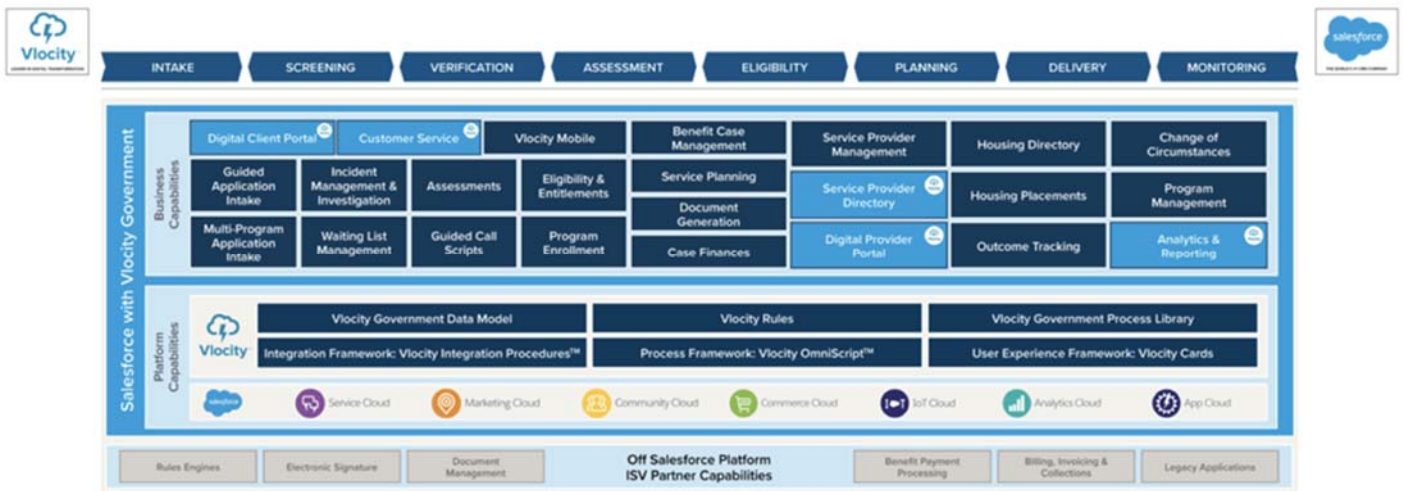
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Functional Requirements (40 points)

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

To best address this question, we will provide an answer that 1) covers general capacity and capabilities of the Vlocity solution and 2) provide a response to each core feature requirement / story as referenced in the RFP.

General Capacity and Capabilities - Vlocity HHS Case Management is a flexible and powerful case management application built on the Salesforce Platform specific to the needs of health and human services agencies that provide services to improve the lives of citizens. Vlocity leverages a secure, pre-built, domain-specific application with a core set of HHS business processes as shown in the diagram below, to deliver a solution that meets Allegheny County's requirements and provides a flexible model to support future enhancements.



Vlocity: A Complete Cloud HHS Case Management Solution

Legend: dark blue - Vlocity, light blue – Salesforce enhanced with Vlocity

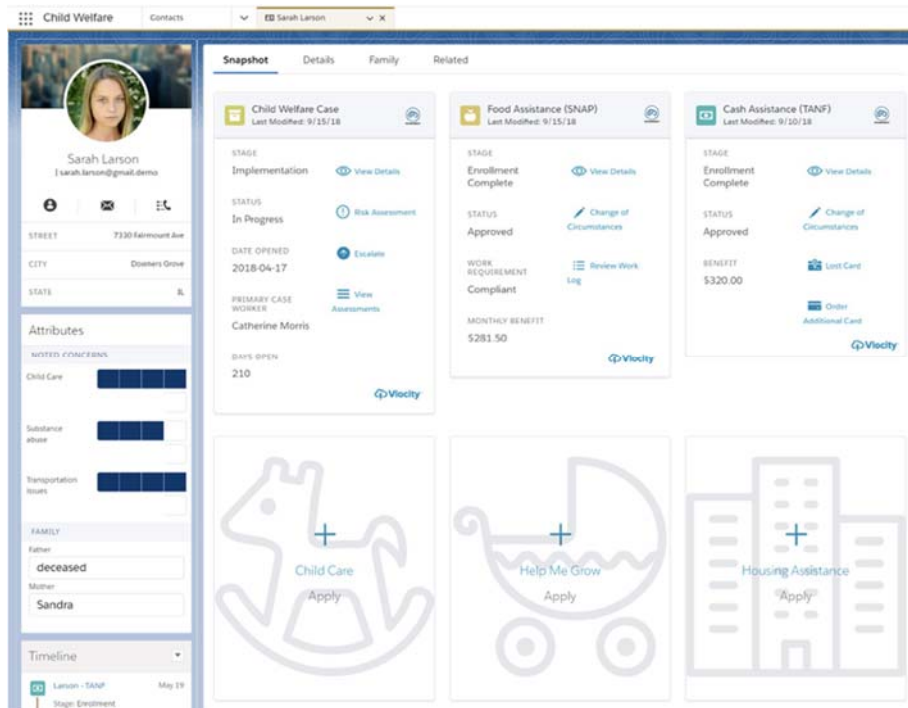
There are several key components that allow for a robust, user friendly, web-based interface that can scale to meet business needs, allows for quick process changes, and mitigates cost of ongoing maintenance. These include:

Vlocity Cards

Central to the Vlocity user experience is a responsive, card-based interface that helps organizations build interactive, easy-to-use screens that surface the most relevant information and best next steps to the attention users.

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Vlocity Cards

The user experience is assembled by configuration of components called Cards. Cards are capable of surfacing data from multiple systems, offering contextual actions, a role/product/status-based presentation, multi-channel support and access from other websites. A Vlocity Card is built once and leveraged in multiple places. Cards are built by specifying a data source, and selecting what fields and actions are available for that particular state.

Cards can be dragged and dropped on the desired layout, to create a 360° view of the client, a service provider, or a program. For example: when creating a single view of a client, information about the client's participation in multiple programs, a timeline of all client interactions, and other programs which the client is not enrolled, are pre-built cards that can be configured via point and click. The configured user experience enables a caseworker to see a 360° view of the client through the lens of the agency, not simply the pinhole view of one program the client is enrolled in. In the example above, active cards show the client's enrollments while the cards that are not active show other programs in which the client is not currently enrolled but could potentially benefit from the identified additional services.

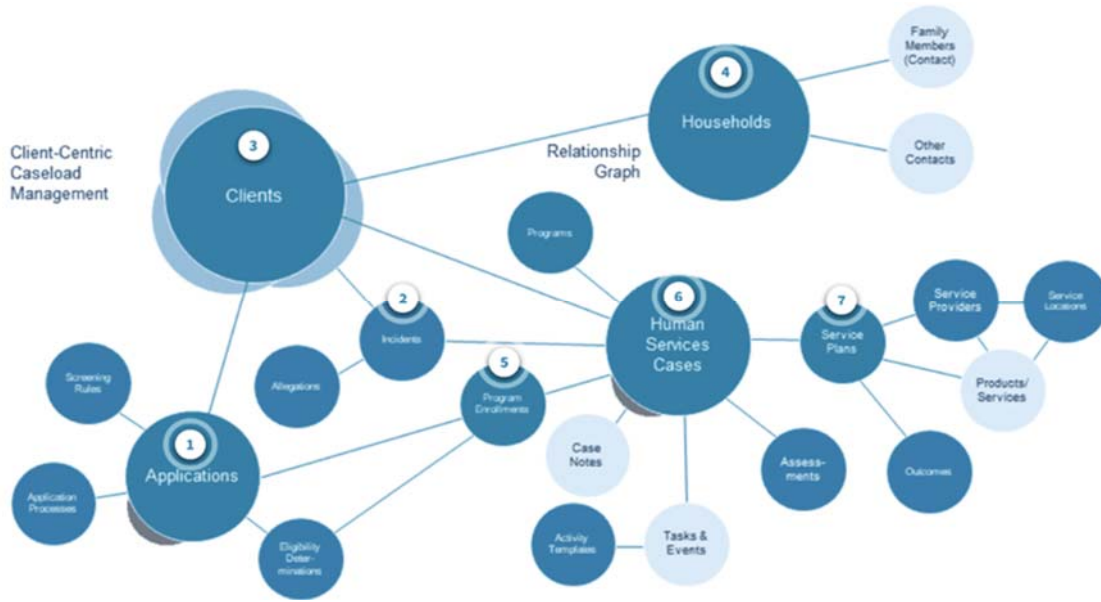
Vlocity HHS Data Model

The visualization below is a high-level representation of the key data elements included with the Vlocity HHS Case Management App. The data model is 100% additive, which means it doesn't duplicate objects in the Salesforce data model. The Vlocity application has been designed for the needs of HHS agencies, with 250+ additional objects that do not count against Salesforce object limits. This means that

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Allegheny County can deploy these 250 additional objects in Salesforce at no additional cost in license fees, implementation fees, and/or support and maintenance fees when compared to custom object development/customization.



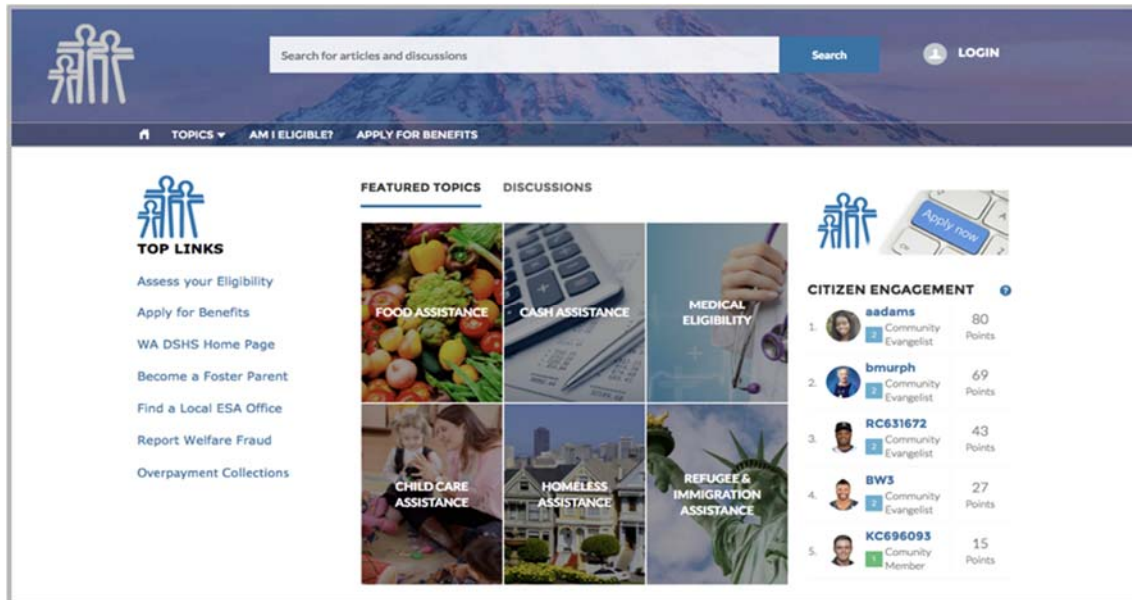
Vlocity HHS Data Model

Self-service Portal for Service Providers

Vlocity's low-code/no-code development toolset helps Government customers create easy-to-use, one-stop portals that allow citizens and service providers to accomplish a wide-variety of tasks from a single website, including learning about available social assistance programs, determining eligibility, applying for services, receiving status updates, tracking services provided and beneficiaries served, and much more. Vlocity layers several capabilities on top of Salesforce Communities, which provides the underlying infrastructure for the self-service portal.

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Vlocity Self Service Portal Example

Vlocity OmniScript

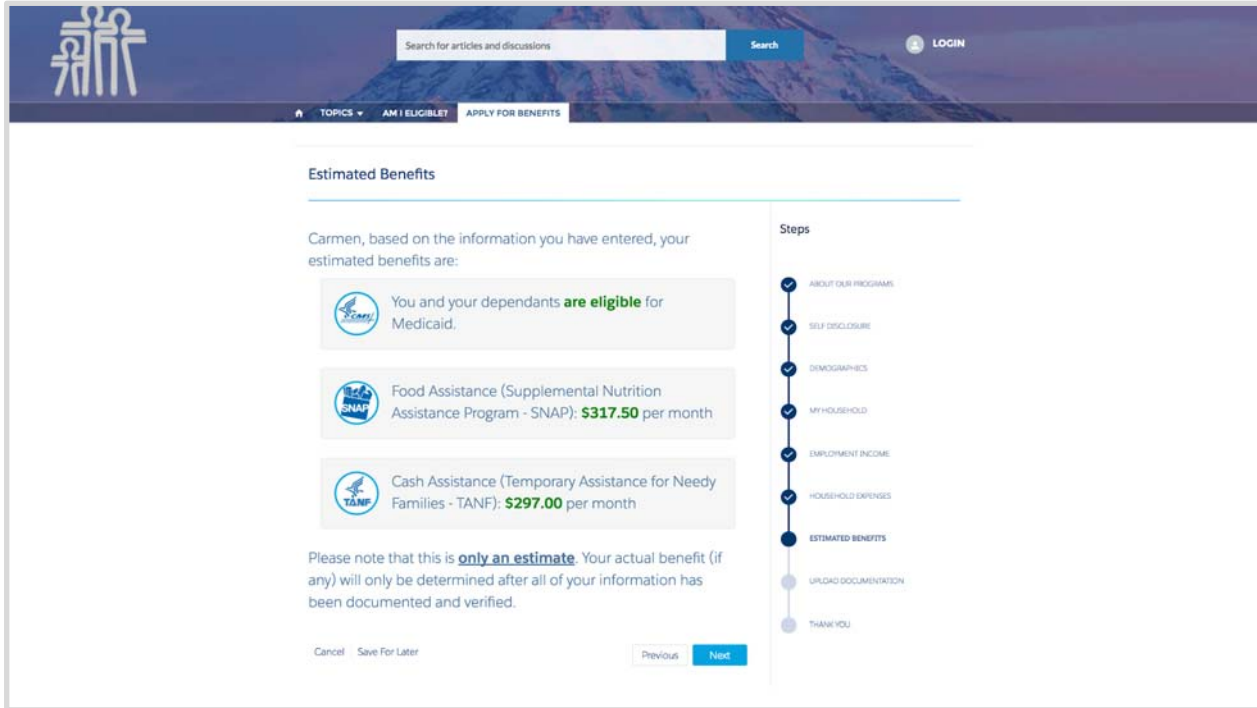
Vlocity's guided process builder (aka OmniScript) directs citizens step-by-step through the intake process to apply for DHS services, as well as any other tasks they may need to complete. With clear instructions and dynamic steps that can adapt the intake form to the client's specific circumstances, based on their answers, Vlocity increases the completion rate of tasks done on the portal, reducing reliance on more expensive channels of service.

Vlocity OmniScript can also connect to Vlocity's calculation procedures and other business logic to determine an individual's eligibility for services and programs based on information provided in the application. This can allow the County to provide the applicant with a preliminary eligibility determination instantly, subject to confirmation of the details provided in the application. OmniScripts can also be used by employees, to complete an application on behalf of a County resident, to perform an assessment, to create a service plan, or to walk the client through any process he or she needs to complete in the Vlocity case management application.

Vlocity OmniScript has a drag-and-drop administrative interface that will allow the County to configure new processes for new services and deploy them to the portal easily, without needing to develop code. This will reduce the County's reliance on a third-party to perform this work. Vlocity case management client Boulder County Housing and Human Services regularly adds new processes to their own portal using the Vlocity tools.

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Vlocity OmniScript (Guided Process) Example

Core Feature Requirements:

3.1 Referral

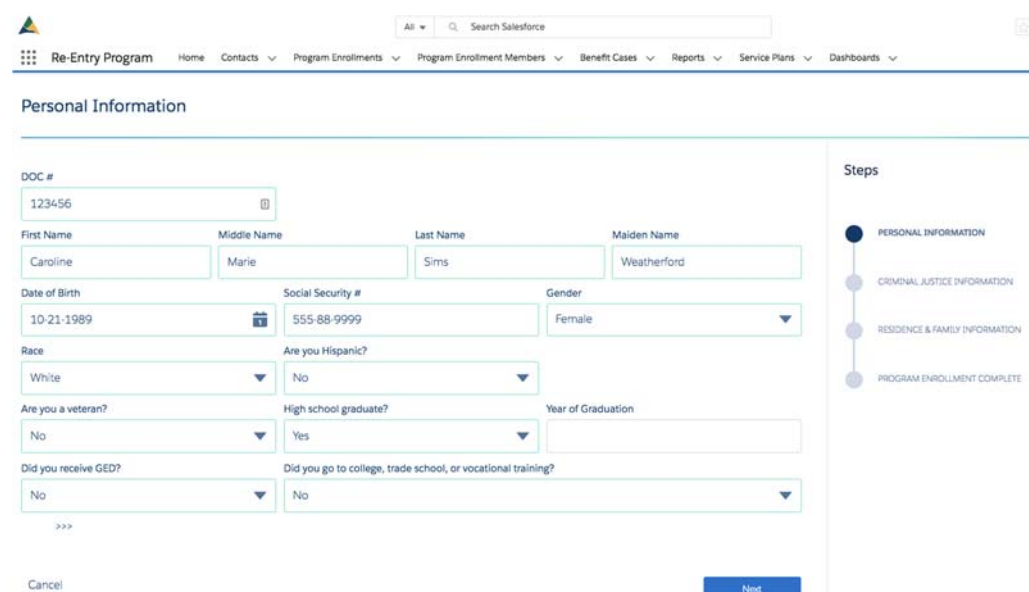
3.1A	The Vlocity HHS Data Model includes a Referral object that captures referrals from multiple sources and can be associated to contacts, households, cases, service providers, program enrollments and individual programs. These Referrals have different statuses, types, and stages that can be used to identify the source and additional information such as outcomes, completion and created dates as well.
3.1B	See answer for 3.1A
3.1C	With Vlocity Waitlists, you can create custom list views with any standard or custom object. For example, you can automate the ordering of applicants waiting for housing and other programs. Vlocity Waitlists are flexible; with the administration tool, an administrator can determine which columns to display and set prioritization rules for ordering records on the list. Workflow rules make it easy to automatically add, inactivate, and remove records from the list.
3.1D	The Vlocity Referral object has an existing relationship to the Salesforce Contact object so multiple referrals can be associated to one client or contact record. Depending on the county’s requirements, Referrals can be identified as a single record but can show multiple activities or events around the single record and essentially show a “history” of that Referral or can maintain the Referral as multiple records.

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3.1E	The Vlocity Referral object can be related to Salesforce objects that identify individual contact points and activities related to any type of communication to clients and referral sources. The activity is associated to the Referral record for tracking purposes.
3.1F	The Vlocity Referral object includes the ability to capture the reason and outcome of the referral.

3.2 Intake

3.2A	<p>The Vlocity OmniScript (guided process) capabilities allow for the intake of information for a variety of purposes such as program enrollments, determining eligibility, as well as application capture and program validation. The guided process is personalized and dynamic, based on the data entered into the different steps of the process flow. Used in conjunction with Vlocity calculation procedures and the Vlocity integration framework, intake of information can be seamlessly accessed, eligibility calculated, and the information saved into the Salesforce system providing an easy to use and consistent interface for citizens and workers to digitally interact with the county.</p>  <p><i>Pre-Entry Program Intake process example with Vlocity guided process</i></p>
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3.3 Client Management

3.3A	<p>The Vlocity data model includes the support of “Party” Relationships that allow for the identification of individual relationships and relationship types between contacts, accounts, and households in the system. The relationship types are all configurable and thus can support the County’s needs including the ability to manage and identify an individual client’s household and relationships so that a worker can easily be able to see a snapshot of a client’s existing family and support structure. The Vlocity capabilities also include a graphical display tool to illustrate the relationships of an individual client so the worker can visualize the current relationships and their types including family, employment, references, and other contacts related to the clients as shown below:</p>
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	<p style="text-align: center;"><i>Vlocity Relationship Graph</i></p>
3.3B	<p>Within the Vlocity data model, there is a robust Household object that provides for the ability to establish and identify household members, their relationships and be utilized to calculate eligibility based on underlying program requirements. Workers can also utilize Vlocity graphical display tools (as displayed in 3.3 A within the Relationship Graph) for the workers to visualize the household relationships and be able to make quick and accurate decisions based on the individual or family’s needs. This Household object has many existing relationships with other Salesforce and Vlocity objects including Contacts, Accounts, Cases, Applications and more where additional details can be captured and associated to the Household.</p>
3.3C	<p>Salesforce user calendars and workflow can be leveraged to schedule and manage meetings and associated alerts. Users can invite people to meetings and see meeting responses in Salesforce. With Lightning Sync you can add attendees to events, and the invitation is sent from Microsoft Exchange or Google calendars. Lightning Sync then syncs attendee responses to Salesforce so that other users with access to the event can see attendee status.</p>
3.3 D	<p>Out of the box file attachments is available via Salesforce files (Content Documents). Data from clients’ service records can be captured and stored as .pdf or other document formats such as Microsoft® Office documents, images, and videos—directly to Salesforce records.</p>

3.4 Assessment

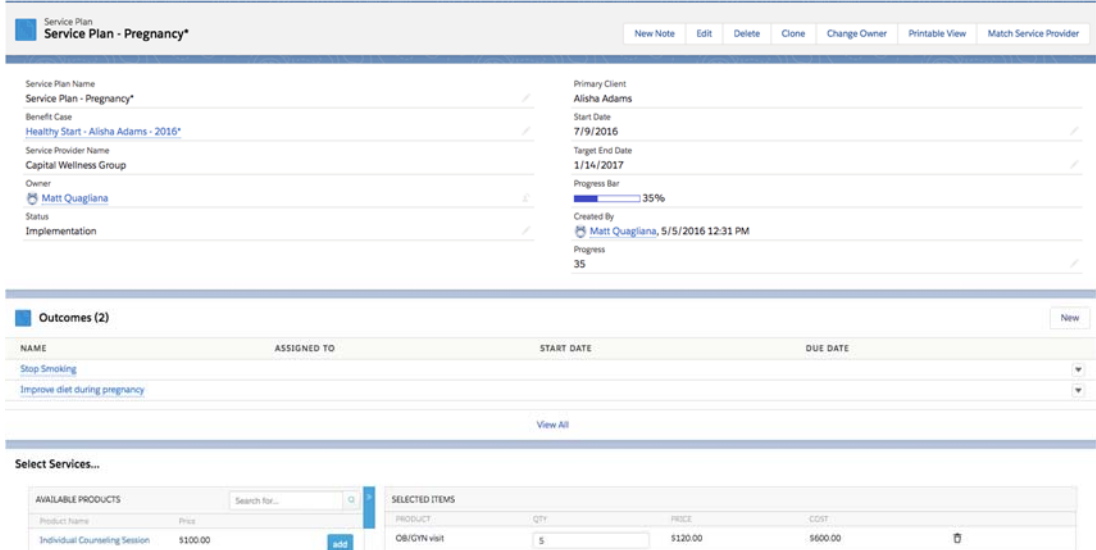
3.4A	<p>Vlocity HHS Case Management includes an Assessment object which can be utilized to perform assessments based on configurable criteria and attributes that can produce a score and status, based on the results of the assessment.</p>
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3.4B	The Vlocity Assessment object is related to a variety of other objects in the system including Contacts and Households and existing records can be updated or additional Assessments can be completed at any point in time by the worker.
3.4C	Vlocity Assessments include the ability to create and configure different assessment types and scoring criteria that can then be saved as templates that can be used to create and save standardized assessments that can be utilized by different workers for different situations.

3.5 Service Planning

3.5A	<p>The Vlocity application and Data Model include the ability to create and manage Service Plans which are the agreed upon actions, products and services that a government organization will provide to the client. The Service Plan structure allows for workers to identify specific services and service providers to assign to a Service Plan, as well as to identify individual goals and outcomes related to the plan. This data is associated to the underlying plan directly.</p>  <p><i>Service Plan example showing underlying Outcomes identified and ability to search and select Services</i></p>
3.5B	Vlocity Service Plans functionality includes the ability to document and edit goals and objectives for an individual client. Additionally, progress bars, statuses, and start/completion times are also available to monitor and track progress of the goals.
3.5C	On the Vlocity Service Plan object and underlying goals and objectives, there are a wide variety of dates including start/due dates, target dates, etc. that can be used to track an individual client’s progress over time. The Vlocity process “Add Outcomes to a Service Plan” guides a case worker through creating an Outcome Plan associated with a Service Plan for a client. After progress has been made with an initial set of outcomes, a case worker can create a new Outcome Plan for the future, with the past Outcome Plan serving as historical progress that the client has achieved.
3.5 D	The Vlocity Service Plans can be created / edited with different names, types and structure to meet DHS requirements. They also can be associated to specific Programs in the system

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	which can drive business processes based on the selected program to drive the plan down specific paths and automate processes.
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3.6 Services

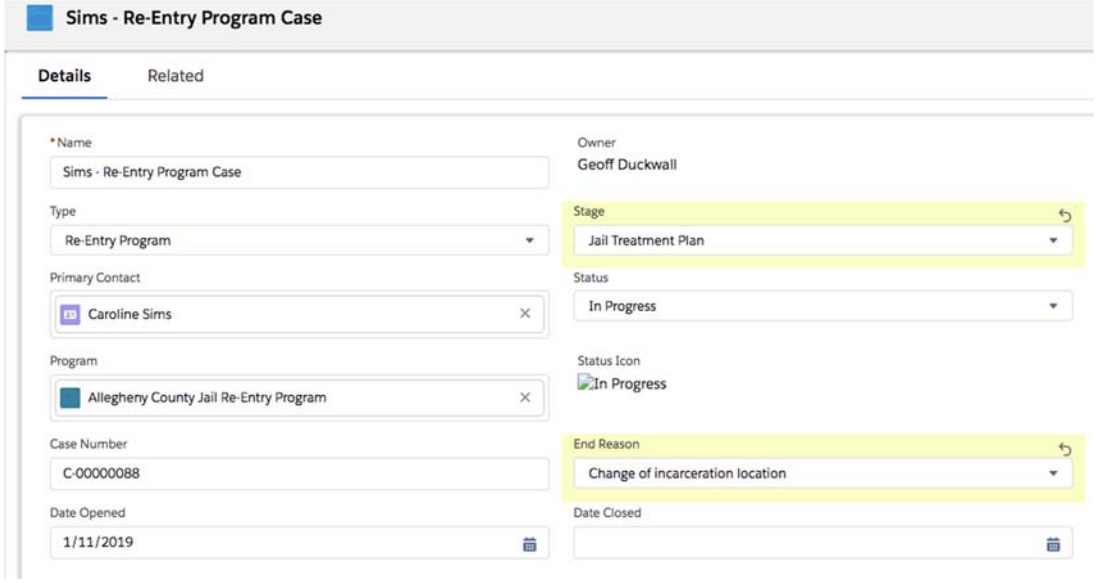
3.6A	The Salesforce Activity Management capabilities, in conjunction with the Vlocity objects such as Benefit Cases, Service Plans, etc. can be used to document and identify “touch points” and tasks/events that take place between the workers and their clients. This functionality can track the beginning and end time, the status, as well as the type of interaction, and provides the ability to capture notes related to the interaction. In addition, other criteria can be identified for capture and the ability to flag for follow up contacts can be provided.
3.6B	See answer to 3.6A
3.6C	Within the Vlocity HHS Data Model the Referral object is leveraged to capture referral details from multiple sources and can be associated to contacts, households, cases, service providers, program enrollments and individual programs. The Referrals data elements allow for the capture of different statuses, types, and stages that can be used to identify the source and additional information such as outcomes, completion and created date.
3.6D	Users can invite people to meetings and see meeting responses in Salesforce. With Lightning Sync, you can add attendees to events, and the invitation is set from Microsoft Exchange or Google calendars. Lightning Sync then syncs attendee responses to Salesforce so that other users with access to the event can see attendee status. To record attendance of a client at an event, a small customization would be needed to mark that an attendee was present at an event.

3.7 Discharge

3.7A	Utilizing the Vlocity Data Model, the worker can update a variety of Stages or Statuses on objects that can indicate and drive different business processes and automated workflows when the discharge status of a client changes. For example, on the Benefit Case associated to a client, a Status or End Reason code/value can be entered to indicate that a client has been discharged and the reason for the discharge. This can drive the generation of additional steps or work items/activities that can be executed to complete the process, provide notifications or complete final steps.
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3.7B	 <p style="text-align: center;"><i>Vlocity Benefit Cases</i></p>
	See answer to 3.7A

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

As a native application built 100% on the Salesforce Platform, Vlocity fully leverages many of the Salesforce features including reporting functionality. Salesforce offers a real-time, robust reporting and analytics engine that enables deep analysis of all Salesforce and Vlocity data.

Key benefits include:

- Real-time information for up-to-the-second insight
- A single solution for insight into clients, programs, case workers, service providers, and operations
- Custom reporting so business users can quickly create their own reports
- Customizable dashboards so executives and managers can turn data into action
- Security controls to limit access to the appropriate users
- Integration with other corporate data for comprehensive business insight

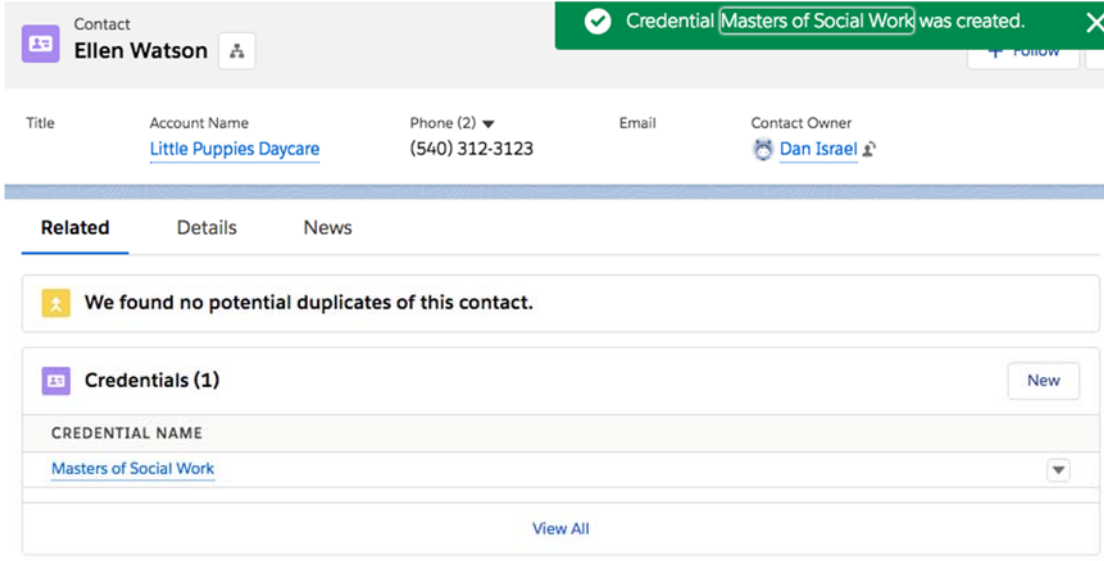
The Vlocity and Salesforce capabilities will meet all desired Allegheny requirements highlighted in these respective areas:

3.8 Provider / Facility Management

3.8A	Vlocity includes Programs to define individual programs including eligibility requirements and Program Enrollments which provide a process for enrolling into a program. These are both configurable by administrators allowing for program and eligibility requirements setup by a non-technical/development resource.
3.8B	Vlocity provides a Credentials object which is a child of Service Provider Contacts, that can

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	<p>be used to track professional achievements. This can be utilized to capture training achievements. See screenshot below.</p> 
3.8C	<p>Activities in Salesforce include tasks, events, and calendars. With Salesforce, track tasks and meetings together in lists and reports to easily prioritize your time and keep up with your applicants, assessments, clients, benefit cases, service plans and work not directly related to a client.</p> <p>For supervisor sessions with workers, a custom task type would be configured to capture these activities. Similarly for other administrative tasks, additional task types could be created to capture the time spent not working on client cases. Repeating tasks can be used to make a task to recur a specified number of days after a trigger that you choose.</p> <p>Run standard or custom reports that display details about your tasks or events and their related clients, benefit cases, service plans, and other associated records.</p>
3.8 D	<p>Utilize Salesforce standard functionality to implement Formula Fields to track time on Case work, and Tasks. Create Triggers to rollup time to appropriate SLA requirements.</p>

3.9 User Administration / Security

3.9A	<p>With Vlocity OmniScript an administrator can easily add, manage or delete data collection fields via configuration. OmniScript supports 20+ input components for collecting information from users including:</p> <table border="0" data-bbox="389 1638 1218 1879"> <tr> <td>*Checkbox</td> <td>*Password</td> <td>*Image</td> </tr> <tr> <td>*Currency</td> <td>*Radio Button</td> <td>*Lookup</td> </tr> <tr> <td>*Date</td> <td>*Range</td> <td>*Multi-select</td> </tr> <tr> <td>*Date/Time</td> <td>*Select</td> <td>*Number</td> </tr> <tr> <td>*Disclosure</td> <td>*Signature</td> <td>*Text Area</td> </tr> <tr> <td>*Email</td> <td>*Telephone</td> <td>*Time</td> </tr> <tr> <td>*File</td> <td>*Text</td> <td>*URL</td> </tr> </table>	*Checkbox	*Password	*Image	*Currency	*Radio Button	*Lookup	*Date	*Range	*Multi-select	*Date/Time	*Select	*Number	*Disclosure	*Signature	*Text Area	*Email	*Telephone	*Time	*File	*Text	*URL
*Checkbox	*Password	*Image																				
*Currency	*Radio Button	*Lookup																				
*Date	*Range	*Multi-select																				
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*Disclosure	*Signature	*Text Area																				
*Email	*Telephone	*Time																				
*File	*Text	*URL																				

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3.9B	<p>Vlocity OmniScript allow for fast and easy creation of validation rules. The following are examples of simple screen validation rules that can be configured:</p> <ul style="list-style-type: none"> ● Masks - expected format that the user should input, E.g. (999) 999-9999 ● Minimum and Maximum lengths ● Regular expression patterns - a pattern that the user input must match ● Required - mandating a field must be completed ● Read Only - a field the user cannot edit, that can be driven by conditional logic
3.9C	<p>As described previously, OmniScript provides an administrator the ability to configure the input fields and associated validation logic for a screen flow. The steps of the flow, retrieval of existing data, the input of new data, the validation, and conditional logic can all be administered via drag and drop configuration.</p>
3.9D	<p>Activity Templates in Vlocity Government allow you to create a set of tasks to be executed for each stage of an application, benefit case or program enrollment process. Once a set of tasks are completed, the process can automatically proceed to the next stage and next set of tasks, ensuring workers are following the same process across clients and cases.</p> <p>With Salesforce Reporting, it is easy to report on tasks and events to measure the productivity of your staff. Reporting on activities related to benefit cases, service plans, administrative tasks, etc. can easily be created to make sure your team is spending time on the right activities and the right clients.</p> <p>As an additional option, Einstein Activity Capture is a productivity-boosting tool that helps keep your email and calendar aligned with Salesforce. Once your email and calendar are connected, Einstein Activity Capture automatically adds emails and events to the activity time of related Salesforce records.</p>
3.9E	<p>Vlocity for Government includes prebuilt processes for the creation and administration of Service Plans. This allows administrators to configure the domains, outcomes, matching service provider services, status and types of service plans. This is also captured via point and click configuration</p>
3.9F	<p>Salesforce’s user profile and security administration capabilities allow field-level security and CRUD access to fields to be dictated by security profile of the user.</p>
3.9G	<p>Salesforce’s user administration capabilities allow for users to be revoked access in real-time either via browser-based user experience or via an API.</p>
3.9H	<p>Salesforce’s auditing features include:</p> <ul style="list-style-type: none"> ● Record Modification Fields: All objects include fields to store the name of the user who created the record and who last modified the record. Refer here for additional information: https://help.salesforce.com/apex/HTViewHelpDoc?id=field_audit_trail.htm&language=en_US ● Field History Tracking: You can also enable auditing for individual fields, which will automatically track any changes in the values of selected fields. Although auditing is available for all custom objects, only some standard objects allow field-level auditing. Refer here for additional information: https://help.salesforce.com/HTViewHelpDoc?id=tracking_field_history.htm&language=en_US

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	<p>uage=en_US</p> <ul style="list-style-type: none"> ● Setup Audit Trail: Administrators can also view a Setup Audit Trail, which logs when modifications are made to your organization's configuration. Refer here for additional information: https://help.salesforce.com/HTViewHelpDoc?id=admin_monitorsetup.htm&language=en_US <p>Paid add-on features through Salesforce include - Field Audit Trail which will let the county define a policy to retain archived field history data up to ten years, independent of field history tracking. This feature helps the county comply with industry regulations related to audit capability and data retention.</p>
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3.10 Workflow Management

3.10A	Salesforce Queues are groups of users that work on similar service requests. Queues can be configured for each type of staffing unit within a program. As service requests come in for different programs, they can then be automatically assigned to the correct staffing unit / queue, based on the type of the service request.
3.10B	<p>Vlocity Government includes State Transitions that allow the county to automate the progress of benefit cases from one stage to the next, depending on the status of the task(s) associated with the benefit case.</p> <p>For example, an agency may decide that to move from the Intake to Assessment stage on an unemployment application, all tasks in the stage must either be complete and/or deferred. After these conditions are met, the stage is moved to Assessment and all tasks associated with the Assessment stage (determined by the Activity Template) appear on the Benefit Case record.</p> <p>Administrators setup state transitions by configuring the Type, From, and To picklists in the State Transition object. Administrators can also set the field dependencies between the From and To fields and modify the Status of Open Activities picklist, which determines which status or statuses—in addition to Completed—the activities in the stage must be set to in order to transition to the next stage.</p>
3.10C	The Salesforce Approval process engine can be used to send assessments, service plans, and other items to supervisors for approval.
3.10D	Supervisors can approve or disapprove received items and include comments with desired feedback to the user as to why something was approved or not approved.
3.10E	Time tasks can be configured for Intake, Discharge and other work items. These can be included as part of business process workflows.
3.10F	Timed workflows can be configured in Salesforce to automatically monitor the completion of tasks and to send alerts when tasks are not completed on time.

3.11 Forms and Reporting

3.11A	Vlocity OmniScript includes a PDF Action to generate a PDF. Collected information can automatically populate fields within the PDF. Remaining information can then be completed outside of the system using the generated PDF
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3.11B	<p>Administrator access to clients, programs, organizations will be completely under the control of DHS.</p> <p>Vlocity fully leverages Salesforce's comprehensive security model, including permission sets and profiles to specify the objects and fields users can access: organization-wide sharing settings, user roles, and sharing rules to specify the individual records that users can view and edit.</p> <p>The Salesforce security model also explicitly supports role hierarchies for greater control and reduced administration. At the top level, record ownership constitutes access, so if an automated/manual process assigns a record to someone who would not normally have access due to their role, record ownership would grant them access. Conversely, records can be marked as Private - or to a specific group - restricting access from users not on the access list.</p>
3.11C	<p>Vlocity as a toolset native to the Salesforce platform, fully leverages Salesforce reporting functionality. This functionality includes a real-time, robust reporting and analytics engine that enables deep analysis of all Salesforce and Vlocity data.</p> <p>Key benefits include:</p> <ul style="list-style-type: none"> ● Real-time information for up-to-the-second insight ● A single solution for insight into clients, programs, case workers, service providers, and operations ● Custom reporting so business users can quickly create their own reports ● Customizable dashboards so executives and managers can turn data into action ● Security controls to limit access to the appropriate users ● Integration with other corporate data for comprehensive business insight
3.11D	<p>Salesforce's reporting functionality automatically allows new fields in the underlying data model to be used in reports.</p>
3.11E	<p>With Vlocity Government, Benefit Cases, Parties, Contacts, etc. can be followed via Salesforce Chatter and data updates can automatically trigger notifications to interested subscribers.</p>
3.11F	<p>Billing extracts can be created as reports that display services clients received over a time period to assist with invoice generation. Reports in Salesforce can also be output as comma-separated value data if desired.</p> <p>Another option is that a billing system can also invoke Salesforce APIs to extract this information via an REST/JSON API call.</p>

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).

Each of the technical considerations identified in this section is specifically addressed below:

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Data Access	<p>Access Permission – are defined in Salesforce by a user's Profile and Role. The user Profile controls access permissions to defined standard and custom objects, as well as all functional capabilities in the application. The user Role, as well as the placement of that role in the organization-defined Role Hierarchy, controls user access to specific data records. For example, a user's Profile may indicate that a user has read, create, edit and delete permissions to the Contact object (table) in the database. However, the user's Role will determine which actual contact records the user will be able to access, which may be a subset of all defined contact records in the database.</p> <p>In terms of data integrity, Vlocity has no ownership, access or visibility to any customer data. Data does not pass through any Vlocity servers or processes; it is all held within Salesforce.</p> <p>Per Salesforce: Customers and as such Allegheny county, has full control of the data stored within the Salesforce Services. Salesforce and Vlocity do not classify Customer Data and do not have visibility into the data stored by Salesforce customers within the service. All information that has been electronically submitted by customers to the Salesforce Services is considered "Customer Data" and is protected with the highest level of security.</p> <p>DHS will have access to all underlying data as needed and required by Allegheny County.</p>
Data Privacy & Protection	<p>Vlocity HHS runs on the Salesforce App Cloud Platform, which is HIPAA compliant. Details can be found here:</p> <p>https://trust.salesforce.com/en/compliance/</p> <p>Salesforce Platform provides an extensive suite of security controls and services including:</p> <ul style="list-style-type: none">● User profiles, which control access to objects and fields● Roles and role hierarchies, which control access to specific records● Field-level encryption● Encryption in transit● Encryption at rest (via Salesforce Shield)● File and attachment encryption (via Salesforce Shield)● Advanced key management (via Salesforce Shield) <p>Salesforce has built, and continues to invest in, a comprehensive security infrastructure including firewalls, intrusion detection systems, and encryption for transmissions over the Internet, which Salesforce monitors and tests on a regular basis.</p>

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	<p>Salesforce Cloud-based solutions are FedRAMP certified at the Moderate Impact level to meet Federal Government most stringent requirements. As of May 2018, Salesforce holds 52 Federal ATOs (Authority to Operate) based on the original FedRAMP ATO. Salesforce has also received Provisional Authorizations (PA) from Defense Information Systems Agency (DISA) at Impact Level 2 (IL2) and Impact Level 4 (IL4), which is based on DISA's Cloud Computing Security Requirements Guide (SRG).</p> <p>Salesforce claims no ownership rights to Customer Data. Salesforce provides contractual assurance to its customers that the Customer Data hosted in the Salesforce Services will be kept confidential and not accessed by third parties except under narrow circumstances (such as a customer support issue or as required by law). In the case of customer support, Salesforce personnel will access a customer's org only with prior approval and subject to confidentiality obligations.</p>
Data Hosting	<p>The Vlocity System is a cloud-based application offered only on the Salesforce.com Cloud Platform. Vlocity applications are not provided as hosted or on-premise solutions.</p>
Data Documentation	<p>Vlocity Government entity-relationship diagrams are available on our customer support portal at success.vlocity.com.</p> <p>The detailed Vlocity Data Dictionary requires a signed NDA or contract to be shared.</p>
Data Quality Tools	<p>Salesforce provides tools for managing duplicates one at a time and across the organization. Progress tracking in eliminating duplicates is also provided.</p> <p>See: https://help.salesforce.com/articleView?id=managing_duplicates_overview.htm&type=5</p>

5. Describe how the proposed Solution enables a high level of interoperability and integration.

Vlocity has developed a robust, highly configurable “clicks not code” integration framework to rapidly address dynamic integration needs (with the option of adding code when needed). In addition, Vlocity also supports several API options.

The integration framework is based on the following key Vlocity unique components:

- Integration Procedures
- DataRaptor
- Dynamic APIs

Vlocity Integration Procedures are declarative, server-side processes that execute multiple actions in a

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single server call. Integration Procedures can read data from Salesforce and from external systems (using REST calls) and can call Apex code. An Integration Procedure can be called from an OmniScript Action element, from a REST API, and from Apex code. Integration Procedures are optimal when you need to access and transform data from third-party sources and no user interaction is required and moving the workload from client to server is desirable. They improve OmniScript performance by bundling multiple OmniScript Actions, avoiding round trips from the client to the server.

Tight integration with Vlocity DataRaptor enables data transfer with Salesforce and provides JSON/XML to JSON/XML transformation services. Vlocity's DataRaptor technology simplifies integration to back-office systems and business processes. DataRaptor uses JSON metadata that is captured through the guided business processes and then sent to external systems through open Web Services and REST API's. All DataRaptor mappings of data are done via "drag-and-drop" and are presented seamlessly, so the end user never has to worry about where the data resides. Vlocity DataRaptor simplifies the process of moving data to and from Salesforce objects while ensuring data integrity with easy-to-manage data maps. Vlocity DataRaptor also provides real-time JSON transformations and multi-object REST interfaces and is tightly integrated with the Vlocity solutions.

APIs are provided with the Salesforce platform to build integration interfaces with third-party applications or by Salesforce integration partners to use in their connectors. Any third-party application that accesses a customer's Salesforce instance via the APIs is subject to the same security protections that are used in the customer's Salesforce user interface. These are open APIs (based on industry standards such as REST and SOAP) that are used to integrate Salesforce endpoints with external endpoints, such as apps or enterprise integration hubs - for example, the Batch and Bulk APIs used in the Data integration patterns, or the SOAP and REST APIs used for UI integration patterns.

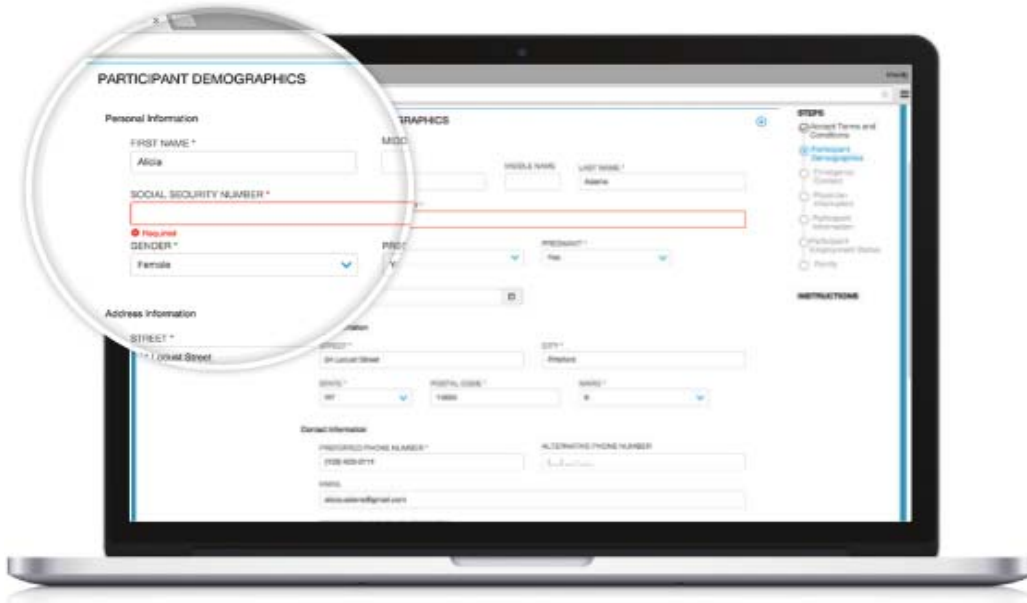
6. Describe your experience in user interface design, user experience design, usability and information architecture and provide examples.

Vlocity/Salesforce company philosophies and commitment to user experience are best demonstrated by the disproportionately large investment of hard dollars in R&D, Innovation, and integration technologies compared to industry peers.

Vlocity has made significant investments to produce consumer-grade user experiences that can be configured for specific customer branding. Vlocity's tools include a powerful point-and-click guided process builder call OmniScript that creates responsive, accessible user flows without the need for code.

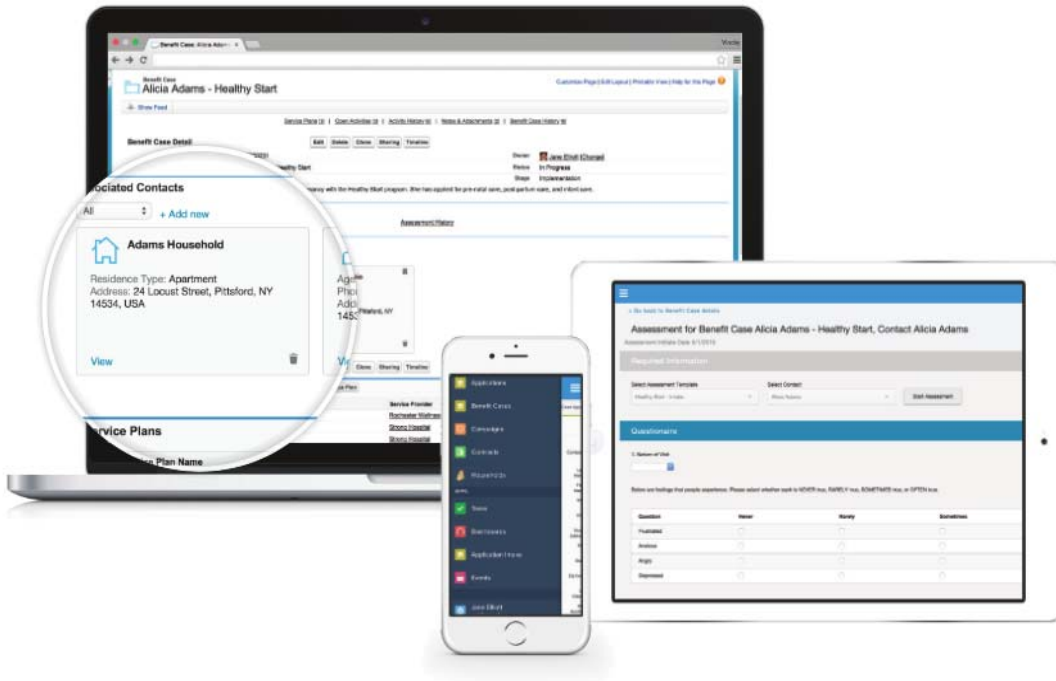
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Easily create a guided intake process with Vlocity OmniScript

Users can execute the same guided processes from their phone or tablet as they can at their desk. Designers have the flexibility to render highly compelling layouts using standard web templates. With Vlocity Cards, administrators can easily display data from a range of data sources, including APIs or Salesforce objects. Designers can choose from one of Vlocity's many responsive templates or develop their own unique look and feel using HTML5, CSS3 and JavaScript.



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7. Describe the proposed Solution's technical support capabilities (e.g., event logging, audit capability, production support, high availability).

Vlocity offers 3 levels of Support: Standard, Premier+ and Mission Critical. A comparison of what is included with each of the 3 levels of support can be found here:

<https://vlocity.com/cms/resources/vlocity-support-plan-comparison.pdf>

Vlocity Support is available 24X7 at www.vlocity.com/support, by emailing Support@vlocity.com, or by calling directly. Vlocity also offers a scheduling service to connect customers directly with a feature functional expert who can provide work on customers desired scheduled. Vlocity guarantees an initial response time of 2-business days for our Standard Support customers and up to 15 Minutes initial response time for our Mission Critical Customers. Vlocity Support has a wide range of Support options to fit your individual business needs.

8. Describe the proposed Solution's capability to support users in the field.

A mobile solution can be provided to DHS so support users in the field. Vlocity operates on all platforms supported by Salesforce, which includes all modern browsers and mobile devices. A comprehensive list of types and versions can be found at:

https://help.salesforce.com/articleView?id=getstart_browser_overview.htm

and for mobile access:

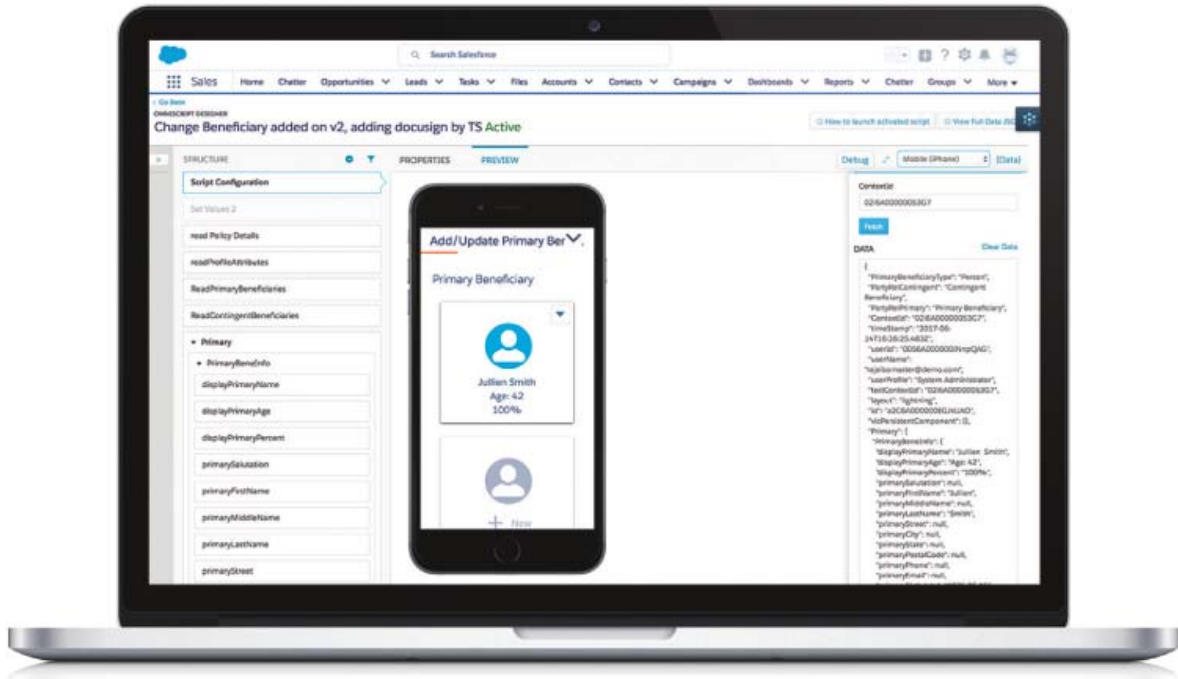
https://help.salesforce.com/articleView?id=sf1_requirements.htm

Vlocity follows the Responsive Web Design approach, which allows for Device independent Design. Vlocity Admins/Configurators can build once and test components on various devices to ensure the layout provides a good user experience.

Whether on-the-go, assisting an applicant or servicing a program enrollee, mobile device users expect fast and efficient workflows with access up-to-date benefit case information. With Vlocity, you can now deliver compelling, public sector specific user experience on mobile devices without the risk and expense of custom development. Vlocity allows administrators, designers and developers to configure fit-for-purpose applications that are tightly aligned to their business flows and usage patterns.

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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.

Leveraging Vlocity's HHS application framework on top of Salesforce is a new paradigm to help Allegheny County get more from a case management system than is possible with traditional implementation methods (i.e. custom build, transfer systems, and/or modified COTS solutions that are purpose built). This framework supports reusability across different use cases and stakeholders while retaining the framework's value by removing the need to custom develop and support the functionality required across programs.

Eagle Creek strongly recommends a "Vlocity first" approach as a means of delivering HHS solutions. By institutionalizing Vlocity as your architectural standard Allegheny County can deliver functionality quickly and consistently across programs with high usability, easy maintainability, and available to future enhancements by Vlocity. In addition, this approach lowers the possibility of technical debt (unnecessary custom code) being accumulated over time.

A "Vlocity first" governance model benefits from out-of-the-box features, such as:

1. **Vlocity's Pre-Built HHS Data Model.** One of the most overlooked features of any application is the underlying data model. Vlocity leverages literally decades of experience in creating an

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underlying data model to support HHS functionality. The time savings of having this available out-of-the-box is immense. With Vlocity, Allegheny County gets a supporting data model and 250 business objects day one. In addition, it comes with 3 upgrades per year.

2. **Vlocity Process Library** Vlocity's library of pre-built business processes can be downloaded by Allegheny County, and used as a starting point from which you can configure the processes to your specific requirements. What's more, processes you develop can be easily shared with other Vlocity customers with common requirements.
3. **Agile Technology Framework** driven by Vlocity Cards, Vlocity OmniScript, and Vlocity Integration and calculation procedures. The Vlocity application will empower the County to make changes to the application after the initial implementation with Vlocity's no-code/low-code tools, freeing the County from dependence on a third-party to adapt the solution to its changing needs.

When the above governance model is used in conjunction with the change management approach highlighted below, the result is a solution that 1) optimizes the current and future budgets, 2) is usable, re-usable and scalable across programs, 3) takes advantage of the massive R&D budgets of both Salesforce and Vlocity, thus retaining the ultimate solution's value.

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.

In general, large transformation programs represent strategic and organization-wide initiatives that require a proven governance framework to effectively manage. Specific to transparency and flexibility, we believe transparency into the design of the solution and commitment to an Agile-based framework / methodology will facilitate a flexible and manageable approach to introducing changes. To support this approach and empower clients to have meaningful impact in the change process, we ask our clients to adhere to a set of governance best practices:

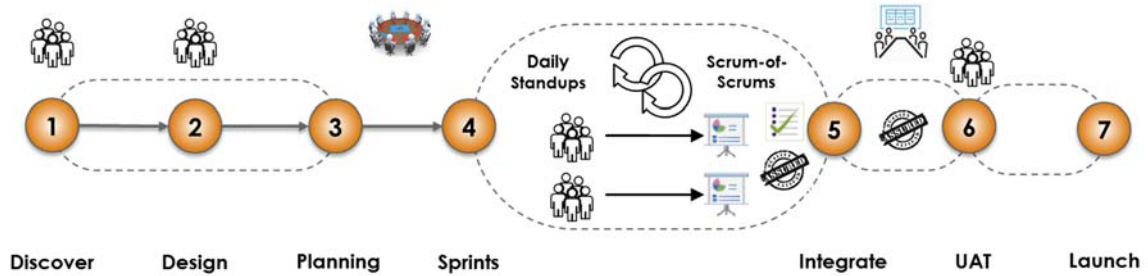
- Executive (C-Level) sponsorship (e.g. CIO as Program director at various stages)
- Program objectives clearly, broadly and constantly communicated to all stakeholders
- Promptly identifying key stakeholders and SMEs and making such individuals available and empowered (Decision Maker, Attorney, Agent of Change) throughout the Program
- Dedicate appropriate SMEs and other personnel to the program, as these personnel are designing the future of the solution
- Frequent involvement from key business personnel in the definition of the solution and feature demos during every iteration of release
- Timely decision making at the source of the debate
- Accountability for business simplification, for example, when faced with decisions to either modify / re-engineer a business process to leverage out of the box functionality vs. customized the application to meet existing process, make every attempt to go with the former
- Maintaining a flexible and agile approach to planning and delivery

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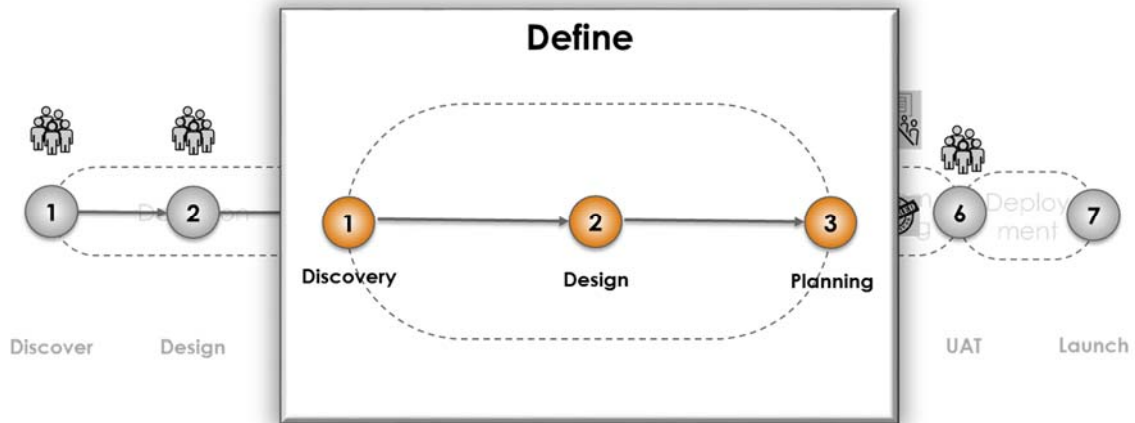
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Implementation Framework and Methodology

Eagle Creek follows an Adaptive (Hybrid) Agile Development Process as depicted below.



We focus on multiple stages that enable definition, design, planning and testing necessary on the front and back end of the project, while leveraging agile sprint development and deployment that allows for faster development to meet speed to market requirements. This also encourages end-user involvement to facilitate early detection of feature success or need for change. The result is a product going into UAT closely aligned with end users' desired solution.



On the front end of the project, we focus on three stages to organize requirements, stories and backlog. The intention is to take slightly more time than typically afforded by Agile, for the project team and business users to better define the end-product, as the project progresses into the development cycle.

The most important aspect of Adaptive Agile is in the first three stages, which essentially serve as an opportunity to define both the solution and project, as well as the intended outcomes.

RFP Response Form

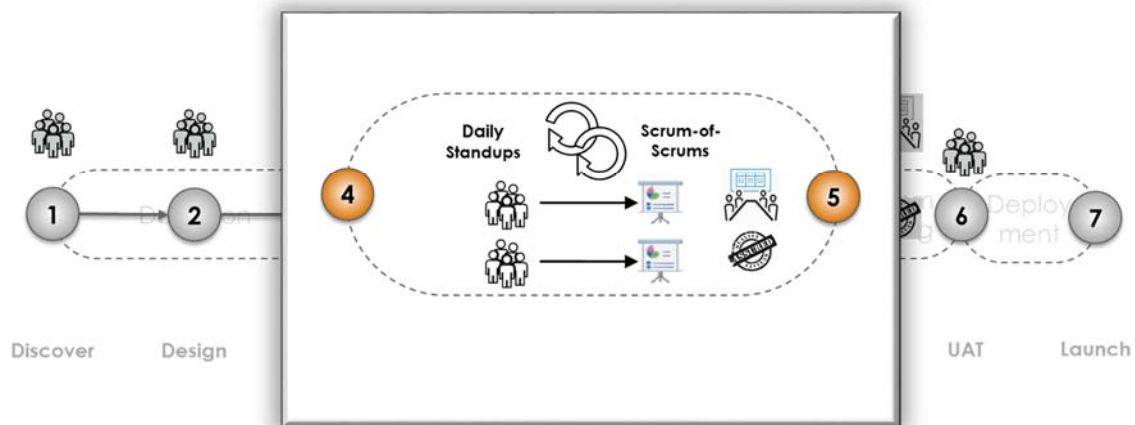
Client Management Information System

During the Discovery and Design stages we hold a project kickoff workshop with the client SME's and any other key project stakeholders to ensure there is consensus on goals and objectives of the engagement. In this workshop we elicit from all parties their ideals for various site attributes, including design preferences, and gather high-level requirements on matters such as site functionality and regulatory compliance. The workshop serves as a means of establishing a set of fundamental principles the team, inclusive of client participants, can use to guide decisions during the project.

After the workshop, we put in place a set of detailed requirements and ensure they are approved by the client review committee. It is upon these requirements the initial draft of the client's new release will be based.

Our Design phase ends with the creation of the appropriate and simple design documentation.

Development



During development, the basic concepts of Agile apply. The team works in iterations or sprints, each focused on delivering a piece, part or chunk of the end-product. These sprints involve unit testing and some level of system testing and conclude with a demo to the users.

Sprint planning starts after the build document contains enough detailed information to confidently start development. Sprints normally run in 2-week iterations. This gives the developers enough time to address issues or UAT adjustments from the previous sprint, and time to develop and plan for the next feature release and Demo. Visibility into the development process keeps things transparent and manages expectations throughout the life of the project. If something is causing a delay, it is identified faster and since Eagle Creek maintains a consistent and efficient building process, new developers are up to speed extremely fast with little to no ramp up time when necessary.

RFP Response Form

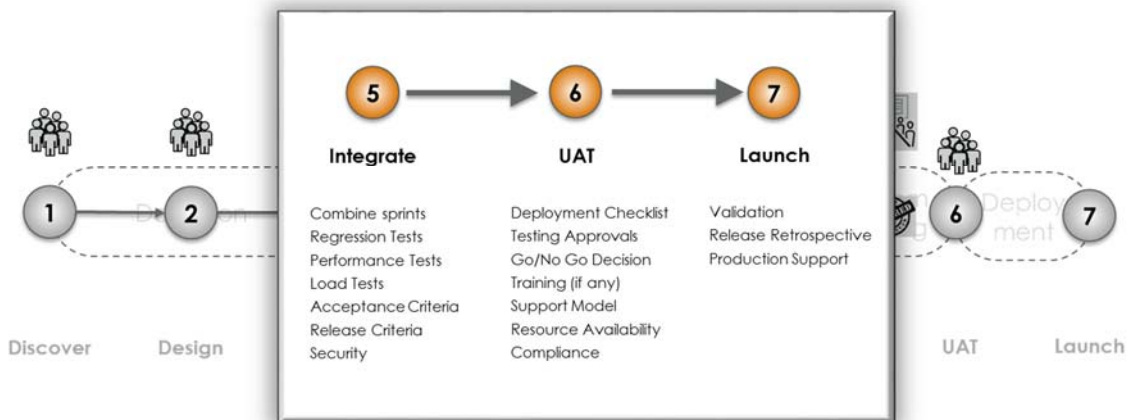
Client Management Information System

During this phase, the migration process is completed, implementing the solution design for the business requirements, completing the UI navigation and layout & reports and, as needed, re-write the existing scripts. Major tasks include:

- Fully configure the new Application to satisfy the existing business requirements and functionality.
- Develop and configure the software to meet the Data Conversion Plan
- Execute the Unit Test Plans
- Formulate a *Production Cutover and Support Plan*
- Validate and update existing *User Acceptance Test Plans*
- Validate and update existing *Integrated System Test Plans*.

Eagle Creek's development resources work closely with the Business/Systems analysts to develop the solution in strict coherence with design documentation and development standards. Predicated on specific tasks and requirements, development responsibilities are allocated to both onsite and Technology Center consultants.

Integration – UAT – Launch



At the back end of the process, the focus is on activities that are aimed at ensuring end-to-end dependencies are considered. End-to-end means every moving part, from back-end data requirements to business rules to the UI of every feature and process. These require a much higher level of scrutiny via testing than pure Agile allows. The intention is to allow for rigorous and well-defined testing in stages outside of the sprints.

In addition, we find in many cases, senior business owners are often less familiar with Agile and consequently less trusting of a process that doesn't allocate exclusive emphasis on end-to-end testing processes. This component of the process addresses that concern.

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Client Management Information System

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

As highlighted in the answer to question 10 above, it is essential business users are providing insight into the requirements for the solution and feedback, as features are developed and demonstrated. This frequent involvement is not only recommended but required to, 1) build a solution that best meets end user requirements and, 2) determine changes and enhancements that are desired by end users for optimal performance.

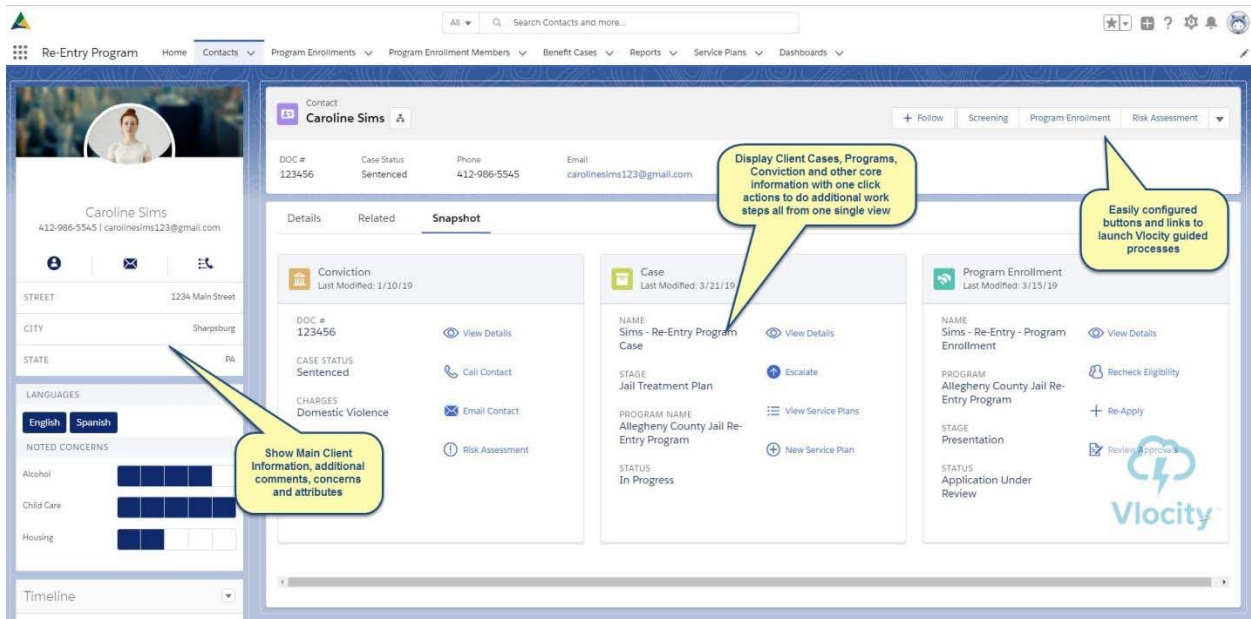
Via the Sprint Demo process, Eagle Creek captures end user feedback. Recommended changes are evaluated by the demo participants and applicable stakeholders (both client and Eagle Creek team members) to achieve the following outcomes:

1. Determine which changes return essential and/or maximum value to the end users.
2. Determine whether the desired changes are part of the scoped solution or enhancements. If the latter, they are identified for Change Order process.
3. Prioritize the changes into the backlog

The objective is to promote an agile and flexible approach to change that is focused on incorporating changes that yield desired functionality to those who matter the most – the end users and their clients.

Screen Shots of Vlocity Re-entry Program Demonstration Addressing Appendices D-N

Appendix D: Vlocity Console for Re-Entry Screening process



RFP Response Form

Client Management Information System

Appendix E and F: Vlocity Omniscript for Re-Entry Client Screening and Proxy Score calculation

The screenshot shows the 'Sentencing Information' form in a preview mode. The form includes a text input for 'Length of Sentence (Days)' with the value '100'. Below it are two radio button questions: 'Out-of-County hold or case?' (selected 'No') and 'Is client involved with a specialty court?' (selected 'No'). A 'Next' button is at the bottom right. A 'Steps' sidebar on the right shows a progress indicator with three steps: 'SENTENCING INFORMATION' (active), 'CALCULATE RISK SCORE', and 'FINAL ELIGIBILITY'. The Vlocity logo is at the bottom right. Annotations include a yellow callout box pointing to the radio buttons stating: 'Sentencing Information is gathered to calculate risk scores and determine eligibility for the Pre-Entry Program'. Another yellow callout box points to the 'Steps' sidebar stating: 'Steps show progress through the guided process'.

Appendix G: Vlocity Re-Entry Client Screening Presentation Process:

This screenshot is identical to the one in Appendix E and F, showing the 'Sentencing Information' form with the same fields and annotations. The 'Steps' sidebar shows the same progress indicator and Vlocity logo.

Appendix H: Vlocity Omniscript Re-Entry Program Enrollment Form:

RFP Response Form

Client Management Information System

Program Enrollment
Sims - Re-Entry - Program Enrollment

Path flow: Presentation → Enrollment Form → Risk Assessment → Servicing → Enrolled

Details

- Enrollment Name: Sims - Re-Entry - Program Enrollment
- Program: Allegheny County Jail Re-Entry Program
- Days Since Application Filed: 91
- Primary Applicant: Caroline Sims
- Owner: Geoff Duckwall
- Stage: Presentation
- Status: Application Under Review

Eligibility Determination

- Eligibility Determination: Eligible

Activity

- Next Steps: No next steps. To get things moving, add a task or set up a meeting.
- Past Activities:
 - Schedule Risk Assessment: You had an Event with Caroline Sims
 - Schedule Presentation: You had an Event with Caroline Sims

Appendix I: Vlocity Omniscrypt Montgomery Assessment:

Personal Information

DOC #: 123456

First Name: Caroline, Middle Name: Marie, Last Name: Sims, Maiden Name: Weatherford

Date of Birth: 10-21-1989, Social Security #: 555-98-9999, Gender: Female

Race: White, Are you Hispanic?: No

Are you a veteran?: No, High school graduate?: Yes, Year of Graduation: [Empty]

Did you receive GED?: No, Did you go to college, trade school, or vocational training?: No

Steps

- PERSONAL INFORMATION
- CRIMINAL JUSTICE INFORMATION
- RESIDENCE & FAMILY INFORMATION
- PROGRAM ENROLLMENT COMPLETE

Appendix J-M: Vlocity Service Plans:

RFP Response Form

Client Management Information System

Client and Screener Information

Screener: Timothy Benjamin | Date of Interview: 01-11-2019

Name: Caroline Marie Sims

Book Name/Alias: Caroline Marie Sims

SID#: 45668989 | DOC #: 123456

Incarcerated Since: 01-01-2019

Steps:

- ALLEGHENY COUNTY JAIL RE-ENTRY PROGRAM SCREENING ASSESSMENT
- CLIENT AND SCREENER INFORMATION**
- GENERAL INFORMATION
- CASE STATUS
- EDUCATION/MILITARY
- EMPLOYMENT AND FINANCES
- FAMILY AND RELATIONSHIPS
- ALCOHOL AND DRUGS
- CERTIFICATION

Full Vlocity guided process completing intake of Montgomery Assessment of information about the client including all background information, their case status and concerns related to behavior and controlled substances

Appendix N: Vlocity Re-Entry Program Statuses and Program End Reasons

Service Plan: Drug and Alcohol Treatment

Service Plan Name: Drug and Alcohol Treatment

Benefit Case: Sims - Re-Entry Program Case

Service Provider Name: Renewal Inc.

Owner: Geoff Duckwall

Status: Planning

Primary Client: Caroline Sims

Start Date: 1/11/2019

Target End Date: 3/15/2019

Progress Bar: 0%

Created By: Geoff Duckwall, 1/11/2019 9:37 AM

Progress: [Progress Bar]

Outcomes:

- Service Delivery Information
- Products and Services

Activity:

New Event | New Task | Log a Call

Set up an event... [Add]

Filters: All time - All activities - All types

Next Steps: No next steps. To get things moving, add a task or set up a meeting.

Past Activities: No past activity. Past meetings and tasks marked as done show up here.

Re-entry Program Dashboard:

RFP Response Form

Client Management Information System

