Children’s Services Council of Leon County (CSC Leon)
Software Solutions Workgroup Meeting

Thursday, March 10, 2022, 3:00 pm
Via Zoom

Members of the public can view the meeting via live stream on this YouTube channel: *https://www.youtube.com/channel/UCc74A9evhLxbHIrH63-cIbQ.*

AGENDA

I. Call to Order
II. Roll Call
III. Approval of Agenda
IV. Governance
   a. Purpose of Committee
   b. Introductions
   c. Government in the Sunshine
   d. Decorum
V. General Public Comment
VI. Request for Information Responses
VII. Workplan Development
VIII. Next Meeting Date
IX. Next Meeting Agenda
X. Workgroup Member Comments
XI. Adjournment

Agenda Item

Governance: Government in the Sunshine

Attachments:

1. Overview of Florida’s Sunshine Laws

FLORIDA'S SUNSHINE LAW

Fla. Stat. Sec. 286

OVERVIEW

Florida's Government in the Sunshine Law provides a right of access to governmental proceedings

The law is equally applicable to elected and appointed boards, including advisory boards

The law applies to *any* gathering of **two or more members** of the same board to discuss some matter which will foreseeably come before that board for action

REQUIREMENTS

There are three basic requirements:

1. Meetings must be open to the public

2. Reasonable notice of meetings must be given

3. Minutes of the meetings must be taken, promptly recorded, and open for public inspection

PUBLIC MEETINGS

Meetings should be held in buildings that are open to the public (open to all choosing to attend)

Boards must allow an opportunity for the public to be heard before the board takes official action on a proposition

Board members may not use the phone, email, text messages, etc. to conduct private discussions about board business

PENALTIES

Any member of a board or commission who *knowingly* violates the Sunshine Law is guilty of a 2nd degree misdemeanor

Any unintentional violation may result in a civil penalty up to $500

No resolution, rule, regulation, or formal action shall be considered binding except as taken or made at an open meeting

Agenda Item

Request for Information Responses

Attachments:

1. Blackbaud
2. MTX
3. Unite Us
4. Webauthor

blackbaud

CSC Leon

Blackbaud Response to Request for Information

01/31/2022

Brandon Castle, Account Executive

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Cell: 636-248-0474

Table of Contents

Executive Summary

Blackbaud is confident in our ability to solve and support CSC Leon's unique set of challenges and goals to help you build and maintain a thriving organization.

Blackbaud is the world's leading cloud software company powering social good – the proven leader in empowering nonprofit organizations drive more outcomes and impact to help good take over. Our Cloud Solution for Nonprofits is a flexible and scalable way to spark powerful results with the greatest impact through relationship management, giving and fundraising, financial management, engagement and events, communications, analytics, and mission delivery.

Our Understanding of Your Challenges and Objectives

Based on your requirements, Blackbaud recommends a cloud solution for CSC Leon that includes the following components:

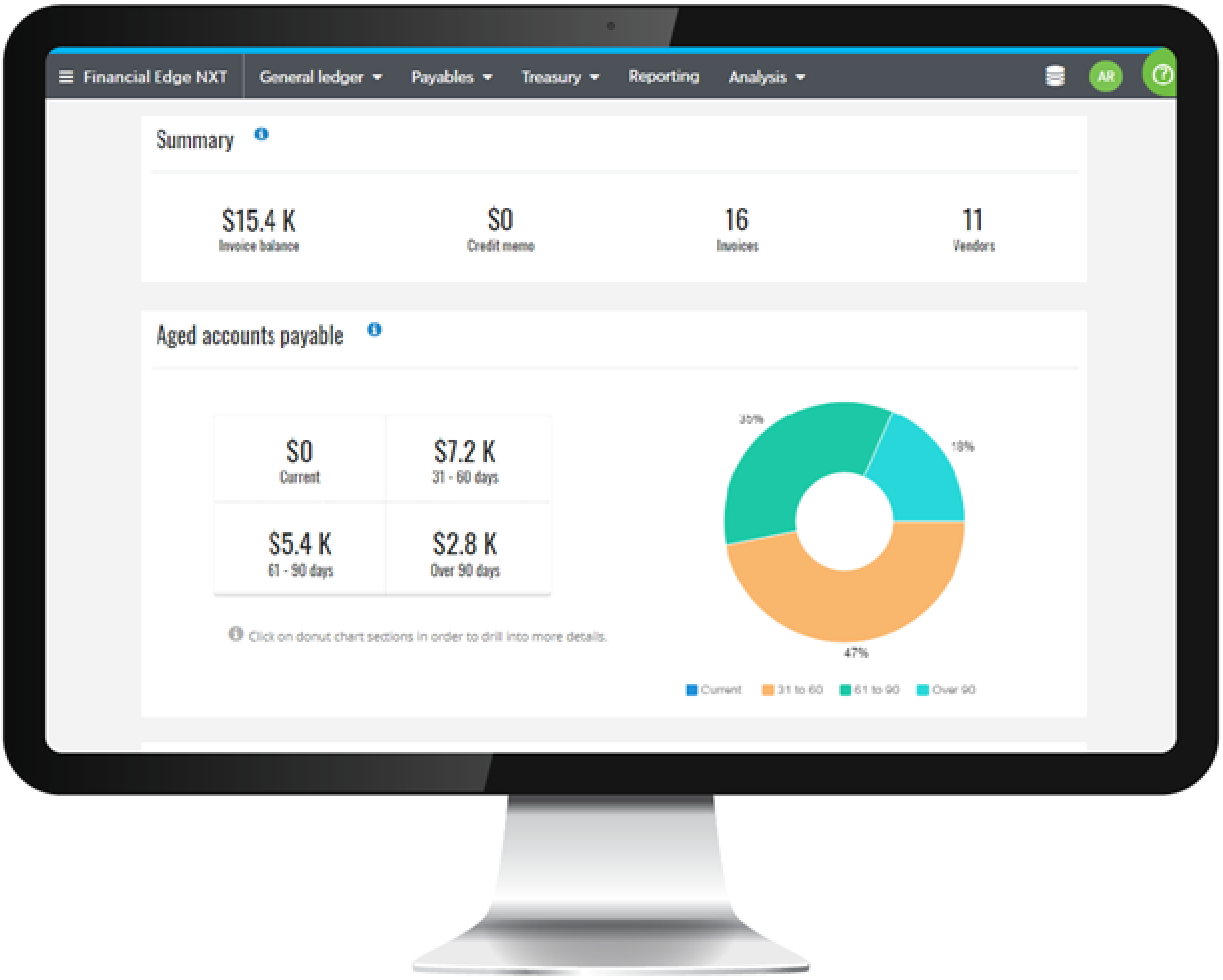
Build a Thriving Organization with Blackbaud

Empower your organization to connect, empower, and drive more impact with our Cloud Solution for Nonprofits. Spanning relationship management, giving and fundraising, financial management, engagement and events, communications, analytics, and beyond, our comprehensive solution is built on a modern, open cloud platform that provides industry-leading security, scale, and performance as well as an extensive partner network including Microsoft. With a common user interface and integration across competencies, the Blackbaud solution is flexible and scalable, making it easy for your team to optimize your organization from the front desk to the back office.

CSC Leon can feel confident that with 40 years of proven expertise building solutions specifically for the social good community, Blackbaud is dedicated to increasing your impact as you raise resources, manage operations, deliver programs, and measure outcomes. We understand the unique context of nonprofits, and our solutions are designed for your evolving needs – today and in the future.

Blackbaud's Comprehensive Solution

Blackbaud Financial Edge NXT is a total cloud accounting solution designed specifically to meet the unique needs of nonprofits and government entities. Built on more than three decades of expertise and experience, Blackbaud Financial Edge NXT delivers all the tools you need to manage financial reporting, monitor and track program success, support fundraising efforts, and ensure overall integrity for your organization.



Blackbaud Financial Edge NXT can help manage your complex reporting requirements and financial processes through best-in-class capabilities that include:

- **Complete Fund Accounting:** A comprehensive cloud fund accounting solution to drive transparency, stewardship, and compliance

- **Financial Planning and Analysis:** Powerful, accurate reporting and budgeting to guide strategic planning and inspire confidence in your stakeholders
- **Grant and Project Management:** Full project and grant accounting capabilities for greater efficiency and visibility across your organization
- Internal Controls: Robust control tools to prevent fraud and wasteful spending and demonstrate your commitment to ethical accounting practices
- **Working Capital and Expense Management:** Effectively manage your organization's cash flow and employee expenses
- **Blackbaud SKY—Our Secure Cloud Platform:** Innovative, modern cloud infrastructure to ensure solution up-time and scalability so your applications are always available when you need them

Financial Planning and Analysis

Monitor program efficacy and plan for the future with Blackbaud Financial Edge NXT's unparalleled reporting, budgeting, and analysis tools.

- Budget years into the future, so your organization can prioritize its expenditures, assess its funding needs, and make comparisons across fiscal years
- Quickly update out-of-the-box FASB-compliant reports to meet your reporting requirements
- Easily share presentation-ready reports with team members and non-financial users across your organization
- Review critical information and drill down for a more detailed look at transactions with configurable dashboards, in-depth records, and custom reports

Efficient Grant and Project Management

Simplify grant and project accounting and reporting with the ability to track and report on all your transactions without complicating your account structure.

- Complete administrative tasks within one system, limiting the need for spreadsheets and reducing costly errors

- Track your grants and projects by type, status, amount, and start/end dates with built-in fields in detailed grant records
- Store project-related information in one place—such as contact details, budgets, reimbursable expenses, and more—so you never have to hunt for files again
- Manage grant and project activity using custom date ranges, not organizational fiscal year

Internal Controls

Blackbaud Financial Edge NXT bolsters your organization's policies to help make your desired control environment a reality.

- Demonstrate your commitment to ethical accounting practices with industry-leading tools to prevent fraud, wasteful spending, and breach of policy
- Structure the control environment to fit your organizational needs and enforce your control activities through automated workflows
- Monitor ongoing activity to gauge how your controls are affecting real behavior
- Enforce your control activities through automated workflow

Working Capital and Expense Management

With Blackbaud Financial Edge NXT, you can effectively manage cash flow and employee expenses at your organization.

- Manage your cash flow, accounts payable, and accounts receivable with efficient workflows, automated approvals, and other time-saving functionality
- Eliminate time- and resource-consuming manual processes, while automatically ensuring that your organization's spending policies are applied and enforced
- Make your entire accounts payable process—from purchase orders to bank reconciliation—more efficient than ever before

Enterprise Resource Management for Nonprofits

Streamline communication across your organization with Blackbaud's ERP for nonprofits.

- Reduce the potential for error that comes with duplicate data entry processes between disconnected systems
- Automate information flow between your business and development offices with Blackbaud Raiser's Edge NXT integration
- Eliminate duplicate data entry and maintain a tight audit trail
- Improve donor transparency with dozens of customizable report templates

Implementation Methodology

Blackbaud has a large professional services team of over 400 employees including former Big 4 consultants, PMI-certified project managers, former top industry fundraisers, and technology experts.

Overview

Blackbaud follows the Project Management Institute's guiding processes for project management and project delivery when implementing its solutions. Phases include Plan, Design, Test, and Deploy.

Plan

The purpose of the planning phase is to prepare the project team for the upcoming implementation activities. During this phase the project team is assembled; requirements are reviewed and refined; and the project governance, schedule, milestones, and progress reporting procedures are established by the project management team. Implementation plans will be documented and delivered for each solution component to outline the strategy and approach for designing and developing the solution.

Design

The objective of the design phase is to reach agreement on the configuration to best meet your requirements and to review how processes and functionality will be delivered within the solution. It ensures all business processes are defined, and the solution supports you in implementing best practices. Blackbaud will demonstrate industry standard business processes, which are supported by system configuration and data conversion.

Test

The purpose of the test phase is to complete comprehensive solution testing in a fully configured, integrated environment.

Deploy

The purpose of this phase is to launch the solution into the production environment and transition you to the Blackbaud support team.

Business Process and Design

The design and configuration of the solution is divided into a series of design cycles, which represent key business areas for an organization. For each design cycle, a set of activities will take place to execute the tasks and produce design deliverables. The process below is repeated for each design cycle.

Prepare

To prepare for design activities, the Blackbaud consulting team will ask for relevant information such as related reports, templates, spreadsheets, communications, and policies to be added to the project collaboration site. Project team members should think about current processes, pain points, improvement opportunities, and use case scenarios.

Explore

During the design meetings, the Blackbaud team will facilitate decision-making sessions by presenting standard business workflows and system concepts while encouraging discussion within the project team. Solution options will be presented and explained as the team explores process scenarios, current state workflows, and future state possibilities. In some cases, the future state will vary from the current state and the team will need to discuss the impact and opportunities for th e end user community and organization as a whole.

Develop

After the design sessions, the Blackbaud team will review the confirmed requirements and business decisions and work to configure and document the recommended business process design for the cycle. The team will incorporate industry and implementation best practices. Wherever possible, the team will also leverage the use of pre-configured system components. During this time the client project team will work to develop use case scenarios and test cases relevant to the design area. Blackbaud can provide a sample set of use case scenarios to assist with this task. The use case scenarios will prepare the team for design validation testing.

Review

After the solution has been configured and documented, the Blackbaud team will meet with the design team to conduct a design review. This demonstration will walk through the key business processes and supporting configuration.

Validate

After the design review session, the design team will validate the processes and configuration, using the developed use case scenarios and test cases. Design validation intends to confirm whether the proposed workflows are feasible. Design validation will be conducted in a sample database but may contain records that reflect the tailored design and configuration. As the team conducts design validation activities, issues are to be tracked in a master issue log to be reviewed by the Blackbaud team for resolution.

Conversion

Data Extraction

Providing Blackbaud legacy system data is one of the most important keys to success for a conversion. You are responsible for extracting source data and providing it to Blackbaud in the same file format for each data extraction. Blackbaud staff will be responsible for receiving the legacy data and loading it into the conversion database on the conversion server.

Conversion Process

The conversion rollout is divided into test previews, test runs, and a final conversion run. Each test run has a set number of goals and tasks, including mapping, implementation, validation, and approval. The process is repeated for each conversion delivery.

Testing

Testing is a crucial activity in ensuring the success of the implementation of your solution. Testing ensures end users will be able to complete the tasks required of their role in the solution after go-live.

If testing activities are incomplete or inaccurate, there is risk that issues may arise after the implementation is complete.

Types of Testing

- Business Process Design Validation: Testing the feasibility of a designed business process and the supporting configuration
- Data Conversion Validation: Ensuring data is converted to the appropriate location as defined in the conversion data map
- User Acceptance Testing: Testing end-to-end business processes in a fully configured, integrated environment
- Website Testing: Testing the user experience and functionality of forms on the website

Training

Blackbaud University offers a variety of training solutions designed with your continued success and satisfaction in mind. Whether it's a quick on-demand video, a virtual instructor-led course, or a private training experience, Blackbaud University is committed to providing you the training and resources to maximize the value of your investment.

Training is an integral part of our on-boarding process. Blackbaud will equip you with the tools needed to effectively participate in the build-out of your Blackbaud solution and prepare you for a smooth transition onto the new system.

Our flexible training program is available year-round for all employees. You will have access to technical classes, solution workshops, and organizational best practices, depending on your subscription. The variety of classes offered allows new hires to rapidly ramp or provide power users with a refresh or deep dive into advanced functionality. This approach ensures your team maintains peak performance through ongoing exposure to new features and time-saving techniques.

Blackbaud University offers several training options to fit different learning styles and meet the needs of a diverse group of learners:

- **On-demand e-Learning:** Tap into our library of recorded tutorials for just-in-time learning. These short lessons provide product training exactly when you need it, day or night.
- **Virtual Instructor-led Events:** For those substantial topics that merit a deeper dive, sign up for online classes. Led by live instructors, these sessions are optimized for distance learning.
- **Classroom Instructor-led Events:** Escape from daily interruptions by joining us for hands-on learning with our expert instructors. At these popular events, you'll also enjoy networking with peers and learning how they solve challenges similar to those you face on the job.
- **Private Remote or Onsite Instructor-led Events:** Delivered at your location by a Blackbaud training expert with sessions covering content from our most popular pre-built agendas, private training can be scheduled for as little as two days and includes Blackbaud sample data for hands-on exercises.

Customer Support

Investing in software technology to further your mission is a great first step, but it takes continuous effort to realize your vision. The key is feeling confident that you have partnered with a team that is not only committed to your success but also has the resources, knowledge, and expertise your organization needs to excel. Blackbaud Customer Support is proud to be your partner in helping good take over.

Blackbaud Customer Support places highly trained agents right at your fingertips with hundreds of support associates supporting thousands of satisfied customers every day. On our award-winning support website, you can learn about our products, access the collective knowledge of all our product experts, and connect with your peers in the nonprofit community. You can also contact our support team to work directly with our support analysts.

Our commitment to you is your success. Our support is comprehensive, outcome focused, and centered around you.

Support Resources

Our award-winning support website has comprehensive resources including:

- **How-to Documentation:** Our help files, user guides, video tutorials, and quick reference guides contain step-by-step instructions for using your Blackbaud solution.
- **Knowledgebase:** Our support analysts record the answer to every question they're asked and regularly update our searchable online Knowledgebase.
- **Community:** Our robust online communities are a popular gathering place for software users to collaborate on best practices and build relationships with their peers.

Contacting Support

- **Chat:** For new questions, our easy-to-use chat interface helps you quickly reach an associate who best matches your solution.
- **Case Central:** Our online case portal allows you to review closed tickets or log notes and attachments on open cases.

- Associates will remain in contact via phone or email for issues not solved on the first contact.
- Additional channels for creating new cases are available depending on your overall investment in Blackbaud solutions.

MTX

CHILDREN'S SERVICES COUNCIL OF LEON COUNTY

Enterprise Resource Planning Software Solutions RFI

AN EXPERIENCED GUIDE WHO KNOWS YOUR TERRAIN

MTX GROUP INC.

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Table of Contents

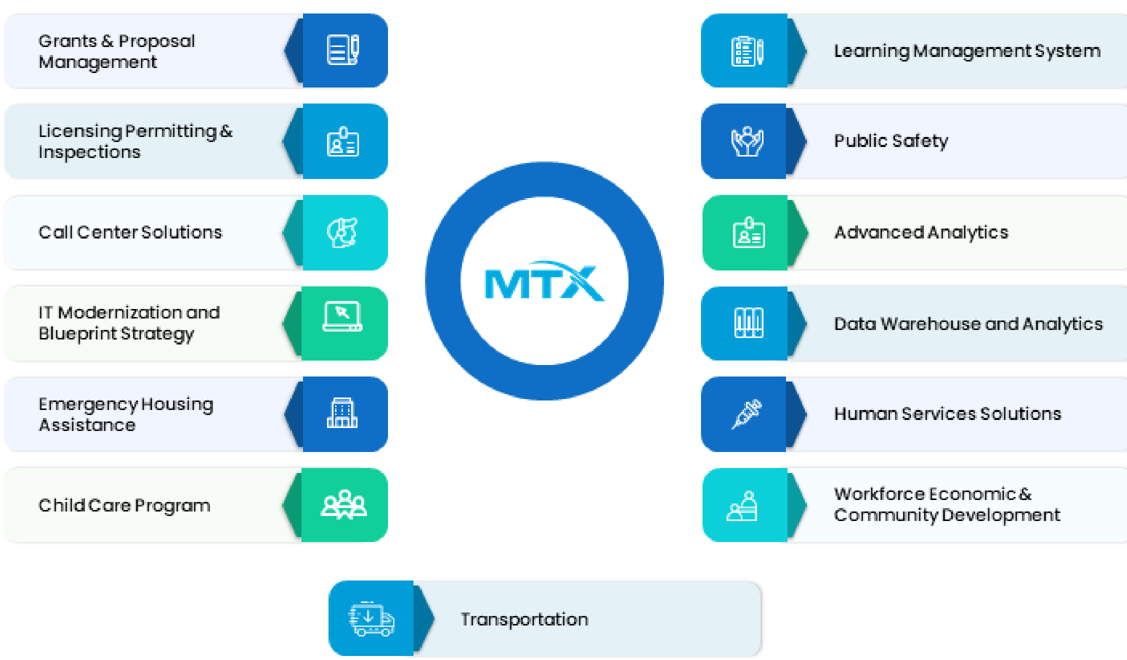
January 31, 2022

To Whom It May Concern,

MTX Group, Inc. (MTX) is pleased to submit our response to the Children's Services Council of Leon County (CSC Leon) Request for Information (RFI) regarding current technologies and viable approaches to addressing the need for a robust, Software as a Service (SaaS) enterprise resource planning solution in support of the County's ongoing efforts to provide the County with early learning and development children's services.

MTX is a system integrator (SI) focused on simplifying and modernizing our clients' case management programs, enabling them to securely manage data, create effective processes, and interact with their users on a larger and more efficient scale. We specialize in merging component subsystems so our clients can manage multiple aspects of their programs within one solution. MTX offers CSC Leon the following services to ensure our solution's success:

- Comprehensive business management to support our solutions throughout the entire development process
- Training and support from discovery through implementation, optimization, and adoption of the solution
- Ongoing maintenance and support after "go-live"
- Effective utilization of our strategic relationships with PaaS and SaaS developers, including Salesforce, AWS, Google, and Microsoft Azure



business intelligence. Our customers are reporting significant success by partnering with MTX to implement remote access initiatives and empower cross-agency collaborations. Our solutions have enabled our clients to personalize customer experiences, train and empower employees, optimize supply chains, discern new operational efficiencies, reduce costs, create new revenue streams, and enhance constituent services.

MTX has the capability to quickly implement, manage, and operate a full-service, CRM solution to include grants management as well as project and case management meeting CSC Leon's needs. The MTX solution delivers a dynamic business interaction platform, enabling administrators to combine user input forms, real-time functions, and an elegant user interface for a cohesive business process. By streamlining integrations among CSC Leon's currently dispersed legacy systems, our grants management system can improve the overall efficiency of the grant process for CSC Leon's 600+ grantee organizations and agencies, thus adding value, simplifying compliance, and reducing overall effort.

Our main points of contact will be the following MTX employees:

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MTX has developed specific expertise and out-of-the-box solutions being used across a range of industries. Our team is led by vertical leaders who are former decision makers in key government agencies and bring a level of expertise and understanding of our client's needs that drives our engagements and project success. MTX looks forward to the opportunity of partnering with CSC Leon to discuss your ongoing solution goals as your organization evolves.

Thank you for your consideration.

Sincerely,

MTX Group, Inc.

Section II - Solution Goals

Technology Advisory

MTX's IT assessment and business case development seeks to fully understand and map the current state of the IT, organization, and business processes such that future CSC recommendations can demonstrate measurable improvements in service outcomes and meet all functional, technical, and business requirements. These services seek to gain and provide tactical and strategic insight to the client's short and long-term IT strategy and needs. MTX will then identify the highest impact solutions, offer recommendations around the required capabilities, develop or procure IT solutions/systems that align with best practices, and develop a governance model geared towards scalability. MTX's business case development will provide CSC with the following benefits:

- **Business Process Re-engineering** - Business process/workflow analysis and redesign for digitization and automation opportunities.
- **Feasibility and Impact Analysis** - Determine demand/gather data for IT-enabled services for stakeholders and assess business and technical viability of technology products.
- **Requirements Elicitation and Validation** - Assist in vendor/consultant selection that will provide IT services according to elicited requirements packages.
- **IT Policies and Procedures Development** - Policies will provide the logical framework for CSC Leon's IT plan, such as CSC Leon's approach to the handling of IT assets, software management, security, and emergency response.
- **Strategic and Operations Planning** - Analysis of existing and planned systems/platforms.

Customer Relationship Management

MTX proposes a customer relationship management (CRM) solution built on Salesforce to address the unique needs and requirements of CSC Leon. The Salesforce platform is an enterprise cloud computing leader dedicated to helping companies and government agencies transform into connected organizations through social and mobile technologies. It is a highly flexible, scalable, and extensible platform, allowing multiple users to access the software applications and database concurrently. Salesforce hosts the entire solution, thus freeing up your organization to manage its mission, not manage an infrastructure solution. Additionally, Salesforce is browser-agnostic and supports all major browsers.

Our CRM solution has the ability to deliver the requested services and manage multiple relationships and tasks/opportunities simultaneously. The same solution can provide case management for clients as well as relationship management tracking for donors and partners. MTX acknowledges that the system would be broadly responsible for, but not limited to, the following:

- Building a custom database that encompasses goals and needs of CSC Leon including but not limited to:
  - Managing different programs separately while accommodating dynamic funding sources and acknowledging that some clients receive multiple services with different fund allocations.
  - Accessing a 360-degree view of clients with dashboards and reports complete with powerful and insightful reports/dashboards capabilities based on demographics, mailing addresses, funding type, service type, etc.

- Assigning clients and schedules to staff so they know their daily schedule; notes may be added to client profiles as necessary.
- Accurately transferring current legacy data to the new system from Excel spreadsheets.
- Providing virtual training for staff who will be inputting data and pulling reports.
- Providing support for database revisions, updates, and questions.

As part of our discovery phase, the MTX team will capture any additional enhancement features and will scope, prioritize, and provide an implementation plan that is tailored for CSC Leon.

Grant/Funds Management

MTX proposes to utilize our out-of-the-box, currently in-use grants management solution for the financial management and disbursement of CSC Leon grants. Built on Salesforce's industry-leading CRM, our solution delivers case management for proactive applications management. Dynamic workflow capabilities will guide the application from submission through determination, incorporating email notifications/alerts, and task management, supporting grant processors, grant managers, and management oversight. The system generates the disbursement schedule that CSC Leon will be able to certify for payment processing. The MTX solution allows applicants to upload files and submit all required information through the application portal. After accepting and signing a grant, applicants can go into the self-service experience and monitor the award. They will receive updates regarding document status and can submit progress reports and track financials. Grantors can use the solution to monitor performance reports, disburse payments, and more.

The MTX solution delivers a dynamic business interaction platform that enables CSC Leon grant administrators to combine user input forms and real-time functions via an elegant user interface to ensure a cohesive business process. The solution provides powerful out-of-the-box grants management features that can quickly be configured to meet CSC Leon's specific requirements for the management and disbursement of grants. Furthermore, because this Salesforce native solution has been designed to readily scale and be repurposed via reconfiguration, the CSC Leon instance can also be tailored to manage additional grant solicitation rounds. This solution will enable CSC Leon to track grant funding history of programs over time, engage in advanced data driven analytics, and improve the quality of grants management services. Subsequent grants can be made available to eligible applicants based on qualifying criteria already collected by CSC Leon and/or other grant-specific criteria. MTX will collaborate with CSC Leon to document specific technical requirements and configure the solution to match the specific requirements for a given grant.

Decision Support/Project Management

As described above, workflow and task management is inherent in the Salesforce platform. The ability to measure processing times helps organizations drive toward more efficient and timely performance. Budgeting across programs and grants is informed by powerful reporting capabilities.

Customizable dashboards from Salesforce provide instant access to the real-time data and analysis users need to run their business. Only Salesforce gives you step-by-step wizards you can use to pull critical metrics from many departments/programs into a consolidated view. Any end user with the appropriate permissions can leverage the visual Dashboard editor and easy-to-use data visualization tools to create and modify dashboards with various charts, gauges, tables, and other graphics without requiring the intervention of an administrator.

Users can drag the corners and sides of dashboard components to scale them up or down. Components can span multiple columns and rows, so you can show more fields on a graph without needing to scroll. Charts automatically resize to match component size. Dashboard components can be easily arranged via drag-and-drop, and the foundation of each dashboard is a responsive grid, so users can create dashboards with up to nine columns and compare metrics side-by-side.

To support your needs for reporting, analysis, and predictive analytics we are proposing Tableau CRM. This will enable advanced reports and dashboards capability across the entire solution. Tableau CRM is a cloud-based platform designed for the business user to get answers to questions instantly through powerful, interactive visualizations of any data, on any device with the power of built in Artificial Intelligence (AI).

Tableau CRM is an analytics system designed to analyze data not just from within Salesforce, but from across different sources. More importantly, it is designed to engage users every day by embedding analytics in business processes - a native tab in the business system and on the home page, or an interactive component on your account page or object page.

Tableau CRM extends beyond standard reports and dashboards providing new views into end-to-end grant insight, and historical analytics to help CSC Leon plan your next best step. The solution can help identify trends and make discoveries you weren't specifically pursuing, making it a much stronger choice for data-driven decision-making. Tableau CRM also provides a number of prebuilt (yet configurable) dashboards. Finally, Tableau CRM is designed to be API-first. And with the Analytics Web SDK you can extend functionality across Salesforce Lightning or any third-party website. With Tableau CRM, it's easy to integrate data from any source, including external data.

Case Management

MTX will leverage Salesforce as the foundation of the Case Management function for CSC Leon's software solution. This Provides a 360-degree view of your customers/cases, helping you maintain a holistic view of your clients regardless of where they are seen and/or served in the system and by any integrated third party.

The following features are typical of the case management solutions we deploy. Features can be provided in a modular way if and when CSC Leon seeks to utilize the functionality.

- **Client Portal** - Equip families with a web-based, mobile-friendly way to request services, communicate securely, provide consent, and coordinate care.
- **Eligibility Determination** - Quickly and accurately assess client's eligibility for services, incorporate real-time benefits history, eliminate duplicate data creation, and improve integration, accuracy, and completeness of data for processing.
- **Provider Management** - Recruit providers, manage contracts with digital signing, track budgets and invoicing, measure performance, and track credentialing and licensing.
- **Provider Portal** - Increase engagement of service providers with shared access to status updates, budgeting, and scheduling to maintain correct data and efficiency for integrated services.
- **Workflow** - Configurable workflow supports multiple processes to manage cases, authorize service, send referrals, and coordinate care. Workflow can be configured to support your

business process including parallel and/or linear approvals, alerts, and notifications, and time-stamped action logging.
- **Data Management** - Legacy data migration and/or integration with multiple data sources enables 360-degree understanding of a client's current needs. Configurable reporting capabilities and automated updates provide real time data for accurate case management.

Section III - Response Content

1. General Costs and License Management

For the users and processes CSC Leon describes, the Salesforce licensing model is a fixed cost per user per year. Further, Salesforce offers low cost or free licensing to non-profit organizations.

Salesforce licenses are purchased in one of three ways:

- Pay-as-you-go, in which customers purchase licenses based upon their immediate need.
- Volume, to take advantage of additional volume discounts. Volume discounts may apply based on the CSC Leon final total user counts and their access requirements. This information is needed in order to derive an accurate price estimate.
- Salesforce Enterprise License Agreement ("SELA"), in order to achieve the greatest financial savings, many customers license and provide multiple Salesforce applications to all of their employees. Salesforce SELAs are based on the total license mix, volume, and term of the agreement that is negotiated with the CSC Leon.

Users are typically managed by a Salesforce administrator, likely a person on your team. This person will have the ability to create and remove users' accounts.

The system contains notifications and alerts and allows users to select the type of notifications they would like to receive. Users may also opt to receive alerts and notifications via email, SMS (text), or through the "system notifications'' feature where all alerts and notifications can be viewed and managed within the user's homepage. Upon logging in, users can view case settings, tasks, and other scheduled activities. Users can quickly and easily access those items through single click navigation.

There are tools to support collaboration. The proposed software can integrate with an existing email system such as Microsoft Outlook or Google Mail. If a user sends an email to an external party, that email and any resulting response will be automatically recorded in the case records. Chatter is a feature for internal communication among users. This captures communications related to a record such as a project or client file so that users have all the related information and status is clear and in one place.

We can help you configure dashboards for data driven insights including to manage workload, view financial status of the organization in real time, and additional date driven information such as upcoming tasks, settings, activities, and recently visited records.

While Salesforce has robust reporting and dashboarding capabilities, natively it is also simple to integrate with other 3rd-party reporting tools. Salesforce has a number of out-of-the box integrations with third-party platforms. Salesforce also has a world-leading integration platform in MuleSoft. Combined, these integration capabilities make it possible to exchange data through virtually any protocol needed. MTX will work with CSC Leon to define the requirements for data exchange with 3rdparty tools. We can adapt integration formats to the capabilities of the receiving system regardless of whether that system is on-premise or cloud-based.

2. Security

Our solution supports role-based security and provides robust means of controlling visibility and access to records. Our solution meets federal requirements for securing sensitive personal information. The core capabilities include the default organization-wide sharing model, defined sharing business rules, roles, role hierarchy, manual sharing permissions, and group-based access through sharing. All users and application-level security are defined and maintained by the system administrator.

For identity and access management we regularly integrate with an organization's existing directory. Often this is Microsoft Active Directory. We are capable of utilizing other solutions as well with OAUTH or SAML. This supports single sign on (SSO). Taking this approach, users would be able to change and manage their passwords in a manner aligned with and governed by your local IT standards. Salesforce also supports multi-factor authentication through a variety of methods:

Salesforce enables CSC Leon administrators to manage roles, relationships between roles, and user-rights from within the application, in a single easy to read page depicting the role hierarchy. The defined role hierarchy can be displayed in Tree View, Sorted List view or List View. Administrators can easily add new roles or sub-roles to the organization. CSC Leon designated personnel shall have access to only those data fields permitted based on their roles/security classes. This can be configured within Salesforce itself and in real-time. The user/personnel will only have access only to those data fields and records permitted based on their roles/security classes.

Within Salesforce, the creator and last updater as well as timestamps are recorded for every record. Additionally, the Salesforce platform and applications have a multitude of history tracking and auditing features that provide valuable information about the use of an organization's applications and data, which can be a critical tool in diagnosing potential or real security issues.

3. Architecture

MTX is proposing Software-as-a-Service (SaaS) and Platform-as-a-Service (PaaS) tools in Salesforce and MuleSoft. These are subscription-based tools that can be supported by numerous implementers as well as the State, given appropriate skills. There is nothing MTX considers to be proprietary in this solution.

The solution will be accessed via a web browser. Salesforce is browser agnostic and supports all major browsers (e.g., Firefox, Chrome, Safari, IE, etc.). No installations on users' laptops or desktops are required. The solution is accessible from anywhere with an internet connection and supported browsers, including mobile devices.

The Salesforce platform is a highly scalable and flexible platform. It provides the ultimate flexibility, enabling a rapid and configured deployment of your solution. The flexible nature of Salesforce means that an agile development approach can take place between the delivery partner and the customer making Salesforce the solution of choice for rapid deployment. Multi-tenancy gives applications elasticity. Salesforce applications can automatically scale from one to tens of thousands of users. Processing more than five billion transactions each day, the platform is used for large-scale deployments. Any application that runs on the Lightning Platform is automatically architected to seamlessly scale from 1 user to 10,000 users without the customer having to do anything differently.

All applications (including mobile, offline, and read-only options) and data running on Lightning Platform are deployed to and replicated across multiple data centers in different geographies. Every application, no matter how large or small, gets the full benefits of the backup, failover, disaster recovery, and other infrastructure services required for an organization's mission-critical applications.

Ease of use is one of the most important factors in ensuring broad adoption of the solution and organizational utility. To achieve the highest value from the solution investment, we can configure the Salesforce solution to best fit its user's needs. The Salesforce Platform offers tools for "no compromise customizations" that make it possible to create both fast and easy configuration as well as deep customizations to meet just about any need. We can easily configure the Salesforce application through clicks or code methodology. Salesforce configuration, development, and administration is focused 80% on clicks vs. 20% code, dramatically improving cost of ownership and enabling non-technical business users to easily extend existing Salesforce functionality. Through the point-and-click methodology, custom fields, custom objects, and new applications are easily configured in Salesforce. All customizations are stored as metadata and interpreted at runtime allowing the core code to be upgraded while guaranteeing that customizations will work across upgrades.

Salesforce is a pure multi-tenant, cloud-based web application. Multi-tenancy gives applications elasticity, enabling Salesforce applications used by customers to automatically and seamlessly scale from one user to 100,000+ users. Processing more than four billion transactions each day, Salesforce is used for small and large-scale deployments.

4. Content Management

MTX proposes an enterprise data assessment and strategy initiative. We will collaborate with CSC Leon to assess the current state of data analytics infrastructure, metrics requirements, and data governance needs, and create comprehensive strategies for modern data infrastructure, data conversion, metadata catalog management, and data visualization.

MTX, through its homegrown data, Business Intelligence (BI), and Artificial Intelligence (AI) firm mavQ, provides Comprehensive Data Management consulting and technical services consistent with industry standards and best practices. We leverage data governance frameworks, including the definition of assets, data steward processes, and data privacy and security standards from government agencies. Our Enterprise Data Strategy assessment workshops include data governance planning, implementation, and Business Analytics and Reporting.

The mavQ Smart Document Management System provides an accurate, fast, reliable solution that can classify and extract vital information from documents. It has the capability to integrate with any third-party system that can provide a REST interface, including Salesforce. The mavQ AI system can accept both digitally filled and handwritten documents and process them to extract vital information through key-value pair extraction, checkbox identification, signature recognition, and more. The mavQ Document Management System can validate the extracted information against a standard database and update the database objects with the information extracted from the document. It can also classify the documents and place them into separate folders based on criteria like document type, assignee, department, and more. The system uses the Human In The Loop (HITL) approach to capture user feedback and improve AI models to keep the models relevant and highly accurate.

5. Mobility

Mobility is a native capability of the Salesforce Platform. The Salesforce mobile app is built on the Salesforce Platform and provides the users with a completely unified mobile experience across a variety of mobile devices, including iOS and Android smartphones and tablets. Virtually all functions in the application proper can be accessed through our Salesforce mobile app such as collaboration, workflow and approvals, and much more. Mobile support is standard, out-of-the-box functionality and requires no customization or third-party mobile application development tools. Users have several options for accessing Salesforce on mobile devices that meet minimum platform requirements and can download the Salesforce mobile app from Google Play or the App Store. The Salesforce app is available for most Salesforce editions and user license types.

Offline access is available for mobile Android and iOS only. When you enable caching and Offline Edit, users can keep working, unimpeded by a subway commute, FAA regulations, capricious cellular signals, or bunker-style buildings.

With just a few clicks, you can protect your Salesforce app users against the vagaries of mobile connectivity. You can enable two levels of offline access: caching frequently accessed records, so users can view data while offline, and Offline Edit, so users can create, edit, and delete records while offline. Offline access is available in Salesforce for Android and iOS only.

6. Timeline for Implementation

From MTX's prior grants management experience, the general implementation time frame is 10-12 weeks for comparable solutions of similar scope and complexity. Depending on the scope and potential phased rollout for CSC Leon's system, this timeline may be extended to implement additional system functions (i.e. Case Management, Financials).

MTX utilizes our proven five phase hybrid Agile-Scrum Methodology, extensive project management toolset, and emphasis on metrics-driven outcomes to develop technology solutions. Our methodology blends the best of iterative and predictive approaches and enables a creative process that anticipates the need for flexibility and applies a level of pragmatism. MTX maintains transparency, tests frequently, and delivers functionality as soon as it is developed. The specific steps and deliverables of each phase vary by project type, but the core tenets ensure that client satisfaction, innovation, thought leadership, quality, and predictability remain intact. Our project development methodology has five phases:

- **Phase 1 - Project Initiation.** This phase culminates with a project kickoff meeting so that team members understand project objectives, challenges, client expectations, and their roles and responsibilities.
- **Phase 2 - Define and Design**. MTX engages with the client in discovery sessions to map out all requirements and deliver detailed, agile sprint-based plans. We engage with the client to understand the underlying technology options to design an optimal integration plan.
- **Phase 3 - Development and Quality Assurance**. MTX rapidly and incrementally develops, prototypes, and demos the solution for client review. This phase is marked by multiple iterative design sprints and each ends with the client reviewing and confirming the solution developed during that sprint meets requirements.
- **Phase 4 - Testing and Training.** This phase is divided into (a) user acceptance and testing (UAT) and (b) training and change enablement. MTX builds a detailed UAT plan for testing and

artifacts. At the end of UAT, we provide a list of all identified and resolved issues and seek approval and sign-off.

- **Phase 5 - Deployment and Rollout**. MTX deploys the system. Regression testing ensures that full functionality has not been affected by deployment efforts.

Our approach ensures the delivered product is fit-for-purpose, within scope, on time, and is adopted. Each phase has typical deliverables that we ensure are delivered prior to moving on to the next phase. These deliverables constitute the Exit and Entry criteria for moving forward to the next phase of development. Furthermore, we leverage our integrated project management tool and proactive risk management processes to mitigate issues ahead of time.

MTX will partner with you to establish a well-defined knowledge transfer and training process that will provide the CSC staff with a complete view of their new solution from introduction and basic usage patterns to system administration, development, and configuration. During the implementation phase, our MTX team will prepare system documentation to be leveraged during post-implementation training, to facilitate efficient knowledge transfer. These documents will summarize system requirements, capabilities as well as detail system operations, and system configurations.

During the project initiation phase, our MTX team will assess specific requirements and expectations and agree to final documentation deliverables. Some typical examples of standard deliverables include Technical Release Notes, System Administration Guide, and End-user Training Guide. These documents will be made available to the CSC team members and end users, and they become part of the online library of resources that can be leveraged as a self-support or reference tool, even after the go-live phase. Our customized training program is designed to meet the needs of public sector agencies. This world-class curriculum is designed for administrators, developers, business users, and architects and covers curated high-quality content to help attendees become proficient users.

There are two types of maintenance at Salesforce: System Maintenance and Release Maintenance. System Maintenance is for sustaining the performance, reliability, security, and stability of the infrastructure supporting our services. Release Maintenance is for upgrading the services to the latest product version to deliver enhanced features and functionality. Major release maintenance occurs three times per year. Patch Releases and Emergency Releases are used to deliver scheduled and ad hoc application fixes. Patch releases are scheduled weekly. Emergency releases are conducted on an as-needed basis and can occur any day of the week. Whenever possible, patches and emergency releases are deployed during off-peak hours and without downtime.

MTX offers a standard post launch support package with a duration of two weeks. Clients are given full access to the implementation team in the event that any issues arise. During this period, our team is on call to resolve these issues and provide general oversight, support, and bug fixing as necessary.

Following the post launch support period, MTX clients who maintain a managed services subscription receive a team of MTX specialists who provide break/fix issue resolution support during the duration of the subscription period on a customized release timeline for the customer. These issues include cosmetic issues, field value updates, minor workflow updates, messaging logic and content updates, and system crashing issues. This does not include creating new integrations or updates requiring architectural changes, which can be scoped separately as part of a separate project engagement. This is the standard post-implementation system by which CSC users can obtain technical support and assistance in resolving issues with the solution.

Enterprise Resource Planning Software Solutions RFI - CSC Leon

EXECUTIVE SUMMARY

Unite Us knows that healthier communities are created by helping individuals be healthier. Our goal is to ensure every individual, no matter who they are or where they live, can access the critical services they need to live healthy and happy lives. To further this goal, we partner with leading state governments, healthcare systems, payers, and nonprofits throughout the country to build accountable networks in a variety of geographies in more than 44 states.

With Unite Us, CSC Leon can manage grant funds, utilize predictive analytics for decision-making, identify social care needs in communities, enroll individuals in services, and leverage meaningful outcome data and analytics to further drive community investment. Our technology solutions will provide CSC Leon with real-time, actionable metrics on individuals, outcomes, and provider performance, enabling you to proactively address the complex needs of your most vulnerable populations and prove the positive impact of your investments. Data sets can be generated to better understand the needs of community members and identify gaps in available services. These data sets can be configured to cover a variety of geographies including specific counties or communities, and even zip codes.

With Unite Us, CSC Leon can be part of Unite Florida, a shared, community-wide coordinated care network which will enable you to better address health disparities and shift investments upstream to build a more sustainable social care infrastructure. We enlist a local team of community engagement managers who understand community needs and priorities to build an accountable network of providers and who can serve as strategic thought partners to ensure the network is providing impact. We promote an “any door” approach by engaging organizations where community members have relationships — whether it is barber shops, churches, or community centers — and bring them onboard. This builds trust and removes traditional barriers to care and services to create new entry points for community members to access previously underutilized resources.

Unite Us has built this framework across the state of Florida including Leon County. Unite Florida partners in Leon County include Whole Child Leon, Capital Area Healthy Start Coalition, Sabal Palm Elementary School, and United Way of the Big Bend. We have also built meaningful relationships with state and regional teams from Early Learning Coalitions, Easterseals, Healthy Start, First 1,000 Days Suncoast, and the Children’s Board of Hillsborough County. Unite Us successfully builds these strategic partnerships in part because we hire local staff who have a vested interest in improving the health of their local communities. Unite Us currently has over 20 staff members who live in the Sunshine state and several of them live in Leon County.

As part of Unite Florida, agencies in First 1,000 Days Suncoast have referred over 2,088 residents to behavioral, medical, and social services across the region since July 2020. Sarasota Memorial Hospital Women and Children services has helped 1,394 families and sent 2,182 referrals through Unite Florida[1].

Unite Us offers products that CSC Leon can use to meet your Enterprise Resource Planning Software Solution goals:

- Our Platform provides the infrastructure to enable collaboration and coordination of closed-loop referrals between health and social care providers. It provides screening with decision support, communication and alerts and assessment and case management needed for true care coordination. (Goals 5 a, b, c, and d.)
- Our Payments solution can be used to track and manage grant funds. Payments gives funders the ability to track their investments at a program level and provides visibility into how dollars are being allocated across the community. (Goal 3 b.)
- Our Insights Center provides predictive analytics capabilities and structured outcomes-focused data to help CSC Leon understand where opportunities and needs exist and shows the positive impact of your efforts. Our predictive analytics highlight the populations who have the greatest risk for social needs and the best way to engage them. The real time data visualizations and reports highlight the power of a coordinated care network and empower leaders with the ability to make data-driven decisions to optimize service delivery for better outcomes. (Goals 4 e; 5 a, b, and c.)

IV. RESPONSE CONTENT

Company Name: Unite USA Inc. d/b/a Unite Us
Address: 217 Broadway, Floor 8, New York, NY 10007
URL: www.uniteus.com
Point of Contact: Matthew Hernandez | 561-248-0633 | matthew.hernandez@uniteus.com

1. **General costs and license management**

   a. **Transparent and consistent license model, including a detailed approach to cost and license management and an explanation of pricing structure specifically an explanation of what the pricing structure is comprised of: e.g. nodes, users, individual vs enterprise, instances etc.**
   Unite Us pricing is proprietary because we have a number of products and services that we offer, however we customize our solution offering to meet the specific needs of our customers. We would be happy to work in partnership with you to learn more about your needs and scope out the best solution for CSC Leon.

   b. **License and feature use tracking to optimize costs and reduce risk**
   All users of the Unite Us Platform need to have an individual license in order for us to adhere to the highest of privacy and security standards. Your customer success manager is there to assist with utilization and support to optimize your experience.

[1] First 1,000 Days Suncoast Expansion Helps More Mothers and Babies

c. **Automated notifications, collaboration and data driven insights**
Notification preferences can be set up in the Unite Us Platform by the user with administrative privileges for that organization.

d. **Ability to integrate with 3rd party reporting tools**
Unite Us has integrated with a number of 3rd party vendors in healthcare, government and other lines of business. Unite Us can also provide data-feeds that can be integrated with 3rd party reporting tools. The data-feeds use data files generated by Unite Us through an ETL process. These files, which will only contain data that pertains to CSC Leon clients, will be created periodically and placed on a dedicated SFTP folder that will be only accessible to CSC Leon.

e. **Preconfigured and custom dashboard capabilities capturing cost, analytics, and optimization insights**
Unite Us captures standardized care outcomes data, which enables analytics and reporting (and use) of the data to understand the impact of interventions on cost of care and inform community investment strategies. Unite Us can further provide analytical support to understand metrics and insights about the network in the form of quarterly in-progress reviews for CSC Leon as well as aggregate data for the entire community.

Unite Us Insights Center

The Unite Us Insights Center is your one-stop-shop to understanding the power and activity of coordinated care networks to optimize service delivery for better health outcomes. The Insights Center is where we house a series of dashboards and reports that equip our customers and partners with the data and insights they need to evaluate the needs of their client population and the overall performance of their teams and the network.

CSC Leon can use the Unite Us Insights Center to best understand your impact on the community and across your clients within our Network Activity and Health Equity dashboards.

- **The Network Activity Data Visualization** provides detailed metrics on the volume of activities and interactions within a network, including services requested and resources available in the network. The Network Activity Data Visualization provides network-level, aggregate data to enable users to understand who their clients are, what services these clients seek, whether the clients have received their requested services, and how organizations within the network can serve client needs.
- **The Health Equity Data Visualization** gives insight into the clients being served in Unite Us networks through a health equity lens. The goal of the data visualization is to provide our partners with a deeper understanding of the clients they serve and the differences that exist between demographic groups on the network impact level. The data visualization includes additional metrics to better assess how and why clients within different demographic groups are or

are not getting connected or to the services they need.

Ultimately, CSC Leon can leverage our insights center to support the design and implementation of a responsive, child-focused system of care to improve birth outcomes, reduce neglect and abuse, and better prepare children for school. Within the Insights Center, CSC Leon can access aggregated social care data on your client-families to better support and measure impact and return on investment, and proactively identify individuals/families at risk, and their likely needs, to drive positive outcomes. Empowered with the necessary data, CSC Leon will be well-positioned to drive strategic planning and advocacy on behalf of children and families across sectors; with the capacity to build data-driven partnerships with key stakeholders across sectors, including: Medicaid, Managed Care, Child Welfare, Education, and Housing.

2. Security

a. Granular access permissions

The Unite Us Platform is role- and permission-based. This structure is the backbone of our HIPAA-compliant architecture; users can only view information in service categories that are permitted based on their role and responsibilities, and only for clients to whom they are directly providing services. There are multiple different permission-levels and roles on the platform, each with different access to information and individual/aggregated data. All software users on the platform are assigned specific user roles. Each role is associated with specific permissions and functionalities. User roles can be updated or changed as needed. Viewers can only see what they are allowed to see, according to rules, regulations, laws, norms, and ethics around privacy and security.

b. Support for directory services and multi-factor authentication, including mobile solutions

The Unite Us Platform supports multi-factor authentication (MFA) via single sign-on (SSO) when the MFA is being enforced by the IdP. Unite Us is MFA/SSO vendor/system agnostic and requires that IdP systems will support either SAML or Oauth. When using SSO-based authentication, credentials are managed by the IdP system and are only stored there.

c. Support for role based and attribute-based access control

Please refer to the response for question 2a.

d. Logging and auditing for successful and failed login and access

Unite Us logs all interactions by users, and monitors usage and access. Audit logs capture basic and detailed transactions, including: User ID and IP capture for login attempts, both successful and failed; date/time stamps of activity, length of time per session/total time spent in product; access, creation, deletion, or altering of records; and time of log out, amongst other information. Logs are backed up and stored pursuant to the Unite Us Audit Logging and Monitoring policy. Logs are also scanned for vulnerabilities as part of our continuous monitoring processes.

3. Architecture

a. Multi-tenant

The Unite Us Platform is a multi-tiered application built on a distributed architecture, and is a fully-managed cloud-hosted Software as a Service solution hosted on Amazon Web Services (AWS). All internal backend components of the Unite Us solution are cloud-based, using standard AWS interfaces. The interfaces between Unite Us front-end and back-end use Unite Us RESTful APIs.

The Unite Us Platform is architected to leverage horizontal scaling across its infrastructure. Data stores are clustered with automated failover/reorganization in the event of individual instance failures. Unite Us relies on best-in-class AWS infrastructure to ensure that content can be delivered to clients in a highly-available, fault-tolerant manner. All of our application development and deployment is done with a close attention to security and compliance following industry best practices.

The Unite Us Platform is designed for high availability and reliability using a distributed elastic architecture. Components of the system can be updated individually without impacting others. Infrastructure can be scaled to meet demand and reduced when demand subsides.

b. Robust APIs to support integration with other systems

The Unite Us Platform is built on modern APIs. For care coordination workflow, Unite Us uses standard security protocols and data exchange, including SAML 2.0, SCIM, SMART, OAuth2.0, and HL7 FHIR.

c. Dynamic scalability

Please refer to the response for 3a.

d. Ability to create and manage complex forms and workflows

Please refer to the response for 3a.

e. Support for enterprise release management and version control

We generally push product updates on a quarterly basis. All updates go through a throughout QA/QC process prior to release.

f. Support for automated testing to include performance, scalability, and regression testing

Please refer to the response for 3a.

g. No code/low code as well as traditional development environments

Please refer to the response for 3a.

4. <u>Content Management</u>

a. Support for querying complex data types and unstructured data

Unite Us provides multiple options for querying data gathered and generated in the platform:

- The **Monthly Data Delivery** is our baseline data delivery offering and provides customers with access to the line-level data attributed to their organization within the Unite Us Platform (i.e., client-level data for clients served by or referred to the organization) on a monthly basis. The data can be provided in identifiable or de-identified format as deemed appropriate based on the Unite Us Data Governance committee standards and review. The data is delivered in .csv format in a folder.

- The **Data Delivery Dashboard** is a Unite Us Insights product made available via the Insights Center that allows users to view and download client-level data because we want to empower users to access data on their own. This product also allows users to view basic summary statistics, drilldown on client-level data and self-serve selected data. Users can export data to gain crucial insight into their organizations' and programs' activity and impact on the community.
- The **Data Feeds** allow data to be exported and integrated with the customers' existing data reporting platform. Data Feed solutions are best suited for customers who would like to integrate the data related to social care interactions between community-based organizations and patients/members/clients directly into an existing reporting platform.

b. Support for enterprise content and document management and search

Unite Us uses an enterprise master person index (EMPI) and a unique social care record for each individual in the database, which reduces duplicate records and enables shared care planning. Once a platform user identifies the client record of interest, relevant and historical information contained in that record can be viewed by the users working with this client. This includes documents that are uploaded through the Uploads tab on the client's face sheet (e.g., proof of income or other relevant documentation to prove eligibility for services). Documents can also be uploaded to specific referrals or cases, which are visible to the participants of that service episode in order to connect the client to the most relevant social care. The Unite Us platform is also used as a Case Management tool for many of our customers and partners. Native functionality allows the care team to have visibility to other members of the team who are assisting the client with addressing their needs. If a client has had social care services provided to them in the past through the Unite Us platform, the care team members are able to see the longitudinal journey of those service episodes. It also allows for notes to be shared among referral providers on the client's face sheet. We would be happy to walk you through a demonstration of the capabilities within the Unite Us platform.

5. <u>Mobility</u>

a. Support for IOS and Android systems (phone and tablet)

The Unite Us Platform is intentionally designed as a web-application to be accessible from any type of internet-connected device and is OS agnostic. The platform is optimized to display across different screen sizes, and be accessible and viewable on tablets, smartphones, or laptops.

b. Support for limited offline work with store-and-forward capabilities

The Unite Us platform has a standard uptime SLA of 99.9%, with historical uptime exceeding this level. Unite Us' platform ensures redundancy and resiliency through both technical resources and operational processes. Unite Us is a cloud-based platform that relies on Amazon Web Services (AWS). As with many prominent cloud providers, there is robust support for redundancy and resiliency. Unite Us benefits from many of these features. In addition to foundational infrastructure pieces, we also follow best design practices to ensure that the system is redundant and resilient. For example, our data stores are configured in causal clusters. On the operational side, we utilize a robust set of monitoring and alerting tools (e.g., NewRelic, LogDNA, AWS Cloudwatch, etc.) to ensure that our system is in a healthy state and that we can react in a prompt manner when there is any deviation from the norm.

6. <u>Timeline for Implementation</u>

a. General project development
See response below.

b. Training and beta testing
See response below.

c. Solutions capable of implementing early and/or on an incremental release
See response below.

d. Ongoing maintenance
See response below.

Unite Us approaches our implementation plans with an agile methodology and provides a suite of project management tools to support the successful completion of implementation. This includes the creation of a high-level critical path, detailed project plan, formal status reports, and risk management tools that are used to provide consistent project tracking, mitigate risks, and adapt as needed.

Our implementation model is designed on a 12- to 20- week timeline (depending on project scope) divided into three distinct phases for easy comprehension and execution. The first phase, planning, starts with a fundamental four-week discovery period. During these four weeks, we create a project plan that leverages Unite Us best practices and accounts for each unique partnership. The second phase, engagement, involves focused workflow discussion and user engagement activities to foster momentum and user excitement. The final phase, onboarding, involves training and configuration of the platform.

Key activities across implementation include (1) project kick-off, (2) prep for community outreach and internal user socialization, (3) socialization and communications targeted to prospective users, and (4) training and onboarding of users prior to go-live. An additional technical implementation plan will be provided as needed for integrations; timing can vary and requires a technical design session to appropriately scope the project and define the workload across Unite Us and the customer.

Our standard timeline is the best practice that we've refined based on our expertise and lessons learned in building networks across the country. Although we can onboard and go-live with particular users more quickly, we are committed to adequate network health. Our standard timeline enables us to lay the integral groundwork to engage a robust range of providers across dynamic communities.

Response to Request for Information-
Enterprise Resource Planning Software Solutions

Submitted to

The Children's Services Council of Leon County (CSC Leon)

Due January 31, 2022

Company Name:	Webauthor.com, LLC (Webauthor)
Address	2737 Misty Oaks Circle, Royal Palm Beach, FL 33411
URL:	www.webauthor.com
Point of Contact:	Perry Borman, Director, Client Solutions 561-629-3491 perry@webauthor.com

Webauthor Overview

Webauthor, a Florida-based Software as a Service provider, has been in the business of developing information system solutions for a broad range of clients since 1995. We develop cloud-based business applications designed to streamline and automate essential business functions that enable our clients to better manage their data, improve client and agency relationship management and support decision-making and improved business process efficiency.

Online Data Management

The Webauthor FLEX platform is an online business tool that equips organizations with the capability to design, build, and implement customized online applications to meet virtually any demand. The built-in adaptive intelligence enables organizations to automate daily tasks, design custom forms, launch training programs, amass data, track and record client activities, generate robust reports, collect and store files, and track project status.

Key system attributes include the ability to

- **Collect** (Automate, filter and centralize data capture)
- **Organize** (Classify, categorize and arrange information)
- **Access** (View, manage and edit data from any device)
- **Design** (Customize grids, charts, forms and reports to showcase data)
- **Build** (Create and customize data tools with custom functions)
- **Produce** (Interpret and maximize data to improve goods and services)

Our applications are all built using a modular approach and those modules can work together or independently from each other. The applications can have an unlimited number of participants and all functionality deployed on our current platform is available on any common Internet browser or on all Apple and/or Android-based mobile devices (if required). On all sites, a client site administrator is able to update most areas of the site without Webauthor involvement. Clients have the capability to:

- Have authorized users add new program sections, add pages to existing sections and edit pages
- Have "lightly trained" staff perform future modifications of templates for use on the site
- Perform page editing across all current, standard browsers and platforms
- Grant user permissions and approvals
- Adopt content workflow management
- Restrict types of files and sections that can be managed
- Create and manage templates
- Have printer-friendly versions of pages
- Store graphics, images, documents, etc. via the document management repository
- Implement audit trails and user authentication
- Approve/decline content
- Personalize content based upon user preferences

- Easily create and update content without knowledge of HTML
- Easily submit content for approval
- Have access via a Web browser from any location
- View/review historical versions
- Search for files
- Post and remove content based on dates (content scheduling)

Since 2015, Webauthor has served as the technology partner for the Services and Activities Management Information System Collaborative **(SAMIS)** which is managed by the **Florida Alliance of Children's Council and Trusts** (formerly Florida Children's Council). SAMIS is used and accessed by more than 1,200 separate organizations and was developed to increase the efficiency of the financial and program data transferred between large government funders and the organizations they fund. SAMIS is utilized by agencies for fiscal functions, including budgets, reimbursements, amendments, position management, and document repository. The SAMIS funders collaborative includes Palm Beach County Government, Broward County Government, the United Way of Broward County, the Children's Services Council (CSC) of Martin County, CSC of St. Lucie County, CSC of Broward County, the CSC of Palm Beach County, the Children's Trust of Miami/Dade, and Kids Hope Alliance (Duval County). These groups fund and monitor more than $500 million/year.

SAMIS enables funders to manage both programmatic and fiscal functions.

- *Programmatic – enter and view all data related to program's participants, including their demographics, attendance and performance outcomes. View information organized as an overview of program.*
- *Fiscal – Where an agency conducts all fiscal activities related to contract, including creating and amending budgets, creating and editing staff positions and submitting monthly reimbursements; able to access reports related to these activities.*

In addition to SAMIS, Webauthor has built hundreds of modules for its clients, including **Customer Relationship Management, Grant/Funds Management, Contracts, Metrics, Case Management** and tools that support reporting, data visualization, project management and workflows. As an example for a general overview of Grant/Fund management, please see the following video: https://www.youtube.com/watch?v=9DP- HplU6og&feature=youtu.be

In one client example, The Children's Trust of Miami/Dade County received a national award in both 2019 and 2020 for Technology Innovation from AT&T and *Government Technology* for elements of Trust Central, their system which was built and is managed by Webauthor. Our solution enables them to manage solicitations, applications, grants, contracts, contract amendments, budgeting, reporting, metrics, and program data for more than 225 funded organizations.

Webauthor **is not** a provider of the traditional ERP modules for Finance and Accounting, however, we have experience with interfacing with those ERP systems used by funders. For example:

- With MIP and Great Plains (and soon OpenGov), Webauthor provides an extract of the reimbursements in the format that is needed. A CSC staff member manually downloads these files and imports them into their system.
- For another CSC client using SAMIS, that is also implementing Finance and Accounting software from Tyler Technologies, Webauthor has arranged for the following:
  - When a record on the Webauthor end is updated or inserted we send an API call to Tyler to push data (and pull data) for that record.
  - We provide a file export (as previously described) that CSC manually extracts and import into Tyler/Incode
  - There is file that Tyler will automate and email to us and we will programmatically import into our system

GENERAL COSTS AND LICENSE MANAGEMENT

A. The Florida Alliance of Children's Councils and Trusts (FAACT) manages membership within the SAMIS collaborative. There is an annual fee to be a member. At a minimum, membership entitles a funder to its own configured portal that consist of both the Fiscal and Program modules within SAMIS. Please contact Sarah Heath, Director of Operations and Special Projects at FAACT for more information on joining the SAMIS collaborative. She can be reached at sheath@facct.com.

In addition to SAMIS

B. Like other SaaS providers, Webauthor provides the right to access and use an on-line service without owning any rights to the underlying code or the application itself (in technology terms a software "license"). In essence, our clients "rent" access to a single on-line version of our source code and modules that have been customized for your use.

There are four components to our pricing model:

1. A one-time setup fee for initial work on building out specific modules that are requested by client. The setup fee depends on the scope and complexity of initial work to build out a portal. Often, there is **no** upfront setup fee to begin the customization of one or more modules to meet client needs.

2. A monthly fee for one instance (client portal). We rely on a relationship with ongoing monthly fees to both recover our investment in your portal in addition to address ongoing support and development. The specific fee is influenced by the number of modules required and an assessment of the overall complexity to support the portal. The monthly charge covers four items:

   (a) The ongoing development costs Webauthor incurs to initially build, test, and deploy your portal.
   (b) The technology behind the scenes that allow the portal to be

accessed by individual users via an Internet connection. This is where our largest investment is. We are constantly upgrading our investment in technology to ensure fast, reliable, and secure Internet access.

(c) Second level support for your portal (for client site administrators). We promote client self-sufficiency (since that only benefits our clients) and, at the same time, do not want to make you the technical experts.

(d) Bug fixes and general maintenance of our underlying code and improvements to all portals on our system.

3. Any additional authorized customization outside of scope and post initial acceptance of portal (including integration with other sites and/or databases, new functionality, graphics, color palette, user interface, etc.) will be charged at Webauthor's hourly development rates ($150/hr).

4. Only if applicable, we pass along the actual costs associated with using SMS texts or generating phone calls from the portal (if needed). The costs are $50/month for up to 5,000 texts and/or $50/month for up to 5,000 minutes.

Our pricing model assumes that our client site/project administrator(s) take an active role in ongoing configuration process.

Our pricing model includes:

- Unlimited users (at any level) that is managed and controlled by our clients
- Unlimited data storage
- Ongoing Client site administrator configuration support
- Test environment
- Software maintenance
- Progressive enhancements
- Training support

SAMPLE DATA MODULE – Client Relationship Management (CRM)

For some clients, the starting off point an integrated data management system is contained in the Client Relationship Management (CRM) module. The Webauthor CRM module contains a number of key features:

- Security groups to control access to functions
- Real-time tracking of activities (e-mails, phone calls, notes, etc.) on any number of entities (Organizations, Agreements, Contacts, Audits, etc.)
- Calendar tool to see what's upcoming
- Custom Notifications – uses templates that the Organization designs to fit their needs and can be scheduled to be sent to anyone using triggers and events that take place
- Robust reporting capabilities
- Classify stakeholder records into different categories

- Automate task assignment and schedule follow-up
- Integration with other application modules
- Contacts can be aligned with multiple departments, multiple programs, multiple roles and multiple organizations
- Tag conversation notes based on conversation itself
- Identified preferred method of contact
- Integrated text messaging (SMS)
- Integration task scheduling with MS Outlook
- Email integration
- Access to campaigns module for email marketing, event invitation distribution
- Search by person, project or event
- Integration of site visit notes
- Dashboard of outcomes data
- Site review summaries – access by board members
- Tracking references to social media
- Integration of status "out of cycle" agency requests
- Able to organize and manage multiple addresses per contact and multiple contacts per organization
- Attach documents
- Reporting/online inquiry for grant history and payment history
- Ad-hoc reports

The platform is equipped with significant flexibility for relationship management, task and opportunity management, stakeholder demographics and distribution, and other groupings lists.

Other features:

- Triggers to enable automatic notifications
- Webauthor has a robust reporting and data visualization tools but the platform can also integrate with PowerBI, Tableau or other 3rd party reporting tools
- Dashboard is configured to the needs of clients

SECURITY

The Webauthor platform utilizes the best technology from Microsoft, Amazon, Adobe, and others. In addition to our server-side technology, we develop applications written in HTML5 and jQuery. We can deploy those applications to many platforms, including web browsers, telephony systems (IVR), mobile (iPhone, Android, etc.), and others.

Webauthor outsources data center services to Amazon Web Services (AWS). Data that our end-users upload (documents, videos, or any type of file), as well as our database backups, are stored on Amazon S3. All data is stored on multiple devices across multiple facilities. The service is designed to sustain concurrent device failures by quickly detecting and repairing any lost data.

Application Security

Electronic Security – Webauthor standard configuration used by most of our clients ensures high level security since only Webauthor and select AWS technical network operations center staff have electronic access to servers. We have a dedicated firewall in place to help provide additional electronic protection with all non-essential ports to all of our servers blocked.

Member Security – All Webauthor applications have the ability to have client administrator control over those who have access to their individual web sites. Each client determines what set of member controls exist on their own application. A robust membership module can be turned on that provides finite control over who gets access to a site, which portions of the site, and what they can and cannot have access to when on each individual site.

This begins by letting an individual site administrator determine how, and if, a new member can be added to the site. Once a member requests membership, the administrator can assign that member to an unlimited number of stand-alone or interconnected “groups”. A group can consist of as many individual members, departments, sub-groups, or any other configuration a client wants.

This group capability means that access to pages, documents, information, and whole sections of a web site can be controlled in very granular fashion. Once the proper groups are assigned to each member, that member is able to access, see, and use only the portions of a site for which they have authorization. In all of our applications, if a particular part of a site is not available to that individual member, they never even see information on that part – it simply does not appear for them (it is not simply grayed out as in a menu structure). As far as an excluded member is concerned, that portion of the site or the information they don’t have access to simply does not exist.

Membership is further controlled through E-mail names and passwords that are unique for each member. Individual member passwords are hashed in our database so that no one, (not even a Webauthor system administrator), can find a password on our system. If a password is forgotten a valid member can use the built-in tools to have a new, temporary password mailed to their valid member E-mail address and then using the temporary password they can log into the site and select a new password that is then hashed in our database. This and other measures that are built into “User/Member Administration” assure the highest level of application-level security. Multi-factor authentication is available.

General Provisions - <u>All data on our site is time and date stamped,</u> and that capability allows a system administrator to monitor the usage of each site. Standard capabilities allow virtually every page on the site to have a history or to show who accessed a page and what they did on the page.

User Access - Permissions

Our platform has a robust mechanism to manage access permission within each portal (also managed by the client). The following video provides a general overview of the Members and Groups feature within the **Admin** module:

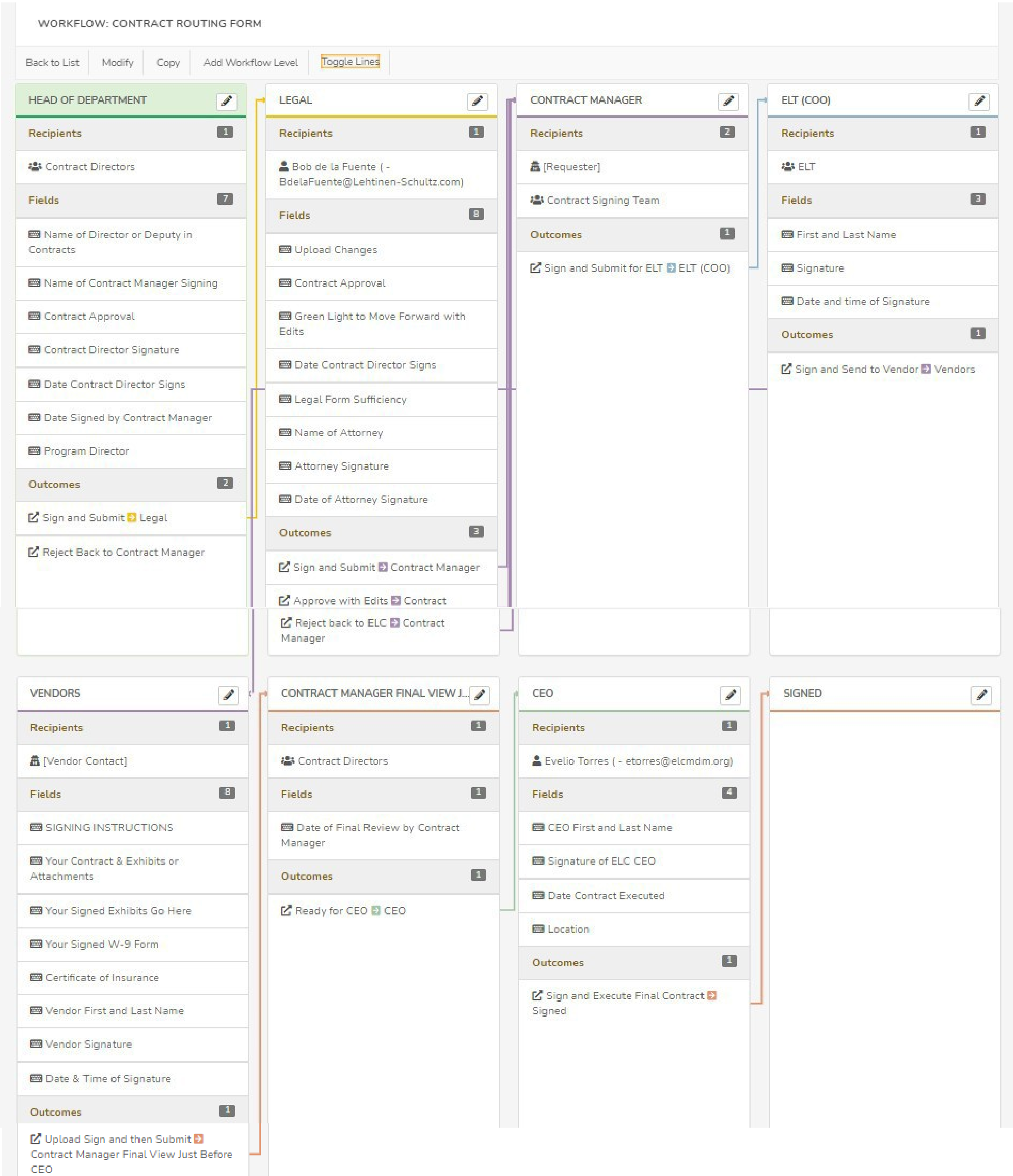
https://www.youtube.com/watch?v=2Gbi2B6iRKQ&list=PLZfgpvVywlhbzxaMEXpmjD0QmEwM2Niha&index=21&t=10s

ARCHITECTURE

Webauthor does not practice multi-tenant architecture. Each application/portal has access to only one data source, tied to that client. Since it is a single-tenant system, we control access to that database through application credentials. Our platform can connect to any 3rd party system as long as those systems have APIs. The platform has unlimited scale, and can automate any form as well as manage and automate workflows. The platform is designed to enable clients to "configure" many aspects on their own.

Sample feature – Automate Workflows

One of our clients uses the platform to manage the contract administration process for the organization. Their internal contract routing goes through seven (7) levels, with opportunity to review, comment, return back for further review, approval, send to next level, etc. The process is entirely automated. The following page contains is a high-level schema of that workflow (which is designed into the system).


WORKFLOW: CONTRACT ROUTING FORM
Back to List
Modify
Copy
Add Workflow Level
Toggle Lines
HEAD OF DEPARTMENT
Recipients 1
Contract Directors
Fields 7
Name of Director or Deputy in Contracts
Name of Contract Manager Signing
Contract Approval
Contract Director Signature
Date Contract Director Signs
Date Signed by Contract Manager
Program Director
Outcomes 2
Sign and Submit Legal
Reject Back to Contract Manager
LEGAL
Recipients 1
Bob de la Fuente (- BdelaFuente@Lehtinen-Schultz.com)
Fields 8
Upload Changes
Contract Approval
Green Light to Move Forward with Edits
Date Contract Director Signs
Legal Form Sufficiency
Name of Attorney
Attorney Signature
Date of Attorney Signature
Outcomes 3
Sign and Submit Contract Manager
Approve with Edits Contract
Reject back to ELC Contract Manager
CONTRACT MANAGER
Recipients 2
[Requester]
Contract Signing Team
Outcomes 1
Sign and Submit for ELT ELT (COO)
ELT (COO)
Recipients 1
ELT
Fields 3
First and Last Name
Signature
Date and time of Signature
Outcomes 1
Sign and Send to Vendor Vendors
VENDORS
Recipients 1
[Vendor Contact]
Fields 8
SIGNING INSTRUCTIONS
Your Contract & Exhibits or Attachments
Your Signed Exhibits Go Here
Your Signed W-9 Form
Certificate of Insurance
Vendor First and Last Name
Vendor Signature
Date & Time of Signature
Outcomes 1
Upload Sign and then Submit Contract Manager Final View Just Before CEO
CONTRACT MANAGER FINAL VIEW J...
Recipients 1
Contract Directors
Fields 1
Date of Final Review by Contract Manager
Outcomes 1
Ready for CEO CEO
CEO
Recipients 1
Evelio Torres (- etorres@elcmdm.org)
Fields 4
CEO First and Last Name
Signature of ELC CEO
Date Contract Executed
Location
Outcomes 1
Sign and Execute Final Contract Signed
SIGNED

CONTENT MANAGEMENT

The Webauthor platform contains a powerful data grid capability for online data management and querying data. We would need more information on what is meant by "unstructured data." With unlimited data storage capabilities, there are a number of options available for clients to store and manage enterprise content, manage documents and search.

The following is a basic tutorial overview of some of the content management tools within the Webauthor FLEX platform (specifically the Searching and finding data): https://www.youtube.com/watch?v=FxBma_ZPXpE&list=PLZfgpvVywlhbzxaMEXpmjD0QmEwM2Niha&index=2

MOBILITY

Access to the entire Webauthor portal is available for IOS and Android systems. Limited offline work with store and forward capabilities is not a common need amongst our clients but Webauthor is able to address.

TIMELINE FOR IMPLEMENTATION

Project development

Webauthor uses the Agile project methodology which focuses on iterative and collaborative development. Agile methods break tasks into small increments with a focus on short-range planning. While keeping in mind the overall project objectives, this approach enables us to condense a typical development planning cycle (i.e., define, design, build, review, deploy, measure, feedback) into a much shorter timeframe in order to adapt to changes quickly.

Agile methods emphasize direct communication between Webauthor and a client's Project Manager. Stakeholders can review, test, and evaluate the work most recently done and make changes through their project manager in near real-time. At the end of each iteration (which can be as frequently as daily in some early stages of a project), the team can review progress and re-evaluate priorities with a view to ensuring alignment with stated needs and project goals.

Given the dynamic nature of the technology platform and our collaborative approach, project management is a shared responsibility. From the time we start development, a client will almost always have on-line access to a development and testing website where the team will be able to monitor changes and enhancements to the portal in real-time and give feedback to Webauthor.

Training

Webauthor uses multiple channels for training and learning and will provide an overview during initial setup. Given that each client portal is unique, our training is tailored to the needs of our clients. The following is the basic foundation from which other needs can be addressed.

- Webauthor provides access to FLEX tutorial videos which cover basic data grid overview and navigation.
- Project kickoff meeting/training typically includes an overview of both the Administration and Support modules. The Administration module covers basic setup functionality and options for portal (including members, access levels, etc.). The Support module is where the Support ticket process is housed. Once the project starts, in addition to any scheduled meetings, the Support ticket will be how much of the communication will occur with the team. The Support module also contains ability for clients to upload their own internal user guides, training material and videos, etc.
- After the initial setup we will schedule a walk through to review process and overview of how the module works. This process repeats itself as more modules or processes are addressed within the portal. We use MS Teams for these meetings and they can be recorded for access by others at a later date.
- A dynamic nature and important part of our training are ongoing “screencast videos.” These are recorded by our team during the process of answering a “how do I...” question or addressing a configuration issue via the support ticket process. This real-time on-demand learning is a critical part of reducing the learning curve.
- With more use, our clients may find that built in functionality of “tool tips” helpful. This is enables clients to add in any client-specific training content on screens that users interact with.

Unlike traditional software developers, we do not disappear into a vacuum for months. We work in short term cycles. Development, review, testing, feedback is ongoing and the cycle repeats itself, so “early” and “incremental” release is more common. Any ongoing maintenance would be scheduled during off-peak hours and would be communicated to clients.