

## COMMISSION MEMBERS



*GREG COX - Chairman*

*CAROL SKILJAN - Vice Chair*

*CHARLENE TRESSLER - Secretary*

*NICK MACCHIONE - Commissioner*

*DR. WILMA J WOOTEN - Commissioner*

*LAURA SPIEGEL - Executive Director*

September 30, 2008

### **First 5 Commission of San Diego County Request for Statements of Qualifications (RFSQ) Consultant for Database Management**

The First 5 Commission of San Diego County (Commission) seeks an individual to oversee the implementation and ongoing management of the Commission's Contract Management and Evaluation Data System (CMEDS). CMEDS is the Commission's database, based upon a software system developed by Persimmony International (Persimmony). It is a web-based, integrated data management system for both contract management and program evaluation. It is anticipated that there will be over 200 users at 50 or more different health, education and human services agencies either entering or uploading data into CMEDS. The data is synthesized and analyzed across multiple projects by the Commission's contract evaluator to determine the effectiveness of the Commission's programs and public investments. Data is also used by Commission staff to manage contracts for fiscal responsibility and contract compliance.

The Database Contractor (Persimmony) provides technical and management support to this project, including but not limited to: providing technical assistance to Commission staff, contractors, subcontractors and grantees. Staff at the First 5 Commission will provide subject matter expertise and review of this project.

The First 5 Commission of San Diego ("Commission") will be requesting a Statement of Qualifications (SOQs) from qualified individuals to oversee the implementation and ongoing operation of this activity. This is a contract position.

## **BACKGROUND**

The Commission was established by the California Children and Families Act (Proposition 10), passed by California voters in November 1998. This statewide ballot initiative imposed an additional tax on tobacco products. The revenue generated from the tax is used to fund programs and activities that promote early childhood development from the prenatal stage to age five. The Commission is responsible for implementing the program requirements of the Act in San Diego County. The Commission's vision is that **every child in San Diego County will enter school ready to learn.**

The Commission is required by State law and County Ordinance to perform outcome evaluations on its funded programs and activities, on the overall work of the Commission and on local components of First 5 California projects. In addition, the Commission is further required to publicly report on the results achieved by the programs it funds and to provide appropriate oversight of its contracts. The CMEDS system is critical to both these functions.

In May of 2008, the Commission contracted with Persimmony to implement an integrated data management system that measures outcomes, promotes accountability and supports a strategic approach to planning and investing the Commission's resources. (A description of the standard system features as well as desired features to be added through customization of the system is in

Appendix I.) Implementation of the data system began in August, 2008 and is still underway. The Commission has a variety of projects (“initiatives”) in health, oral health, early learning and family programs. The data system is currently in the rollout phase, with each initiative rolling out separately. Rollout will continue through the fall and early winter, with first online reporting scheduled for December 31, 2008.

Persimmony also provides ongoing technical assistance and management services to assist the Commission in complying with State reporting requirements. In addition, the Commission employs an evaluation firm, Harder+Company Community Research (Harder), which plays a central role in identifying data and reporting requirements for contractors. These are key partners in the implementation and ongoing use of the data system.

Qualified individuals are invited to apply who have the skills and experience to manage the rollout and ongoing management of a database system, including: setting up and scheduling user training, overseeing security, interfacing with users, serving in a help desk function, and ensuring the system meets the evaluation and contract management needs of Commission staff. (The system has been developed, tested, and implemented for other County First 5/Prop 10 Commissions. The duties for these services, therefore, do not involve overseeing a software development project.)

Offerors should provide a monthly rate for database management services. The proposed contract period is from December 1, 2008 through June 30, 2009, with a potential of up to two (2) option years.

#### **RFSQ CONTENT**

This RFSQ package includes the following:

- Overview and General Instructions
  - General Information and Instructions
  - Statement of Qualifications (SOQ) Submittal Requirements
  - Statement of Qualifications Evaluation Criteria
  - Oral Interview
  - Oral Interview Evaluation Criteria
- Offeror Information and Authorization (SOQ Cover Page)
- Exhibit A –Statement of Work

NOTE: The Pro Forma Contract and Insurance Requirements are posted separately on the Commission’s website ([www.first5SanDiego.org](http://www.first5SanDiego.org)) under First 5 Partners/Current Solicitations/RFSQ Supplemental Documents. All documents will be inserted into the contract at time of negotiation.

#### **SOQ DUE DATE**

Submit one (1) original and three (3) copies of each SOQ to the Commission at the address stated in the letterhead above in a sealed envelope or package clearly marked on the exterior with “RFSQ: Consultant for Database Management” and the name and address of the Offeror prior to **4:00 PM, Local Time on October 21, 2008**. Parking is available across the street from Commission offices, at the County Administration Center at 1600 Pacific Highway. Parking is limited, so be sure to submit your SOQ early.

Submit one (1) electronic copy of the SOQ by email to [Marites.Perez@sdcounty.ca.gov](mailto:Marites.Perez@sdcounty.ca.gov) by 4PM on October 21, 2008.

**Any late submission cannot be considered unless it is the only one received or there was mishandling on the part of the Commission staff.**

## **RFSQ TERM**

This RFSQ does not commit the Commission to pay any cost incurred in the submission of the RFSQ, or in making necessary studies or designs for the preparation thereof, nor procure or contract for services or supplies. Further, no reimbursement cost may be incurred in anticipation of a contract award.

## **EVALUATION AND ORAL INTERVIEWS**

Upon review of the written SOQ's submitted, Offerors meeting the eligibility requirements of this solicitation and meeting/exceeding the qualifications specified in this RFSQ shall be invited for an oral interview for further evaluation. More information on this is provided in RFSQ Instructions.

## **AWARD**

This RFSQ will be a competitively negotiated procurement. The Commission may decide to award a contract without negotiation; therefore, Offerors are strongly encouraged to submit their **best** SOQ's initially. The Commission reserves the right to award contracts to those Offerors that submit the SOQ's, make the oral presentation and produce the writing exercise determined to be most advantageous and in the Commission's best interest, price and other factors considered.

## **QUESTIONS**

Questions and requests for clarification related to definition or interpretation of this RFSQ must be requested in writing prior to the date the SOQ's are due. Questions and requests for clarification must be received in sufficient time to allow an Addendum to the RFSQ to be issued on the First 5 Website prior to the due date for receipt of the SOQ's. Therefore, questions received after **3:00 PM on October 9, 2008** will not be answered

Questions must be submitted in writing by email (preferred), fax or mail, to:

Tess Perez, Grants & Contracts Coordinator  
First 5 Commission of San Diego  
1495 Pacific Highway, Suitor 201  
San Diego, CA 92101  
FAX No: (619) 230-6466  
Email: [Marites.Perez@sdcounty.ca.gov](mailto:Marites.Perez@sdcounty.ca.gov)

If you have questions or comments, please contact Tess Perez at (619) 230-6475 or by email.

**REQUEST FOR STATEMENT OF QUALIFICATIONS (RFSQ)  
FIRST 5 COMMISSION OF SAN DIEGO COUNTY  
CONSULTANT FOR DATABASE MANAGEMENT  
SECTION A: RFSQ INSTRUCTIONS, SUBMITTAL REQUIREMENTS  
AND EVALUATION CRITERIA**

---

**1. RFSQ Estimated Timeline**

Event Description	Target Date(s)
RFSQ Issued	September 30, 2008
Questions Due (by 3:00 p.m.)	October 9, 2008
Addendum (answers to questions)	October 13, 2008
Statement of Qualifications Due	October 21, 2008
Oral Interviews (Competitive Range Only)	November 5-6, 2008
Notice of Intent to Award	November 18, 2008
Contract Effective	December 1, 2008

**2. RFSQ Process: The successful Offeror will be selected based on a review of three factors: submitted SOQ, oral interview, and review of references.**

**Step 1: Application (SOQ) Review.**

Offerors shall submit a completed SOQ and a Source Selection Committee (SSC), appointed by the Executive Director of the First 5 Commission of San Diego, will evaluate the SOQ's in accordance with the evaluation criteria contained later in this RFSQ. The SSC will reach consensus on those SOQ's that are in the Competitive Range (those most highly rated SOQ's that have a reasonable chance of receiving the award).

**Step 2: Oral Interview**

Those individuals in the competitive range will be invited to participate in an oral interview concerning the Offeror's experience and expertise related to overseeing similar types of projects. Individuals will be notified approximately three to four (3-4) business days prior to oral interviews.

**Step 3: References.**

References will be contacted for those Offerors remaining in the competitive range to verify information contained in the proposal concerning past employment and projects.

After a review of these factors, the SSC will make a recommendation to the Executive Director of the Commission for contract award.

**3. ELIGIBILITY CRITERIA**

3.1 Minimum Years of Experience. Offerors must have a minimum of three (3) years experience in database management, data analysis, and/or decision support including experience and proficiency in using software for analysis.

3.2 Education. Bachelor's degree or higher in relevant field required. Undergraduate or graduate coursework in statistics, data analysis or research methods highly desired.

3.3 Local Presence. A locally based office is required.

**4. EVALUATION AND SELECTION**

4.1 Responses will be evaluated using the Evaluation Criteria set forth in this RFSQ and such other information as the Commission deems appropriate.

4.2 The Commission reserves the right to request clarification and/or request additional information from Offerors if necessary. However, since the Commission is under no

**REQUEST FOR STATEMENT OF QUALIFICATIONS (RFSQ)  
FIRST 5 COMMISSION OF SAN DIEGO COUNTY  
CONSULTANT FOR DATABASE MANAGEMENT  
SECTION A: RFSQ INSTRUCTIONS, SUBMITTAL REQUIREMENTS  
AND EVALUATION CRITERIA**

---

obligation to require additional information, Offerors are advised to submit complete information in their initial response.

- 4.3 Responses will be evaluated by a Source Selection Committee (SSC) appointed by the Executive Director of the First 5 Commission of San Diego County, the Source Selection Authority (SSA).
- 4.4 The SSC may also ask for clarifications and additional information.
- 4.5 The SSC will prepare a report to the SSA on their findings and make award recommendations. The SSA will make the final award determination.

## **5. SUBMISSION OF SOQ**

- 5.1 The Commission has the right to withhold all information regarding this procurement until after the contract award, including but not limited to:
- the number of SOQ's received;
  - competitive technical information;
  - competitive price information; and
  - the SSC evaluation concerns about competing responses.
- 5.2 Submit one (1) original plus three (3) copies of each response (and one copy electronically). Mark as "original" and "copy" as appropriate.
- SOQ's should not exceed 5 pages, excluding cover page.
  - Use standard form (Arial or Times New Roman) with font size **no less than** 11 point and minimum one inch margins.
  - Double-space all narrative responses. Materials in chart format may be single-spaced.  
*NOTE: font size and spacing requirements do not apply to resumes or CV's.*

## **6. SOQ SUBMITTAL REQUIREMENTS**

The purpose of the Statement of Qualifications (SOQ) is for the Offeror to demonstrate that they meet the eligibility requirements and meet or exceed the experience and qualifications specified in the Statement of Work section of this RFSQ. The SOQ shall contain the following to be considered:

### **Section A: Offeror Information and Authorization** (SOQ Cover Page)

### **Section B: Offeror's Experience**

Supply the following documents, and include information that highlights experience from the last five (5) years relevant to this project:

- 1) Provide a professional resume that emphasizes activities that most closely relate to the activities as described in Exhibit A – Statement of Work of this RFSQ and the position description in Appendix I. Include a detailed description of each project cited, the Offeror's specific role, and any other key parties and their specific roles.
- 2) Provide a summary in table format (see sample chart provided on page 7) of relevant database projects and experience. Include the name of the client organization, project dates, geographic location, description of project, list of services provided, and a client reference. Clients listed in the table may be contacted as references. Offeror is

**REQUEST FOR STATEMENT OF QUALIFICATIONS (RFSQ)  
FIRST 5 COMMISSION OF SAN DIEGO COUNTY  
CONSULTANT FOR DATABASE MANAGEMENT  
SECTION A: RFSQ INSTRUCTIONS, SUBMITTAL REQUIREMENTS  
AND EVALUATION CRITERIA**

---

responsible for ensuring that all contact information is current. Reference must include: name, title, organization, phone, fax, and email. [*Three pages maximum*]

**Section C: Monthly Rate**

Provide a monthly rate for services for the period December 1, 2008 through June 30, 2009. Describe fees involved with a clear definition of associated services provided.

**7. SOQ EVALUATION CRITERIA**

In general, SOQ's will be evaluated according to the following factors, listed below in descending order of importance:

- 7.1 Experience and education that demonstrates the ability to oversee the ongoing operations of a data system.
- 7.2 Experience and education that demonstrates the ability to plan and coordinate the implementation of a web-based data system for over 200 users in over 50 locations.
- 7.3 Experience in providing end user support via telephone.
- 7.4 Ability to provide quality customer service to end users of varying knowledge and skills with computers.
- 7.5 Knowledge and experience in overseeing data security.
- 7.6 Experience in monitoring projects and reviewing invoices.
- 7.7 Ability to meet deadlines.
- 7.8 Pricing: based upon monthly rate.

**8. ORAL INTERVIEW REQUIREMENTS EVALUATION**

Those Offerors deemed most qualified will be invited for an oral interview. At the oral interview the Offeror will be provided a list of questions to respond to. (An oral presentation will not be required.) The SSC will interview and evaluate prospective candidates using some of the elements identified under SOQ evaluation criteria (Section 7). There will be a reference check of those Offerors determined to be most qualified.

**9. PROTEST PROCEDURE**

The Commission will follow the First 5 Commission of San Diego Protest Procedures for Award of Grants Policy (Policy CFC-004), which can be obtained on the Commission's website. Protests must be submitted to the Executive Director of the Commission at 1495 Pacific Highway, Suite 201, San Diego, CA 92101 within five (5) business days after (a) a notice of contract awards(s) has been posted in a public place at 1600 Pacific Highway San Diego, CA 92101, or (b) a Commission recommendation to award the contract(s) has been posted, whichever is earlier.

**10. DEBRIEF**

After an Offeror has been notified by the Commission that the SOQ is no longer being considered for award, the Offeror may request a "debriefing" from the Commission on the findings about that one SOQ (with no comparative information about SOQs submitted by others).

**REQUEST FOR STATEMENT OF QUALIFICATIONS (RFSQ)  
 FIRST 5 COMMISSION OF SAN DIEGO COUNTY  
 CONSULTANT FOR DATABASE MANAGEMENT  
 SECTION A: RFSQ INSTRUCTIONS, SUBMITTAL REQUIREMENTS  
 AND EVALUATION CRITERIA**

**SAMPLE CHART OF EXPERIENCE (SECTION 6B – Item 2)**

<b>Client Organization, Date(s), Geographic Location</b>	<b>Project Description: include number of users, organizations, and locations</b>	<b>Description of Services Provided: include user services such as help desk, training</b>	<b>Reference Contact: Account Name Agency Contact Address Phone Email</b>
County of Santa Cruz Dates 1/06 – 12/07	Santa Cruz County Tobacco Control System. Database tracking reduction of tobacco use. System used by 10 organizations including doctor's offices, nurse home visitors and school nurses. 70 users in 14 locations.	Customized existing system. Training of all users and new users. Created user manual.	County of Sacramento John Adams 555 Central Ave Sacramento, CA 95600 (916) 425-6000 <a href="mailto:jadams@sacramentocounty.org">jadams@sacramentocounty.org</a>
Temp Power Services, San Diego Dates: 2004 – 2006	Relational database of over 10,000 temporary service workers and 140 company clients. Web-based system accessed by 60 client organizations and 25 staff.	Implementation of COTS. Managed significant customization through vendor. Created and managed web-based training modules for client users. Classroom training for Temp Power staff. Created user manual. Oversaw help desk function.	Operations Manager Susan Smith 6522 Mission Gorge Rd. San Diego, Ca 92120 (619) 280-5454 <a href="mailto:Susan.smith@temp_power.org">Susan.smith@temp_power.org</a>

**REQUEST FOR STATEMENT OF QUALIFICATIONS (RFSQ)  
FIRST 5 COMMISSION OF SAN DIEGO COUNTY  
CONSULTANT FOR DATABASE MANAGEMENT  
SOQ Cover Page**

---

MAIL OR DELIVER YOUR STATEMENT OF QUALIFICATIONS (SOQ's) TO

First 5 Commission of San Diego County  
1495 Pacific Highway, Suite 201  
San Diego, CA 92101

**SOQ's shall be received at the FRONT DESK at the above address prior to 4:00 pm local time, Tuesday, October 21, 2008.**

The First 5 Commission of San Diego is requesting Statements of Qualifications (SOQ's) from qualified individuals (consultants) to oversee the implementation and ongoing management of the Commission's Contract Management and Evaluation Data System (CMEDS). CMEDS is the Commission's database, based upon a software system developed by Persimmony.

**CONTRACT PERIOD**

The planned contract period is December 1, 2008 – June 30, 2009. There is a potential for up to two option years.

**TYPE OR USE BLUE INK TO COMPLETE THE OFFEROR INFORMATION BELOW**

---

Offeror hereby **acknowledges** receipt of RFSQ

OFFEROR INFORMATION

Consultant Name: \_\_\_\_\_

Firm/Organization Name: \_\_\_\_\_

Address: \_\_\_\_\_

City/State/Zip: \_\_\_\_\_

Contact Person: \_\_\_\_\_ Title: \_\_\_\_\_

Phone No: ( ) \_\_\_\_\_

E-Mail Address: \_\_\_\_\_

AUTHORIZATION FOR OFFER

**(Must be signed):**

Offer Date: \_\_\_\_\_

Authorized Signature: \_\_\_\_\_

Name: \_\_\_\_\_ Title: \_\_\_\_\_

(Please print)

**REQUEST FOR STATEMENT OF QUALIFICATIONS (RFSQ)  
FIRST 5 COMMISSION OF SAN DIEGO COUNTY  
CONSULTANT FOR DATABASE MANAGEMENT  
EXHIBIT A – STATEMENT OF WORK**

---

The First 5 Commission of San Diego County (Commission) seeks a fulltime database manager to plan, coordinate and implement processes and procedures in the successful implementation of a database system (CMEDS). In addition, the Database Manager will oversee the ongoing operation of the data system; maintain appropriate security and possible customization of the database. This work involves analyzing customer requirements; working with Commission staff and contractors to plan and coordinate the plan for design, development, implementation and support of modifications and customization to the database software. This position serves as the primary liaison with Commission staff and customer organizations on all matters relating to the database.

## **I. BACKGROUND**

The First 5 Commission of San Diego County promotes the health and well-being of children during their most critical years of development – from the prenatal stage through age 5. The goal of the Commission’s work is that all children will enter school prepared to succeed, thrive and reach their highest potential. The Commission’s vision is that: *Every child in San Diego County will enter school ready to succeed.* The Commission funds programs for children and families in the area of health, early learning, families and community.

## **II. TASKS**

The primary responsibilities of the database manager include overseeing the implementation of the database, ongoing oversight of the data system project, customer support and contract oversight. Detailed descriptions of the anticipated roles and responsibilities for this position are contained in the job description in Appendix I.

### **1. DATA AND MEDIA MATERIALS**

- 1.1 Consultant shall provide all data files, disks, CD ROMS, tapes, and other deliverables relating to this project upon request from the Commission.
- 1.2 All data files, reports and materials are the property of the Commission. Consultant shall not release any data, reports or other materials resulting from Commission projects without prior written approval from the Executive Director or her designee.

### **2. REPORTING REQUIREMENTS**

- 2.1 Consultant shall document hours worked and the nature of work performed.
- 2.2 Consultant shall meet in-person with key Commission staff as required to report on project status, including any challenges, obstacles and delays; proposed solutions or corrective action plans including time frames; and activities anticipated to be completed in the next reporting period.
- 2.3 Consultant shall provide a detailed written status report on the progress of the implementation of the CMEDS project twice a month. At a minimum, the status report shall include the following:
  - Description of project accomplishments;
  - Description of challenges/obstacles or delays with proposed solutions or corrective action plans including time frames (if appropriate);
  - Activities anticipated to be completed in the next reporting period.

### **3. WORKING CONDITIONS**

- 3.1 Commission will supply a work space and computer.
- 3.2 Consultant shall report to the Commission’s Program and Evaluation Manager, and work closely with the Commission’s evaluation and database contractors.

**REQUEST FOR STATEMENT OF QUALIFICATIONS (RFSQ)  
FIRST 5 COMMISSION OF SAN DIEGO COUNTY  
CONSULTANT FOR DATABASE MANAGEMENT  
EXHIBIT A – STATEMENT OF WORK  
APPENDIX I – CONSULTANT SERVICES: DATABASE MANAGEMENT**

---

This is a fulltime contract position with the First 5 Commission of San Diego County. The Database Manager will assist Commission staff to plan, coordinate and implement processes and procedures in the successful implementation of a database system (CMEDS) for the First 5 Commission of San Diego County. In addition, the Database Manager will provide support on the ongoing operations and possible customization of the database.

This work involves analyzing customer requirements, working with Commission staff and contractors to prepare and coordinate the plan for design, development, implementation and support of modifications and customization to the database software. This position serves as the primary liaison with customer organizations on all matters relating to the database.

**POSITION ROLES AND RESPONSIBILITIES**

The key roles and responsibilities of this position are as follows:

**Implementation of Database**

- Manage database build out timeline.
- Work directly with First 5 contractors to facilitate agreements (e.g., Business Service Agreements / MOUs) between agencies so that data can be shared within and between initiatives.
- Liaison between the database and the Commission as the database structure is developed.
- Identify potential bugs or issues and propose solutions as needed with Commission staff.
- Work with First 5 contractors and Commission database and evaluation contractors to ensure that existing data can be uploaded to the database.
- Assist with the development of transition plans for roll out of data entry by initiative.
- Work with Commission staff as well as database and contractors to identify system reporting functions for contract monitoring and fiscal management.
- Attend initiative-specific database trainings to ensure cross-initiative quality.

**Ongoing Oversight of the Data System Project**

- Provide oversight of database implementation to ensure that project goals are met.
- Ensure system data is clean.
- Ensure the database integrates with the County IT infrastructure as needed.
- Provide advice and guidance in implementing IT security policies and procedures in the development and operation of database system.
- Monitor and evaluate systems compliance with IT security requirements, including HIPPA, FERPA and informed consent.
- Work with database contractor to monitor and resolve problems concerning system downtime and performance.

**Customer Support**

- Provide help desk support to Commission contractors concerning such issues as: lost passwords, adding or deleting system users, installing Citrix to desktop, responding to common questions and determining which issues to refer to the data system contractor.
- Schedule and setup user trainings.
- Attend meetings of Commission contractors as needed.

**Contract Oversight**

- Manage and monitor project timeline and budget.
- Review contractor progress reports and invoices and recommend for approval.
- Meet, as needed, with the database contractor.

**REQUEST FOR STATEMENT OF QUALIFICATIONS (RFSQ)  
FIRST 5 COMMISSION OF SAN DIEGO COUNTY  
CONSULTANT FOR DATABASE MANAGEMENT  
EXHIBIT A – STATEMENT OF WORK  
APPENDIX I – CONSULTANT SERVICES: DATABASE MANAGEMENT**

---

**Working Structure and Support**

The Commission Database Manager will work under the direction of the Commission's Program and Evaluation Manager. In addition, the Database Manager will work closely with the Commission's database contractor (Persimmony) and contract evaluator (Harder+Company Community Research). This position involves interacting with managers and users of a variety of client agencies.

**KNOWLEDGE, SKILLS AND ABILITIES**

The ideal candidate will demonstrate:

**Knowledge of:**

- The principles, practices, and trends of data system management.
- The objectives, overall design, and operating characteristics of database software.
- The principles of computer security.
- Information processing standards and procedures.
- The principles and practices of effective customer service.
- The principles of program evaluation (desired).

**Skills:**

- Demonstrated experience in using advanced database features and techniques required.
- Demonstrated experience in using advanced Excel features and techniques required.
- Experience working with a variety of information systems and data files, including large and complex files and transforming raw data into finished products.
- Experience in creating custom reports within a database structure.
- Familiarity with MS SQL and/or MS NET.
- Demonstrated experience with database application development (ACCESS, MS SQL) is desirable.
- Comfortable working independently, with experience working in a team environment.
- Apply IT security principles and methods to ensure the data system and operating procedures comply with federal requirements (such as HIPAA and FERPA); to evaluate, recommend oversee and implement modifications and customization of the database software, based upon the needs of the Commission staff and its contractors; to work closely with Commission staff and its customers to ensure seamless implementation and ongoing operation of the database system.

**Ability to:**

- Plan, coordinate and direct the activities of a database system.
- Provide outstanding customer service to users of a variety of levels.
- Make effective use of interdisciplinary teams.
- Reason logically and creatively and use a variety of analytical techniques to resolve problems.
- Present ideas and information effectively, both orally and in writing.
- Consult with and advise administrators and other interested parties on a variety of subject-matter areas.
- Translate technical terms into everyday language.
- Gain and maintain the confidence and cooperation of others.

**REQUEST FOR STATEMENT OF QUALIFICATIONS (RFSQ)  
FIRST 5 COMMISSION OF SAN DIEGO COUNTY  
CONSULTANT FOR DATABASE MANAGEMENT  
EXHIBIT A – STATEMENT OF WORK  
APPENDIX I – CONSULTANT SERVICES: DATABASE MANAGEMENT**

---

**OTHER WORK REQUIREMENTS**

**Education/Experience and Licensing Requirements:**

- Bachelor's degree or higher in relevant field.
- Undergraduate or graduate coursework in statistics, data analysis or research methods.
- 3-5 years of experience in database management, data analysis, and/or decision support, including experience and proficiency in using software for analysis.

**Physical Demands**

Work is primarily sedentary, although there may be some carrying of books, printouts, manuals, files, and equipment.

**Work Environment**

Work is performed at the Commission office. Some travel is required within the county for meetings. Consultant shall be required to provide own transportation. A current State driver's license is required.

**REQUEST FOR STATEMENT OF QUALIFICATIONS (RFSQ)  
FIRST 5 COMMISSION OF SAN DIEGO COUNTY  
CONSULTANT FOR DATABASE MANAGEMENT  
EXHIBIT A – STATEMENT OF WORK  
APPENDIX II – CMEDS SYSTEM ELEMENTS**

The table below highlights the core elements sought by First 5 San Diego for its CMEDS system. The columns to the right indicate the ability of the off-the-shelf Persimmony database software to meet the requirements. Key: S= currently exists in its entirety and is standard in the data system; C= could be customized to include this element. The notes sections refer to how the system can be customized to meet the requirements sought by First 5.

<b>System Elements Desired for First 5 San Diego Database</b>	
<b>PROGRAM-LEVEL TRACKING</b>	
<b>Program and Service Definitions.</b> Ability exists to define how programs and services (both type of service and quantities/units of service delivered) are assigned to clients.	<b>S</b>
<b>Indicator Definitions.</b> System supports multiple types of indicators such as activity, process, and outcome/result measures.	<b>S</b>
<b>Multiple Levels of Indicators.</b> Indicators can be attached to individual (e.g. client), to individual services, to a program as a whole (potentially spanning multiple services), and to the system as a whole (spanning multiple programs).*	<b>S</b>
<b>Longitudinal Tracking.</b> The same indicators can be tracked and compared over many months and years. Users can select the time periods, such as tracking some indicators quarterly and others annually.	<b>S</b>
<b>Linkage of Related Programs and Services.</b> Similar or related programs and services can be linked across multiple organizations in order to see an aggregated picture of activity and results (for example, to get a collective view of how well the system is working, e.g.. referrals within the system, client transitions, and longitudinal client tracking).	<b>S</b>
<b>Development of Tools.</b> Authorized users can load entire outcomes surveys/assessments into the system in a non-technical manner, without requiring extra programming or support by the vendor.	<b>S</b>
<b>Custom (User-Defined) Data Elements.</b> Authorized users can add program-specific questions to the above surveys/assessments in a non-technical manner, without requiring extra programming or support by the vendor.	<b>S</b>
<b>Data Validation.</b> System thoroughly validates data entered by users (i.e., internal checks for errors, e.g., like requiring that birthdates must be 19__ or 20__ to try to minimize error). Authorized users can define and edit data validation rules.	<b>S</b>
<b>Terminology.</b> Authorized users can configure the terminology used in the system so that terminology matches that used by their organization, First 5 San Diego, or others as needed. As an example, contractors will have the ability to use the terms currently utilized by their program, such as "client" or "patient" or "child".	<b>S</b>
<b>Data Collection Tool View and Use.</b> System offers surveys and assessment tools loaded into the system in printable form.	<b>S</b>
<b>Data Collection Alternative Options.</b> Practical methods are provided to allow funded programs to capture the necessary data at the point of service or other appropriate locations, including through tools such as PDA's/hand-held data terminals. <b>NOTE:</b> The standard Persimmony First 5 application can be implemented on laptops with aircards accessing the Internet for direct data entry at point of service. Persimmony also has programmed First 5 Persimmony database software for handhelds. Handheld software is not included in Persimmony's standard First 5 application.	<b>C</b>
<b>Scanable Forms.</b> Can accept different formats of scanable sheets and index data to search, retrieve, and populate the database. <b>NOTE:</b> Persimmony develops and implements scanning interfaces that is compatible with their First 5 database application. These interfaces are not included in Persimmony's standard First 5 application.	<b>C</b>
<b>Internal document management.</b> Ability of contractors, subcontractors, and grantees to view the scope of work or body of their contract.	<b>S</b>

**REQUEST FOR STATEMENT OF QUALIFICATIONS (RFSQ)  
FIRST 5 COMMISSION OF SAN DIEGO COUNTY  
CONSULTANT FOR DATABASE MANAGER  
EXHIBIT A – STATEMENT OF WORK  
APPENDIX II – CMEDS SYSTEM ELEMENTS**

<b>System Elements Desired for First 5 San Diego Database</b>	
<p><b>Data Entry.</b> System should support data entry via multiple vendors, e.g. online entry, scannable forms or a web tool such as Survey Monkey. <i>NOTE: All users can enter data directly into Persimmony in their standard web-based First 5 application. Scanning, other web-based and import interfaces are not included in Persimmony's standard First 5 application, but can be scoped and developed.</i></p>	<b>C</b>
<b>CLIENT-LEVEL TRACKING</b>	
<p><b>Client Data Elements.</b> System captures a complete set of common data elements and information across programs about each client including demographic data, services delivered, client and family descriptors, and results/outcomes achieved over time, as well as barriers to accessing services/supports or achieving results.</p>	<b>S</b>
<p><b>Unique Client Identifier.</b> System has a practical, low-impact, and effective way of accurately identifying each unique person receiving services to ensure that services delivered over time can be accurately matched to the correct person.</p>	<b>S</b>
<p><b>Client Consents.</b> Client consents to collect and share data are captured and reported in the system. System flags and alerts case workers/supervisors to consents that have expired or have been revoked/restricted by client.</p>	<b>S</b>
<p><b>Non Consented clients.</b> System will accept outcome surveys and assessments without client identifiers (i.e., anonymous).</p>	<b>S</b>
<p><b>Referral Management.</b> System captures information about referrals made by one agency to one or more other agencies <u>within</u> Commission funded programs and track the results of those referrals (e.g., whether follow up occurred. System allows real-time appointment scheduling among partners where relevant. <i>NOTE: All users can capture information about referrals made by their own agency. Persimmony offers a comprehensive Referral Tracking/Home Visitation module that not only tracks inter-agency referrals but follows up with reports, alerts ad real-time appointment scheduling. Persimmony's Referral Tracking/Home Visitation module is not included in Persimmony's standard First 5 application.</i></p>	<b>C</b>
<p><b>Registry of Services.</b> A master repository of early childhood programs and other related community services can be maintained and updated either at the individual organization level, or through a centralized system administrator.</p>	<b>S</b>
<p><b>Barriers to Access.</b> A list of pre-defined barriers to accessing services are provided and tracked for individual clients. Pre-defined barriers could include such factors as "transportation".</p>	<b>S</b>
<b>MANAGEMENT REPORTING AND ANALYSIS</b>	
<p><b>Access to Data.</b> Data in system are real-time (vs. batch).</p>	<b>S</b>
<p><b>Standard Report Library.</b> System directly generates a broad range of standard reports that meet the common analysis requirements of the Commission.</p>	<b>S</b>
<p><b>Custom Report Library.</b> System has the ability to create and save custom reports without requiring extra programming or support by the vendor.</p>	<b>S</b>
<p><b>Ad Hoc Query/Reporting Features.</b> Tools are provided as an integrated part of the system to allow users to create custom or ad hoc queries and reports.</p>	<b>S</b>
<p><b>Reporting Ease of Use.</b> Standard and custom reports can be run without users having special technical knowledge (e.g. without SQL commands or knowledge of the underlying database structure).</p>	<b>S</b>
<p><b>Flexible Selection of Report Data.</b> Users can select which data are used to generate the report, such as including only a particular group of services or clients on a report.</p>	<b>S</b>
<p><b>Comparison reports:</b> The system can compare the process and outcomes findings of individual contractors and grantees with the average findings of the Commission Initiative of which they are a part.</p>	<b>S</b>

**REQUEST FOR STATEMENT OF QUALIFICATIONS (RFSQ)  
FIRST 5 COMMISSION OF SAN DIEGO COUNTY  
CONSULTANT FOR DATABASE MANAGEMENT  
EXHIBIT A – STATEMENT OF WORK  
APPENDIX II – CMEDS SYSTEM ELEMENTS**

<b>System Elements Desired for First 5 San Diego Database</b>	
<b>Inclusion of Secondary Benchmark.</b> Ability to incorporate county or national benchmarks for program-level data to compare same indicator by a program, initiative, or the system as a whole.	<b>S</b>
<b>Aggregation of Data.</b> Common data elements can be aggregated at the program, initiative, and Commission level.	<b>S</b>
<b>Time Periods.</b> Reports can include multiple and dissimilar time periods. For example, a report can compare program performance for the first quarter of 2005 to the first quarter of 2004.	<b>S</b>
<b>Trend Reports.</b> Trend graphs can be created that show time period to outcomes/process numbers. Users can control the time periods to show weeks, months, quarters, years, or any other user-specific time period.	<b>S</b>
<b>Visual Representation.</b> Program-level and initiative-level data reports (e.g., results of outcome surveys for all clients) are available in user-friendly formats, such as pie charts and bar graphs.	<b>S</b>
<b>Data Export Features.</b> System provides built-in tools to export data to Microsoft Office applications (Word, Excel, and Access) as well as SPSS and databases written in SQL.	<b>S</b>
<b>Data Export Interface.</b> System provides built-in tools to export data into the database application of First 5 California to meet State Annual reporting requirements.	<b>S</b>
<b>Data Import Features.</b> System provides built-in tools to import data from Microsoft Office applications (Excel, and Access) as well as SPSS and databases written in SQL. <b>NOTE:</b> Persimmony's standard First 5 application includes migrating of all legacy system data from the current data system upon initial setup. Any additional or ad hoc importing of data from Microsoft Office applications, SPSS or SQL requires customized programming, pricing and optimization. These additional services, past initial database setup are not included in Persimmony's standard First 5 application.	<b>S/C</b>
<b>Legacy System Data Import Feature.</b> System will accept and import identified data elements of pre-existing data. <b>NOTE:</b> Persimmony's standard First 5 application includes migrating of all legacy system data from the current data system upon initial setup. Any additional or ad hoc importing of data from legacy systems requires customized programming, pricing and optimization. These additional services, past initial database setup are not included in Persimmony's standard First 5 application.	<b>C</b>
<b>USABILITY</b>	
<b>General Ease of Use.</b> System can mimic the look of common forms and tools already in use by Commission initiatives (i.e., group of funded programs).	<b>S</b>
<b>Data Entry.</b> Features are provided to minimize data entry errors and time requirements, such as prompts and drop-down menus to show valid options and allow quick selection of choices with minimal typing.	<b>S</b>
<b>Reminders.</b> The system can remind different funded programs when surveys are due to be completed and when uncompleted surveys need to be completed.	<b>S</b>
<b>Multi-User Operation.</b> Multiple users can concurrently enter data (same type of data) and multiple users can generate reports at the same time data entry is occurring, without restriction.	<b>S</b>
<b>Usage with a Variety of Internet Connections.</b> Flexibility to allow for "real time only" dial-up access, LAN, WAN, VPN (Virtual Private Network) and wireless connection to the Internet.	<b>S</b>
<b>System Security by Function.</b> System access rights for each user can be configured to selectively provide or prevent access to specific system features. (For example, allow end-user to access to reports but not to data maintenance functions.)	<b>S</b>
<b>System Security by Data Rights.</b> System access rights to <u>data</u> can be configured for each user based on data values, e.g. to allow a user to see data for their organization's programs but not data from other organizations.	<b>S</b>
<b>Regulatory Compliance.</b> Application meets or exceeds data confidentiality/security requirements from local, state and federal regulatory bodies or standards, such as the Health Insurance Portability and Accountability Act (HIPAA) and the Family Educational Rights and Privacy Act (FERPA).	<b>S</b>

**REQUEST FOR STATEMENT OF QUALIFICATIONS (RFSQ)  
 FIRST 5 COMMISSION OF SAN DIEGO COUNTY  
 CONSULTANT FOR DATABASE MANAGER  
 EXHIBIT A – STATEMENT OF WORK  
 APPENDIX II – CMEDS SYSTEM ELEMENTS**

<b>System Elements Desired for First 5 San Diego Database</b>	
<b>CONTRACT MANAGEMENT AND COMPLIANCE</b>	
<b>Contract Records.</b> System can store and manage data records of each of the Commission's contracts and grants, (currently at 120 active contracts) as well as archived contracts and grants.	<b>S</b>
<b>Tracking.</b> System allows tracking of compliance with implementation plans, project milestones, site visit schedules and results, targets vs. actuals, and submission of reports at the individual contract level.	<b>S</b>
<b>Financial Management.</b> System is capable of capturing and analyzing expenditures by outcome and/or result area and provides data for deeper financial analyses such as cost/benefit or return on investment studies.	<b>S</b>
<b>Reporting.</b> Data can be analyzed to review financial investments in multiple ways, to include, at minimum, by individual contract, by project, across initiatives, regionally and Commission-wide.	<b>S</b>
<b>Web Based Access.</b> Allows for remote user access by contractors and grantees for export, import and review of data by specified and unique user data rights.	<b>S</b>
<b>Expansion Capability.</b> Allows for at least 100 custom designed fields.	<b>S</b>
<b>TECHNOLOGY</b>	
<b>Electronic Signatures.</b> System must provide ability for program administrators, Commission staff and within define parameters, contractors and grantees, to electronically sign and approve reports, forms and/or other files. In addition, it should be based on Open Standards and Open Source to ensure that the Commission is not locked into any proprietary and/or incompatible technology limiting future proof of security.	<b>S</b>
<b>Computer Platform.</b> System must run on PC-compatible computers using the Microsoft Windows operating system (Windows 2000/ME/XP at a minimum) as well as Macintosh systems.	<b>S</b>
<b>Interface.</b> System should be able to import/export data in standardized file formats, through either a manual or automated process, and support initial population of the system through an automated dump of existing client data.	<b>S</b>
<b>Conversion.</b> System should be able to support initial population of client data through an automated conversion process.	<b>S</b>