



Board of Directors Meeting

November 29, 2012

Recommendation for New Data System

Item III.D.

Recommended Action:	Approve RFP Team Recommendation
Issue:	Client Tracking and Data Collection
Program:	Impacts all Funded Programs
Budget Impact:	Up to \$165,750 (\$124,000 annualized)
Strategic Plan Goal:	Supports all Headline Indicators

Background:

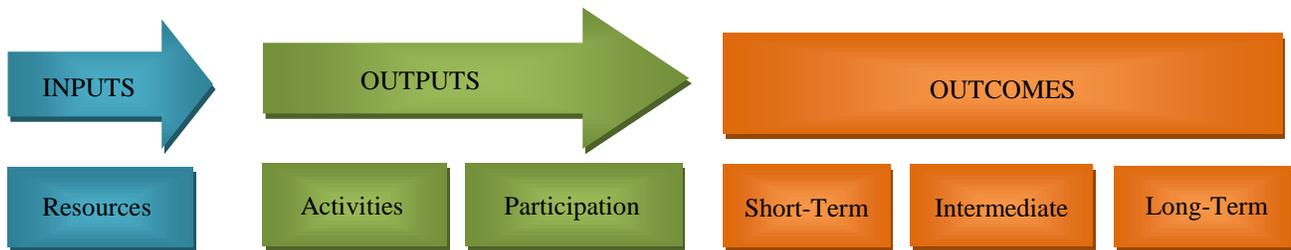
One of JWB's core functions is to fund providers to deliver effective services which produce measurable sustainable changes for children and families which demonstrate high return on investment to the community. Over the past four years, JWB has become much more sophisticated in the means used to measure desired outcomes. The Board's data sharing relationships with the major social systems which touch children's lives are at the center of this progress. These agreements have been instrumental in allowing the research team to trace JWB's impact down to the individual level. For example, through the data sharing relationship with Pinellas County Schools, JWB has been able to tell the Board that only 47% of children in certain subsidized child care environments enter school ready to learn. This figure has been the touchstone for concerted efforts to improve this outcome.

The level of detail was seen as impossible in 1998, when the Services and Activities Management Information System (SAMIS) (JWB's current data collection system) was originally conceived and developed. During that period JWB had not yet established individual-level data sharing agreements, and staff at many agencies did not possess the skills to utilize sophisticated measurement tools. Some were still recording clients served using a paper-based system, and it was not unusual to perform a site visit where the number of clients served was literally counted from lines on a handwritten ledger.

In the 14 years since SAMIS was developed, the world has become significantly more technologically advanced. More accountability is not only possible; it is expected. The age of "guessing" about client outcomes is over. We know where the vulnerable children live in Pinellas County and sadly, without high quality programs we know what their outcomes are likely to be. The goal is to intervene appropriately, at the right time, with high quality resources to positively change the trajectory for a child by providing a continuum of needed supports. Answering the right questions takes a range of sophisticated tools to synthesize the data from the various systems, conduct analyses and produce actionable results.

When staff discussed data collection needs, the first consideration was how to deliver meaningful information to our funded agencies which would guide them in providing services that consistently produce sustainable measurable change. This means providing the right inputs, activities which have been documented through an evidence-based methodology, immediate outcomes and sustainable change evidenced through medium and long-term outcomes. This idea, known as the logic model, provides a clear map of the chain of connections needed to show what a program is funded to accomplish (see figure 1, below).

Figure 1: Logic Model



The JWB data collection system should be structured, and services coded to assure each element of the logic model is present in our funded programs. The system needs to include a library of standard outcomes, evidence-based strategies, desired results and a shared client level information platform, so that children receiving services in multiple programs are not duplicated in the system.

Staff envisioned a database that would assist in the movement to unit costs associated with measurable outcomes. This system would increase accountability by assuring that the right child, receives the right service (or continuum of services), at the right time, in the right dosage, and does not get dropped from the “service system” when the program ends, but receives interventions which continue to support them on their path to successful young adulthood. It was important that, as JWB moved to reimbursing vendors and child care providers directly through the Family Services Initiative and the Quality Child Care system, that the data system would be able to collect attendance records through biometrics rather than paper-based attendance records that require monitoring and data entry.

Most importantly, staff sought a database which had been widely tested by a broad coalition of both funders and service providers at sites across the country. Ideally, a new system would not require JWB to devote staff resources to either administer it or provide a help desk. The system would be client-focused rather than provider focused. The database would give both internal and funded agency users at any skill level the ability to easily produce custom reports tailored specifically for monitoring program services and progress toward outcomes. It would be a highly flexible, user-friendly interface with minimum downstream effects.

SAMIS was developed in a collaborative framework, which at the time was thought to effectively distribute both cost and staff resources across all of the Children’s Services Councils (CSCs) while providing the highest level of technological benefit through the development of functionalities that would be shared by all CSCs. Over time, it was found that cost-savings were not as significant as anticipated and JWB may not have reaped the expected level of benefits promised by the SAMIS collaborative. The Board made the decision in April 2012, to withdraw from the SAMIS collaborative. At this time, JWB staff made the request to the Collaborative to host SAMIS on a monthly reimbursement basis until another option could be developed. In September 2012, the Collaborative informed JWB that they were no longer willing to continue this arrangement.

In response, JWB explored the option of having Tribridge, SAMIS’ original developer, host the system, however Tribridge declined citing security reasons. JWB also explored the option of having Pinellas County Business and Technology Services (BTS) host the data system since JWB’s other information technology

services are now contracted with the County's BTS. BTS also declined to host SAMIS citing similar security and risk issues. With both Tribridge and BTS unwilling to host the database, JWB was left with few viable avenues for administering its client tracking and fiscal database and currently JWB is hosting SAMIS internally. This approach is not ideal and should only be considered for the short-term for the following reasons:

- The application will require at least one committed IT staff member to provide administrative support to the database. JWB has moved away from the model of having internal IT staff and this option would likely result in the need to re-hire at least one IT staff member.
- SAMIS, originally deployed in 1998, is cumbersome and not responsive to the agency's business needs. Functionalities in the SAMIS system are difficult to change as needed without the engagement of significant programming resources from an outside vendor.
- SAMIS requires JWB resources to monitor a help desk and conduct ongoing trainings which takes staff away from core business functions
- Funded agencies dedicate a significant amount of staff resources to entering data into SAMIS, and they have observed that SAMIS is often slow and difficult to use both for data entry and reporting.

The current situation positions JWB to migrate to a comprehensive, flexible and easy to use data collection, contract management and fiscal system in order to provide better alignment on multiple platforms. A system of this type is also conducive to streamlining data entry at the funded agency level, which leaves more time to devote to providing services. Intuitive reporting structures also support funded agencies and programs to develop reports on the data they have entered so they can easily monitor their progress toward desired outcomes.

To prepare for the change, staff developed a request for proposal (RFP) for an existing design solution, and collaborated with the Pinellas County Purchasing Department to publicize the RFP on Demandstar, a procurement site utilized by a large group of local, state and federal agencies nationwide. It should also be noted that, concurrent to their declining to host SAMIS, BTS did note that they would be willing to provide any needed support if JWB could locate an acceptable "off the shelf" data collection system.

The RFP yielded responses from Mosaic Network and Social Solutions. In light of the potential for collaboration, JWB also considered Pinellas County Health and Human Services' recently implemented Community Help and Data Application System (CHEDAS), developed in collaboration with Emdeon. The RFP team reviewed each proposal for respondent's alignment with the minimum system requirements outlined in the RFP. Some key requirements included a web-based application, hosting and maintenance supplied by the provider in a secure/redundant environment, HIPAA compliance, training and follow-up support by the provider in order to alleviate having to utilize significant JWB staff resources for this role, and a user-friendly interface. Follow-up webinars were scheduled with each of the responders to address any additional questions that arose during the review process. In the end, each team member assigned a score (1-4) on the system's strength across each system requirement which was then tabulated to reach a total score for the overall proposal. A summary of each proposal, overall score and cost analysis follows (see table 1 and table 2 for summaries).

MOSAIC NETWORK

Mosaic is a California corporation with over 12 years of experience in implementing comprehensive and effective data solutions for community-based youth development initiatives. Mosaic's team of technology and evaluation professionals have implemented applications currently being used by an array of multi-site social service initiatives including Annie E. Casey Foundation's national Making Connections Initiative, Smart Start in North Carolina, First Five in California, and the National Family Strengthening Initiative of the Center for the Study of Social Policy.

The Grant Evaluation and Management Solution (GEMS) is a web-based system which will enhance evaluations efforts and simplify grantee data collection tasks. GEMS is able to collect data from programs and instantly integrate the information into reports which can be customizable by any user. The system also interfaces with pre-existing data systems and facilitates the integration of historical, local, state and federal information. GEMS provides the ability to manage evaluation, administrative, and fiscal information to determine if initiatives are meeting contractual obligations and demonstrating community impact.

The GEMS system optimizes staff's ability to conduct research and document program impact through timely monitoring of process, outcome, and impact indicators critical for effective evaluation and by helping to answer questions regarding impact of funds directed toward a particular result in a strategic area and return on investment.

Mosaic is proposing to implement the following functionalities:

- **Program activity and data management module:** client tracking, service tracking, outcomes tracking, data analysis and GIS/mapping reporting functionalities
- **Contract customization module:** Compiles agency performance and budget information to automatically generate contracts
- **Periodic report/data transfer module:** with functionality to track contract compliance and program progress
- **Fiscal module:** Complete with budgets, invoices, revisions and billing by line item and/or units of service.

SOCIAL SOLUTIONS

Social Solutions is a Baltimore-based company founded by former case managers in 2000 to deliver outcome-oriented client management software to human service organizations. Their Efforts to Outcomes (ETO) software is utilized by more than 15,000 human services programs. Examples of agencies utilizing Social Solutions ETO software include Florida PACE Center for Girls, St. Louis County Children's Service Fund, and Harlem Children's Zone.

ETO impact is a web-based system designed to meet the evolving environment of human services providers. As such, the system is case management focused, but flexible enough to be utilized by a funder to clearly report on measurable results, compare and analyze performance and maximize the use of dollars toward improved impact.

Social Solutions proposed to implement the following modules:

- **Demographics:** A wizard tool which allows users to collect a nearly limitless combination of demographic data elements which can be used by an entire site, a specific group of programs, or an individual program
- **Touchpoints:** A forms management tool that offers the ability to create, replicate, capture and report on standard forms. Typical Touchpoint forms include needs assessments, service plans, and pre/post-tests.

- **Reporting:** a library of pre-built standard reports based on standard and custom fields.
- **Finance module (ETO Money):** Social solutions included development hours in their proposal to support the setup and configuration to meet JWB's fiscal requirements.

Staff resources would need to be allocated to participate in the ETO staff certification program so that changes to the system could be directed internally at JWB. Staff would also require reports orientation training in order to create custom reports. While Social Solutions services team would build out the initial program structure to accommodate JWB's current needs, a local system administrator would be trained to use standard administrative tools to manage sites, programs, user accounts, data collection field/forms and reports in the system.

Community Help and Data Application System (CHEDAS)

Emdeon is a leading provider of revenue and payment cycle management and clinical information exchange solutions, connecting payers, providers and patients in the U.S. healthcare system. Emdeon's offerings integrate and automate key business and administrative functions of its payer and provider customers throughout the patient encounter. Emdeon's comprehensive suite of solutions are designed to easily integrate with existing technology infrastructures, customers are able to improve efficiency, reduce costs, increase cash flow and more efficiently manage the complex revenue and payment cycle and clinical information exchange processes.

The Board of County Commissioners invested in CHEDAS, a technological system that will enable Health and Human Services to deliver measurable per service/per unit cost savings and improved customer service. CHEDAS allows tracking of eligibility and enrollment, contains case management software, allows for data collection and assessments, has a financial component, electronic medical records, comprehensive service and financial reports, and tracks measurable performance outcomes. CHEDAS is composed of three distinct databases that collect all data necessary to report the quantity and cost of services:

- **CareScope:** The service records database which provides access to service enrollment, case management, scheduling, and provider management. It also provides the ability to capture outcome measures tied to programmatic performance.
- **NextGen:** A medical records database and document management system, allowing the user to become completely paperless. This database can serve as an interface for shared records across multiple agencies across the county.
- **SLG** is the financial records database, which allows for the electronic payment of all services provided by or contracted.
- **Advanced Reporting Tool:** Provides ability to run data reports that provide information regarding desired outcomes.

A primary drawback of this option is the time to implementation. BTS estimates that the system would not be available for JWB use for a minimum of 18 months. Secondly, staff time would continue to be engaged in manning an internal helpdesk and conducting agency staff trainings. Lastly, it is currently unknown if the variable structure would provide the reporting and analysis capabilities required to assess questions such as return on investment and community impact as staff has not had the opportunity to review the system.

Comparison Outcomes

Table 1: Combined Staff Ratings for Data Collection Systems (possible 1-4 range for each function listed)

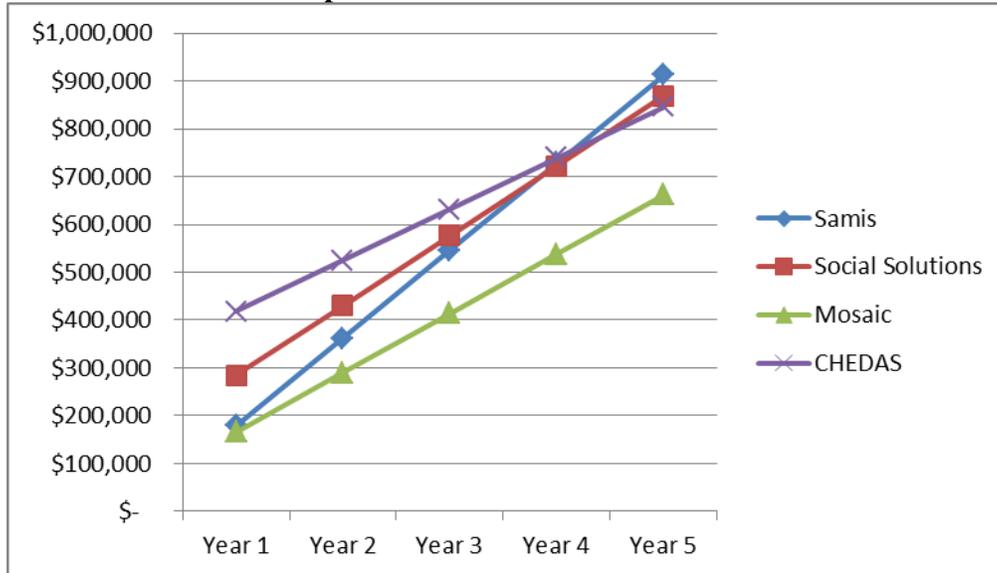
Major System Requirements	SAMIS	Social Solutions	Mosaic	CHEDAS
Web Based	3.75	4	4	N/A
Hosted by company in secure/redundant facility	2.25	3.4	3.8	N/A
Security	3.45	3.54	3.65	N/A
HIPPA Compliant	3.25	3.8	4	N/A
Fiscal Capabilities	4	2.15	3.75	N/A
Ad Hoc Reporting	1.25	3.4	3.8	N/A
Tracking of Demographics and Measures	2.75	3.36	3.96	N/A
Universal Participant ID and Family Tracking	2.25	3	3.8	N/A
Company has Research/Evaluation Capabilities	1	4	3.8	N/A
GIS/Mapping Capabilities	1	1.2	3.8	N/A
Support and Training	1.5	3.4	3.8	N/A
Company Provided Help Desk	1.5	3.8	3.6	N/A
Total	27.95	39.05	45.76	System functionalities not viewed. Unable to rank.

Table 2: Cost Comparisons for Data Collection Systems

Category	SAMIS	Social Solutions	Mosaic	CHEDAS
Purchase Cost	\$0	\$79,410 (650 hours @ 122.17 per hour)	\$66,750 (630hrs @ \$75 to \$175 per hour range)	\$346,100
Server Hosting	\$13,000	\$0	\$5,250	\$0
Maintenance/License Fees	\$55,000	\$146,256 (350 users)	\$88,750 (300 users)	\$0
Reporting Costs	\$65,000	\$0	\$0	Unknown
Help Desk	\$45,500	\$0	\$0	\$45,500
Initial Training Expenses	\$5,000	\$2,000	\$5,000	\$26,000
Additional Customization Development	Requires system re-write	\$31,764 (260 hours @ 122.17 per hour)	\$0	Unknown
Integrate mapping and custom interface functionalities	Not currently possible	\$24,434 (200 hours @ 122.17 per hour)	\$0	Unknown
Total First Year Costs	\$183,500	\$283,864	\$165,750	\$417,600
Server Hosting	\$13,000	Included	Included	\$0
Maintenance/License Fees	\$55,000	\$146,256 (350 users)	\$124,000	\$61,620
Reporting Costs	\$65,000	\$0	\$0	Unknown
Help Desk	\$45,500	\$0	\$0	45,500
Annual On-Going Costs	\$178,500	\$146,256	\$124,000	\$107,120
Staff Recommendation	24 month timetable for upgrades	Higher Cost. More customization development required	Lower cost, development completed for most applications Recommended*	Cost prohibitive, lengthy implementation timeframe

*Funds will be sourced from the technology budget

Total Cost of Ownership



Mosaic clearly offers the maximum range of ready-made functionalities and requires the least amount of customized development. For example, the company's fiscal module design for line-item reimbursement is similar to how JWB's current system is organized. Similarities such as this will allow for a quick, seamless integration into current processes and ease training for internal and funded agency staff. Secondly, Mosaic has proposed to implement the new client tracking and fiscal system for the least amount of initial and ongoing costs while offering a high-level of customer support both for internal JWB staff with their evaluation consulting and ongoing project management as well as funded agency users with unlimited email, phone and webinar support. Based on these findings, staff is recommending the selection of Mosaic.