AGENDA REPORT

CITY OF OAKLAND

TO:	Edward D. Reiskin City Administrator	**FROM:**	Guillermo Cespedes Chief, Violence Prevention
SUBJECT:	DVP Data Management System	**DATE:**	March 14, 2022

City Administrator Approval _(signature)_   Date: Mar 28, 2022

RECOMMENDATION

Staff Recommends That The City Council Adopt A Resolution Authorizing The City Administrator To 1) Waive the Local and Small Local Business Enterprise Program (L/SLBE) and the Competitive Bid Process and 2) Award a Five-Year Contract From May 1, 2022 To June 30, 2027 With Social Solutions Global, Inc. For The Development Of A New Data Management System and Annual Licensing And Technical Assistance Fees For a Total Amount Not To Exceed Five Hundred Thirty-Three Thousand Fifty-Six Dollars ($533,056).

EXECUTIVE SUMMARY

The proposed resolution, if adopted, will authorize the Department of Violence Prevention (DVP) to allocate funds in an amount not to exceed Five Hundred Thirty-Three Thousand Fifty-Six Dollars ($533,056) to Social Solutions Global, Inc. (Social Solutions) to customize a cloud-based data management system for the DVP and fund 150 user licenses and ongoing technical assistance over five years, from May 1, 2022, to April 30, 2027. The proposed resolution will also authorize a waiver of the competitive procurement process for the contract with Social Solutions Global, Inc. given that the new data management system must be fully developed and operational by July 2022, when the DVP's Fiscal Year (FY) 2022-23 program contracts begin. Social Solutions Global, Inc. fully meets the DVP's complex data management system requirements, has extensive experience providing data management system services to similar social service agencies, and provided the second lowest cost bid out of three bids procured by the DVP. The City of Oakland's Contracts and Compliance Unit recommends waiving the Local/Small Local Business Enterprise (L/SLBE) requirement for this contract given that no business located in Oakland provides the services required by the DVP.

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Public Safety Committee
April 12, 2022

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BACKGROUND / LEGISLATIVE HISTORY

The DVP contracts annually with community-based organizations (CBOs) to deliver violence prevention and intervention services using funding from the 2014 Oakland Public Safety and Services Violence Prevention Act (Measure Z) and the General Purpose Fund (GPF). On December 10, 2021, the DVP issued a competitive request for qualifications (RFQ) for violence prevention and intervention services in the strategies of gun/group/gang violence response, gender-based violence response, and community healing and restoration (RFQ #267700). The DVP anticipates funding awards to at least 40 CBOs through RFQ #267700 in the total amount of $20,000,000 for FY22-23 by June 2022. On December 3, 2021, the Measure Z unit or coordinator issued RFQ #267688 to solicit submissions from qualified applicants to evaluate DVP services funded through Measure Z for FY22-23 and FY23-24. The Measure Z unit or coordinator expects to select a vendor to perform the evaluation services outlined in RFQ #267688 no later than April 30, 2022.

In order to adequately evaluate program implementation and outcomes for CBOs funded by the DVP, both internally and in partnership with an external evaluator selected through RFQ #267688, the DVP requires a data management system that allows CBOs to enter and track a wide range of service delivery and outcome data (**Table 1**). The DVP also requires a data management system with strong functionality pertaining to contract management, data visualization and extraction, and data quality assurance and privacy pertaining to individual service records (**Table 2**). In order to properly onboard CBOs that will be funded through RFQ #267700 for the FY22-23 funding cycle and to ensure adequate data are collected for the required FY22-23 Measure Z evaluation (RFQ #267700), the DVP requires a data management system that meets these requirements to be developed and operational by July 2022.

Table 1. Service delivery and outcome data required for the purpose of process and outcome evaluation

Category	Service delivery and outcome data
Individual service delivery	- Date, method, and result of outreach attempts - Names and contact information - Demographic and information (e.g. age, race, gender, education, language spoken at home) - Current education, employment, and housing information - Risk and protective factor assessment results - Program referral, intake, and exit information - Individual flags to identify unique features of clients (e.g. clients engaged through Ceasefire) - Information about important people (contact information and affiliation for family members, spouses, close friends, probation or parole officer, etc.) - Date, duration, and method of all communication involving client (including communication *about* client with important person or other service provider) - Date, location, type, and duration of all activities involving client - Date, amount, and purpose of financial incentives received - Client outcomes (e.g. obtained GED, completed probation)

Category	Service delivery and outcome data
	▪ Case plan goals, actions, start dates, and completion dates ▪ Date and status of referrals made to other service providers
Group services	▪ Date, location, and duration of service ▪ Number of clients and/or community members engaged ▪ Number of staff members present ▪ Other metrics based on event (e.g. number of meals distributed)
Crisis response	▪ Date, time, sender, and recipient of crisis notifications to staff ▪ Date, time, and name of individual responding to the scene or hospital ▪ Victim name and demographics ▪ Incident type (e.g. group/network involved, domestic violence), homicide status, and level of retaliation ▪ Dates, person responsible, and notes on the following categories of response: relocation, mediation, peer outreach, family outreach, and community outreach

Table 2. Functionality requirements pertaining to contract management, data visualization and extraction, and data management

Category	Functionality requirement
Contract management	▪ Store documents like scope of work, city council resolution, etc. for reference ▪ Display contract budget and show amount remaining in each budget category based on invoices submitted ▪ Allow for invoice submission, approval, and reminders ▪ Allow for communication between DVP staff and CBO staff
Data visualization and extraction	▪ Download raw data in Excel files and customize file downloads to specify fields included, date ranges, etc. ▪ Within the data management system, display easy-to-understand graphs and charts of service or contract data that are relevant to each individual staff member ▪ Customize and generate reports for CBOs or program strategies that present results in comparison to predetermined metrics or deliverables
System and data management	▪ Display or hide specific data fields based on staff credentials ▪ Flag and prompt a correction for missing or incomplete data ▪ Retain historical data entries (e.g. prior program enrollments for clients) ▪ Store consent forms, sign-in sheets, and other scanned documents ▪ Provide mobile database access that allows staff to easily record data in the field (e.g. crime scene response) ▪ Provide a high level of privacy security that complies with the Health Insurance Portability and Accountability Act (HIPAA) ▪ Issue reminders for staff regarding upcoming tasks or inactive clients ▪ Identify and merge duplicate client records ▪ Allow for staff to make service referrals for clients to other providers, both contracted by the DVP and not contracted by the DVP

ANALYSIS AND POLICY ALTERNATIVES

The DVP (formerly Oakland Unite) has contracted with CitySpan Technologies, Inc. (Cityspan) since 2006 to procure data management services. Details on the recent contracts between the DVP or Oakland Unite and Cityspan are listed in **Table 3**. CitySpan, however, is unable to provide a variety of functions that are essential to the ongoing monitoring of process and outcome metrics and the evaluation of program impact (**Table 4**).

Table 3. Previous contracts between Cityspan and Oakland Unite or the DVP

Fiscal Year	Resolution #	Contract Amount
2015-2016		$70,000
2016-2017	85821	$70,000
2017-2018		$70,000
2018-2019		$66,750
2019-2020	87195	$65,000
2020-2021		$68,250
2021-2022	Not yet executed	$68,250

Table 4. Data management system functions that are not possible using Cityspan.

Category	Function
Individual service delivery	▪ Track outreach efforts with potential clients prior to enrollment, including date, method, and result of each contact ▪ Track multiple program enrollments for a single client ▪ Allow staff to make program or service referrals for clients to outside organizations and track referral acceptance ▪ Flag clients who are inactive and require follow-up ▪ Detect and resolve duplicate client entries ▪ Track client progress on individual life map goals
Crisis response	▪ Automatically notify staff of shooting and homicide incidents that require a response ▪ Track data on deployment, assessment, and response activities ▪ Allow for mobile data entry in the field ▪ Allow for communication within the system between members of the response team to coordinate activities
System and data management	▪ Modify data system fields or functions (done by DVP staff) ▪ Download raw service delivery data at the client level rather than the provider level for internal analysis ▪ Flag and prompt the correction of missing or incomplete data ▪ Present up-to-date data to DVP staff and grantees through visually-appealing dashboards ▪ Allow for automated communication between other grantee data management systems & the DVP's data management system ▪ Allow for staff to make service referrals for clients to other providers, both contracted by the DVP and not contracted by the DVP

From December 2021 to February 2022, the DVP solicited proposals and quotes from Salesforce.com, Inc. (Salesforce), Microsoft Corporation, and Social Solutions for the customization and ongoing use of a data management system that meets the DVP's aforementioned requirements. **Table 5** provides information on the cost of annual licensing and technical assistance, one-time implementation, and contingencies over a five-year contract period for each vendor.

Table 5. Proposal costs from three vendors that meet the DVP's data management system requirements

Vendor	Location of company head-quarters	Average annual license and technical assistance cost	One-time development cost	Contingency cost	Total contract amount
Social Solutions	Austin, Texas	$90,411	$71,000	$10,000	$533,056
Salesforce	San Francisco, California	$58,548	$173,700	$10,000	$476,440
Microsoft Corporation	Redmond, Washington	$9,300	$1,053,000	$10,000	$1,099,500

As demonstrated in **Table 5**, the proposal from Social Solutions is $56,616 greater than the proposal from Salesforce, which equates to $11,323 per year. However, the maintenance and administration of a Salesforce system requires very specialized training that would likely require the DVP to hire an additional staff person or contract with a Salesforce consultant on an ongoing basis, which would significantly increase the annual costs. After reviewing demonstrations of both the Social Solutions and Salesforce systems, DVP staff felt strongly that the Social Solutions was significantly less complex and easier to use. Additionally, Social Solutions specializes in local government, non-profits, and social services, while Salesforce does not. Social Solutions already contracts with a number of similar social service agencies, including the Oakland Unified School District, the City of Stockton's Office of Violence Prevention, the Los Angeles Mayor's Office of Gang Reduction and Youth Development (GRYD), and five CBOs currently funded by the DVP. Social Solutions also received a strong endorsement from Empower Tehama, a service provider based in Northern California that provides services similar to the DVP, during a reference check conducted by DVP staff. For these reasons, staff recommend that the DVP contract with Social Solutions for the development and use of a new data management system.

Further details on the proposal from Social Solutions are included as **Attachment A**, but the proposal includes the following elements annually:
- Licenses for 150 users
- 96 hours of advanced support consulting
- Train the trainer 4-hour session with up to 12 internal attendees to teach staff how to train others on the product

- Custom end-user training including access to live webinars and video and training libraries for staff
- Advanced training subscription with access to online administrator training courses

The creation and use of a new data management system that meets all of the DVP's requirements will advance the citywide priorities of (1) holistic community safety and (4) responsive, trustworthy government. A new data management system will advance the priority of holistic community safety by allowing for ongoing collection, visualization, and critical review of data pertaining to violence prevention and intervention service delivery to ensure that programs are serving the correct populations and producing the desired outcomes. In cases when services are not producing the desired outcomes, granular data will be available to help program staff understand how to modify service delivery to increase effectiveness. Additionally, a new data management system will allow DVP staff and contracted CBOs to collect the wide range of data required for a robust program and outcome evaluation, which will inform the future allocation of violence prevention and intervention resources towards practices that are maximally effective.

A new data management system will advance the priority of responsive, trustworthy government by enabling DVP staff to better respond to families of shooting and homicide victims by clearly tracking and processing relocation requests, service referrals, and other support provisions. Data visualization capabilities of a new data management system will allow contracted providers (through the data management system) and external stakeholders (through integration with the DVP's website) to view real-time data on process and outcome metrics for DVP-funded services. This will provide transparency across contracted CBOs and external stakeholders about services rendered, outcomes, and funding allocations. Finally, customizable reports and data downloads from the new data management system will allow DVP staff to easily extract data on services provided to specific populations, in specific neighborhoods, during specific time periods, or in accordance with other metrics for public presentations or reports. This will allow DVP staff to quickly respond to data requests from a range of stakeholders, including councilmembers.

Justification of Waiver
In February 2022, the DVP requested an availability assessment from the City of Oakland's Contracts and Compliance Unit pertaining to data management system providers located in Oakland. Following an assessment, the Contracts and Compliance Unit found that no businesses located in Oakland provides the services required by the DVP and issued a recommendation to waive the L/SLBE requirement for this contract.

Oakland Municipal Code (OMC) Section 2.04.050.1.5 authorizes the City Council to waive the advertising and competitive bidding requirements of OMC Section 2.04.050 after finding and determining that it is in the best interests of the City to do so. As previously mentioned, the DVP is in the process of awarding program contracts to at least 40 CBOs that will begin on July 1, 2022 (RFQ#267700), as well as a contract with a single vendor that will evaluate programs and services funded by Measure Z in FY22-23 and FY23-24 (RFQ#267688). In order to properly onboard CBOs that will be funded for the FY22-23 funding cycle and to ensure adequate data are collected for the required Measure Z evaluation, the DVP requires a data management system that meets these requirements to be developed and operational by July 2022. A

competitive RFQ process would take several months and would render the DVP unable to meet the July 2022 deadline. For this reason, it is recommended that City Council finds and determines that it is in the best interest of the City to waive the advertising and competitive bidding requirements of the OMC for the DVP's procurement of data management system services from Social Solutions for $533,056.

FISCAL IMPACT

Approval of this resolution will authorize the DVP to allocate funds in the amount of $533,056 to fund the development of a custom data management system and annual licensing and technical support fees provided by Social Solutions for five years. Funding allocations by fiscal year are outlined in **Table 6**.

In FY2022-23 and FY2023-24, $70,000 will be allocated from the following account: Measure Z Fund (2252), City Administrator's Office Organization (02111), Measure Z Evaluation Project (1001362), and Measure Z Program (PS37). $70,000 will continue to be allocated from this account in subsequent fiscal years if Measure Z is reauthorized by Oakland voters.

Remaining funding will be provided by the DVP from the following account: DVP Measure Z Fund (2252), Oakland Unite Organization (70211), Measure Z Administration Project (1005645 for FY22-23) and Measure Z Program (PS37). The Measure Z administration Project number will change in future fiscal years but other account information will remain the same.

Table 6. Budget allocation for Social Solutions data management system by fiscal year and organization fund.

Fiscal year	Description of fees	Amount from CAO Organization	Amount from Oakland Unite (DVP) Organization	Total amount
2022-2023	Custom system development and implementation	$70,000	$1,000	$71,000
	Annual licenses and training/technical support	$0	$49,014	$49,014
2023-2024	Annual licenses and training/technical support	$70,000	$28,028	$98,028
2024-2025*	Annual licenses and training/technical support	$70,000	$28,028	$98,028
2025-2026*	Annual licenses and training/technical support	$70,000	$30,969	$100,969
2026-2027*	Annual licenses and training/technical support	$70,000	$36,017	$106,017
TBD	Contingency for system development or additional annual licenses	$0	$10,000	$10,000

Fiscal year	Description of fees	Amount from CAO Organization	Amount from Oakland Unite (DVP) Organization	Total amount
Total		**$350,000**	**$183,056**	**$533,056**

*Funding allocations in these fiscal years are based on the assumption that Measure Z funding will be reauthorized. If Measure Z is not reauthorized, the DVP will use grant funding or money from the General Purpose Fund to cover the Measure Z allocations.

PUBLIC OUTREACH / INTEREST

In developing requirements for the proposed data management system, the DVP considered feedback obtained from DVP grantees in June 2018 regarding the existing Cityspan system. Challenges identified by grantees regarding the current system include the following:

- The Cityspan help desk takes too long to respond, or the agency has trouble connecting with a representative due to high call volume.
- The database does not allow grantees to capture certain information that is critical to effective service delivery, including case notes, ability to track homelessness and employment, nature and result of client contacts, bedside visits, etc.
- The database makes it challenging to track a client's progress towards identified goals.
- The database does not allow for automated communication between the agency's primary data management system and CitySpan.
- The database makes it challenging to match new client records to previous records for the same individual.

All of these challenges will be remediated with the data management system developed by Social Solutions.

COORDINATION

In preparation of this report and resolution, the City Attorney's Office, Budget Bureau, City Administrator's Office, Workplace and Employment Standards Department (Contracts and Compliance Unit), and Information Technology Department were consulted and provided edits. Once the data management system is operational, the DVP will coordinate with CBOs on an ongoing basis regarding system training and use.

PAST PERFORMANCE, EVALUATION, AND FOLLOW-UP

The DVP's current data management system provider, CitySpan, is unable to meet the DVP's new system requirements, which are essential to the ongoing monitoring of process and outcome metrics and the evaluation of program impact. Deficits of the CitySpan system are

described in **Table 4**. Additionally, many of the DVP's contracted CBOs have reported challenges with the CitySpan Technologies, Inc. system that are detailed under *Public Outreach/Interest*.

SUSTAINABLE OPPORTUNITIES

Economic: Implementing a more efficient data system will save time and money for CBOs and the DVP. Social Solutions Global, Inc. estimates that the implementation of their data management system saves approximately 35% time on data entry, 75% time on reporting, and 25% time on reconciling data integrity issues.

Environmental: There are no environmental benefits.

Race & Equity: By increasing the effectiveness of the DVP's programs and ongoing program evaluation, the new data management system will contribute to improved service delivery for individuals who are exposed to, at risk for, or involved in violent crime. Violent crime in Oakland disproportionately impacts people of color, with 77% of shooting victims and 83% of homicide victims in 2021 identifying as African American or Latino. Improvements in DVP service delivery and program impact that will undoubtedly result from an improvement data management system will predominantly impact people of color in Oakland and lead to more equitable outcomes.

ACTION REQUESTED OF THE CITY COUNCIL

Adopt A Resolution Authorizing The City Administrator To 1) Waive the Local and Small Local Business Enterprise Program (L/SLBE) and the Competitive Bid Process and 2) Award a Five-Year Contract From May 1, 2022 To June 30, 2027 With Social Solutions Global, Inc. For The Development Of A New Data Management System and Annual Licensing And Technical Assistance Fees For a Total Amount Not To Exceed Five Hundred Thirty-Three Thousand Fifty-Six Dollars ($533,056).

For questions regarding this report, please contact Guillermo Cespedes, Chief of the Department of Violence Prevention, at 510-238-2916.

Respectfully submitted,

Guillermo Cespedes (Mar 23, 2022 16:04 PDT)

Guillermo Cespedes
Chief
Department of Violence Prevention

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Attachments (1):

A: Proposal from Social Solutions